

# PerformCARE<sup>®</sup>

## Instructional Guide to CYBER for Family Support Organizations

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## I. Introduction

### Family Support Organizations Utilizing CYBER

Family Support Organizations (FSOs) are nonprofit, county-based organizations that work collaboratively with PerformCare, Care Management, state agencies, and other providers to offer face-to-face family support, education, and advocacy to families. FSOs ensure that the New Jersey Children's System of Care (CSOC) is responsive to the needs of involved children and families. In addition, youth receiving Mobile Response or Care Management services through CSOC are also provided access to FSOs for family support.

FSOs utilize the Family Assessment of Needs and Strengths (FANS), an electronic assessment in CYBER, to inform and assist in collaborative treatment planning, and also inform of the development of the Family's Care Plan and identify education, advocacy, and supports needed by the family.

For families receiving Care Management, the FANS assessment is available to FSOs to demonstrate and support how and why certain planning decisions are made. The ratings used for individual questions, or domains, can indicate the areas of the youth's family life that need immediate action, as well as what areas of strength can be utilized to address any identified needs.

### Highlights for Family Support Organizations

- FANS assessment is accessible to all FSO users to capture the strengths and needs of the youth and their family while receiving services through CSOC via Care Management Organization (CMO) referral.
- FSO agencies have CYBER Security Administrators to manage their user security in CYBER.
- FSO users may utilize Document Upload functionality, the Plan Approval Screen and Outcome Reports with appropriate security.
- FSO Welcome Page has a link called Youth Access Progress Notes that identifies the youth records that require a progress note to keep the record open.
- Entered progress notes (exceptions noted) will keep the youth record open while treatment is being documented.
- Select Progress Notes have associated functionality that allows the youth record to close.
- All FSO Progress Notes have a Sub type feature that identifies the stages of wrap around care.
- **January 2018** - CYBER Release 1.42 provided the functionality for FSO agencies to have FSO Security Administrator access in CYBER, and an electronic version of the FANS was added to CYBER. The release also made changes to the Progress Notes and Welcome Page for FSO CYBER users (also known as Family Support Partners or FSPs).
- **March 2018** - CYBER Release 1.44 expanded the progress note functionality for all FSO users to assist in managing access to youth records.
- **August 2018** – CYBER Release 1.44.05 captured separate episodes for FSO when open to MRSS and CMO at the same time. These episodes may overlap during a youth's transition from MRSS to CMO. In this situation, there may be two distinct episodes for FSO that are overlapping.
- **February 2019** – CYBER Release 1.44.10 provided the functionality for FSO agencies to allow FSOMGT and higher to view work of their FSOWOR staff on the Welcome Page.
- **April 2020** – CYBER 1.44.18 added Telehealth Progress Notes and created separate FSO Progress Note Guide

Training materials for this and other CYBER releases is available in the Providers Training section on the PerformCare website, [www.performcarenj.org](http://www.performcarenj.org).

## II. Accessing CYBER

Users must first log into CYBER with their Username and Password. CYBER can be accessed via the PerformCare website – [www.performcarenj.org](http://www.performcarenj.org). The link is available at the top and bottom of the main page.



Each provider organization has at least one CYBER Security Administrator, and your agency's CYBER Security Administrator can set up a login for you.

Your access will be based on your login type and security levels.

### Before you log in, keep in mind...

- There is no 'back button' use in CYBER!
- Most areas/buttons are single-click – do not double-click on a button!
- Every time you launch CYBER, **you will be required to enter your Username and Password and Enter, Tab and Enter or click the LOGIN button to continue.**

Above the log in area is a statement that, as a CYBER user, you acknowledge your responsibility to protect the privacy of, and to guard against, the inappropriate use of the Protected Health Information (PHI) contained within the system.

This statement will appear each time you log in.

The image shows a screenshot of the 'CYBER LOGIN' page. The title is 'CYBER LOGIN'. The page contains a disclaimer: 'As a CYBER User I understand that my work will involve access to Protected Health Information (PHI) as defined by HIPAA (The Health Insurance Portability and Accountability Act) for the purpose of providing or arranging treatment, payment or other health care operations. I also acknowledge that I am engaged by a covered entity. I further acknowledge my responsibility to protect the privacy of and to guard against inappropriate use or disclosure of this PHI by logging in as a CYBER User'. Below this is a statement of compliance with HIPAA of 1996 and its implementation regulations, with a link to <http://www.hhs.gov/ocr/hipaa/>. There is also a warning: 'CYBER contains substance abuse diagnosis and treatment information that is protected by federal confidentiality rules (42 CFR Part 2). CYBER users are not permitted access to that information without a valid written consent that meets the requirements of 42 CFR Part 2. Users that access such confidential information pursuant to a valid written consent are prohibited from making any further disclosure of this information unless further disclosure is expressly permitted by the written consent of the person to whom it pertains or as otherwise permitted by 42 CFR Part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose. The Federal rules restrict any use of the information to criminally investigate or prosecute any alcohol or drug abuse patient.' Below the text is a prompt: 'Please CLEAR your browser Cache before using this new version of CYBER'. At the bottom, there are input fields for 'Username' and 'Password', and a 'LOGIN' button.

Please also check the **Providers** section on the PerformCare website for the most up-to-date technical requirements (such as browser compatibility and operating systems) that a user would need to access CYBER.

## III. Welcome Page

After logging in, all users land on the Welcome Page. The Welcome Page within CYBER allows users the ability to track certain ongoing required activities. FSO users with the appropriate supervisor security group (FSOMGT) may review users' activity if they have the security group in the (FSOWOR) level of security. See [References](#) for Welcome Page Features for CYBER Users with High-Level Access.

FSO users are able to use the Welcome Page functionality to track FANS that are in progress, submitted, returned, approved and those that will be Coming Due. FSOs should use the Welcome Page links and grids to support the review and completion of their ongoing requirements. A youth's episode of care and access to the record must be closed in CYBER in order to be removed from views on the Welcome Page.

FSO users have the following sections and links on the right-hand side of their Welcome Page described below:

Tips for using the *Select a User* feature:

1. Add FSOWOR and FSOMGT to the Provider tab of all youth (best to do as they are being opened to FSO)
2. On Welcome Page, FSOMGT may choose a name from *Select a User*
3. Click one of the four links on right column (In Progress, Submitted, Returned or Approved)
4. Display in center is the *Select a User's* activity. (Note Author name in the grid)

### Using *Select a User* Feature

- Users with the same level of security cannot use this feature to view each other
- FANS numbers in parentheses ( ) on right indicate the logged in user's activity
- FANS Aging Report displays all user activity and does not filter by *Select a User*
- Youth Access Prog Note does display the *Select a User* feature (aging report)

## FANS

- In Progress – displays FANS assessments in draft form, started and saved, but not submitted or approved.
- Submitted – displays FANS assessments submitted to a supervisor for review.
- Returned – displays FANS assessments returned from another FSO user.
- Approved – displays FANS assessments approved within the last 7 calendar days.
- Aging Report – Link will display the **FANS – Aging Report** in the center grid shows Coming Due FANS and Overdue FANS.

Youth/Child ID	First Name	Last Name	Author	Plan Type	Due Date	Coming Due

- Due Date column shows “Coming Due” or “Overdue” based on the actual Due Date of the FANS (the first FANS is due within 25-calendar days of FSO receiving consent to work with the family, and the Due Date of the next FANS, due 85-calendar days after each prior FANS).
- ‘Coming Due’ status is displayed in the Coming Due column until the due date passes; then it will display ‘Overdue’.
- Hyperlink is available to go directly to the youth’s record and complete the FANS.

When is FANS Due?

### Initial FANS

- Initial FANS is required after youth is opened to FSO.
- *Coming Due* status appears for 25-calendar days after youth is opened.
- *Overdue* means the Due Date has passed.
- *Due Date* is 25-calendar days after youth is opened to FSO.

### Ongoing FANS

- Ongoing FANS are required every 85-calendar days after the Initial FANS
- *Coming Due* status appears 15 calendar days before the FANS Due Date (days 70-85).
- *Overdue* means the Due Date has passed.
- *Due Date* is 85-calendar days after the previous FANS was submitted.

Youth Access Prog Notes link is described in the FSO Progress Notes Guide. See ([References](#))

If the user clicks a Youth/Child ID hyperlink and the user no longer has access to the youth’s record, the system will display the following pop-up message: “The search you just performed came up empty...Try searching again...”

## IV. Managing My Active Youth using *Active Agency Youth*

The **Provider Tab** on the Face Sheet of each youth has functionality to allow FSO users to manage their **My Active Youth** list. As new youth appear on the Active Agency Youth List, it is recommended that agencies assign staff using the Provider Tab. Assigning youth to staff also helps the staff see their current FANS as they change in status. From the Welcome Page:

1. Click Youth/Child Search
2. On the right, click the icon picture on the right for Active Agency Youth → → →
3. Double click the row to open the selected youth record
4. When the Face Sheet loads, click the Provider Tab
5. Click **Add Provider** button



Dashboard | Demographics | Episodes | Provider | Supports | Dx/Med | Eligibility | Insurance | Legal | Doc

Active Providers | All Providers Agency Type:  **Add Provider**

6. Assign user(s) by clicking **Existing Provider** and selecting a name from the dropdown list and adding a **Start Date** only and click Accept. Select one username and Start date at a time. You may want to assign a Supervisor and a worker to a youth record.

**Add Provider to Youth/Child Record**

Existing Provider

Program

Start Date  End Date

Accept Cancel

When the assigned user logs into CYBER, they can click the **My Active Youth** button on the left side and see all their assigned youth. More details about Active Agency Youth may be found in the Face Sheet Instructional Guide on the Provider Training page.

*Note: Assigning a supervisor (FSOMGT) and a worker (FSOWOR) will allow both users to utilize the Welcome Page effectively and allow the Supervisor to review the activity occurring as the worker creates FANS and progress notes.*

## V. Creating a New FANS - Family Assessment of Needs and Strengths

The Family Assessment of Needs and Strengths (FANS) is for FSO users only. In order for a FANS user to access the FANS assessment type, the FSO Security Administrator must ensure that the user has the FSO Security group added to the CYBER user ID. If this group is not added, there will be no option to add the FANS assessment to a youth's record.

Security Group	Group Description
FSO	FSO Agency
FSOADM	FSO Security Administrator
FSODOCATTCH	Give FSO users ability to read ar
FSODOCATTCHRead	Give FSO users ability to read at
FSOEXE	FSO Executive Director
FSOFIN	FSO Financial Director
FSOMGT	

Outcomes Report Select Treatment Plan or Assessment type to create:  Add New

Double click an existing assessment to open it for Rev

Assessment Type	Assessment Sub Type	Assessment/CFT Date	Author	Submitted To CSA Date	Assessment ID
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Longitudinal Outcomes Report

Individual Outcomes Report

After the group is added, the FANS will be accessible to a user clicking on the **Treatment Plans and Assessments** button within a youth's CYBER record.

Once the Treatment Plans and Assessments screen loads, the user may begin a new assessment by selecting the FANS document from the "Select Treatment Plan or Assessment type to create" menu. Clicking "Add New" will open the new assessment.

Face Sheet

Out Of Home Treatment

My Active Youth

Plan Approval (1)

Progress Notes

Treatment Plans Assessments

Outcomes Report Select Treatment Plan or Assessment type to create:  Add New

Double click an existing assessment to open it for Rev

Assessment Type	Assessment Sub Type	Assessment/CFT Date	Author	Submitted To CSA Date	Assess
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Longitudinal Outcomes Report

Individual Outcomes Report

## VI. FANS Assessment Tabs

The FANS will have the following tabs: **Demographics, Support, Education, Advocacy, and Summary.** Each question on the Support, Education, and Advocacy Tab **is required.** A comment is required for any section rated as a 2 or 3. Users may click the “Tab” key on their keyboard to navigate from one field to the next field within the assessment.

The screenshot shows the top navigation bar with fields for First Name, Last Name, Gen, Birth Date, Age, SSN, and Youth/Child ID. There are buttons for Search, Clear, Agency Cases, and Logout. Below the navigation bar, a row of tabs is visible: Demographics, Support, Education, Advocacy, and Summary. The Demographics tab is selected and highlighted with a red box. The Demographics section contains several input fields: Child Name, Address, City, County, State, Zip Code, DOB, Gender, Race, and Medicaid #.

Users will only be able to create one FANS at a time for a youth. If the user attempts to create a new FANS, and there is already a FANS ‘In Progress’ created for the youth, the user will receive a message that an assessment is already in progress.

The FANS is designed with tabs and scroll bars to allow for navigation through the assessment. The user may click on the individual tabs and that section will be displayed. The scroll bars allow top to bottom navigation.

*Note: There is no auto save feature. When working in this assessment, the user should remember to **save frequently** as any disruption in work may cause a loss of information.*

Each section within the tabs has a heading in bold with an asterisk button  next to it. When clicked, this button will display the prior FANS’ selected answer and comment for each rated question if available. Hovering the mouse over the asterisk button will display a pop-up of the answer selected for the most recently submitted FANS. If this is the first FANS for the youth, then holding the mouse over the asterisk will display ‘No prior assessments’.

The screenshot shows a section titled **\* CAREGIVERS' COLLABORATION**. Below the title is a description: "This item refers to how well you and the other adults involved in the raising of your youth work together." There is a dropdown menu and a text area labeled "Comments".

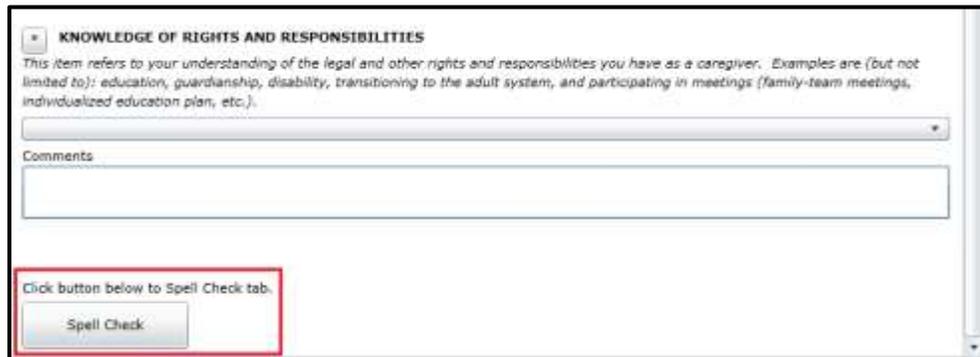
The screenshot shows the same section as above, but with a pop-up message displayed over the dropdown menu. The message says "7 No prior assessments" and is highlighted with a red box. The text "all you and the other ad" is partially visible below the message.

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Clicking on the asterisk button will bring up a pop-up window, which will include the selected answer and comment from the most recently submitted FANS. The user can close the window by clicking OK.



There is a **Spell Check** button at the very bottom of each tab that will check all the comment boxes on that tab.



## FANS Demographics Tab

In the FANS, the Demographics Tab displays information directly from the youth's Face Sheet Tabs.

If the Face Sheet information is changed 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 Demographics Tab.

Users should review this tab, update the Assessment Date field to the correct date of the assessment, and enter the Assessment Completion Date in order to submit the assessment.

The screenshot shows the 'Demographics' tab selected in a navigation bar. The form contains the following fields:

- Child Information:** Child Name, Address, City, County, State, Zip Code, DOB, Gender, Race, Medicaid #.
- Parent/Guardian Information:** Parent/Guardian, Address, City, State, Zip Code, Guardian Relationship, Primary Phone, Secondary Phone.
- Care Management Information:** Care Management Entity, Care Manager, Care Manager Phone.
- Assessor Information:** Assessor Username, Assessor Name, Assessor Agency, Assessor Phone, Assessor Email.
- Assessment Dates:** Assessment Date (with a calendar icon), Assessment Completion Date (with a placeholder <M/d/yyyy> and a calendar icon).

A 'Refresh' button is located at the bottom center of the form. The 'Assessment Date' and 'Assessment Completion Date' fields are highlighted with a red border.

## Understanding Ratings

The rating range is from 0-3 (0 being the lowest rating and 3 being the highest rating). Each rating has a specific description of the degree or level describing the question in each tab.

- 0 – Appropriate degree/levels
- 1 - Usual degree/levels
- 2 - Limited degree/levels
- 3 – Difficult degree/levels

0 - I/we have some stressors, but I/we do not feel overwhelmed.
1 - I/we have some stressors, and at times have difficulty managing them.
2 - I/we have significant stressors and I/we frequently feel overwhelmed.
3 - I/we have significant stressors and I/we need support to manage the stress associated with them.

## FANS Support Tab

The Formal/Informal Supports grid of the FANS will display all *active* supports from the Formal/Informal Supports Tab the youth's Face Sheet each time the FANS is opened until the assessment has been submitted and approved. The user can select which support gave information to complete the FANS. If a new support has become active or needs to be changed, the FSO user must contact the CMO or MRSS care manager and have them update the Formal/Informal Support Tab on the youth's Face Sheet. When CMO or MRSS are open to a record, no other provider may update Formal/Informal supports for a youth. This is a rule of the Face Sheet design. If a change was made to a support or a Care manager while a FANS is in progress, the Refresh button at the bottom of the Demographics page will update the FANS with any changes that are saved in the youth record.

The FANS Support Tab also includes the following rated questions, with a rated drop-down list:

- Caregivers' Collaboration
- Family Communication
- Caregiver Family and Social Resources
- Family Safety
- Caregiver Optimism (Hopefulness)
- Spiritual
- Caregiver Organization Skills
- Caregiver Self Care
- Caregiver Stressors

## FANS Education Tab

The FANS Education Tab includes the following rated questions, with a rated drop-down list:

- Caregiver Self-Efficacy
- Knowledge of Family/Youth Needs
- Knowledge of the Children's System Of Care (CSOC)
- Knowledge of Community Resources
- Knowledge of Rights And Responsibilities

## FANS Advocacy Tab

The FANS Advocacy Tab includes the following rated questions, with a rated drop-down list:

- Ability to Communicate
- Ability to Advocate
- Ability to Participate In Planning and Support

## FANS Summary Tab

The FANS Summary Tab will display only the FANS ratings of 2 or 3 with their associated comments. Any combination of displayed FANS items may require additional information.

“Strategy” text boxes beneath each tab Section Comment should include documentation of the action steps and strategies to help meet the family’s needs. The Total Score box at the bottom of the Summary Tab is a calculation of all the ratings from each tab of the FANS assessment.

Examples of two different FANS Summaries where tabs require a different number of comments and strategies.

## Reminders

A comment for each question on the Support, Education, and Advocacy Tabs is **required for submission**. If a question is rated 2 or 3, a complete comment that supports the rating is also required. Users may choose to enter a comment for a question rated 0 or 1 if it supports the rating or to provide additional information to support or aid in the development of an action plan. However only comments with ratings of 2 or 3 will be displayed on the Summary Tab.

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

- Use complete sentences and include language from the question when entering information.
- Do not enter the same information into every comment field.
- Be as specific as possible in your documentation. Each Strategy box will expand to hold all the information entered. Users should 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.

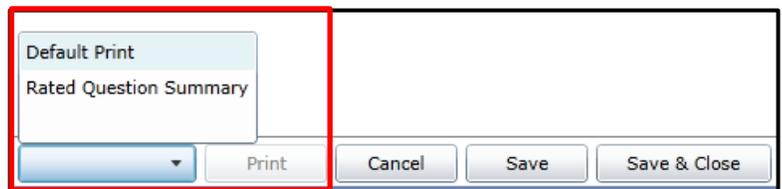
## Functionality Buttons

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



The buttons' functions are as follows:

- **Print** – is available to all users that have access to view the assessment, but it **will be disabled** for all users **until the assessment has been approved**. Once an assessment is submitted and approved, only the Print, Cancel and Review History buttons will be enabled.



- **Blank menu button** – is a pop up to select the print version to create. Print options are:
  - **Default Print** – will print the full assessment with each question, rating (indicating which options were selected), and entered comments.
  - **Rated Question Summary** – will print only the questions, ratings and entered comments (not the associated text).

When a user chooses to print any version of the assessment, it will automatically generate as a PDF. The document may be printed or saved.

*Note: depending upon the user's system, the PDF may take up to a minute to load. Once it loads, printing should be a quick process.*

- **Cancel** – cancels any actions taken within the assessment, exits the assessment, and returns the user to the Treatment Plans and Assessments screen.

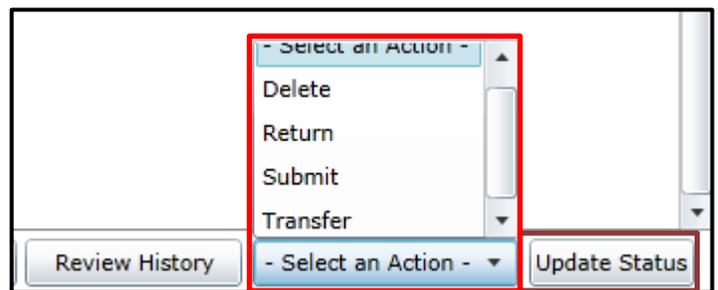
*Note: Cancel does not delete the assessment if was saved during the session. To delete an assessment, the user will need to open the assessment and select Delete using the Select an Action menu.*



- **Save** – saves the document at the current point and the current assessment remains on-screen. User receives **Assessment Saved** message if a Save was completed. If no message appears, it is possible the user has lost connection to the system. Please close out of all screens and log back in.

*Note: When working in this assessment, the user should remember to save often as any disruption in work may cause a loss of information.*

- **Save & Close** – saves the document and closes the assessment, returning the user to the Treatment Plans Assessments grid.
- **Review History** – will open a pop-up window with a history of the users that have had the document assigned to them and any action taken on the assessment such as transfer, return, or submit.
  - A Plan Level 1 user may find this functionality helpful when determining if their manager or supervisor (Plan Level 2 or 3 user) has submitted their submitted FANS to PerformCare. This is also a useful screen to utilize to see if the assessment has been approved.



- **Select an Action/Update Status** – The **Select an Action** button allows the user to select the action they want to perform. Once the action is selected, it can be implemented by clicking the **Update Status** button.

- **Action Options include:**

- **Delete** – If the FANS status is **In Progress** only, the assigned user will be able to delete the assessment. If the assessment has been submitted to PerformCare at any point, the FANS can no longer be deleted and the Delete button will be unavailable.
- **Return** – Used when the current assigned user needs to return it to the author; typically used after the assessment has been submitted for internal review, but prior to final submission to PerformCare.
- **Submit** – Submits the assessment either to an internal reviewer or to PerformCare based on Plan Level Hierarchy.
  - After selecting Submit and Update Status, if there are any missing required fields, the system will pop up a message listing each missing field and the tab the field is located in. The missing fields will be displayed in red.
  - If there are no missing fields, the system will open the **Select User for Review** screen. If your agency is set up for **Plan Level Hierarchy (see p 16 for more details)**, the FANS will be subject to the following levels:



- For more information on setting up Plan Level Hierarchy, please refer to the previously released training, **Welcome Page Instructions for Supervisors and Up.**

- When the FANS assessment is submitted to PerformCare the assessment will be **automatically approved**.
- The system will then automatically create the **FSO – FANS Completion Progress Note** in draft form, which will include all questions, rated a 2 or 3 on the FANS. Users can only add text to the progress note template, but cannot edit the information that is drawn from the FANS.
- **Transfer** – allows the user to transfer an **In Progress** assessment to another user within the FSO agency. (See **Plan Hierarchy** section in this document for more information)

## FANS Assessment Statuses

The FANS will be in one of the following statuses that defines where the assessment is in the creation to submission process:

- **In Progress** (saved and not yet submitted to a supervisor for review)
- **Submitted** (submitted to a supervisor for review through Plan Level Hierarchy)
- **Returned** (returned to a previously assigned user)
- **Approved** (submitted with no validations and approved).

**Please note that upon submission to PerformCare, FANS assessments are automatically approved.**

## Timeframes for Completion

FSO users will be required to complete the FANS within **25-calendar days** of receiving consent to work with the family. In addition, FANS should be completed every 85-calendar days from the previous FANS while the FSO is working with the youth and family.

## VII. Plan Approval

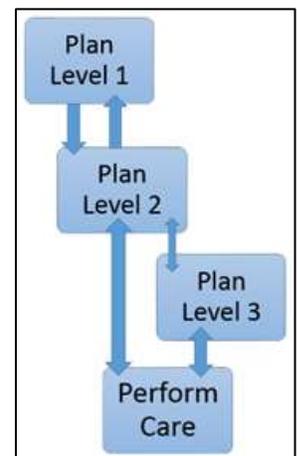
### Plan Level Hierarchy

The existence of plan level hierarchy in CYBER enables the electronic transfer of treatment plans and assessments to all involved parties for review before the plan/assessment is submitted to PerformCare for review. Hierarchy ensures that the information is only assigned to or accessed by one party at a time. It tracks the status, location, and assignment of the plan while allowing for movement of the plan/assessment between users and PerformCare for changes or additions.

A CYBER user's profile and security dictates their location in the Hierarchy. A CYBER user's security is set-up and managed by their agency's Security Administrator.

- Plan Level 1 users can author plans/assessments and submit them for review internally.
- Plan Level 2 users can author plans/assessments, return them to others, and submit to Plan Level 3 or directly to PerformCare.
- Plan Level 3 users can author plans/assessments, return them to others, and submit directly to PerformCare.
  - If there are any Plan Level 3 users in the agency, the Plan Level 2 user will have the option to submit to Plan Level 3 users or to PerformCare.

Security Administrators: For more information on Plan Level Hierarchy, see [References](#) for *Welcome Page Instructions for Supervisors and Up*.

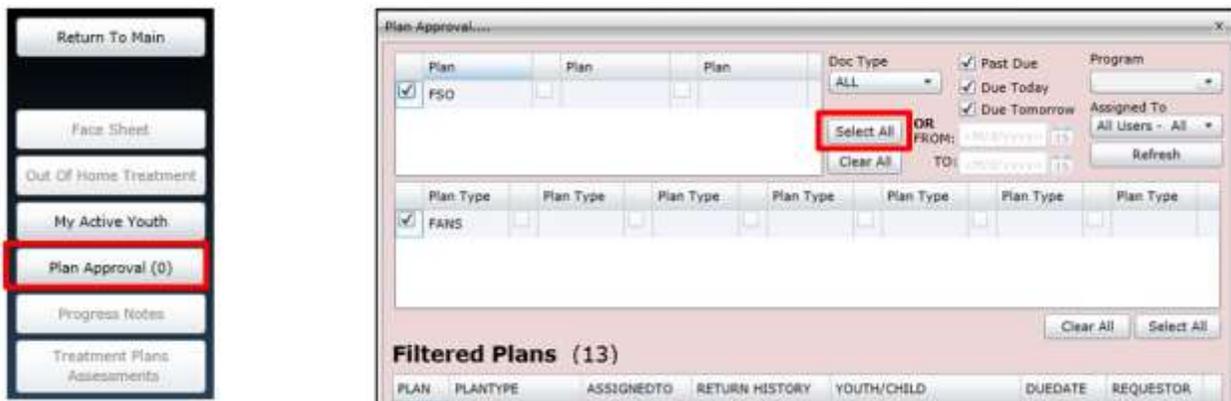


## Plan Approval Screen

The Plan Approval screen is the one screen where all users at an agency can see who is assigned to plans/assessments in the different statuses. The Plan Approval screen allows FSO users the option to reassign FANS assessments to other users within their agency. This can be very beneficial if a user started an assessment and then was unable to complete it. A Plan Level 2 or 3 user may reassign an 'In Progress' FANS assessment to another user in Plan Approval.

FSO users with Plan Level 1, Plan Level 2, or Plan Level 3 Security Groups will have access to the Plan Approval screen by clicking the **Plan Approval** button.

## Opening the Plan Approval Screen



The Plan Approval screen can take a few moments to load fully. In the Plan grid, FSO users will see an FSO checkbox. Clicking the **FSO** box will allow assessment/plan types that FSO has created in the Plan Type area. The user can check the **FANS** box from the Plan Type grid and the Filtered Plans grid will display all the FANS currently assigned to the Agency.

Clicking the **Select All** button will populate all the grids with available information. The grids will show the plans and assessments that are currently active at the agency in statuses of Unassign, Transfer, Return, In Progress (all not currently submitted to the CSA).

The "Doc Type" menu gives the user the option to look at Treatment Plans only (TXP), Assessments only (ASMT), or All. If the user makes a selection here, it will cause the Plan grid (to the left of the menu) to show only what is applicable and available to the user. For example, if the user were to select "ASMT", the Plan grid would only show Assessments that are available for the user to select.

Next to this area are the checkboxes for timeframes. These timeframes are associated to when the plan or assessment is due. If the user enters a timeframe into the boxes here, they will be unable to select any of the other options listed above.

The Filtered Plans grid will show all plans and assessments (based upon the filters chosen above) that are still within the agency and have not been submitted to the CSA. The grid will show the Plan and Plan Type, the status of the document ('In Progress' indicates that it is still with the author), who can currently edit the document (Assigned To), the Name and ID of the youth, the Requestor's (or Author's name), and the due date (when applicable).

Users can assign a plan or assessment to themselves, even if it is currently assigned to another user. In order to assign a document, the document must be selected in the grid (by single clicking on it). If you click on the blue link of the Youth ID and name, you will be taken out of the Plan Approval screen and to the youth's face sheet.

To Assign the plan or assessment click on the Assign button, below the Filtered Plans grid and a window will open. Select the Assign User box, choose the name of the user to assign and click Accept.

Once the plan or assessment has been assigned to the user, it will appear in the My Plans grid at the bottom of the window. Plans and assessments that have been submitted to the CSA will not appear on this screen.

## My Plans Screen

PLAN	PLANTYPE	ASSIGNEDTO	YOUTH/CHILD	DUE DATE	REQUESTOR	AGENCY	DATESU
FSO	FANS - In Progress						
FSO	FANS - In Progress						
FSO	FANS - In Progress						
FSO	FANS - In Progress						

Double-clicking on an entry in this grid will open the document up to the user, who will be able to work on the document, transfer it to another user within the agency (if need be), or submit it directly to the CSA if they have the correct security.

Users have the option of **Unassigning** a plan or assessment from their own ID; doing this will set the status in the Filtered Plans grid to Unassigned. This process does not automatically transfer the document to another user; if the logged in user is the author, the document will remain available to them on the Treatment Plans and Assessments grid of the youth's record. When the document needs to be transferred to another user, the person currently assigned to the document should open the document and, using the Transfer button, send it to another user within their agency for work or review.

Keep in mind that the assessment will be in read-only status to the author after it has been transferred to another user or submitted to the CSA; if the author needs to make revisions to the document prior to it being submitted, they can assign it to themselves on the Plan Approval window, from the Filtered Plans grid.

## VIII. Understanding Episodes

The Episodes tab is available to all FSO users and displays by default all the *active* episodes of care that are occurring for the selected youth. The active episodes are also displayed on the Dashboard tab.

- Information on the Episodes tab will include the Program (name), Program Type (IIC, MRSS, OOH, IDD, IIH, PHP, etc.), Service Type (IOS), Start Date (admission date), Transition Date, Referral Date, and the Referral Source.
- The grid is automatically populated when a youth is admitted to a program or receiving a service; these episodes may occur via YouthLink, FSS Link, or to providers through Treatment Plans/assessments.
- As noted on the Dashboard, the Current Episodes section will display each *active* Episode of Care on the Episodes tab.
- The primary purpose of the Episode Tab is to document the actual Length of Stay during the authorization period allowing for more accurate reporting and outcomes data.

Separate episodes for FSO are captured when open to MRSS and CMO at the same time. These episodes may overlap during a youth’s transition from MRSS to CMO. In this situation, there may be two distinct episodes for FSO that are overlapping. Users will now see two separate FSO episodes where MRSS and CMO were open at the same time. For the purpose of this description, we are identifying the separate episodes as FSO (MRSS) and FSO (CMO).

- When MRSS Transition plans (TICP) are submitted, the transition date will be the Episode End Date for FSO (MRSS) episode.
- When CMO Transition plans (TISP) are submitted the transition date will be the Episode End Date for FSO (CMO) episode.
- FSO users open on the Provider tab during MRSS episode will remain open during the transition to CMO.

This is an example of what the FSO (MRSS) and FSO (CMO) episodes would look like if they were overlapping:

The screenshot shows the 'Episodes' tab in the PerformCARE system. The table displays the following data:

Program	Program Type	Service Type	Start Date	Transition Date	Referral Source
FSO (CMO)	FSO	FSO	7/27/2018		
UCM	UCM	CMO_MOD	7/27/2018		Family/Friend
	BAIC	Intensive In Comm. Individual LCSW (H0036TJU1)	6/2/2018	8/26/2018	
MRSS	MRSS	MRE Care Coord & Stabilization Plan CRI02 (H0032TJ)	6/2/2018	7/23/2018	
FSO (MRSS)	FSO	FSO	6/1/2018	7/23/2018	

## IX. Document Upload

Document Upload is CYBER functionality that allows certain users to upload or view uploaded documents in a youth's record; these documents can be found on the Doc Tab of a youth's Face Sheet. Users with the ability to upload and view documents need to have certain security attached to their ID in CYBER. Access to this functionality is managed by the FSO's CYBER Security Administrator.

*Note: Please visit <http://www.performcarenj.org/provider/performcare-presentations.aspx> for more training documents that review Security Administrator-specific functionality and detailed Document Upload functionality.*

FSOs now have the ability to **view** designated documents uploaded by system partners. This security group is called **FSODOCATTACHREAD**. FSO view capability will include **IEP/Educational Info** and **CFT Sign-In records**.

FSOs also have the ability to **upload** designated documents. This security group is called **FSODOCATTACH**. Current capability includes the FSO ability to upload the following:

- **Release of Information:** This document is used to indicate a family's agreement for the FSO to share information relative the family's involvement with the FSO and other system partners as delineated. This document should be uploaded within one week of obtaining the signed copy.
- **Contact Sheet:** This document is used to reflect family attendance at a face-to-face visit with the FSP. This could be reflective of an ongoing visit or a CFT. This document should be uploaded within 72 hours of the face-to-face visit.

**Note: FSOs should not upload any other document type to a youth's record at this point. Additional documents may be added in the future.**

The Document Upload security functionality will need to be designated by the Security Administrator for any FSO CYBER user that requires the use of the Document Upload.

A new FSO CYBER user should be assigned both security groups, FSODOCATTACH and FSODOCATTACHREAD, to have the ability to **upload documents** and **read documents** as outlined. A new FSO CYBER user should be assigned DOCATTACHREAD to have **read only** capabilities of the documents as outlined.

To upload documents, users will click on the Doc Tab within the youth's Face Sheet (highlighted in the example below). Click **Add New Document** button and the File Upload window will appear.

Doc Status	Document Type	Document Sub Type	Description	Date Uploaded
New Doc Uploaded	CMO Attachments	CFT Sign-In		4/3/2018
New Doc Uploaded	CMO Attachments	CFT Sign-In		4/3/2018

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Click Type of Document and select FSO Attachments from the menu. Click Subtype of Document and select from the options.

\*Please review your specific Appendix at the end of this document for details on what you can and cannot upload.\*

Once selections are made in both the Document type and Subtype menus, enter a comment into the comment text box. Information entered within the comment box may include, but is not limited to date of assessment, the specific type of specialty assessment/evaluation, applicable dates for a court order, or IEP effective date.

The user can then select the files to upload. Clicking on the **Browse** button will open up the user's local files either on their computer or network. Important facts to remember:

1. Uploaded files cannot exceed 20 MB in size; if they are larger than this, the user will receive an error message and will be unable to complete the upload. Users may need to split a large document into two separate files; this may include re-scanning documentation into two (or more) separate files in order to upload the information into the record.
2. Only PDFs and files in the following formats can be uploaded – BMP, GIF, JPEG, JPG, PNG, TIF, TIFF. Any other formats will be rejected and the user will need to either convert their document into one of the accepted formats or chose another document.
3. All file names must follow this naming convention – **CyberID, Document Type, Date Received**. For example, a user uploading the FSO Action Plan for Youth ID 23456, which was received by their agency on November 25, 2016 should name the file “**23456 FSO Action Plan 11252016**”.

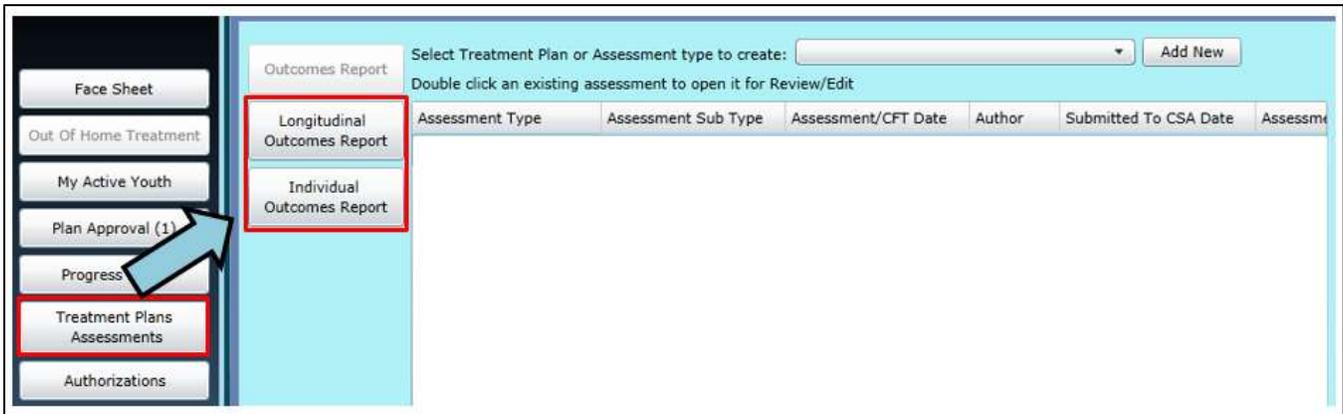
Once a file is selected, the user will see it appear in the Selected Files area. Users will see that the size of the file appears within this area; if the file exceeds 20 MB (1000 KB = 1 MB), please delete it (using the X next to the file name and size in the first line) and replace it with a smaller file(s).

Clicking the Upload button will run the upload; the user will see the progress bar (where the word Total appears) fill with a color – most likely yellow – and the percentage number will increase as the upload is completed. If the upload is successful, the user will be brought back to the youth's Doc Tab, where the file will be listed.

If a document is uploaded to CYBER in error, the FSO user must submit a request on the Customer Service Request Form in order to have the document removed from the youth's record. Only PerformCare has the ability to remove uploaded documents. See [References](#) for a link to the Form.

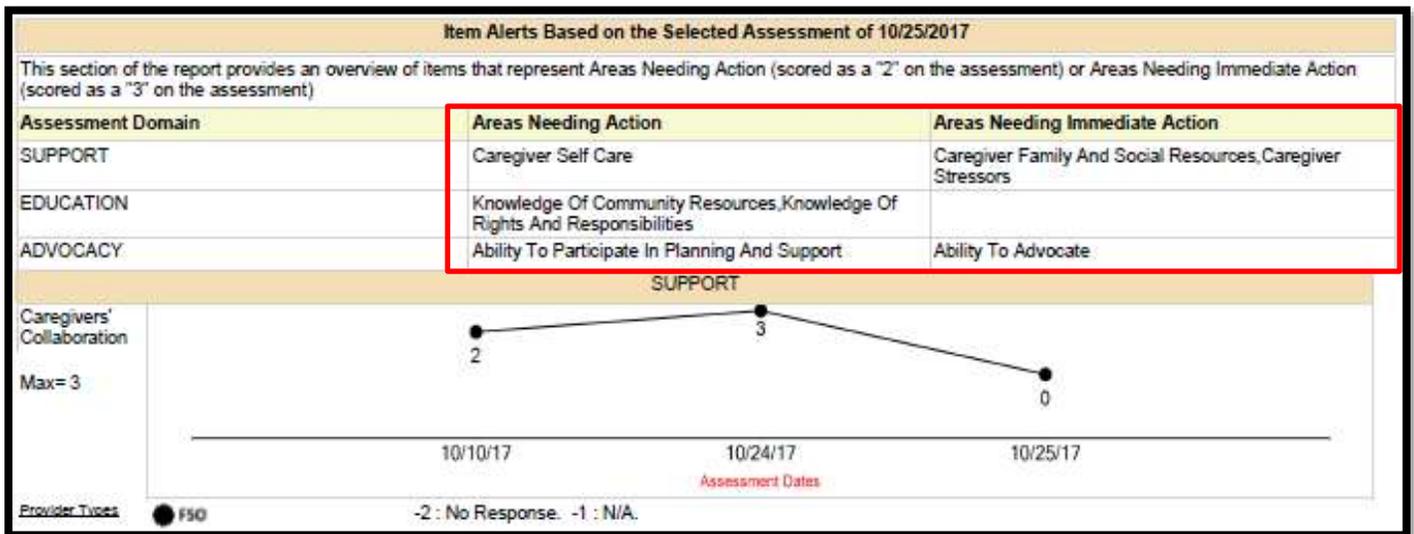
## X. Outcomes Reports

Two FANS outcomes report types will be available within CYBER for FSO use with families. The reports are accessed from **Treatment Plans Assessments** button in a youth's record.

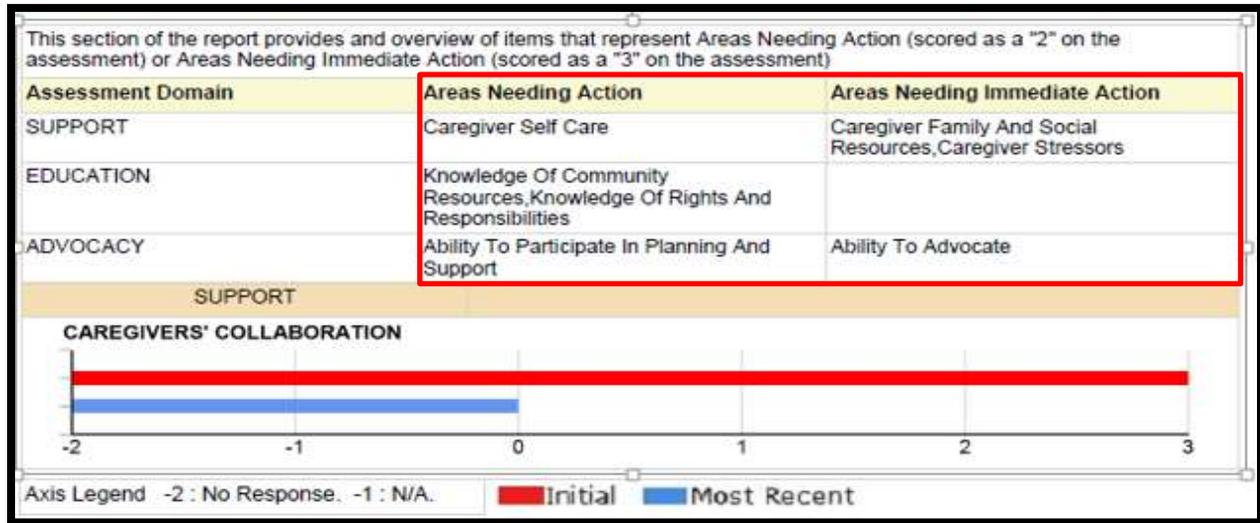


There are **Individual Outcomes** and **Longitudinal Outcomes** reports available for each family within CYBER. The FSO user should use these reports to discuss family progress on the areas of their identified needs currently and over time as relevant and determine areas of focus for review or further development of strategies, resources, and supports.

**Longitudinal Outcomes Report** – each section of the report will compare the values of rated question in line graphs for the assessments completed within the episode of care. An overview of items that represent **Areas Needing Action (2)** or **Areas Needing Immediate Action (3)** will be displayed.



**Individual Outcomes Report** – each section of the report will compare the values of the rated questions from the Initial FANS and the Most Recent FANS in a bar graph. An overview of items that represent **Areas Needing Action** (2) or **Areas Needing Immediate Action** (3) will be displayed. The legend is located at the bottom of each page and indicates that the Initial FANS will show in red and the most recently approved FANS will show in blue.



FSO users must provide information and context for families relative to the outcome reports use and interpretation to support a family's understanding of the report data relevant to a family's path of progress. Information arising from discussion of the outcome reports will be incorporated into the Family Action Plan as agreed upon with the family.

## XI. References

### Glossary

CMO – Care Management Organization

Domain – area of knowledge or activity

Dropdown list – a box that when clicked lowers to display a list for selection

Face Sheet – a series of tabs in a youth’s record in CYBER containing related information about the youth

FANS – Family Assessment of Needs and Strengths

FSO – Family Support Organization

FSP – Family Support Partner

Hierarchy – in CYBER, this refers to security groups that provide different levels of permissions for submission of assessments and plans

Hyperlink – an underlined word or series of words that when clicked links to another location

NJCSOC – New Jersey Children’s System of Care

Welcome Page – landing page for all users after logging into CYBER

### Training Support

PerformCare Website Training page <http://www.performcarenj.org/provider/training.aspx>

FSO Training Section: <https://www.performcarenj.org/provider/training.aspx#fso>

- FSO Progress Note Instructional Guide  
<http://www.performcarenj.org/pdf/provider/training/family-support-organizations/fso-progress-notes-guide.pdf>
- Instructional Guide for Welcome Page Features for CYBER Users with High-Level Access (“Supervisor” designation and up) <http://www.performcarenj.org/pdf/provider/training/general-csoc/welcome-page-features-high-level-access.pdf>
  - This guide details the functionality for Supervisors and higher security to use the Welcome Page to manage others’ work.
- Document Upload Functionality Guide <https://www.performcarenj.org/pdf/provider/training/general-csoc/document-upload-functionality.pdf>
  - This guide is an in-depth document about document upload.
- Password Reset for All Providers <http://www.performcarenj.org/pdf/provider/training/security/instructional-guide-password-reset-all-providers.pdf>
  - This is an updated guide to resetting your CYBER password.

**PerformCare Customer Service**

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