

Treatment Planning Checklist

PLAN

Assess and Hypothesize

- Interview to learn who the client is, determine possible treatment aims that reflect sociocultural lived experiences, beliefs, values, and identities, and select assessment tools and procedures.
- Administer assessment tools and procedures to obtain clarity on client strengths, weaknesses, and goals.
- Prepare a holistic summary of assessment results and client characteristics.
- Review all possible underlying factors that could be responsible for the client's presenting characteristics.
- In collaboration with team members, state assumptions and select a working hypothesis.
- Test hypothesis with assessment measures or a trial of therapy.

Define Targets, Aims, and Measures

- Confirm functional and meaningful treatment aims.
- Select behaviors to address in therapy (targets), including which aspect of behavior is to be modified (accuracy, speed, quality, frequency, duration, level of cueing) and in which context(s).
- Ensure targets contribute to achieving aim(s).
- Ensure targets reflect assessment results and underlying cognitive model/theory.
- Ensure target group (S vs. R) addresses client needs.
- Ensure client has prerequisite skills and insight/awareness needed to achieve targets.
- Complete task analysis to specify all steps required to achieve target.
- Prepare a plan to advance independence in and/or complexity of target behaviors and contexts.
- Identify stakeholders to support the intervention process.
- Identify facilitators and barriers.
- Formulate targets using SMART or GAS formatting.
- Select target measures (acquisition, generalization, maintenance).
- Select impact measures.

Identify Phase of Learning, Ingredients, and Dose

- Identify implementation phase for target (acquisition, generalization, or maintenance).
- Describe ingredients (clinician actions and materials) required to advance the client toward achieving targets.
- Ensure ingredients are appropriate for the target group (e.g., distributed practice for S targets, self-reflection for R targets) and are consistent with theorized mechanism of action.

(continued)

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- Ensure ingredients are appropriate for the client's skills, sociocultural beliefs and values, and psychological status.
- Ensure ingredients and variety of stimuli match phase of implementation.
- Include ingredients for motivation or awareness, if needed (required for homework).
- Determine stakeholder role in supporting intervention ingredients.
- Determine length of intervention program, frequency of therapy sessions, duration of each therapy session, number of repetitions per target in each session.

IMPLEMENT

Apply Ingredients

- Prepare session data and progress monitoring forms.
- Determine practice starting point via retention probe results.
- Implement practice stimuli and methods in required contexts.
- Provide sufficient opportunity for practice within sessions.
- Provide sufficient opportunity for practice across sessions.
- Incorporate team members and other stakeholders in training opportunities, as appropriate.
- Optimize client motivation, engagement, and self-efficacy.
- Ensure homework takes into account opportunity for practice, partner and environmental supports, and client motivation.

EVALUATE

Measure Target Acquisition, Mastery, Generalization, and Maintenance

- Document target acquisition data.
- Analyze progress on acquisition measures to test working hypothesis or ongoing progress.
- If progress is not being made, reevaluate the plan (hypothesis, target, ingredients) and reimplement.
- If progress is being made, continue with acquisition phase or advance to mastery and generalization phase.
- Probe for target generalization.
- Analyze target generalization probe results, adjusting plan or learning phase as needed.
- Probe for target maintenance.
- Analyze target maintenance probe results, adjusting plan or learning phase as needed.

Measure Impact/Outcome on Aim

- During mastery/generalization or maintenance phase, obtain objective data of changes in daily functioning.