UNIVERSITY OF MARYLAND
INSTITUTE FOR GOVERNMENTAL SERVICE & RESEARCH

SMART Tip Sheets
Recovery Plan

ADAA
Alcohol and Drug Abuse Administration
Working toward drug-free communities

Recovery Plan

Profile	Life Domain/Goals
Overview	Plan Outline

The Recovery Plan is designed to capture a snapshot of where the client is during his/her road to recovery . It serves a means to identify, prioritize needs and potential risk factors; as well as, conduct constructive dialogue between the recovery team, the patient, and other relevant service providers.

Total Pages: 12

IGSR Technical Support: 401.405.4870 Updated: July2013

www.igsr.support@umd.edu

Baltimore Substance Abuse Systems

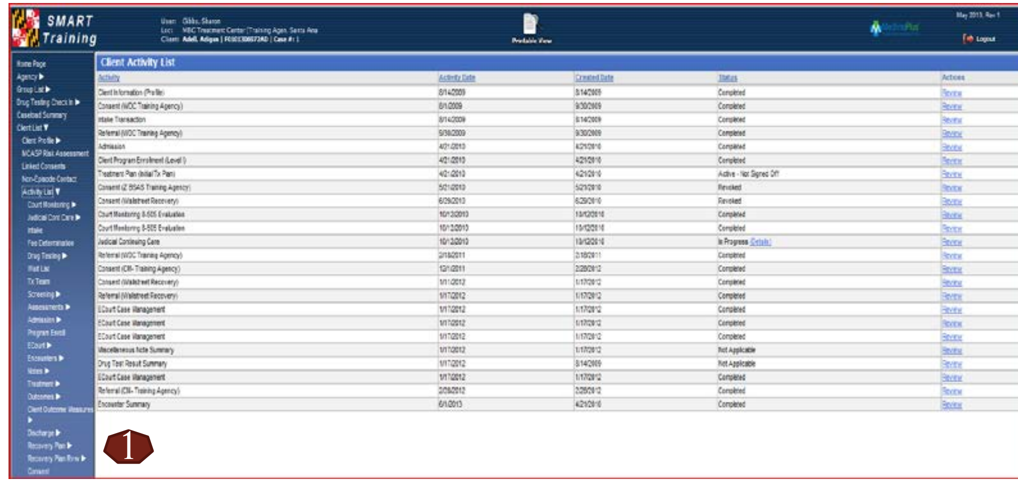
Maryland Department of Juvenile Services
Treating • Supporting • Protecting

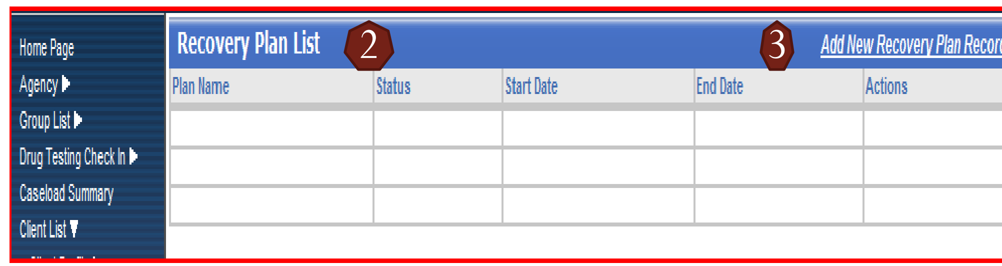
Office of Problem Solving Courts

Recovery Plan

Entry Steps: Login, Completed Client Profile, Completed Client Program Enrollment , Select Client List, Search for Client, and Click Activity List.

1. Go to the Menu Tree, and click **Recovery Plan.** Note: A Recovery Plan must always be completed with an ‘Active’ Signed-off status before completing a Recovery Review.
2. The next screen you will see on your screen is the Recovery Plan List view screen. The screen will contain a list of all the Recovery Plans done for your client.
3. Click **<u>Add Recovery Plan Record</u>**.
4. This will open the first Recovery Plan screen.





Recovery Plan Profile

Once you start the Recovery Plan, please remember to respond to each question to fully determine your client's status and needs. In most instances, you will be using a team approach in managing your clients.

1. Go to the Plan Name field, and enter the name of your client's plan.

2. Go to the Plan Start Date field, and enter the Start Date. Note: This field will pre-populate with the current date, so make sure this date reflects the accurate date.

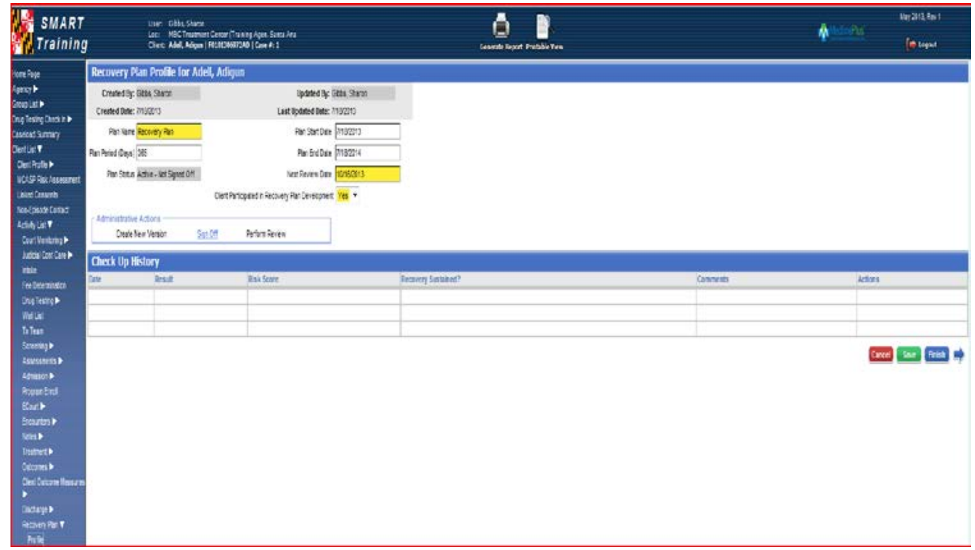
3. The Plan Period Days will default automatically to 365. This field is editable so you can modify if necessary.

4. The Plan End Date will be based upon the Plan Period Days. This field is editable so you can modify appropriately.

5. The Plan Status will default to Active-Not Signed-Off. This status will not change until the plan is signed -off and approved by your client and team members.

6. The Next Review Date field will provide a default date. The review date should be three months after the Plan Start Date. You must update this if this date does not fall within the three month range.

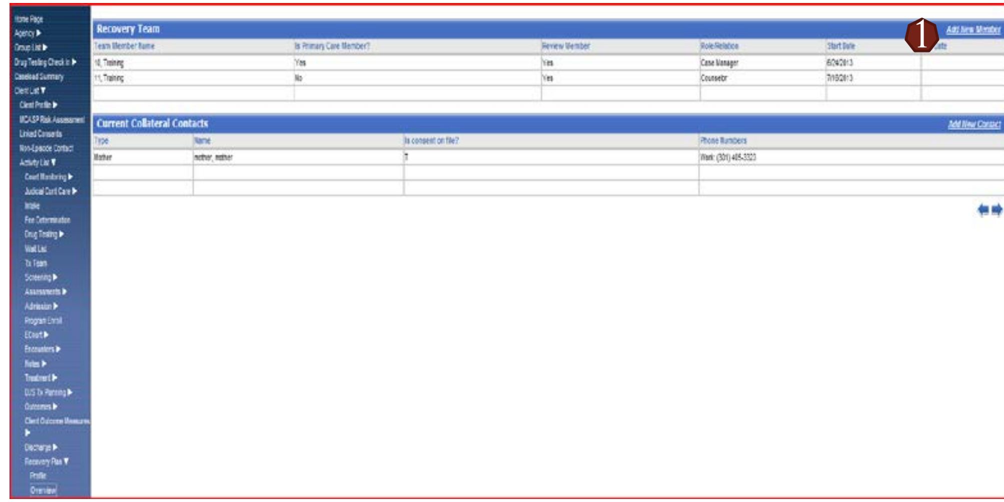
7. The 'Client Participated in the Recovery Plan' field response will always default to 'Yes'. Based upon the Recovery Plan protocol, the client should actively be involved in the process.
8. Click right arrow to open the next screen.



Recovery Plan Overview (Team)

The Recovery Team is an integral part of managing your client's case. Teams can consist of a combination of agency staff and non agency staff.

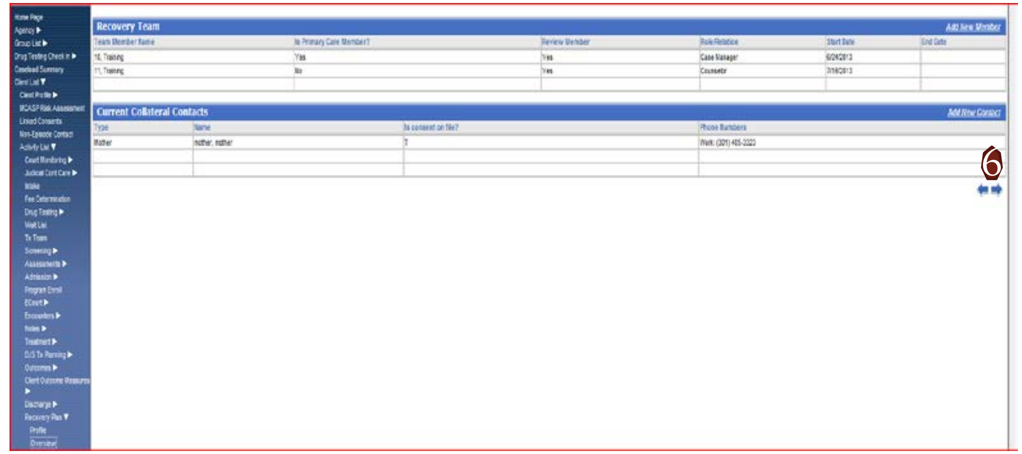
1. Click **Add Team Member**.
2. Go to the Staff Name Field and select the Staff Name.
3. Enter the Start Date. Note: SMART will automatically provide a default date, so review the date for accuracy.
4. Go to the Role/Relation field, and select the appropriate answer.
5. Go to the Review Member field, and click **Yes**.
6. Go to the Primary Staff field, and select Yes. Note: There can be only one Primary Staff per team.
7. The Deny Access to Client Records field will automatically default to 'No'. Note: Do not change this unless there is a staff member who should not have access to your client's record. Changing the response to 'Yes' will not allow the team member to pull up your client's record.
8. Go to the Treatment Sub-Teams mover box, and follow the steps below. Note: Completing this step will assign the Team members to your client's recovery plan.
   - Select/Highlight 'Recovery'.
   - Click on the top right arrow to move Recovery to the Selected Sub-Teams.
9. Click **Save**.
10. Repeat steps 2 through 10 to add additional Recovery Team members.
11. Click **Finish** when done.

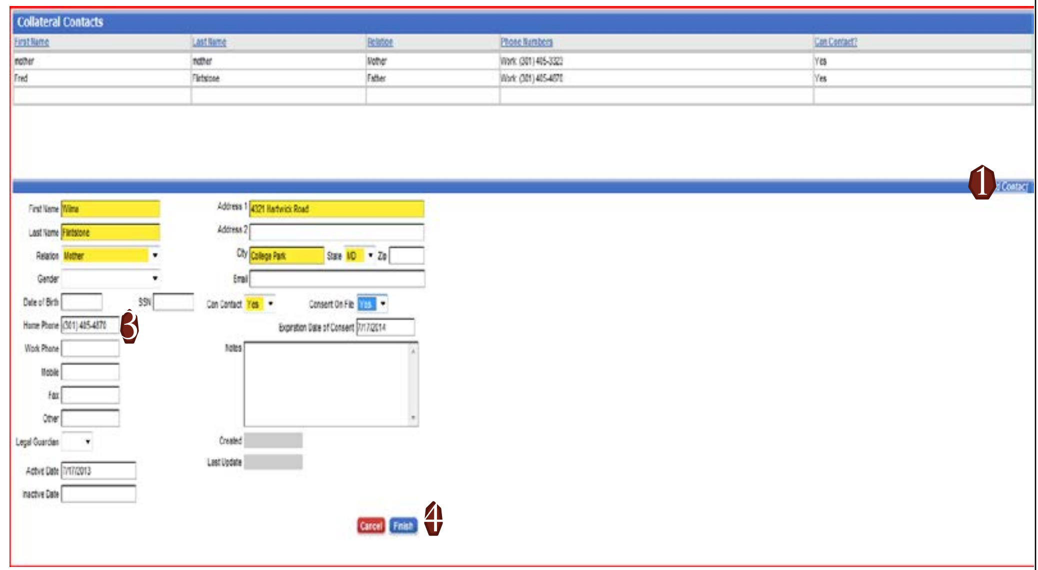


Collateral Contacts

Collateral Contacts are used to assist in connecting clients to coordinated services.

1. Click **Add New Contact**.
2. Complete all yellow fields.
3. Enter at least one phone number, i.e., home, work, etc.
4. Click **Finish**.
5. Repeat steps 1 through 4 to add additional contacts.
6. Click the right blue arrow to get to the Life Domain/Goals screen.

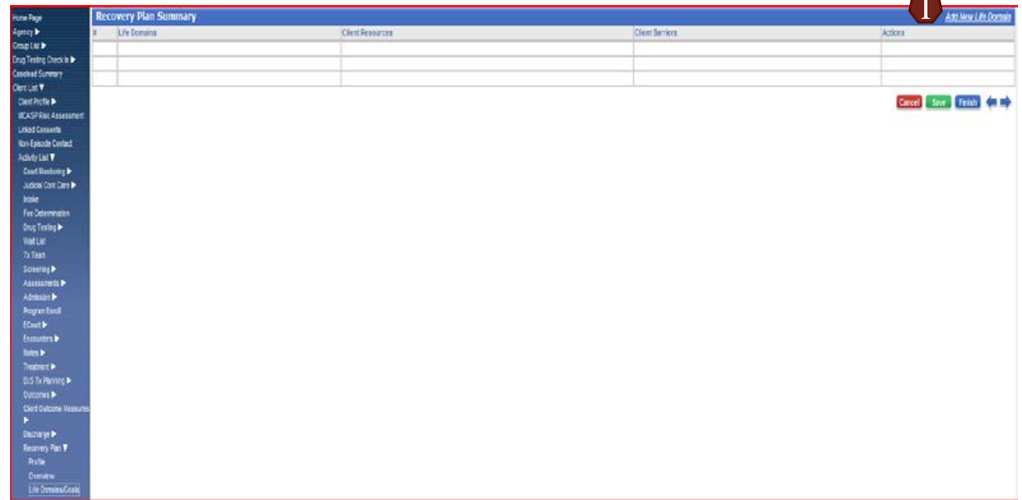


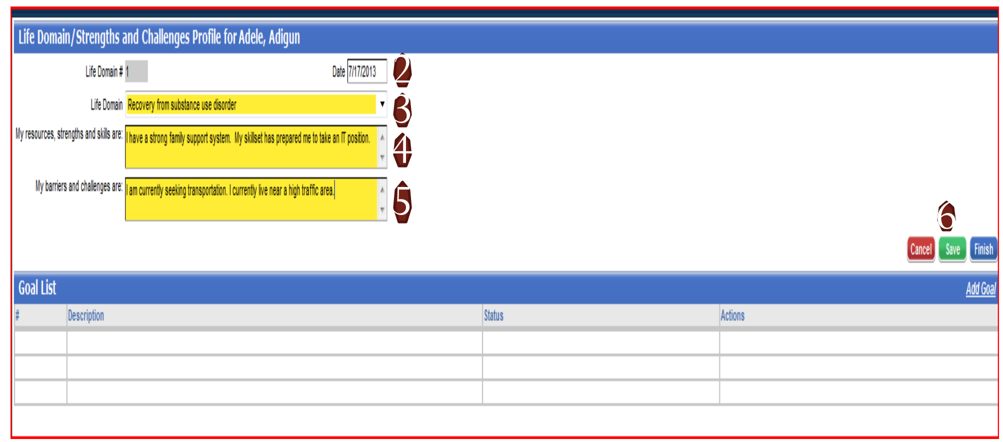


Life Domain/Goals

The Recovery Plan is a dynamic document which provides the flexibility to document and modify client goals, objectives, strengths and challenges based upon a collaboration between your client and his/her treatment plan. This team approach will allow for the identification of services that will best meet the needs of your clients. The first step of the process is identifying and addressing the domain(s) which may impair your client's progress.

1. Click **Add New Life Domain**.
2. Go to the Date field, and enter the Date of the domain was discussed.
3. Go to the Life Domain, and select the appropriate response. Note: The first domain will always be 'Recovery from substance abuse disorder'.
4. Go to the next field, and document the client's resources, strengths, and skills based upon the client's disclosure.
5. Go to the barriers field, and document any barriers which could potentially impact your client's recovery.
6. Click **Save**.

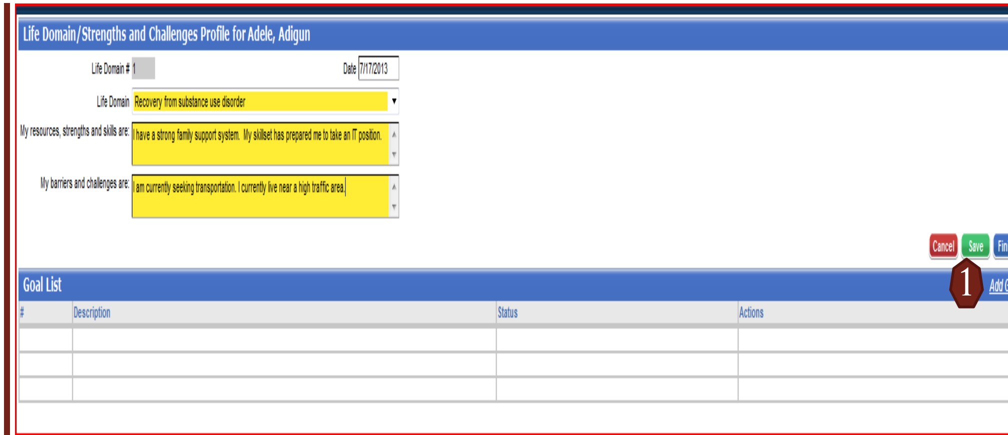


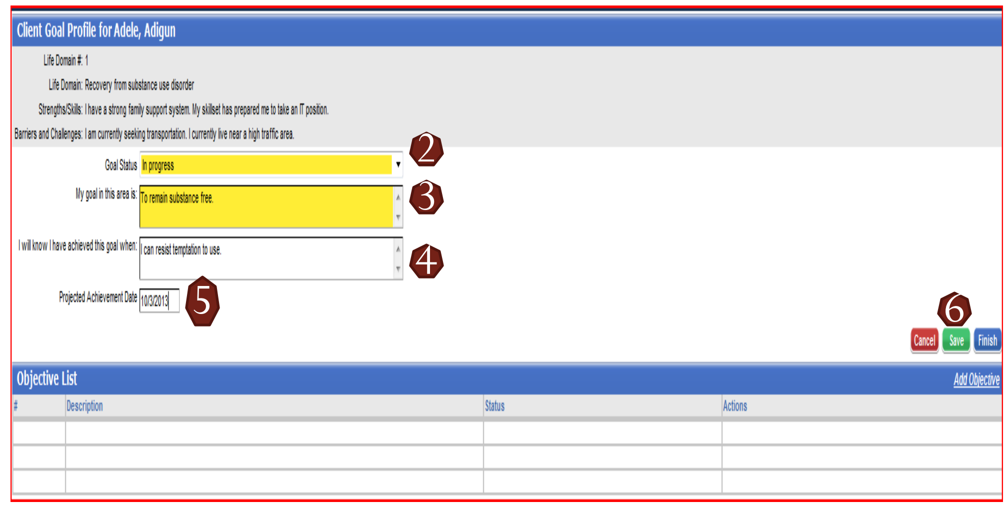


Life Domain/Goals

Goals are created in conjunction with your client once the Domain has been selected.

1. Click **Add Goal**.
2. Go to the Goal Status field, and select the appropriate response, i.e., In Progress, etc.
3. Go to the My goal is field, and enter the appropriate response.
4. Fill in the appropriate patient response in the next field.
5. Enter the Projected Achievement Date.
6. Click **Save**.

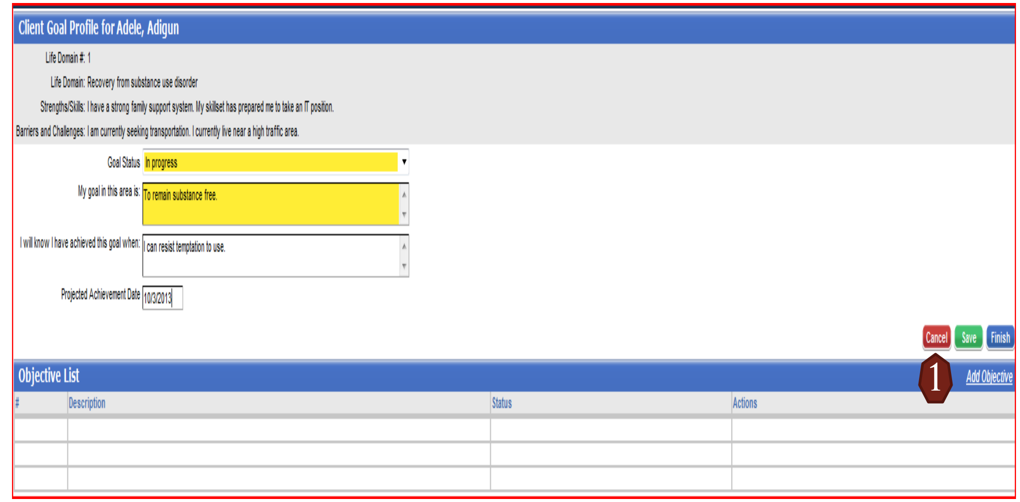


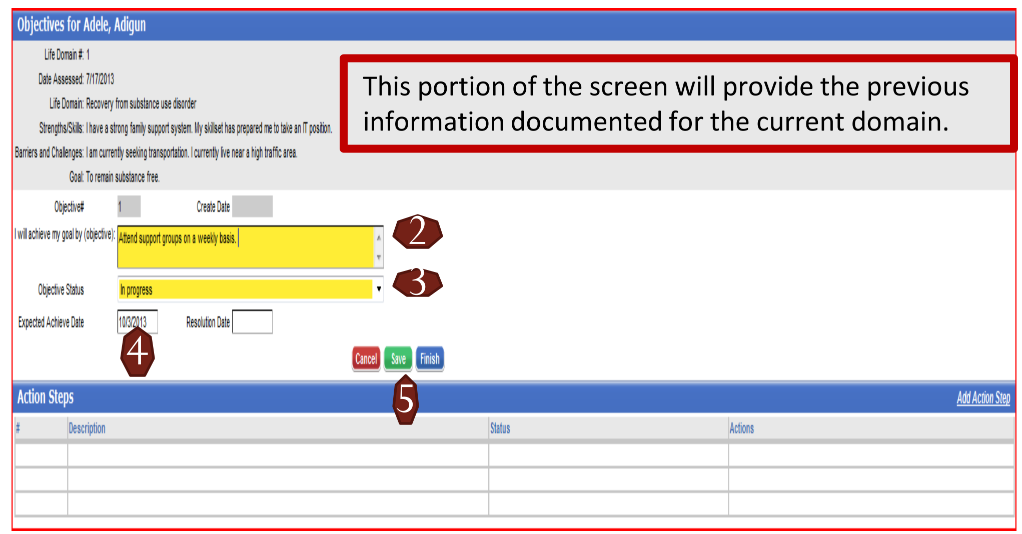


Life Domain/Objective

Once you and your client have created goals, the next step is adding objectives that will support efforts in meeting your client's goals. This screen will show previous documented information for the current domain to assist in developing your client's recovery plan objectives.

1. Click **Add Objective**.
2. Go to the first field, and in your client's words.
3. Go to the Objective Status field, and select the status of this objective, i.e., In progress, etc.
4. Go to the Expected Achievement Date field, and enter the appropriate date.
5. Click **Save**.
6. Repeat steps 1 through 5 to add additional objectives.
7. Click **Add Action Step**.
8. Enter your client's activities that will support his/her goal.
9. Go to the Action Step Status, and select the appropriate status.
10. Click **Save**.
11. Click **Finish**.
12. Repeat steps 2 through 19 to add another Life Domain entry. Note: You can also add another Life Domain by using the Plan Outline screen.

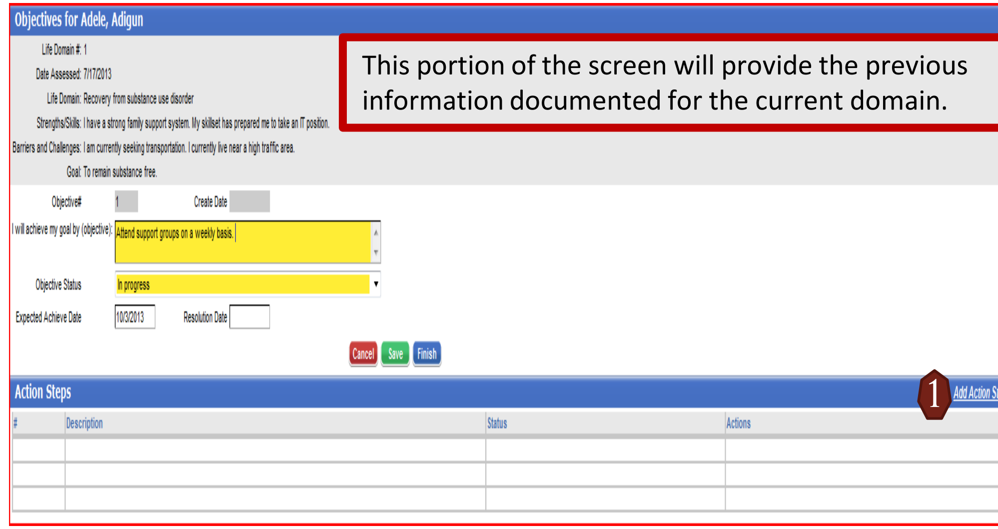


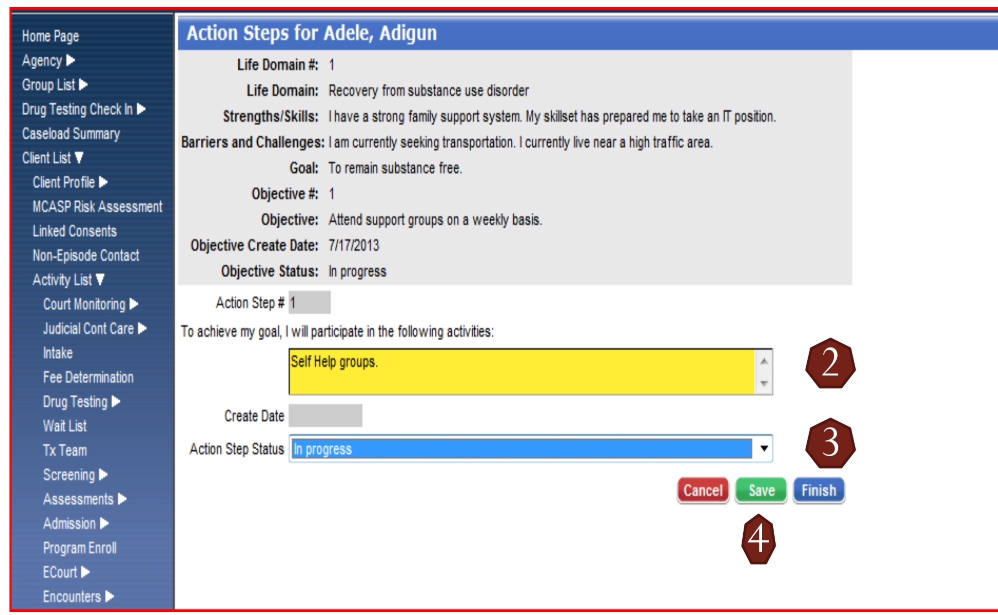


Life Domain/Action Steps

The next step is documenting the action steps that will be specific to the domain's goal and objectives. This screen will show previous documented information for the current domain to assist in developing your client's recovery plan action steps.

1. Click **Add Action Step**.
2. Go to the first field, and enter your client's response.
3. Go to the Action Step Status and enter the status of this step, i.e., In progress, etc.
4. Click **Save**.
5. Click **Finish**.
6. Repeat steps 1 through 6 to add additional Action Steps.

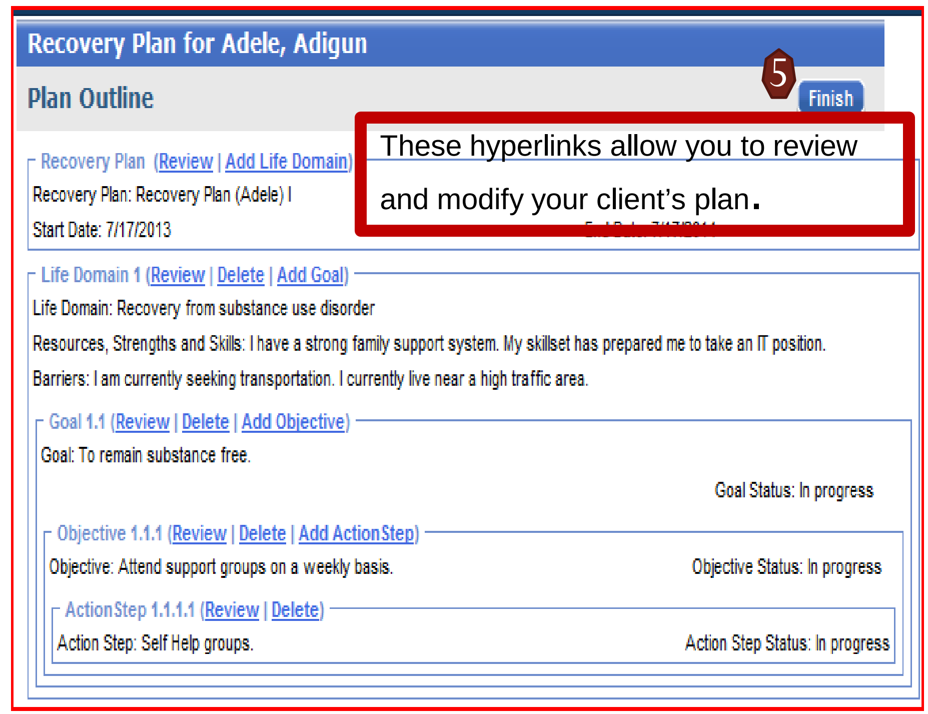




Plan Outline

The plan outline provides a snapshot of your client's Recovery Plan. You can modify your client's Recovery Plan by clicking the following hyperlinks '**Review**', '**Delete**', and '**Add**'.

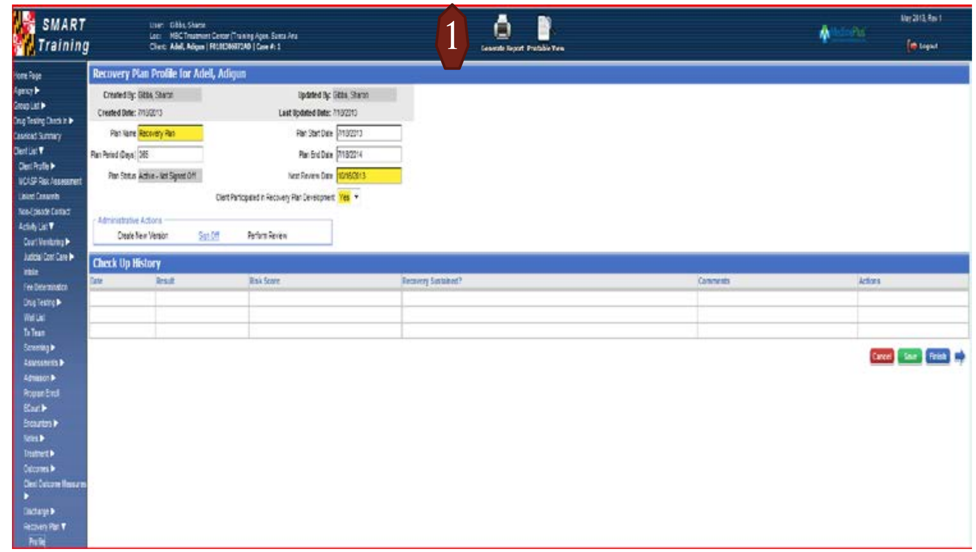
1. Go to the menu tree, and click **Plan Outline**.
2. Click **Review** to see detailed information.
3. Click **Add Life Domain** if you need to add another Live Domain to your client's recovery plan.
4. Click **Delete** to remove information.
5. Click **Finish** when done.

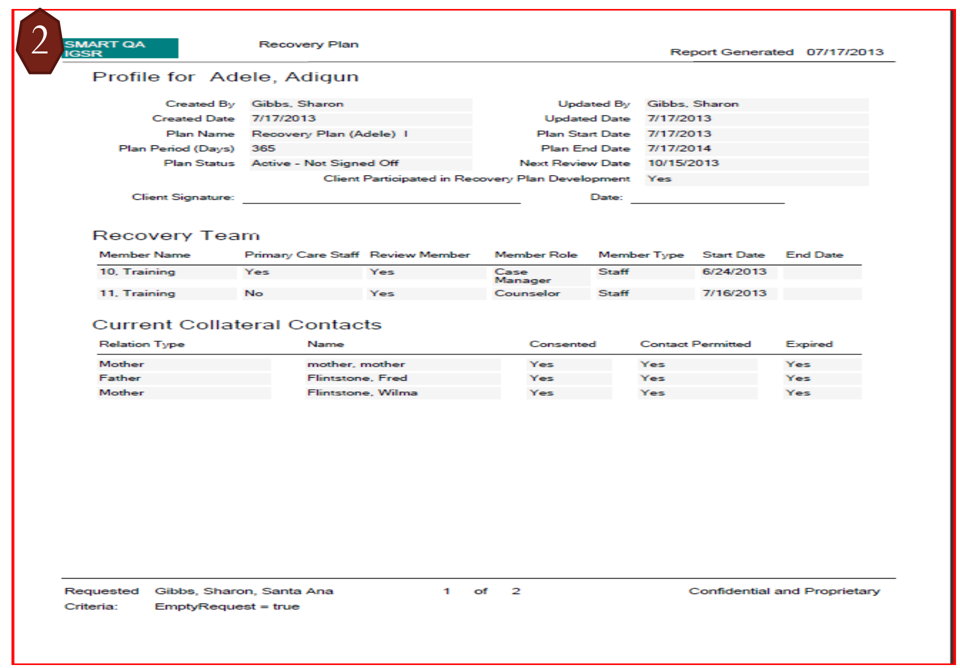


Recovery Plan Document

After you have reviewed the Recovery Plan with the client, the next step is signing off on the plan. (Note: All documents requiring a client signature, must be printed and placed into the client's chart. Print out a copy of the Recovery Plan. Prior to client signing, make sure your client and all the appropriate Recovery Team members have approved the plan. Have your client sign and date the plan. Provide your client a hardcopy, and place the original in your client's chart.)

1. From the Recovery Plan profile screen, go to the Generate Report icon which looks like a printer.
2. Review the Recovery Plan with your client.
3. Click the printer icon on the tool bar.





SMART QA IGSR

Recovery Plan

Report Generated 07/17/2013

Profile for Adele, Adigun

Created By	Gibbs, Sharon	Updated By	Gibbs, Sharon
Created Date	7/17/2013	Updated Date	7/17/2013
Plan Name	Recovery Plan (Adele) I	Plan Start Date	7/17/2013
Plan Period (Days)	365	Plan End Date	7/17/2014
Plan Status	Active - Not Signed Off	Next Review Date	10/15/2013
		Client Participated in Recovery Plan Development	Yes

Client Signature: ______________________ Date: ____________

Recovery Team

Member Name	Primary Care Staff	Review Member	Member Role	Member Type	Start Date	End Date
10, Training	Yes	Yes	Case Manager	Staff	6/24/2013	
11, Training	No	Yes	Counselor	Staff	7/16/2013	

Current Collateral Contacts

Relation Type	Name	Consented	Contact Permitted	Expired
Mother	mother, mother	Yes	Yes	Yes
Father	Flintstone, Fred	Yes	Yes	Yes
Mother	Flintstone, Wilma	Yes	Yes	Yes

Requested Gibbs, Sharon, Santa Ana 1 of 2 Confidential and Proprietary
Criteria: EmptyRequest = true

Recovery Plan Sign-off

You must also sign-off on your client's plan electronically. The following steps will walk you through the process. Remember to give a hard copy of the signed Recovery Plan to your client, and maintain the original in your client's file.

1. From the Recovery Plan profile screen, click the <u>Sign-off</u> hyperlink. This will open a confirmation screen confirming if the plan is ready for the electronic sign-off.
2. Click **Yes** to complete the process.
3. The plan will become 'Read only' and cannot be edited.
4. The status will change to 'Active Signed-off'.