In some instances, you will have to manually document progress or completion of a goal or intervention.

**Key Icons:**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔄</td>
<td>Click this icon to chart progress toward a goal, or to complete Done/Not Done items.</td>
</tr>
<tr>
<td>✔️</td>
<td>Documentation has been done, but progress on a Goal/Intervention can still be updated.</td>
</tr>
<tr>
<td>📁</td>
<td>Click this icon to open a form. The Intervention is completed when the form is signed.</td>
</tr>
</tbody>
</table>

**Document Progress on a Goal or Intervention**

**Step 1**
From the Orders Plans section, select **Document in Plan**.

**Step 2**
Click the 🔄 icon to document progress or complete done/not done items for a Goal or Intervention.
Completing Care Plan Goals/Interventions

**Step 3**

Use the area to the right of the Goals/Interventions to chart progress and document additional items.

*Note: You’ll also document here when a Goal/Intervention is not progressing or can’t be completed.*

- Chart Outcome Description
  - Select **desired outcome** radio button
- Enter Evaluation time and date
- Chart Outcome Variance as needed
  - From the drop-down, select **desired outcome Reason**
- Select **Action**
  - Document details as appropriate

---

**Step 3**

Click **Sign Documentation.**

---

**Step 4**

A green check will display for Goals/Interventions that have been met. A red X will display for Goals/Interventions that have not yet been met.

*Note: You can update Goals/Interventions that haven’t been met once the Goal/Intervention is completed.*
Document on a Form

Complete the form based on topics you have discussed with your patient.

**Step 1**
Click the icon.

**Step 2**
Fill out the form as appropriate for your patient and **Sign** the form.

**Step 3**
Click **Sign Documentation**

After you documented completion of a Goal/Intervention or completed a form, the date/time appears under the *Last Evaluated* column.