

A trial to **e**valuate an **e**xtended
rehabilitation service for **s**troke patients
(EXTRAS)

Goal setting and action planning record v2

Patient name: _____

Patient study number: _____



This goal setting and action planning record should be used to document and evaluate the patient's goals for each review. It is to be used alongside the 'extended rehabilitation review documentation.'

For further information on how to conduct the reviews and use the documentation, please refer to the extended rehabilitation service manual or contact the study coordinating team in the Stroke Research Group at Newcastle University:

Stroke Research Group
Institute for Ageing & Health
Newcastle University
3-4 Claremont Terrace
Newcastle NE2 4AE
Tel: 0191 208 6779

Goal setting and action planning record – goals set at 1 month review (evaluation at later review)

Patient study number: _____

1 month reviewer name: _____

Goal / action point No	Date set	SMART goal or action point	Action plan (advice or information given or referral required)	Baseline score (-1 or -2) *	Date goal / action point evaluated§	Achieved	Verbal rating and numerical score *	Describe achievement if differs from expected and give reasons
1.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	
2.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	
3.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	

* indicates these columns only need to be completed when setting goals (NOT when setting action points)

§ Goals/action points do not have to be evaluated at each review – e.g. if you set a goal at 1 month which was to be achieved by 6 months, you should evaluate it at the 6 month review not the 3 month review. You may wish to review progress towards the goal at the 3 month review. If so, comments can be recorded in the 'extended rehabilitation service review documentation'

Goal setting and action planning record – goals set at 1 month review (evaluation at later review)

Patient study number: _____

1 month reviewer name: _____

Goal / action point No	Date set	SMART goal or action point	Action plan (advice or information given or referral required)	Baseline score (-1 or -2) *	Date goal / action point evaluated§	Achieved	Verbal rating and numerical score *	Describe achievement if differs from expected and give reasons
1.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	
2.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	
3.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	

* indicates these columns only need to be completed when setting goals (NOT when setting action points)

§ Goals/action points do not have to be evaluated at each review – e.g. if you set a goal at 1 month which was to be achieved by 6 months, you should evaluate it at the 6 month review not the 3 month review. You may wish to review progress towards the goal at the 3 month review. If so, comments can be recorded in the 'extended rehabilitation service review documentation'

Goal setting and action planning record – goals set at 3 month review (evaluation at later review)

Patient study number: _____

3 month reviewer name: _____

Goal / action point No	Date set	SMART goal or action point	Action plan (advice or information given or referral required)	Baseline score (-1 or -2) *	Date goal / action point evaluated§	Achieved	Verbal rating and numerical score *	Describe achievement if differs from expected and give reasons
1.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	
2.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	
3.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	

* indicates these columns only need to be completed when setting goals (NOT when setting action points)

§ Goals/action points do not have to be evaluated at each review – e.g. if you set a longer term goal, you should evaluate it at the longer term time point. You may wish to review progress towards the goal at a review. If so, comments can be recorded in the 'extended rehabilitation service review documentation'

Goal setting and action planning record – goals set at 3 month review (evaluation at later review)

Patient study number: _____

3 month reviewer name: _____

Goal / action point No	Date set	SMART goal or action point	Action plan (advice or information given or referral required)	Baseline score (-1 or -2) *	Date goal / action point evaluated§	Achieved	Verbal rating and numerical score *	Describe achievement if differs from expected and give reasons
1.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	
2.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	
3.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	

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§ Goals/action points do not have to be evaluated at each review – e.g. if you set a longer term goal, you should evaluate it at the longer term time point. You may wish to review progress towards the goal at a review. If so, comments can be recorded in the 'extended rehabilitation service review documentation'

Goal setting and action planning record – goals set at 6 month review (evaluation at later review)

Patient study number: _____

6 month reviewer name: _____

Goal / action point No	Date set	SMART goal or action point	Action plan (advice or information given or referral required)	Baseline score (-1 or -2) *	Date goal / action point evaluated§	Achieved	Verbal rating and numerical score *	Describe achievement if differs from expected and give reasons
1.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	
2.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	
3.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	

* indicates these columns only need to be completed when setting goals (NOT when setting action points)

§ Goals/action points do not have to be evaluated at each review – e.g. if you set a longer term goal, you should evaluate it at the longer term time point. You may wish to review progress towards the goal at a review. If so, comments can be recorded in the 'extended rehabilitation service review documentation'

Goal setting and action planning record – goals set at 6 month review (evaluation at later review)

Patient study number: _____

6 month reviewer name: _____

Goal / action point No	Date set	SMART goal or action point	Action plan (advice or information given or referral required)	Baseline score (-1 or -2) *	Date goal / action point evaluated§	Achieved	Verbal rating and numerical score *	Describe achievement if differs from expected and give reasons
1.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	
2.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	
3.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	

* indicates these columns only need to be completed when setting goals (NOT when setting action points)

§ Goals/action points do not have to be evaluated at each review – e.g. if you set a longer term goal, you should evaluate it at the longer term time point. You may wish to review progress towards the goal at a review. If so, comments can be recorded in the 'extended rehabilitation service review documentation'

Goal setting and action planning record – goals set at 12 month review (evaluation at later review)

Patient study number: _____

12 month reviewer name: _____

Goal / action point No	Date set	SMART goal or action point	Action plan (advice or information given or referral required)	Baseline score (-1 or -2) *	Date goal / action point evaluated§	Achieved	Verbal rating and numerical score *	Describe achievement if differs from expected and give reasons
1.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	
2.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	
3.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	

* indicates these columns only need to be completed when setting goals (NOT when setting action points)

§ Goals/action points do not have to be evaluated at each review – however, any goals/action set at the 12 month review (or earlier and not yet evaluated) need to be evaluated at 18 months as this is the last review.

Goal setting and action planning record – goals set at 12 month review (evaluation at later review)

Patient study number: _____

12 month reviewer name: _____

Goal / action point No	Date set	SMART goal or action point	Action plan (advice or information given or referral required)	Baseline score (-1 or -2) *	Date goal / action point evaluated§	Achieved	Verbal rating and numerical score *	Describe achievement if differs from expected and give reasons
1.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	
2.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	
3.						<input type="checkbox"/> Yes	<input type="checkbox"/> Much better (+2) <input type="checkbox"/> A little better (+1) <input type="checkbox"/> As expected (0)	
						<input type="checkbox"/> No	<input type="checkbox"/> Partially achieved (-1) <input type="checkbox"/> Same as baseline (-1/-2) <input type="checkbox"/> Worse (-2)	

* indicates these columns only need to be completed when setting goals (NOT when setting action points)

§ Goals/action points do not have to be evaluated at each review – however, any goals/action set at the 12 month review (or earlier and not yet evaluated) need to be evaluated at 18 months as this is the last review.

Goal setting and action planning record – action points set at 18 month review

Patient study number: _____

18 month reviewer name: _____

Action point No	Date set	Action point ‡	Action plan (advice or information given or referral required)

‡ As this is the 18 month review, it is unlikely to be practical to set goals as these cannot be evaluated at a later date. It will probably be necessary to set action points if unmet needs are highlighted.

Goal setting and action planning record – action points set at 18 month review

Patient study number: _____

18 month reviewer name: _____

Action point No	Date set	Action point †	Action plan (advice or information given or referral required)

† As this is the 18 month review, it is unlikely to be practical to set goals as these cannot be evaluated at a later date. It will probably be necessary to set action points if unmet needs are highlighted.