

PerformCARE[®]

Instructional Guide to the Strengths and Needs Assessment (SNA) Tool In CYBER

Strength and Needs Assessment Instructions for Use

Table of Contents

I. Introduction	2
II. Accessing CYBER.....	3
III. Strength and Needs Assessments and Treatment Plans	4
IV. Strength and Needs Assessment Tool	5
Documentation Reminders in the Assessment	6
Viewing Previous Answers	7
Pre-Fill Functionality.....	8
V. Strength and Needs Assessment Tabs.....	9
Demographics Tab.....	9
Life Domain Functioning Tab.....	9
Child Strengths Tab	10
Child Behavioral/Emotional Needs Tab.....	10
Child Risk Behaviors Tab.....	11
Caregiver Strengths/Needs Tab	11
VI. The Modules	12
I/DD Module.....	13
Medical Module	13
Trauma Module.....	13
Substance Use Module.....	14
Problematic Sexual Behavior Module	14
Legal/Juvenile Justice Module.....	14
Fire Setting Module	15
Readiness for Adulthood Module	15
Parenting Module.....	15
VII. Action Buttons	16
VIII. Plan Approval Window	17
IX. References	20

I. Introduction

Care Management Organizations (CMO), Out-of-Home (OOH) providers and Substance Use (SU) treatment providers within the Children's System of Care utilize the **Strengths and Needs Assessment Tool (SNA)** to inform and assist in collaborative treatment planning. The assessment can be used to demonstrate and support how and why the Child Family Team makes certain treatment decisions. The ratings used for individual questions, or dimensions, can indicate what areas of the youth's life need immediate action, as well as what areas of strength can be utilized to address any identified needs.

Automatic association of the most recently submitted SNA are a part of the submission process for treatment plans for CMO, SU and OOH. The assessment must be from within the last 30 days; the SNA submitted into CYBER nearest to the submission of the treatment plan will automatically associate to the plan when the user submits it. The CMO and OOH plans will only associate those SNAs submitted by a CMO or OOH; the SU plans will associate the SNAs created by their SU agency, a CMO or OOH.

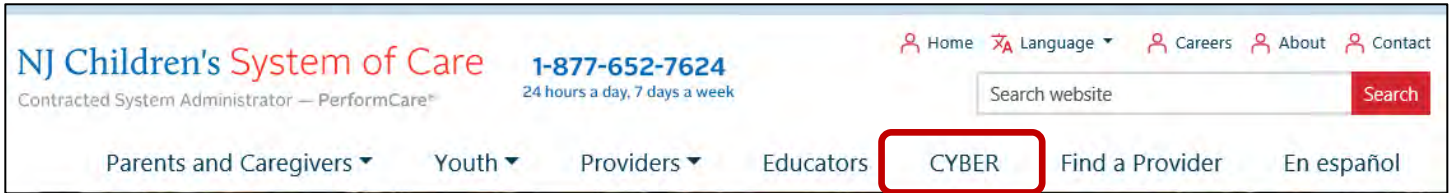
This instructional guide reviews the treatment plan types available to Substance Use Providers. These treatment plans document the requests for services, current needs, and transitioning a youth to another level of care or discharging a youth from services.

This guide will include a review of the following functions and operational processes in CYBER:

- Strength and Needs Assessment (SNA)
- Plan Approval window
- Substance use authorization process
- Access to Substance Use Treatment forms

II. Accessing CYBER

CYBER can be accessed via the PerformCare website – www.performcarenj.org. The link is available under the CYBER menu at the top of the home page or the button at the bottom of the page. Users must log into CYBER with their Username and Password.



Each provider organization has at least two CYBER Security Administrators, and your agency's CYBER Security Administrators can set up a login and temporary password. Access will be based upon login type and security levels.

Before logging in, keep in mind...

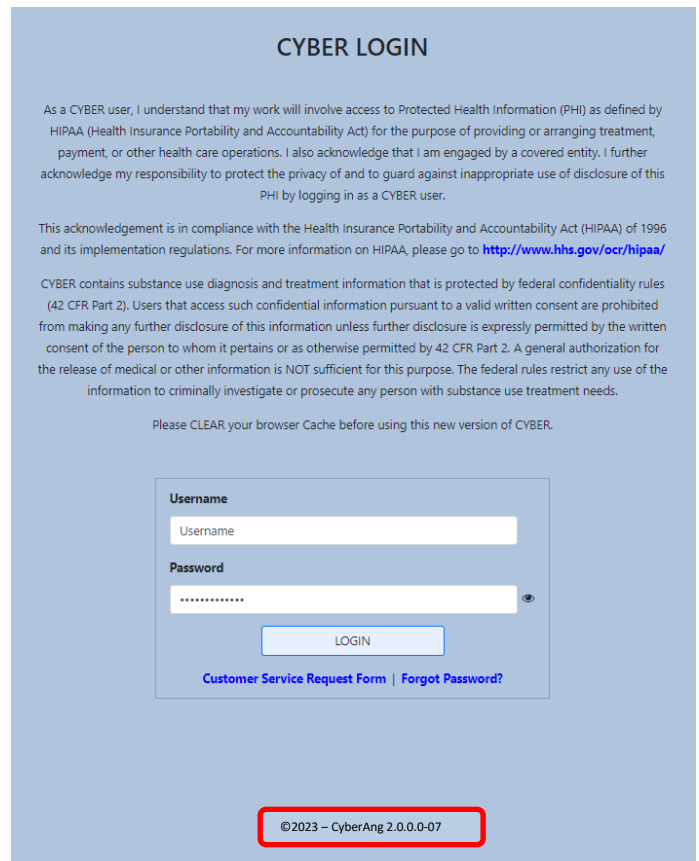
- Every time CYBER is launched, the **Username and Password is required, then click the LOGIN button to continue.**
- Users are required to **change their password every 90 days.**

Above the login area is a statement that, CYBER users acknowledge their responsibility to protect the privacy of and to guard against the inappropriate use or disclosure the Protected Health Information (PHI) contained within the system.

This statement will appear during each log in.

Please also check the link: [CYBER Access Requirements](#) page on the PerformCare website for the most up-to-date technical requirements (such as browser compatibility and operating systems) needed to access CYBER.

At the bottom of the login page is the version of CYBER. The server number is the last 2 digits at the end (-XX). This is helpful to note when requesting assistance.



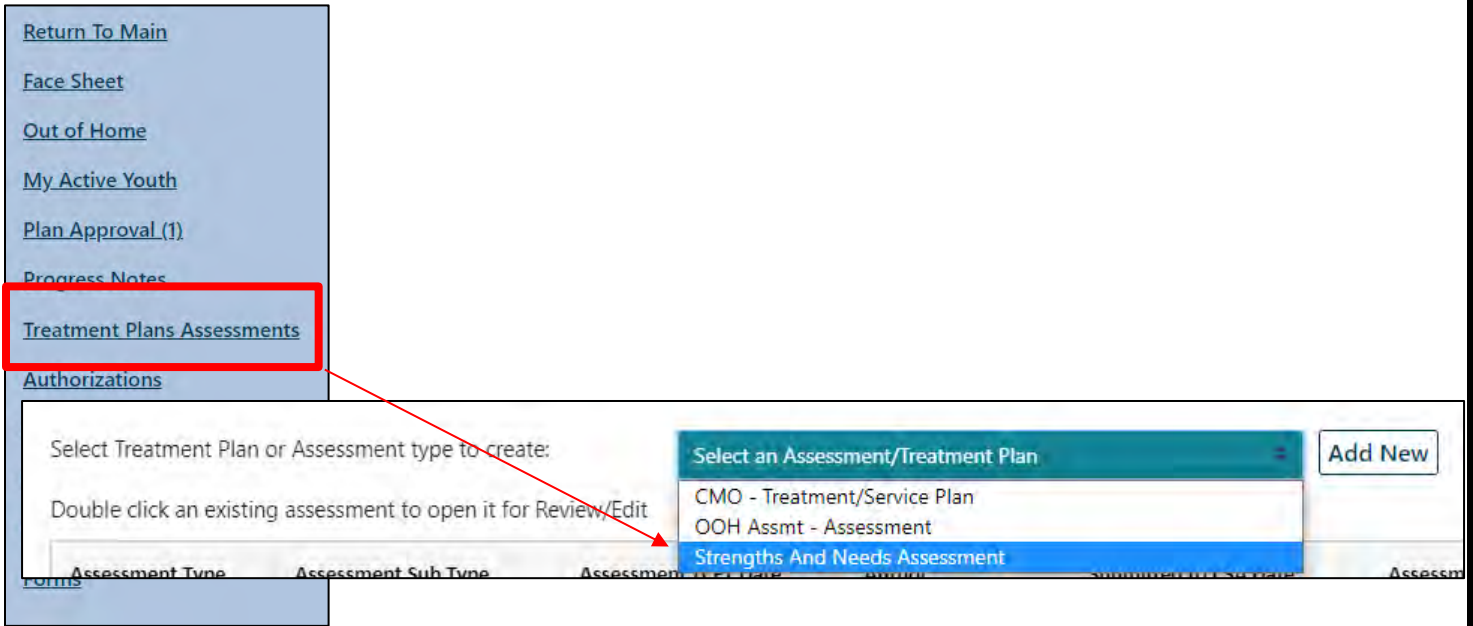
For technical support, please use the [Customer Service Request Form](#) link under the login.

III. Strength and Needs Assessments and Treatment Plans

A Strength and Needs Assessment (SNA) should be completed prior to starting a new Treatment Plan. The assessment should be prepared within 30 days of the treatment plan submission to CSA. To create a new assessment, a user must first navigate to the Treatment Plans and Assessments screen within a youth's CYBER record.

Once the Treatment Plans and Assessments grid loads, the user will be able to create a new assessment by selecting the document from the *Select Treatment Plan or Assessment type to create* menu.

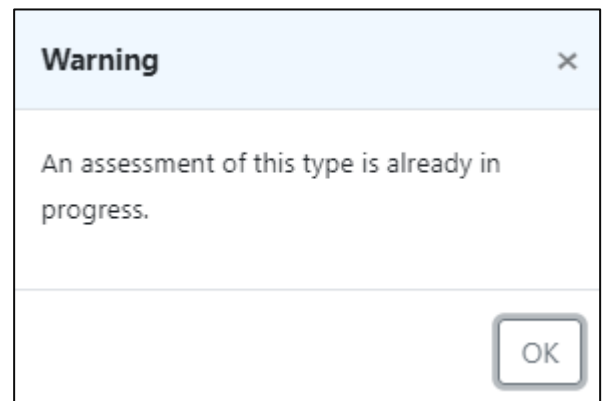
Clicking "Add New" will open the new Strength and Needs Assessment.



If there is a SNA in draft for the youth (authored by the logged-in user or another user from the same agency), the user will receive an alert message but will be able to continue with the new assessment.

The assessment will automatically save upon creation, navigating between tabs will also auto-save the document.

Note: Assessments that belong to the user may be edited or deleted prior to being submitted.



IV. Strength and Needs Assessment Tool

The assessment is structured in a tabular format. To navigate throughout the document, the user may click on the individual tabs. The user can also use the scroll bars, once inside a tab, to navigate through all the required questions.

Demographics | Life Domain Functioning | **Child Strengths** | Child Behavioral/Emotional Needs | Child Risk Behaviors | Caregiver Strengths/Needs | I/DD Module | Problematic Sexual Behavior Module | Out of Home Care Module

City [] Secondary Phone []
State [] Zip []
Care Management Entity []
Provider Name [] Care Manager []
Admission Date [] Care Manager Phone []
Provider Phone []
Assessor Username []
Assessor Name []
Assessor Agency []
Assessor Phone []
Assessor Email []
Assessment Date [MM/DD/YYYY] []
Assessment Completion Date [MM/DD/YYYY] []

Default Print | Print | Cancel | Save | Save & Close | Review History | Select an Action | Update Status

Make sure your Assessment Date is not set prior to the authorization date. Doing so will cause issues when associating to a Crisis Plan. Also ensure the plan has the same Assessment Date as the assessment.

Documentation Reminders in the Assessment

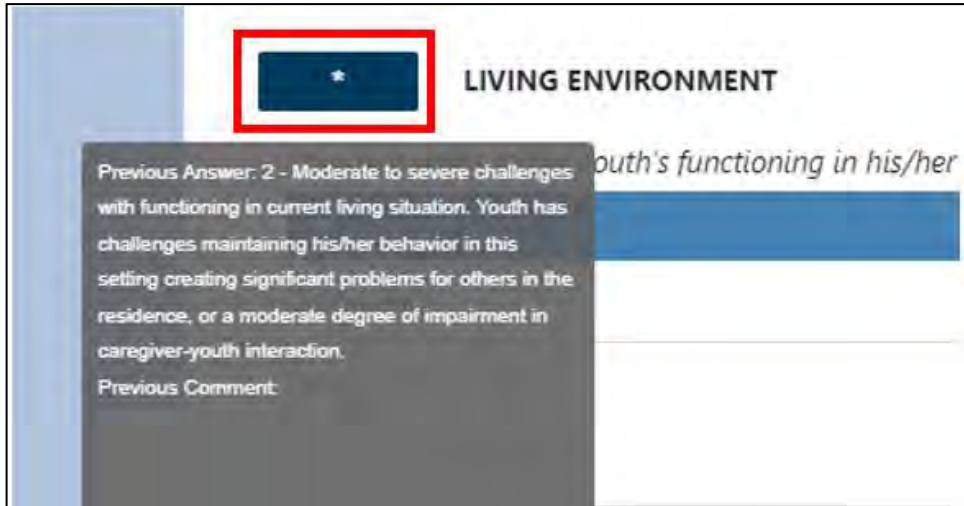
- **Unless otherwise noted, all fields in the assessment – and any modules that open – are required for submission.**
- **If a question is rated a 2 or 3, a complete comment that supports the rating is required.** Users may choose to enter a comment for a question rated 0 or 1 if it will support the rating or provide additional information to support or aid in treatment planning. **Users do not need to enter NA into the comment field if a comment is not required.**

When entering information into a comment field, users are expected to follow these guidelines:

- **Do not enter only a diagnosis as justification for a rating.** In most instances, the rated questions ask for *how* the youth is exhibiting the behaviors. The user should be documenting that information along with any details regarding historical behaviors or prior treatment.
- **Do not enter the same information into every comment field.** This will cause a return of the assessment and associated treatment plan.
- **Use complete sentences and include language from the question when entering information.** If your supporting comments do not justify the rating given, your assessment (and associated plan) may be returned.
 - If, in order to satisfy a required field validation, a user enters a period (.), a comma (,), “NA”, or other non-alpha character such as “/”, etc. the assessment and associated plan will be returned.
- **Include details if documenting an acute episode or significant event;** for example, if a youth is detained on legal charges and you are documenting reported facts about the event, include not only the charge but information about the event and alleged behaviors such as who was reportedly involved, where the event allegedly took place, status of the charge, etc.
- **Be as specific as possible in your documentation.** Include dates, information regarding who was involved, where the behaviors were exhibited, what factors may have been involved, who provided the details, etc.
- **Documentation must be specific to the youth.** Do not duplicate documentation across youth records. This applies to siblings and non-related youth, as well.

Viewing Previous Answers

The SNA includes functionality that allows the user to view the previous answer and comment for each rated question.



Hovering the mouse over the asterisk (*) button will display a pop-up of the answer selected for the most recently submitted SNA from within the last 120 days.

Clicking on the asterisk button will bring up a pop-up window that will include the answer selected and comment from the most recently submitted CAT from within the last 120 days; the user will need manually close the window by manually clicking OK.



CMO and OOH users will have access to the previous answers from SNAs submitted by CMO and OOH users only. SAB users will have access to the answers from previous assessments submitted by users within their agency as well as any CMO or OOH user.

Pre-Fill Functionality

The option to copy the *entire assessment* is not available; replacing this feature is an automatic pre-fill of certain fields in the assessment that tend to be historical in nature (see below). Generally, the answers to these questions will not change over time, but can be edited if change has occurred.

Fields that will pre-fill from the most recently submitted SNA from any user within the current episode of care are as follows:

Domain/Tab	Question	
Life Domain Functioning	Developmental Delay (trigger)	
Child Behavioral/Emotional Needs	Exposure and Response to Implicit Trauma (trigger)	
	Exposure and Response to Explicit Trauma (trigger)	
Child Risk Behaviors	Substance Use (trigger)	
	Problematic Sexual Behavior (trigger)	
	Legal/Juvenile Justice (trigger)	
	Fire Setting (trigger)	
I/DD Module	Cognitive	
Trauma Module	What trauma treatment/services have been tried in the past and have been helpful?	
	What trauma treatment/services have been tried in the past and have not been helpful?	
	Recommendations for treatment approach	
	Sexual Abuse	
	Physical Abuse	
	Emotional Abuse	
	Neglect	
	Emotional Closeness to Perpetrator(s)	
	Medical Trauma	
	Witness to Family Violence	
	Witness to School and Community Violence	
	Natural or Man-Made Disasters	
	Witness/Victim to Criminal Activity	
	Parental Criminal Behavior	
	Disruptions in Caregiver/Attachment Losses	
	Substance Use Module	Substance Use (History column)
	Problematic Sexual Behavior Module	Date of most recent problematic sexual behavior
Describe the most recent behavior		
Was sexual act against a family member?		
Identify		
Is the youth currently subject to the provisions of Megan's Law?		
What treatment/services have been tried in the past and have been helpful?		
What treatment/services have been tried in the past and have not been helpful?		
Recommendations for treatment approach		
Relationship		

	Physical Force/Threat
	Planning
	Age Differential
	Type of Sex Act
	Temporal Consistency
	History of Problematic Sexual Behavior Towards Others
	Severity of Sexual Abuse
Prior Treatment	

Domain/Tab	Question
Legal/Juvenile Justice Module	Seriousness
	History
Fire Setting Module	Seriousness
	History
	Planning
	Use of Accelerants
	Intention to Harm

V. Strength and Needs Assessment Tabs

Demographics Tab

The Demographics tab pulls information directly from the youth’s Face Sheet.

If the Face Sheet information changes after the assessment has been created (prior to submission), the user can update this information by clicking the “Refresh” button at the bottom of the tab.

Users must update the **Assessment Date** field to the correct date and enter the **Assessment Completion Date** in order to submit the assessment.

Life Domain Functioning Tab

The Life Domain Functioning tab, or domain, includes an Assessment Subtype menu at the top of the tab. This allows the user to select from two options:

1. Routine – The default option, used for the initial and on-going SNA used to support treatment planning and ongoing services.
2. No Contact – Used when the agency has lost contact with the family and is submitting a plan to discharge the youth from services. This removes the validations from the assessment, allowing for minimal completion. Users are expected to document as much information as they have available.

This domain includes the following rated questions/dimensions each displayed in a drop-down list:

- Living Environment
- Interpersonal
- Developmental Delay - If this question is rated a 1, 2, or 3, the associated I/DD module will open as a new tab
- School Behavior
- Academic Achievement
- School Attendance

- Learning Disability
- Educational Agency Involvement
- Medical - If this question is rated a 1, 2, or 3, the Medical module will open as a new tab
- Physical - If this question is rated a 1, 2, or 3, the Medical module will open as a new tab
- Sleep
- Eating
- Sexual Health
- Attachment
- Bullied by Others
- Cultural Stress

Caregiver Strengths/Needs

I/DD Module

Medical Module

Child Strengths Tab

This tab includes questions that look at the strengths of the youth and family or other important individuals in the youth's life. This domain includes the following questions each displayed in a drop-down list:

- Family Strengths
- Relationship Stability
- Talents/Interests
- Community Involvement
- Youth Involvement with Care
- Optimism
- Self-Expression
- Spiritual
- Wellness Behaviors
- Resiliency

Note: Depending upon the age of the youth, some of the questions may not apply (for example, a six-year old may not be knowledgeable of their needs but is willing to participate in care or may not understand what care would entail due to their age and need further work on engagement. This information should be included in the comments area for the question on Youth Involvement with Care. Entering "youth is only six years old" is not appropriate.)

Child Behavioral/Emotional Needs Tab

This domain will include questions on the youth's needs in regards to their behavioral and/or emotional symptoms.

Note: Documenting only a youth's diagnosis in the comments area for any question in this domain rated a 1, 2, or 3 may result in the return of the assessment and associated plan. For example: rating the Depression question a 2 – Clear evidence of depression associated with either depressed mood or significant irritability, and entering "youth has a diagnosis of depression" is not sufficient information. The user should document how the youth is exhibiting the symptoms of depression and what evidence supports that rating.

The rated questions include:

- Psychosis
- Impulsivity and Attention
- Depression
- Anxiety

- Oppositional Behavior (Compliance with Authority)
- Conduct
- Exposure and Response to Implicit Trauma – this type of trauma may not be obvious but may be related to a situation that the youth was personally subject to or was a witness to such as multiple placements or caregiver loss.
- Exposure and Response to Explicit Trauma – this type of trauma refers to the youth’s experiences that may include abuse and/or neglect, witness to family violence and/or natural or man-made disasters

I/DD Module

Medical Module

Trauma Module

Note: These two questions are looking for information regarding two distinct types of trauma; do not include the same information in the comments field for both. In addition, if any of these questions is rated a 1, 2, or 3, the Trauma module will open as a new tab:

- Anger Control
- Gambling
- Technology

Child Risk Behaviors Tab

This domain looks at the possible risk behaviors the youth is exhibiting, including suicidal thoughts/plans/actions, self-injurious behaviors and actual or threatened violence against others.

The questions in this domain are:

- Suicide Risk
- Self-Injurious Behavior
- Other Self Harm
- Danger to Others
- Problematic Sexual Behavior - Rating this question a 1, 2, or 3 will open the Problematic Sexual Behavior module.
- Flight Risk
- Legal/Juvenile Justice - Rating this question a 1, 2, or 3 will open the Legal/Juvenile Justice (JJ) module.
- Judgment
- Fire Setting - Rating this question a 1, 2, or 3 will open the Fire Setting module.
- Substance Use - Rating this question a 1, 2, or 3 will open the Substance Use module.

Demographics

Life Domain Functioning

Child Strengths

Child Behavioral/Emotional Needs

Child Risk Behaviors

Caregiver Strengths/Needs

I/DD Module

Medical Module

Trauma Module

Substance Use Module

Problematic Sexual Behavior Module

Legal/Juvenile Justice (JJ) Module

Fire Setting (FS) Module

Out of Home Care Module

Note: If the user is seeking Substance Use treatment for the youth, or if the youth is currently receiving treatment for substance use, this question must be rated a 1, 2, or 3, or the assessment and associated plan will be returned.

Caregiver Strengths/Needs Tab

This domain was two separate domains in the prior version of the assessment.

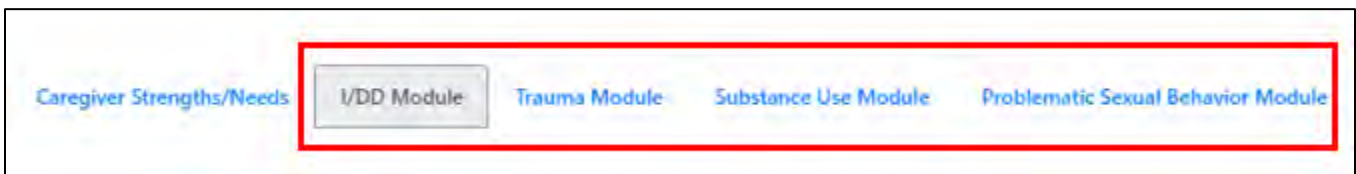
This domain specifically looks at the youth’s caregiver(s), where they are successful and where they have challenges and may need additional supports or assistance. The questions are:

- Natural Supports

- Caregiver Resourcefulness
- Supervision
- Involvement with Care
- Knowledge of the Youth's Strengths/Needs
- Caregiver Optimism (Hopefulness)
- Residential Stability
- Family Stress – documents the current level of family stress, regardless of where the youth is living
- Physical/Medical
- Mental Health
- Substance Use
- Developmental
- Child/Adolescent Protection
- Military Transition

VI. The Modules

Additional Modules may appear at the end of the SNA if they are triggered by information in the youth's record or from the user's response to certain questions within the SNA. Modules will not be visible unless they are triggered. They will appear after the Caregiver Strengths/Needs tab and will remain open unless the specific, related trigger changes prior to submission (for example, if the user made an error in rating the Developmental Delay question a 1 instead of a 0 and corrects it, the I/DD module will then close and be unavailable).



The modules' purpose is to gather additional, more detailed information to support or supplement the domains of the assessment and may indicate that additional evaluations are necessary.

All questions within the modules are required unless otherwise noted. Once a module is opened, or triggered, it must be completed in order for the user to submit the assessment.

Some of the modules are broken into two distinct sections. For those modules, the first section (Section I) will include questions that cover historical information; this section will ask for information on the youth's treatment history, most recent incident that began the most recent episode of treatment, etc. The second section (Section II) will include questions that contain outcomes measurements; areas included will be how the youth is currently coping, the behaviors the youth is currently exhibiting, the influences that are currently in place, etc. The modules that have two sections are as follows:

- Trauma
- Problematic Sexual Behavior
- Legal/Juvenile Justice (JJ)
- Fire Setting

I/DD Module

Triggered by rating the **Developmental Delay** question in the *Life Domain Functioning* domain a 1, 2, or 3.

- The “I/DD Eligible” checkbox at the top of the tab will auto-populate if the youth has been determined eligible by DDD, CSOC PerformCare (based upon the External ID Information creating a DD Eligible indicator within the youth’s record).

Note: If the family has not applied for I/DD Eligibility, they should be informed about the DD eligibility application process. The application process and applicable documentation are posted on the PerformCare NJ website.

- I/DD Module includes questions that cover the following areas:
 - Self-Care
 - Communication, Receptive and Expressive Language
 - Learning
 - Home Living
 - Social/Interpersonal Skills
 - Mobility
 - Leisure
 - Safety

Medical Module

Triggered by rating the **Medical and/or Physical** questions in the *Life Domain Functioning* domain a 1, 2, or 3.

- Contains a series of open text questions that the user should utilize to document information such as barriers to treatment for the medical condition, and anticipated future needs due to the youth’s medical condition.
- Includes the following rated questions:
 - Pain
 - Impairment in Functioning
 - Access to Health Care
 - Youth Accountability for Medical Care Plan
 - Family Management of Medical Condition

If the youth is enrolled in a Behavioral Health Home (BHH), the Medical Module needs to reflect the diagnosis and reasons that BHH was necessary and continues to be necessary. The extent of the youth’s participation in BHH should be documented under the Youth Accountability question; the parent/legal guardian’s participation should be documented under the Family Management question.

Trauma Module

Triggered by a rating of a 1, 2, or 3 for either the **Exposure and Response to Implicit Trauma** and/or **Exposure and Response to Explicit Trauma** in the *Child Behavioral/Emotional Needs* domain.

- Section I of the module does not include items that are tracked for the measuring of outcomes; some of the items may occur or re-occur during the youth’s involvement with CSOC and may impact the items later in the module that do impact outcomes.
- Looks to gather information regarding services that have been tried in the past with the youth and the success of that treatment; also asks for treatment approach recommendations.

- Includes the following rated questions:
 - Sexual Abuse
 - Physical Abuse
 - Emotional Abuse
 - Neglect
 - Emotional Closeness to Perpetrator(s)
 - Medical Trauma
 - Witness to Family Violence
 - Witness to School and Community Violence
 - Natural or Man-Made Disasters
 - Witness/Victim to Criminal Activity
 - Parental Criminal Behavior
 - Disruptions in Caregiver/Attachment Loss
 - Traumatic Stress Symptoms including Traumatic Grief, Affective and/or Physiological Dysregulation, Re-Traumatization, Hyper-Arousal, Avoidance, Numbing, Reactive Sexual Behavior and Dissociation.

Substance Use Module

Triggered when the **Substance Use** question in the [Child Risk Behaviors](#) domain is rated a 1, 2, or 3.

- First section gathers information regarding the youth's substance use, active or historical, age of first use, last use and amount used.
- Rated questions ask about the potential for withdrawal and environmental influences.
- The following rated questions are included:
 - Acute Intoxication or Withdrawal Potential
 - Frequency
 - Duration of Use
 - Environmental Influences
 - Substance Use and Risk Behavior

Problematic Sexual Behavior Module

Triggered by the **Problematic Sexual Behavior** question in the [Child Risk Behaviors](#) domain.

- Seeks information regarding the most recent behavior including activity, circumstances, reasons and results; also seeks information regarding the youth's status with Megan's Law and the youth's past treatment history.
- Includes the following rated questions:
 - Relationship
 - Physical Force/Threat
 - Planning
 - Type of Sex Act
 - Temporal Consistency
 - History of Problematic Sexual Behavior Towards Others
 - Severity of Sexual Abuse
 - Prior Treatment
 - Response to Accusation
 - Management of Risk
 - Treatment Compliance

Legal/Juvenile Justice Module

Triggered when the **Legal/Juvenile Justice** question in the [Child Risk Behaviors](#) domain is rated a 1, 2, or 3.

- Gathers information regarding the most recent incident resulting in legal charges; documents the youth's JJC Contact Person if the youth is incarcerated or the youth's Parole/Probation Officer.
- Prior and current interventions must be documented.
- Includes the following rated questions:
 - Seriousness
 - History

- Community Safety
- Peer Influences
- Parental Criminal Behavior
- Environmental Influences

Fire Setting Module

Triggered when the **Fire Setting** question in the [Child Risk Behaviors](#) domain is rated a 1, 2, or 3.

- Gathers information regarding the youth's most recent first-setting behavior; also includes an assessment of the youth's likelihood of future fire setting.
- Includes the following rated questions:
 - Seriousness
 - History
 - Planning
 - Use of Accelerants
 - Intention to Harm
 - Community Safety
 - Response to Accusation
 - Remorse
 - Likelihood of Future Fire Setting

Readiness for Adulthood Module

- Triggered for any youth 14 years of age and older based on date of birth entered on the Demographics tab.
- Gathers information regarding the youth's ability to care for themselves independently in their community.
- Includes the following rated questions:
 - Autonomy/Independent Living Skills
 - Community Resources
 - Job Skills
 - Job Attainment
 - Job Functioning
 - Resourcefulness
 - Intimate Relationships
 - Residential Stability
 - Transportation
 - Educational Attainment
 - Career Interests
 - Vocational/Technical Training
 - Maintaining Physical and Psychological Treatment
 - Knowledge of Needs
 - Medication Adherence
 - Access to Healthcare and Other Benefits

*The final question asks if the youth/young adult is a parent, answering 'yes' will automatically open the Parenting Module.

Parenting Module

Triggers when the user answers "yes" to the "Is the youth/young adult a parent?" question at the end of the [Readiness for Adulthood](#) Module.

- Gathers information regarding the youth/young adult's skills in caring for their child(ren); looks at how involved the youth/young adult is with the child, their ability to manage the needs of their child as well as their own needs.
- Includes the following rated questions:
 - Independent Parenting Skills
 - Demonstrated Parenting Ability
 - Balance/Organization
 - Hazards
 - Supervision
 - Identification of Community Resources
 - Involvement
 - Support
 - Judgment
 - Collaboration with Other Parent

VII. Action Buttons

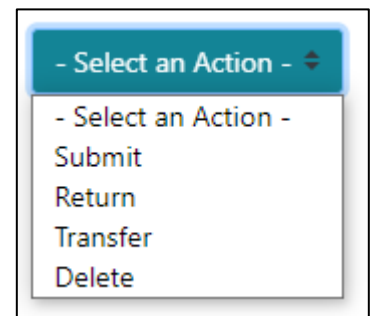
The functionality buttons at the bottom of the assessment will remain locked at the bottom of the screen and will not move when the user scrolls the document.



Buttons functions are as follows:

- **Print** – a user can print the assessment once it has been submitted. The fields will be included in the default print.
 - The menu button to the direct left is where the user selects which print version they want to create. Print options are:
 - **Default** – a print version of the full assessment with each question, rating option (indicating which options were selected) and entered comments.
 - **Rated Summary** – a printout of the questions, the ratings only (not the associated text) and entered comments.
 - When a user chooses to print the assessment, it will automatically generate as a PDF so the user no longer has to export the document to print or save. *Note: depending upon the user's system, the PDF may take a minute or so to load. Once it loads, printing should be a quick process.*
- **Cancel** – cancels any actions taken within the assessment and takes the user back to the Treatment Plans and Assessments screen.

Note: Cancel does not delete the assessment; the system will automatically save the assessment upon creation. To delete an assessment, the user will need to go into the assessment and select delete using the Select an Action menu.
- **Save and Save & Close** - Navigating between tabs will auto-save the assessment, and in addition the assessment will be saved automatically upon creation. However, when working within a tab, the user should remember to save and save often as any disruption in work may cause a loss of information.
- **Review History** - will open a pop-up window with a history of the users that have owned the document and any action taken on the assessment such as transfer, return, submit.
 - A Plan Level 1 user may find this functionality helpful when determining if their submitted SNA and Treatment Plan have been submitted to PerformCare by their manager or supervisor (Plan Level 2 or 3 user). This is also a useful screen to utilize when checking to see if the assessment and plan have been approved or returned
- **Update Status** - The *Select an Action* menu button is where the user selects the action or status, which will go into effect or take place once the user clicks this Update Status button. Options include:
 - **Delete** – a saved assessment can be deleted before submission
 - **Return** – used when the current owner of the assessment needs to return it to the author; typically used after the assessment has been submitted for internal review prior to final submission into CYBER.
 - **Submit** – submits the assessment either to an internal reviewer or into CYBER for association with a treatment plan.
 - **Transfer** – transfers a draft assessment to another user within the agency for review or additional work.



Note: there is spell check functionality available at the bottom of each tab that will check the spelling all of the comment boxes within that tab.

VIII. Plan Approval Window

Clicking the Plan Approval button displays the Plan Approval window.

The screenshot shows the 'Plan Approval' window with the following elements:

- Left Sidebar:** A vertical menu with items: Face Sheet, Out of Home, My Active Youth, **Plan Approval (2)** (highlighted with a red box), Progress Notes, Treatment Plans, Authorizations, and Claims.
- Plan Approval Window:**
 - Plan List:** A table with columns 'Plan' and 'Plan'. It contains three rows: 'Assessment' (checked), 'CMO' (checked), and 'OOH' (checked).
 - Doc Type:** A dropdown menu set to 'ALL' with 'Select All' and 'Clear All' buttons.
 - Filters:** Checkboxes for 'Past Due', 'Due Today', and 'Due Tomorrow'. Date pickers for 'FROM:' and 'TO:'.
 - Program:** A dropdown menu set to 'CMO Cape/Atlantic - C1'.
 - Assigned To:** A dropdown menu set to 'All Users - All' with a 'Refresh' button.
 - Plan Type Grid:** A grid of checkboxes for various plan types: Annual Revi..., DJCR, InIISP, OOH-Assmt, SN Assmt, CR90D, FCP, JCR, SC, and TISP.
 - Buttons:** 'Clear All' and 'Select All' buttons at the bottom right of the grid.
 - Filtered Plans (149):** A table with columns: PLAN, PLANTYPE, ASSIGNEDTO, RETURN HISTORY, YOUTH/CHILD, DUEDATE, REQUESTOR, and AGE. It shows several rows of data.
 - Footer:** 'Assign' and 'Clear Search' buttons.

CMO Plan Approval Screen

The Plan Approval screen has multiple purposes depending upon how the user wants to manage their work and what the user's role is within the system. The Plan Approval window shows the treatment plans and assessments that are in the system for the user's agency. These are the current documents that are housed within your agency that have either not been submitted to CSA, or have been submitted and have been returned to the user's agency and haven't yet been resubmitted. For CMO this includes CMO plans as well as Out of Home plans such as, Joint Care Review (JCR), Transition Joint Care Review (TJCR) and Discharge Joint Care Review (DJCR).

Users may utilize this window to manage their work. The *My Plans* portion of the window displays the plans and assessments that are currently assigned to the user. These may be items that are in draft and have not yet been submitted, or items that have been submitted but have been returned back to the agency (internally or by CSA) and have yet to be resubmitted. These may also include plans from a Plan Level 1 user within the agency that needs to be reviewed by a Plan Level 2 or Plan Level 3 user. Typically, individuals that are managers or supervisors are Plan Level 2

or Plan Level 3 users who utilize this window to monitor the plans and assessments that have been submitted to them for review prior to submitting them to CSA.

The **Filtered Plans** grid contains the PLAN, PLANTYPE, ASSIGNEDTO, RETURN HISTORY, YOUTH/CHILD, DUE DATE, REQUESTOR, AGENCY, DATESUBMITTEDTOCSA, TREATMENTPLANID, CurrPGMIndicator, OrigPGMIndicator, and ASSESSMENTDATE fields. The user can click on any of the column headings (field names) to sort the records in the grid.

The **My Plans** grid contains the same fields as above and the records can be sorted by clicking on any of the column headings (field names).

- The PLANTYPE will indicate the name of the plan type and its status for example: “InitISP- In Progress”, Initial Individual Service Plan In Progress, “CR90D-Returned” Comprehensive Review 90 Days or “SN-Assmt – Assigned” Strength and Needs Assessment Assigned.
- The ASSIGNEDTO column will display the individual who started or authored the plan. If the plan or assessment was returned at all.
- The RETURN HISTORY will indicate the name of the individual who returned it to the author. Most of the times this will be a PC user’s name. If the document was returned internally within the program, it will have the name of the program manager.

Assigning Documents

Documents are assigned using the Filtered Plans grid. Keep in mind that Plan Level 1 users may assign documents only to themselves, and Plan Level 2, or 3 users can assign documents to other users in their agency. To assign a plan or assessment the user must first select the row indicating the document and then click the Assign button.

PLAN	PLANTYPE	ASSIGNEDTO	RETURN HISTORY	YOUTH/CHILD	DUE DATE	REQUESTOR	AGE
CMO	SC- Transferred						U
CMO	SC- Transferred						U
CMO	SC- Transferred						U
CMO	SC- Transferred						U

Assign Clear Search

Highlighted document in Filtered Plans appears blue

Assign a user to the selected treatment plan document(s)

Assign User

Accept Cancel

The *Assign a user to the selected treatment plan document(s)* pop-up window will display. Here the user can click the drop-down arrow to display a listing of provider ID’s from within their agency. Selecting the provider ID and then clicking the “Accept” button will assign the treatment plan or assessment to this individual. Clicking the “Cancel” button returns the user to the Plan Approval window. The ASSIGNEDTO column will change to the individual selected.

A user may also assign a plan or assessment to themselves by selecting the treatment plan or assessment in the Filtered Plans grid and clicking the Assign button. Once again, the “Assign a user to the selected treatment plan document(s).” pop-up window will display. Here the user can click the drop-down arrow, locate and select their name/provider ID, and then click the “Accept” button to assign the treatment plan or assessment to themselves. Clicking the “Cancel” button returns the user to the Plan Approval window. The newly assigned plan or assessment will appear in the My Plans grid for that user and the ASSIGNEDTO column will change to that user’s name.

To access the treatment plan or assessment, the assigned user can double-click on the record in the My Plans grid. This will open the treatment plan or assessment.

IX. References

State of New Jersey Department of Children and Families

- Children's System of Care: <https://www.nj.gov/dcf/about/divisions/dcsc/>

PerformCare website:

- Providers – Training Section: <http://www.performcarenj.org/provider/training.aspx>
 - Assessments: <http://www.performcarenj.org/provider/training.aspx#assessment>
- Providers – Security Section
 - Instructional Guide for CYBER Security Administrators
<http://www.performcarenj.org/pdf/provider/training/security/role-based-security-system-admin.pdf>

PerformCare Customer Service

www.performcarenj.org/ServiceDesk/

1-877-652-7624