

Treatment Plan Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · July 2026

A mental health treatment plan is the roadmap for a course of therapy: diagnoses, presenting problems, measurable goals and objectives, interventions, and how often care happens. Future-focused, spanning many sessions; most run 1 to 3 pages.

1 – Ground it in the assessment why treatment is medically necessary

Do: state diagnoses, presenting problems in the client's own language, and the strengths you will build on.

Pitfall: a plan that could belong to any client; individualization is the requirement.

2 – Set measurable goals two to four, chosen with the client

Do: give each goal a number or observable state and a target date ("PHQ-9 to 9 or below by session 12").

Pitfall: goals with no measure or date; auditors cannot verify "feel better."

3 – Break goals into objectives steps a session can actually move

Do: one to three observable, dated steps per goal.

Pitfall: objectives that restate the goal instead of stepping toward it.

4 – Specify interventions and dose Medicare's four-part formula

Do: state the type, amount, frequency, and duration of services, and who provides them.

Pitfall: missing frequency or duration; a named finding in federal audits.

5 – Sign, share, schedule the review then keep it current

Do: document client involvement, collect required signatures, set the review date.

Pitfall: unsigned plans; one audit found no physician signature on 96 of 100 sampled days.

Before you sign

- ☐ Goals measurable, each with a target date
- ☐ Type, amount, frequency, duration stated
- ☐ Objectives observable and dated
- ☐ Client involvement documented
- ☐ Plan matches the services you bill
- ☐ Review date scheduled

Drafting with AI

Give it your intake note or assessment bullets: diagnoses, problems, strengths, the goals the client chose, modality and cadence.

"Draft a treatment plan from this intake summary: MDD moderate, PHQ-9 16, CBT with behavioral activation, weekly, 16 sessions: ..."

Never paste client-identifying information into consumer AI tools. BastionGPT is HIPAA-compliant with a signed BAA on every plan.

1–3 pages
typical length

30–60 min by hand
clinical team estimate

At intake, then reviews
when it's written

Client · payers · auditors
who reads it

Mental Health Treatment Plan Template

Copy or print for your practice · Adapt fields to your organization's, payer's and jurisdiction's documentation requirements.

Client (initials): _____ Date of plan: _____ Diagnosis (ICD-10): _____

Presenting problems / needs

In the client's own language where possible; include baseline scores

Strengths & client priorities

What the client brings and what matters most to them

Goal 1 (measurable, with target date)

Goal, then objectives (observable, dated), then interventions with modality, frequency, duration

Goal 2 (measurable, with target date)

Goal, then objectives (observable, dated), then interventions with modality, frequency, duration

Review date: _____ Client involvement documented: ☐ yes (copy offered: ☐)

Clinician signature / credentials: _____ Date signed: _____

Client (or guardian) signature, where required: _____ Date: _____