

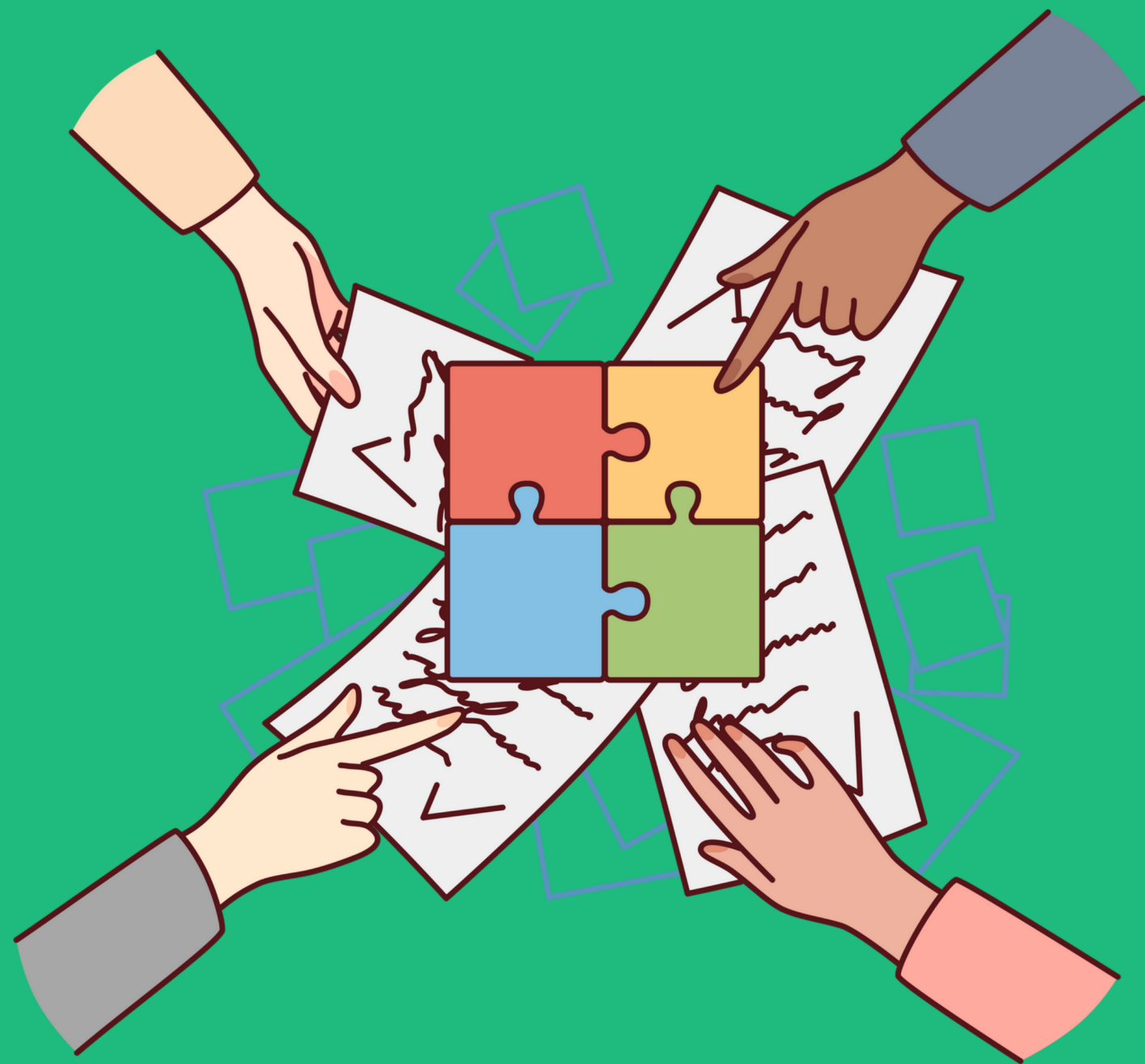
 NCWC
presents

SMART Documentation *For Care Providers*

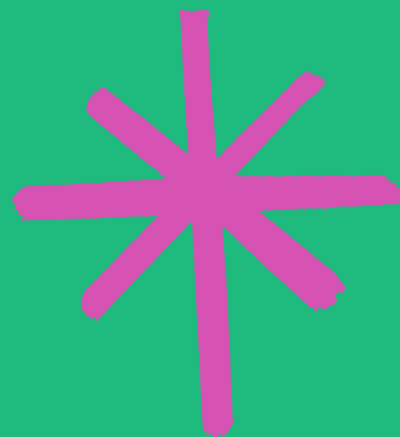


JESSICA STEWARD
LMHC, Presenter

Part Two of Anxiety & Depression
Training Series



About today's *Training*



SMART goals are important– both to do and document– *if it's not documented– it didn't happen.* They can inspire and motivate individuals to pursue change. For care providers, creating, supporting, and documenting SMART goals can be a vital aspect of our clients' care journey.



Overview



What you'll learn in this workshop:

- What are SMART goals?
- Why do SMART goals matter?
- Examples of SMART goals
- How to create my own SMART goals
- SMARTTreatment Planning
- Final Tips

What are **SMART** goals?

SMART goals are **S**pecific, **M**easurable, **A**chievable, **R**elevant, and **T**ime-bound objectives designed to provide clear direction and empower change.



What SMART means

S

Specific

Goals should be clear and well-defined to provide focus.

M

Measurable

Goals need criteria for tracking progress and success.

A

Attainable

Goals must be realistic and attainable within available resources.

R

Relevant

Goals should align with broader objectives and values.

T

Time-bound

Goals require a deadline to ensure timely completion.

Step by Step

If a client lacks belief in their ability to change and cannot realistically apply what they learn with you, they are unlikely to make lasting changes in their lives. Your work together is important!

Assessment

Identification of problem(s)

Willingness to engage/ make change

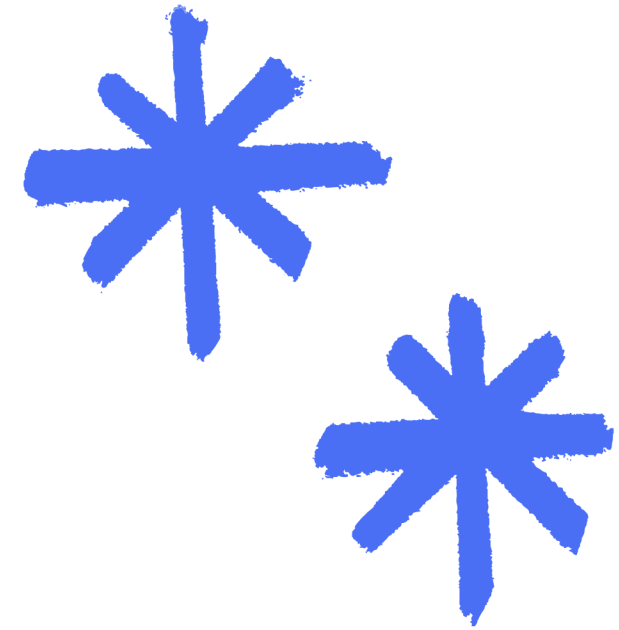
Identification of problems to work on during time together/ treatment

Overall goal(s)

SMART goals/ objectives



Friendly Reminder: Stages of Change



Effort

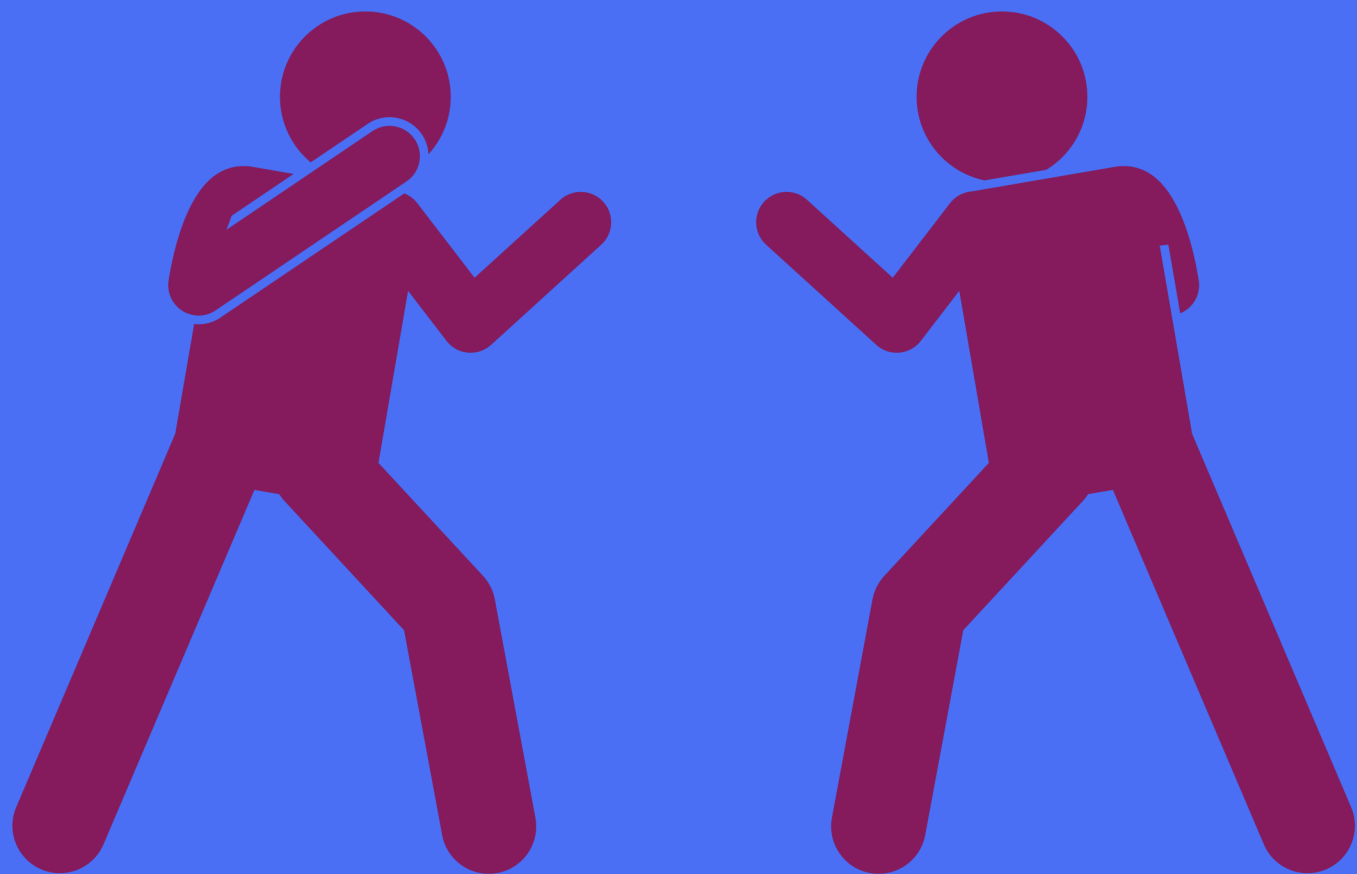
Precontemplation
Contemplation
Preparation
Action
Maintenance




Awareness



Pro Tip: Work *with* the stage of change instead of *against* it



Why are SMART goals important?



Let's support clients by developing and pursuing goals that will genuinely help them achieve desired changes in their lives through **realistic, manageable** steps.

Enhanced motivation

When goals are SMART, clients can progress through their achievements, building momentum for more challenging times and providing them with direction and purpose.

Increased self-efficacy


A client can feel confident in their ability to achieve desired changes, resulting in better adherence to the plan and improved outcomes.

Clear communication

Clients will know what to expect and when, which can improve alignment in both expectations and efforts.

Ownership of outcomes

SMART goals can foster a client's sense of ownership and control over their own health, allowing them to take responsibility for their results.



SMART goals are the key to an *empowered* client

They help all parties feel invested in the process...

That's right, we didn't forget about

YOU!



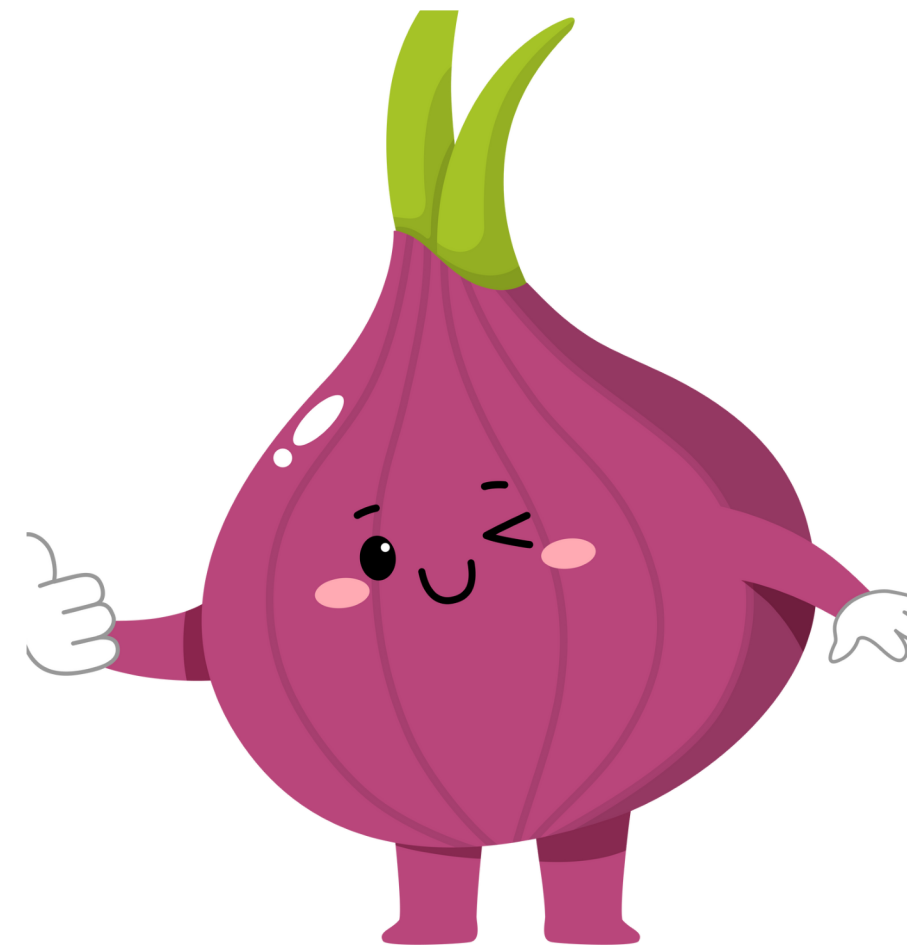


Pro tip: Use your client's



When you've
created a
goal, see if
you can peel
it down.
Break it
down into
even smaller
steps.

**ONIONS HAVE LAYERS. OGRES HAVE LAYERS.
YOUR CLIENT GOALS HAVE LAYERS.**



It's not about me.
Let's focus totally
on client.

To be or not to be... in the SMART goals

Teamwork
makes the
dream work.

NO



Spoiler: Either way works!



YES

“Client will”:

- Client will explore how current living situation impacts sobriety.

“Therapist will” or “with therapist”:

- Therapist will explore with client how current living situation impacts sobriety.
- Client will explore with therapist how current living situation impacts sobriety.

Pop quiz: Select the SMART goal(s)!

1

Jane will reduce her anger.

2

Jane will develop positive coping skills for anger.

3

Jane will practice deep breathing when angry.

4

Jane will identify two situations in which she recently felt angry and discuss the triggers associated with each situation.

5

Jane will utilize one grounding technique 2x a day for one week.

6

Therapist will educate Jane on two mindfulness techniques she can utilize when feeling angry.

7

Jane will explore with therapist how primary caregivers managed anger and discuss impact on self.

8

Jane will not get angry this week.

Learnings from Pop Quiz



Making your treatment plan count means asking these important questions

Can I tell when the goal is complete?



How much of a burden is it for me to monitor goal?

Realistically, will you monitor that person 2x a day for a week?

Can you break the task down into even smaller steps?



How uncomfortable is this task for the client?

Is the goal too general?

Does the client agree with the overall goal, and does this support it?

I.e.: Maybe the client agrees with addressing anger but doesn't yet see how talking about family hx would matter.

How would you know the goal is accomplished?

When can you "check off" this goal as accomplished?

Are these goals realistic for the time we have together?






Pro tip: Set an “almost offensively”

Low Bar

**and be prepared to celebrate
overachievement!**



HUH?!



SMART goals are made, not born



Tip # 1

Practice and engage in active listening to discover the problem areas you can address.

Tip # 2

Be both realistic AND empathetic. (Work within limitations, i.e. length of treatment/ care)

Tip # 3

Get buy-in from your client (and client's support network, if able).

Tip # 4

Don't shy away from challenge, discomfort, and silence as these can be especially meaningful during treatment/ care.

Tip # 5

Break it down, break it down.

Helpful Terms

These verbs can be used to in SMART documentation to support any goal.



Explore

Identify

Educate

Discuss

Role-play

Demonstrate

Practice

Verbalize



Pro tip:
Speak your *client's* language

Using clinical or uncommon terms may lead to miscommunications and feelings of frustration.





Pro tip: Limit your use of the term



"Coping Skills"



Real-life SMART Goals

Client states “I keep having panic attacks at work.”

Goal: Client will utilize coping skills to reduce anxiety.

Goal: Client will reduce frequency of panic attacks.

Coping skill
Not specific

SMART goal: Client will practice one grounding technique that can be used to reduce anxiety .

SMART goal: Therapist will educate client on deep breathing techniques that can be utilized during feelings of panic.

SMART goal: Client identify three symptoms of anxiety and explore ways to reduce intensity of symptoms.

SMART goal: Client will discuss most recent panic attack and identify one way to de-escalate self in similar situations.



Remember: The treatment plan is meant to be a *Living* document.

**We can add, defer, close goals at any time.
We should be reviewing ~30 days for best practice.**

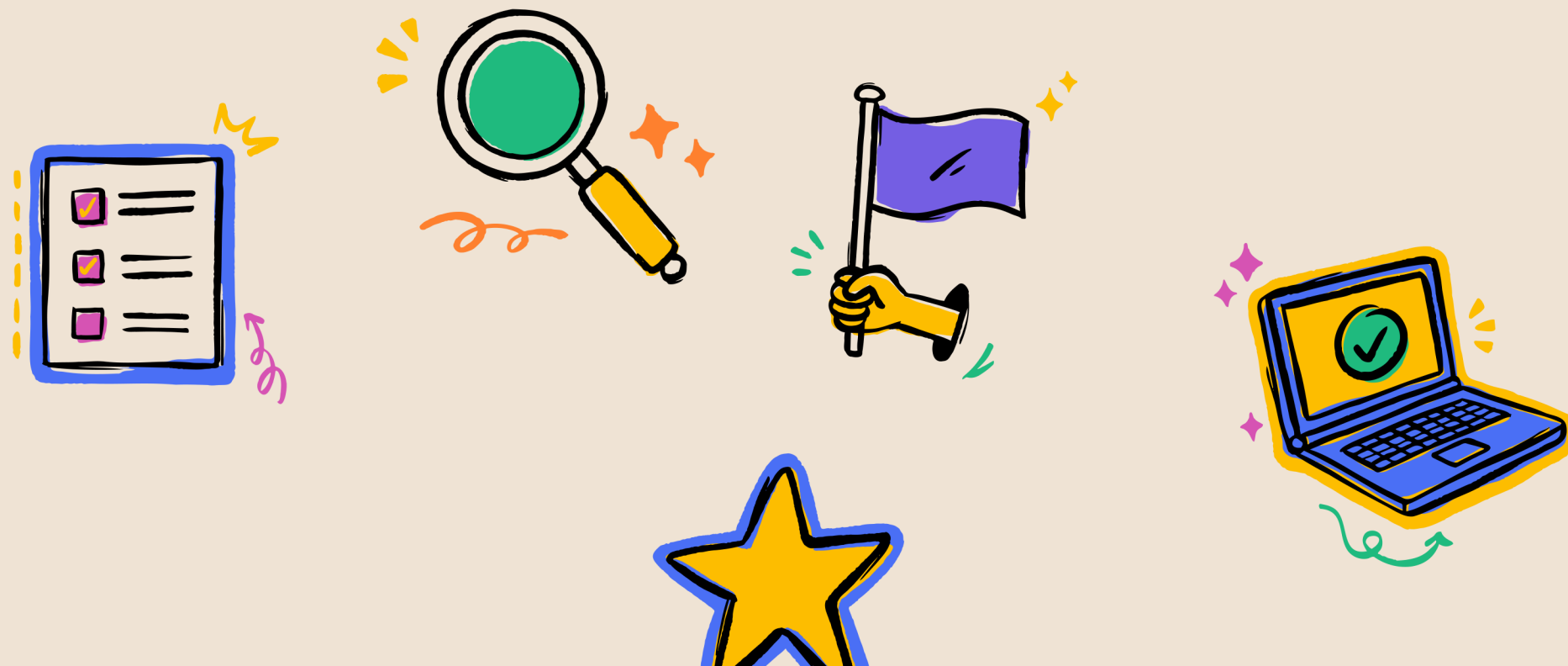
Within 30 days, do you ever change your mind or focus?
Balance keeping on track vs needed edits/ changes.



Dual Dx

and Co-occurring Conditions

When treatment planning for individuals with co-occurring disorders and dual diagnosis, several specific challenges can arise.



1. Complex Symptom Interactions 
2. Medication Management
3. Treatment Adherence
4. Stigma and Discrimination 
5. Integrated Care Coordination
6. Relapse Risk
7. Limited Access to Specialized Services
8. Social and Environmental Factors 
9. Motivational Challenges
10. Dual Focus Requirement 



Pro tip: Manage expectations and keep



FOCUS



This can be especially helpful for dual diagnosis and co-morbidity populations.



Dual Dx SMART Goals

Tip: Be mindful of the length of treatment. We do not want to be overwhelming client by addressing every problem we think they have! (Even if they appear motivated and *want to!*)



Client will identify one family member that is trustworthy and discuss why.

Client will role-play one assertiveness technique that can be used with father.

Family relationships: Argument with dad occurred prior to DUI

Major Depression: Has been struggling with depression since teens

Client will identify two strategies to avoid isolation when feeling depressed.

Client will explore how depressive sx impact substance use.

Client will explore how substance use impacts depressive sx.

Mandated to tx by drug court because of DUI

Client will identify 2 ways that his use of substances has impacted his legal status.

Legal issues: Understand seriousness of DUI.

Client will name 2 possible consequences that can result from driving under the influence.

Financial problems

Substance use: Reports drinking to cope with depression and anxiety

Client will submit to one random drug test.

Client will identify 3 triggers for substance use.

Treatment Plan Example: Problems & Overall Goals



Problem statement:
“I feel really bad about myself and can’t speak up when others hurt my feelings.”

Overall Goal: Client will improve self-esteem.



Problem statement:
“My family says I need to stop smoking pot. I guess it’s causing problems and I’m anxious all the time.”

Overall Goal: Client will refrain from using marijuana during treatment.

Treatment Plan Example: SMART goals



A

Client will improve self-esteem.

- Client will be educated on passive, aggressive, and assertive communication styles.
- Client will discuss relationship with sister and how self-esteem has been impacted thus far.
- Client will identify one mantra that he can utilize when feeling negative about self.
- Client will role-play assertiveness skills to utilize in situations in which he feels unheard.

B

Client will refrain from using marijuana during treatment.

- Client will identify two ways that marijuana use has impacted her life.
- Client will role-play two coping skills that she can utilize when feeling triggered to smoke marijuana.
- Therapist will educate client on how marijuana use can impact mental health symptoms.

You did it!



Let's review what we talked about today!

- What are SMART goals?
- Why do SMART goals matter?
- Examples of SMART goals
- How to create my own SMART goals
- SMARTTreatment Planning
- Pro tips



Upcoming *Training*


Anxiety & Depression Training Series

Final 3rd Session

When: September 12th

Tactics for Meaningful Work with Challenging Populations

This session will explore factors that may contribute to client resistance to tx and the frustration care professionals may experience when individuals express desire to change but fail to engage. Discussion on suicidal clients and critical situation mitigation.



Questions? or Comments!

Thank *you.*



LinkedIn

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