Family Support Organization Functionality in CYBER

The Youth Record

April 2019 – (01258)

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Objective of this Training

Provide an overview of FSO Functionality in CYBER for the **Youth Record**. We will cover:

- Locating a Youth Record
- Assigning Youth to Staff - *My Active Youth*
- Understanding the Face Sheet
- Progress Notes
- *Maintaining* Access to Youth Record
- Historical Access to a Youth Record
- *Requesting* Access to Youth Record
- When to Contact PerformCare
- References

Locating a Youth Record

There are two search functions within CYBER where you can input information to find a specific youth.

- **Quick Search** on the Welcome Page
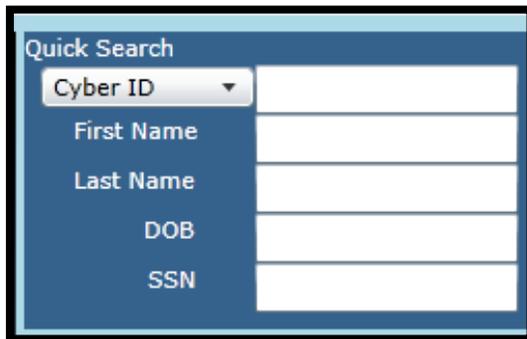
Enter the CYBER ID or use a partial name search.

Type any part of a youth name and click Enter.

(Mary Smith = *Mar* in First name field and *Smi* in the Last name field).

- **Youth/Child Search** on the Face Sheet

My Active Youth

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My Active Youth is a selected list of youth assigned to a specific CYBER user. Each user will have their own My Active Youth list.

A designated FSO user at your agency would:

- Review new Active Agency Youth

- Assign new youth to specific users

  o The Provider Tab creates My Active Youth lists for staff to assist users in locating youth easily.

- If youth is closed to agency, once reopened, re-assignment of youth is needed again to populate the My Active Youth list.

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Suggested Workflow for Youth Management

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1. Review Agency Active Youth using the icon

2. Click the youth record to open

3. Click Provider tab when the record opens
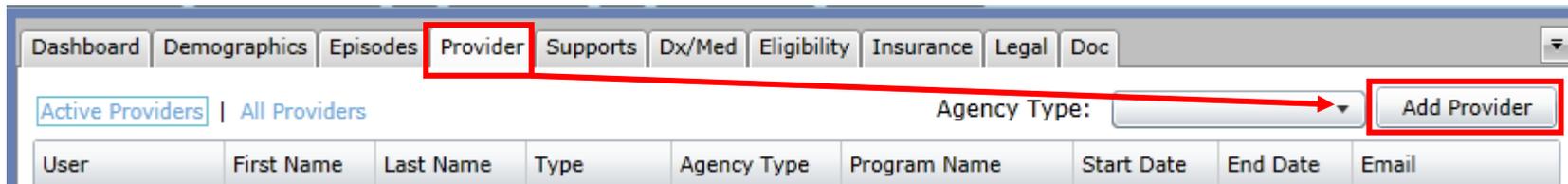
4. Add FSO user to the Provider tab with start date and click Accept

5. User can now access youth from their My Active Youth list

The Face Sheet

Demographics

- Location

- Physical attributes

- Language

- Race/Ethnicity

- Preferred Method of Contact

Episodes

Providers

Supports

Diagnoses/Medications

Eligibility

Insurance

Legal

Doc Upload

The Face Sheet contains core information about the youth.

The Dashboard, the default tab for all providers, displays current information drawn from different locations in the youth's Face Sheet tabs and other parts of the record.

Progress Notes

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Progress Notes are used to document a youth's status or achievements during the course of care. Essential to the youth record, updated information is valuable to all providers working with the youth.

For FSO, Progress Notes are required to
maintain access to youth records!

- A progress note that keeps a youth record open must be entered every 90 calendar days.

- Review Welcome Page links **Youth Access Prog Note – Aging Report** to determine if youth needs documentation.

- FSO Business Rules cover the access request process and progress note functionality.

- FSO regularly entering progress notes feeds data directly to your agency's reports.

When are Progress Notes Due?

Every 90 calendar days a committed progress note is required to keep a youth record open

- *Coming Due* status appears 15 calendar days before the progress note due date (days 75-90).

- *Overdue* means the Due Date has passed.

- The *Due Date* is calculated as 90 calendar days after the previous progress note was committed.

Youth Access Progress Notes – Aging Report					
Youth/Child ID	First Name	Last Name ▲	Due Date	Coming Due	
			2018/11/14	Overdue	
			2019/04/14	Coming Due	
			2019/04/09	Overdue	

> FANS()
∨ Youth Access Prog Notes()
Aging Report()

Submitting a FANS will create an automated FANS Completion progress note that keeps a youth record open.

Progress Notes that Keep Youth Records Open

Progress notes that keep youth records open:

- FSO – Child/Family Team Participation

- FSO – Collateral Contacts

- FSO – Contact w/Family

- FSO – FANS Completion (automated on submit of FANS)

- FSO – FSO Team Meeting

- FSO – Initial Face-to-Face Visit - FSO

- FSO – Initial Face to Face Visit – FSO and CMO

- FSO – Ongoing Face to Face

After submission/approval of FANS:

- FSO – FANS Completion

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- FSO – Family Declined
- FSO – Family No Longer Engaged
- FSO – No Family Contact
- FSO – Transition (allows 14 days access)

Progress Notes that Close Youth Records

- FSO – Family Declined
- FSO – Family No Longer Engaged
- FSO – No Family Contact
- FSO – Transition (allows 14 days access)

IMPORTANT CLOSING POINTS

If youth *should* be closed and are still open, do not contact PerformCare. Please enter an appropriate progress note that will close the youth record (above). The closure will occur overnight.

If you entered a note that will keep a youth record open <u>after</u> a Closing note, it will cancel the Closing operation request.

Please enter another Closing note with a current date to assure closure. Report issues to PerformCare.

STAY OPEN - FSO Contact with Family <u>keeps the record open</u>.

This progress note type is used to document all contacts with a family other than face to face contacts. *This may include communication that occurs by telephone, electronic or other methods.* **This also includes attempts at contacting family without connecting with the family.** *Progress note content will include a summary of the purpose of contact as well as the outcome of the contact including any next steps.*

CLOSE - FSO No Family Contact *will* <u>auto close record</u>.

This progress note type is used to document when no contact has been established with a newly referred family despite multiple attempts. *Progress note content should indicate that the family will transition from the FSO episode of care due to inability to contact the family. All efforts to contact the family including dates, times and method should be documented. Requirements for expected efforts are currently defined by each FSO.*

--Review CSOC FSO Business Rules and FSO Instructional Guide--

Resolving Draft Progress Notes

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- Create the Note

- Click Save Draft

- Select Show My Draft Progress Notes

- Double click to reopen note for editing, click Commit

Complete and *submit* your FANS!

- Review Welcome Page – FANS Aging Report to find unsubmitted FANS.

Transfer FANS to a Supervisor for review (and let them know you have done this)

- Supervisor can review Plan Approval screen – Look in My Plans section.

Enter progress notes that keep a record open every 90 days or less

- Review Welcome Page – Youth Access Prog Note Aging Report to find coming due and overdue progress notes.

Commit your draft progress notes!

- If you save a note as Draft, it must be committed to keep a youth record open.

FSO Access When MRSS or CMO Transition

- FSO will automatically close to youth the day that MRSS or CMO submit their transition plans for youth. MRSS or CMO will still have access to the youth record for 14 calendar days.

- During the 14 calendar day window, if FSO needs access to the youth, they should follow the Request for Access process noted in this document. (See Requesting Access to the Youth Record)

- MRSS/CMO should not open FSO during the 14-day transition period.

- **FSO should use the Customer Service Request Form and enter a specific access request reason.**

Historical Access of Youth Record

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Historical Access allows users to access, read and print youth information that was previously open and is now closed. From the Welcome Page, clicking Historical Access will bring up an alphabetical list. Clicking Face Sheet button will take the user to the youth record.

Requesting Access to the Youth Record

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Do not call PerformCare to request access to youth records.

The process for requesting access to youth record:

- Use the Customer Service Request Form to request access.

- Any missing details about the request or unclear requests will delay your request.

PerformCare is required to resolve access for requests of up to 10 youth within two (2) business days if requested correctly.

The Customer Service Request Form is at the bottom of the PerformCare Provider web page:

https://apps.performcarenj.org/HelpDesk/csareqajax.aspx/

Access Requests to Reopen Youth Record

- **Currently working with family**, but is missing documentation (FSO currently receives 2-day access)

- **Family wishes to re-engage** - new episode – start normal routine

- **Administrative reopening** - family is no longer engaged with FSO FANS or Progress note determines number of days open

- Last access > 60 days, requires CSOC Service Line Manager approval. Please contact Service Line manager directly.

Communicating with PerformCare

Technical Issues that may appear in CYBER should be reported to PerformCare.

Use the Customer Service Request Form and please include:

- Name and contact information of person reporting the issue

- Description of the behavior or issue

- Location in CYBER

- Date and time of incident

- Screen shots of the issue or exported reports

The Customer Service Request Form is at the bottom of the PerformCare Provider web page https://apps.performcarenj.org/HelpDesk/csareqajax.aspx/.

For Secure Email read the "Quick Reference Guide to Secure Email" in the Security section of the Providers' Training web page.

References

PerformCare Training web page:

- http://www.performcarenj.org/provider/training.aspx

FSO Section:

- http://www.performcarenj.org/provider/training.aspx#fso

Security Section:

- http://www.performcarenj.org/provider/training.aspx#security

General Section:

- http://www.performcarenj.org/provider/training.aspx#general

Important Contact Information for CSOC Providers:

- http://www.performcarenj.org/pdf/provider/training/general-csoc/important-contact-information-for-csoc-providers.pdf

For Training questions, email the PerformCare Training Unit:

- PCNJTraining@performcarenj.org

Policy questions, requests to change functionality:

- CSOC Service Line Manager

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