PerformCARE®

Instructional Guide for Providers' Use of the IIC/BA Treatment Plans

(Last update: January 2017)

PerformCARE®

CYBER 1.20 – Instructions for Use

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I. Introduction

The Treatment Plans for Intensive-In-Community (IIC) providers and Behavioral Assistants (BA) have been modified to make them more intuitive for users to complete. CYBER will also now allow a Care/Case Manager (CM) to see when a Treatment Plan has been submitted by the IIC or BA provider that is working with a youth the CM is open to; this information will appear on their Welcome Pages.

The Treatment Plans for IIC and BA providers will include a structure that is new to the CYBER system – the Treatment Matrix. The Matrix allows users to input clinical information such as a youth's Needs and Strengths, as well as Strategies, Techniques and Barriers to treatment in an easy-to-use format. The Matrix itself is presented in a tree structure instead of the previously used accordion structure; this new format allows the user to see all of the associated information at once. For example, the user will be able to view the Desired Outcomes/Goals that are associated with a specific Need, as well as the Strengths, Strategies and Techniques associated with the same Need without having to open other areas of the plan.

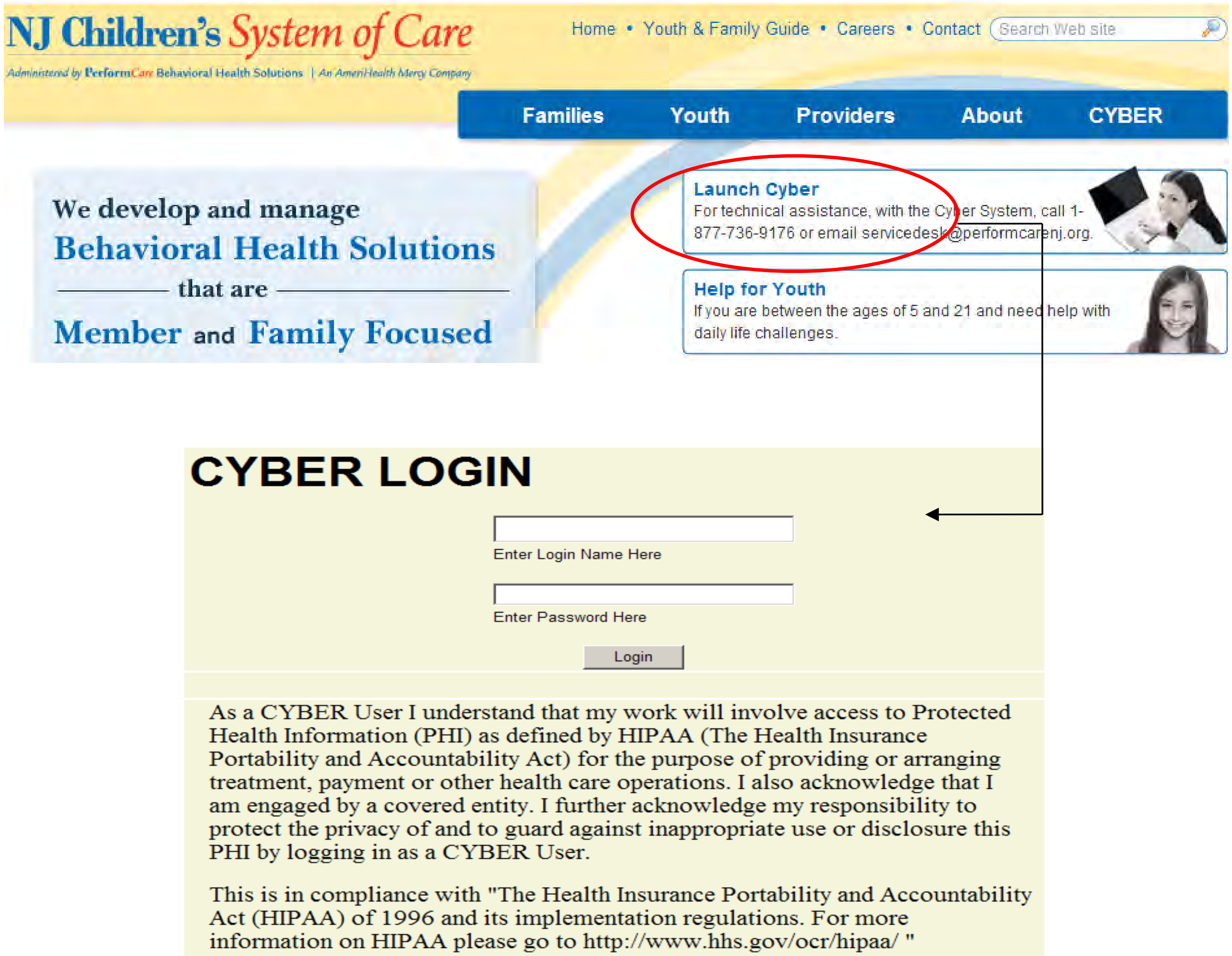
This release also includes additions to the Treatment Plan which utilize the information already saved to a youth's CYBER record. Medications, Diagnosis and Supports can now be pulled into the Treatment Plan from their existing locations in the youth's record. New information can also be created for each of these accordions in the Treatment Plan and saved to the separate areas within the youth's record.

Also to note is that these Treatment Plans will be part of the automatic-approval process in CYBER; once submitted, the plan will automatically be approved because there are no service requests present.

The enhancement that is being made to the Welcome Page for CM users is discussed within this guide (see page 31).

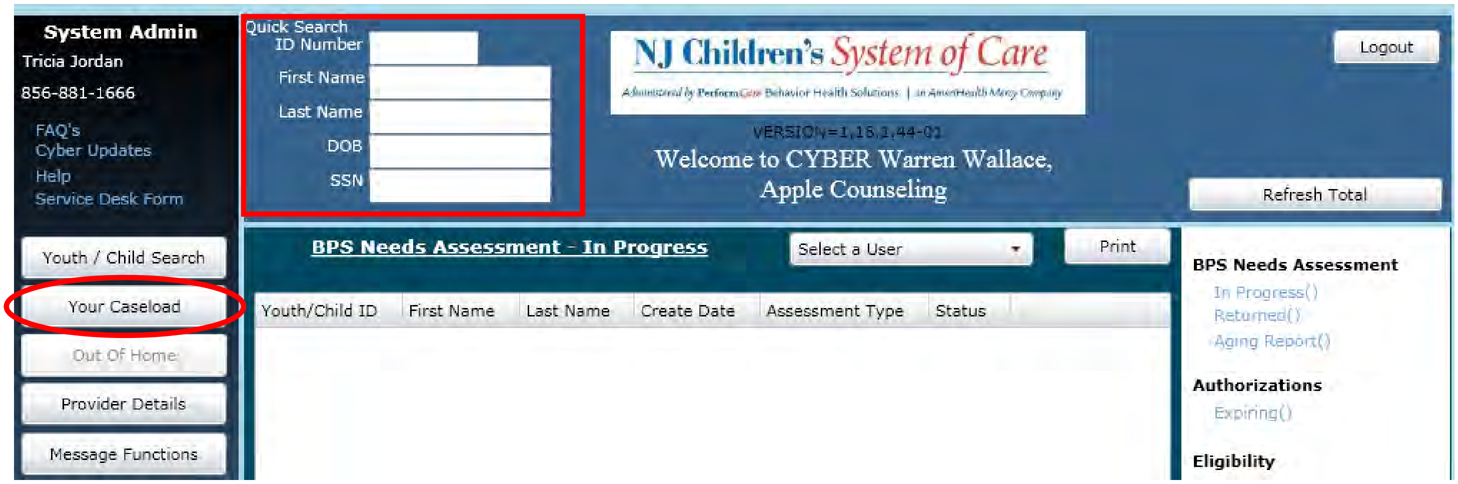
II. Accessing CYBER

Users must first log-into CYBER with their UserID and Password. The log-in screen can be found via the PerformCare website – www.performcarenj.org.



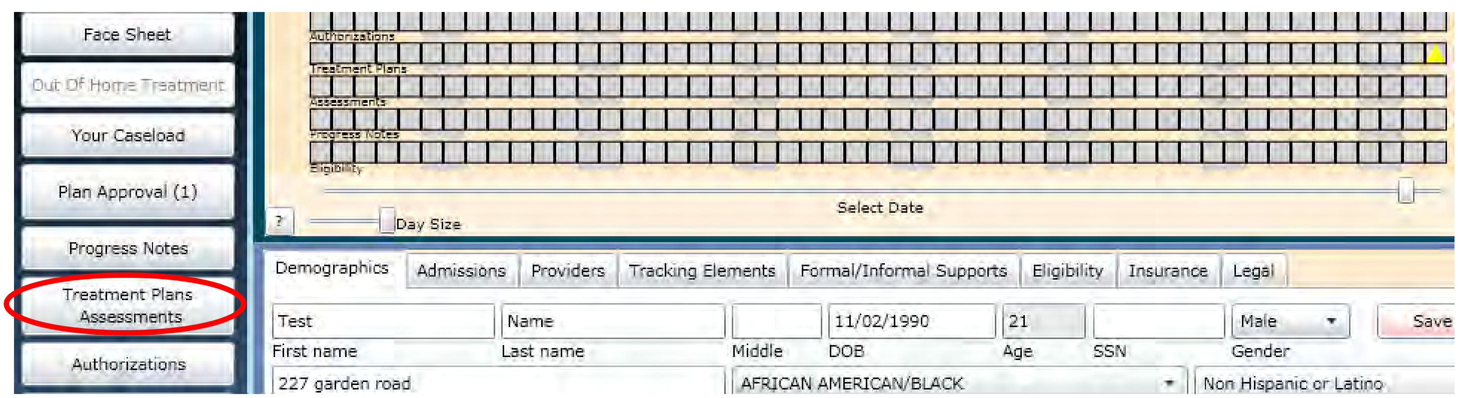
III. How to Create a New Treatment Plan

In order to create a new IIC or BA Treatment Plan, the user must first locate the appropriate youth's CYBER record. Users have a variety of options available to them.

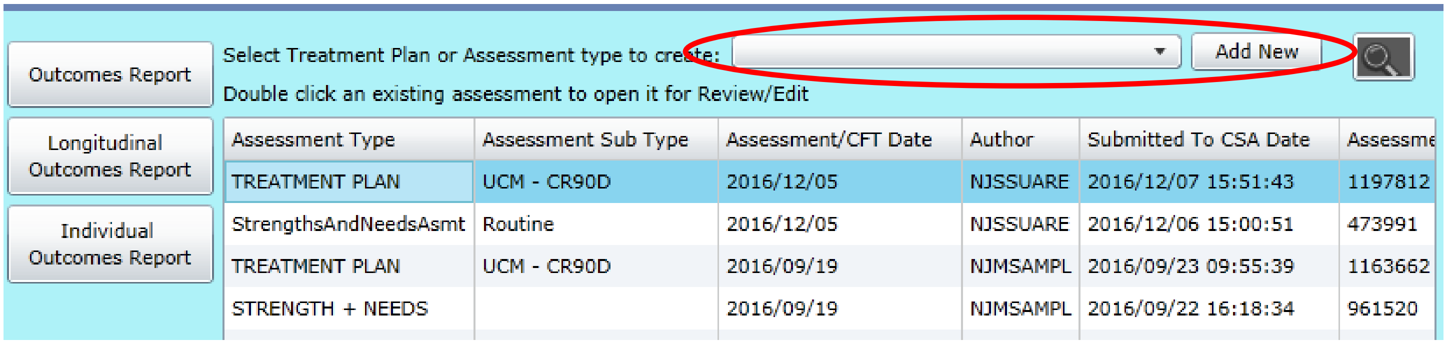


Clicking on the "Your Caseload" button on the left-side of the screen will bring up a list of youth that the logged-in user is currently open to (on the Provider tab of the youth's Face Sheet). Using the Quick Search function at the top of the Welcome Page allows the user to search for a specific youth they are open to by using a combination of identifiers (see above screenshot). (Users may also utilize the Agency Cases button on the Youth/Child Search screen, which will show all of the youth that are open to the user's agency.)

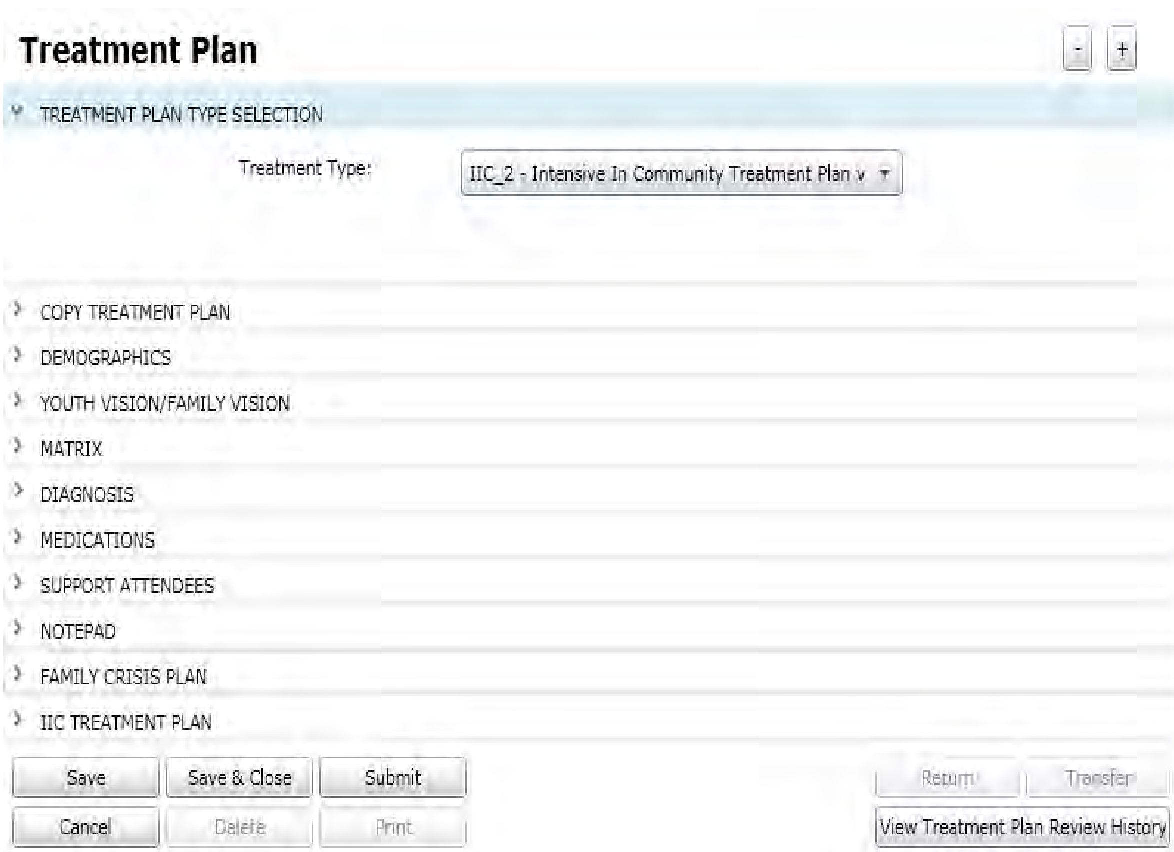
Once the correct youth's record is located, the user will click on the "Treatment Plans Assessments" button on the left-side of the record.



Clicking here will bring the user to the youth's Treatment Plans and Assessments screen.



Making a selection in the Select Treatment Plan or Assessment type to create drop-down menu, and then clicking the "Add New" button will open the new plan. *Only one draft of each Plan Type (IIC or BA) can be open at a time; if there is already a draft saved to the youth's record by the user (users can identify these plans by the lack of a date in the "Submitted to CSA Date" column), and the user attempts to create another plan, they will receive an error message and will be unable to continue. The user has the option of deleting the draft or making changes to it and submitting it.



*This is an example of an IIC Treatment Plan; the BA Treatment Plan is identical except for the final accordion which is named "BA Treatment Plan". (There is also an additional area in the Matrix to document Behaviors that is not on the IIC Treatment Plan.)

IV. Creating the Treatment Plan

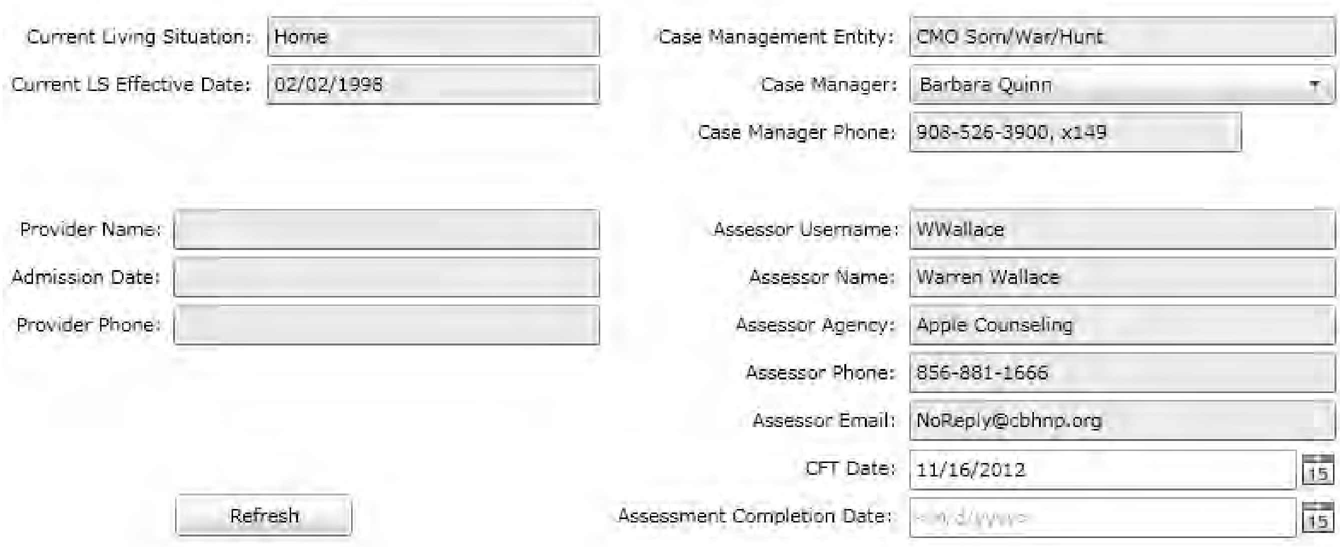
The following sections of this guide review each accordion, or section, of the Treatment Plan.

The Treatment Plan will also now be available for the open CM to view, via their Welcome Page (see page 30 for details).

These Treatment Plan types will be automatically approved by CYBER, once submitted to PerformCare; there is no review period associated with them.

IV.a The Demographics Accordion

In the Demographics accordion, users will now find two changes – one to the CME fields and another that addresses the functionality of the fields in the accordion.

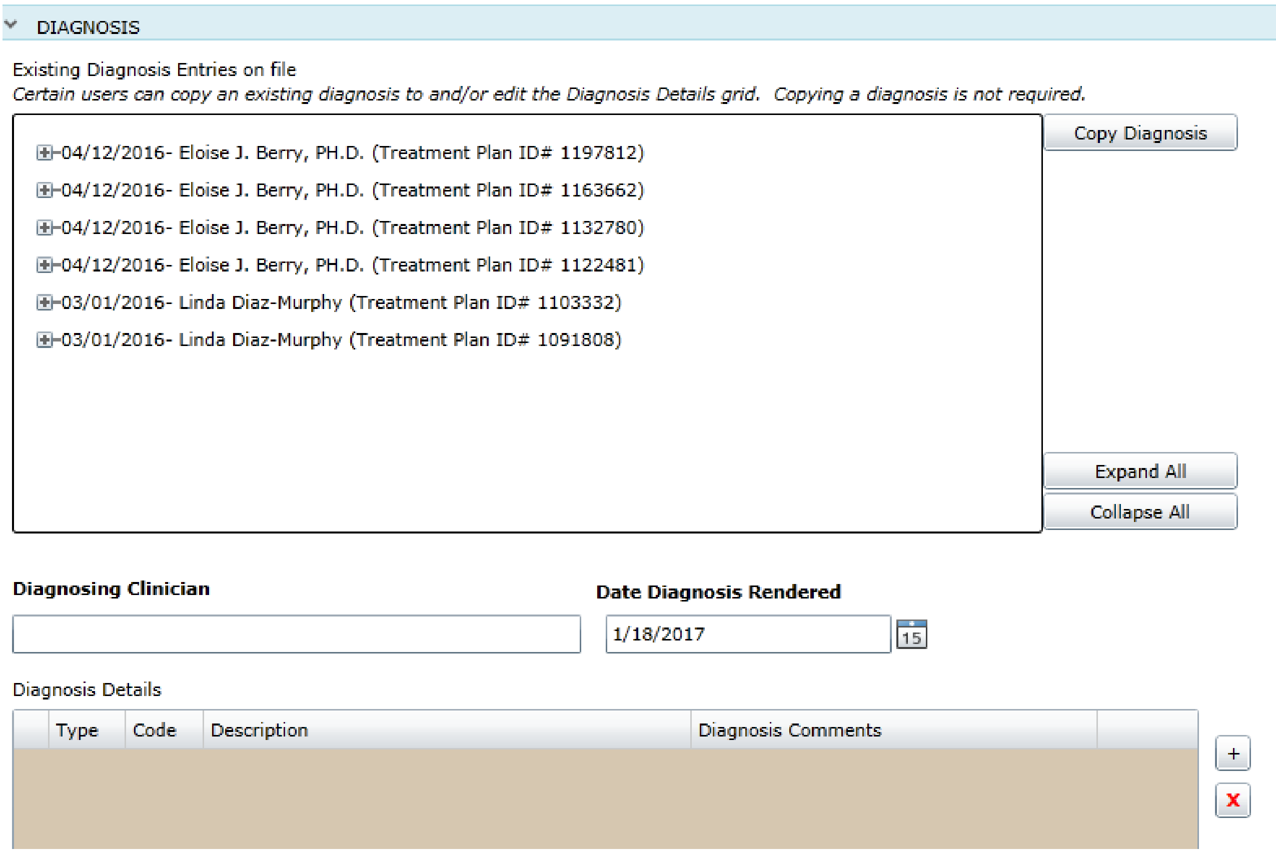


The CME field will have a pull-down menu available if there is more than one CME open on the youth's Face Sheet. Users will also see a pull-down menu available if there is more than one CM open on the youth's Face Sheet.

- Please note – If there is only one open CM or CME on the youth's Face Sheet the field will default to that CM's information and a selection will not be necessary.

Users will find a new "Refresh" button at the bottom of the accordion (see above example); this button can be used by the user prior to submitting the plan to update the demographic fields in the accordion. Previously, the fields in this accordion would change anytime the fields on the youth's Face Sheet would change; the changes would occur after submittal as well as when the plan was still in draft. This will no longer occur.

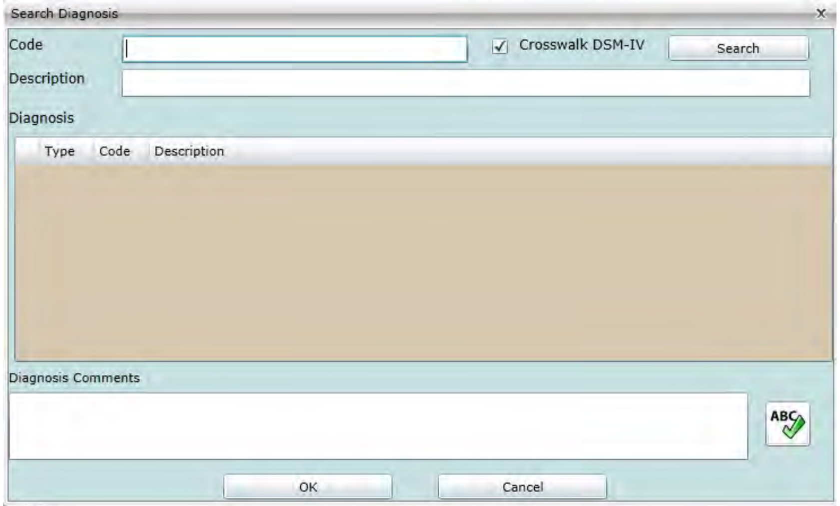
IV.b The Diagnosis Accordion



Users can select an existing diagnosis from the top grid to add to their plan; clicking the "+" button next to each entry will open the record for the user to review the entire diagnosis record. Single-clicking on one record in the Existing Diagnosis grid, and then clicking the "Copy Diagnosis" button will copy the full record into the Diagnosis area at the bottom of the accordion.

Users may also enter in new diagnosis information. The Diagnosing Clinician and Date Diagnosis Rendered are both required fields; note that the Date field will automatically default to the create date of the plan and should be updated accordingly.

To add a new diagnosis, the user will click the "+" button next to the Diagnosis Details grid. The following window will open;



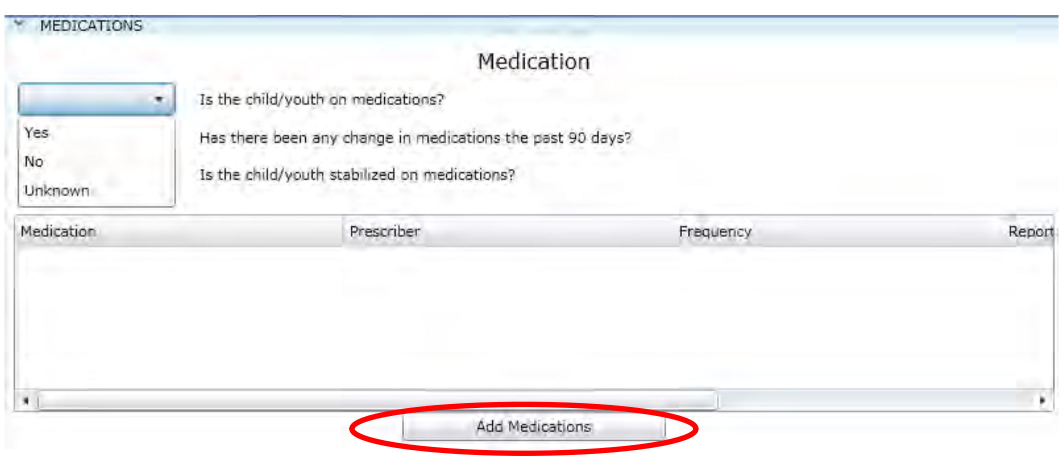
This window will allow the user to search the system for the appropriate code; it is recommended that, unless the user knows the exact code or description that they enter in a partial search – meaning the first number of the code, the first few letters of the diagnosis description; this will ensure the user will receive results from the search. By default, the option to Crosswalk DSM-IV codes is selected. This allows users to enter in the DSM-IV code and the search function will return the associated ICD-10 code, if one exists.

Once the appropriate code is found in the Diagnosis grid, the user can double-click on it in the grid to add it to the assessment; depending upon the code the user may need to add additional, more specific information about the diagnosis into the Comments field. Clicking "OK" will also add the selected diagnosis to the assessment.

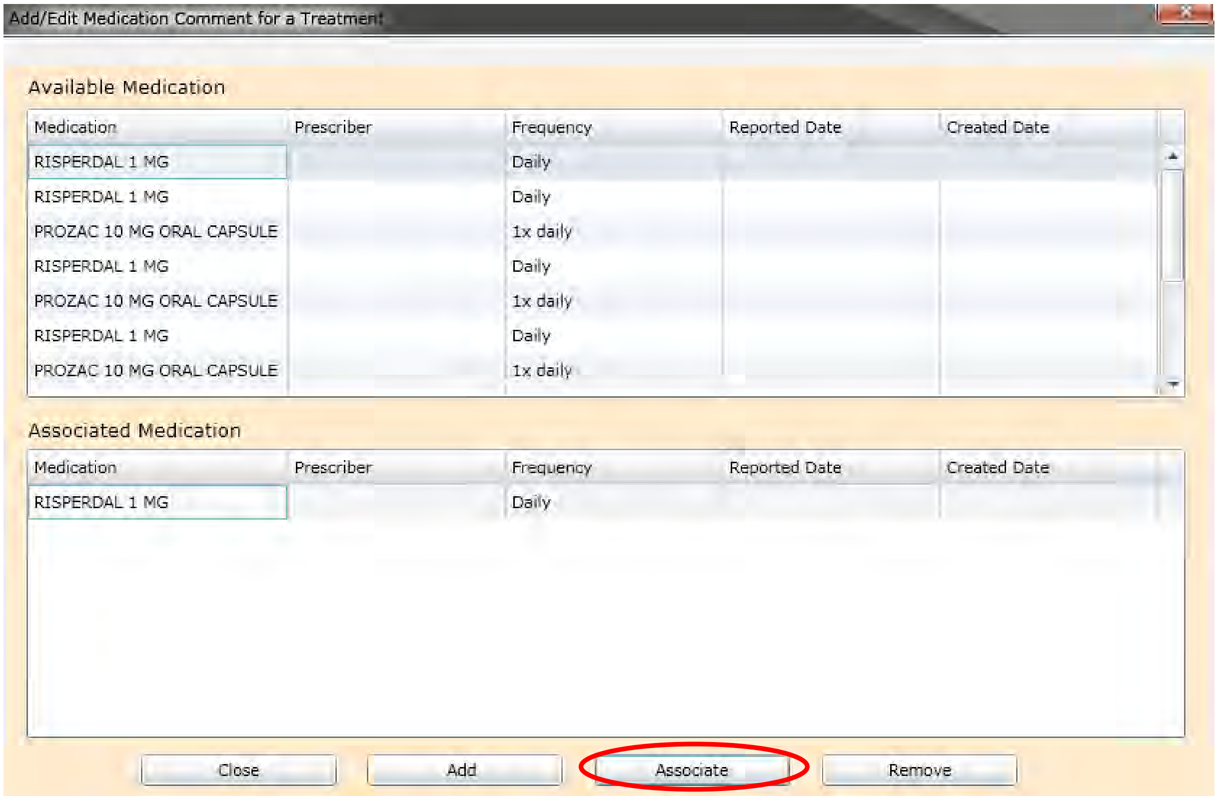
IV.c The Medications Accordion

There are a number of changes in the Medications accordion.

- Users will find that the three questions at the top of the accordion are no longer checkboxes; a pull-down menu is available and will include "Yes, No, Unknown" for each question. A response is required for each.
- There is new functionality attached to the Add Medication button, which is located at the bottom of the Medications accordion.

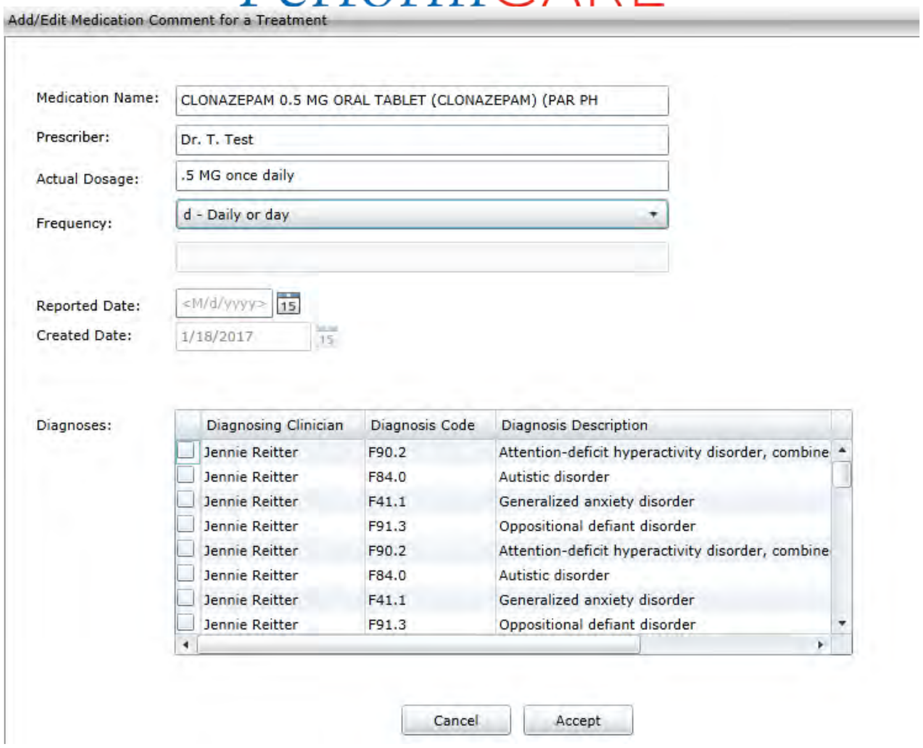


- Clicking here will bring up a new window, which will allow the user to add new medication records, as well as associate existing medication records from the youth's record.



- Any medications that are currently in the youth's record will appear in the top grid, Available Medications. (This will include any records added within the last year.)
  - To add a medication from the grid to the Treatment Plan, the user must single-click on the record and then select the "Associate" button at the bottom of the window. The medication will then appear in the Associated Medications grid, in the lower half of the window.
  - The "Created Date" will be the date the record was created; once a medication is associated with the Treatment Plan, the Created Date in the Associated Medications grid will automatically update with the current date.

- If the user chooses to enter a new medication into the record and associate it with the Treatment Plan, they must first click on the Add button at the bottom of the Add/Edit Medication Comment window. Doing so will bring up the Add/Edit screen (see next page).



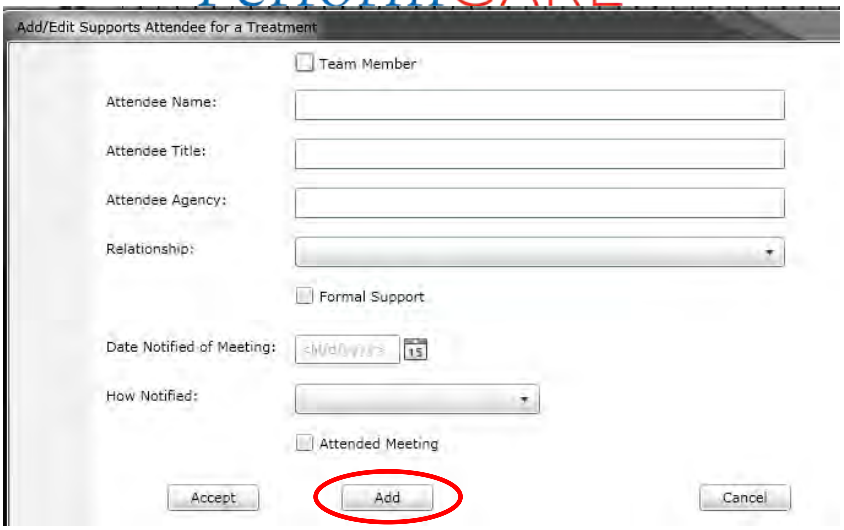
- The user will complete each of the fields and click Accept to add the record; selecting a diagnosis at the bottom of the window will link the diagnosis to the medication and it will display in the grid on the plan. This action is not required.
  - The Reported Date should be entered as the date the user learned of the youth's use of the medication.
- The user will need to also use the Associate button to have the new medication added to the Treatment Plan.
  - Please note – the new medication will appear in the youth's record once the Treatment Plan has been submitted and approved.

- If the user needs to remove a medication that has been associated with the Treatment Plan, double-clicking on the medication record in the Medications accordion will open the Add/Edit Medications window. Users will then select the medication record from the Associated Medications grid, and click the "Remove" button at the bottom of the window. The medication will not be removed from the youth's record; it will appear in the Available Medications grid.

IV.d The Supports Attendance Accordion

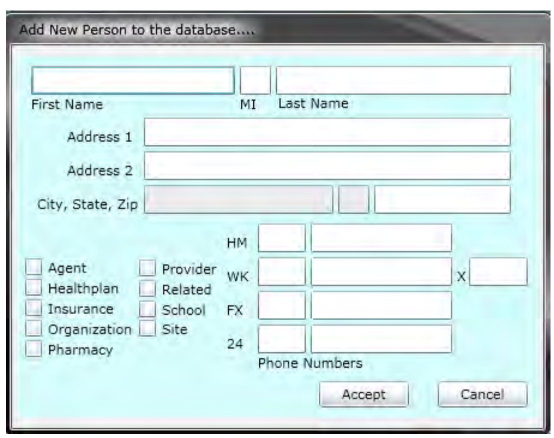
The Supports Attendance accordion has been renamed "Supports Attendees"; the following changes have been made;

- Clicking on the Add Supports Attendee button at the bottom of the accordion will bring up the Add/Edit Supports Attendees window.



- In order to add a new support, users will click the “Add” button at the bottom of the window.

- Clicking the “Add New” button will allow the user to add a new person to the Treatment Plan and to the youth’s Face Sheet/Formal and Informal Supports tab.

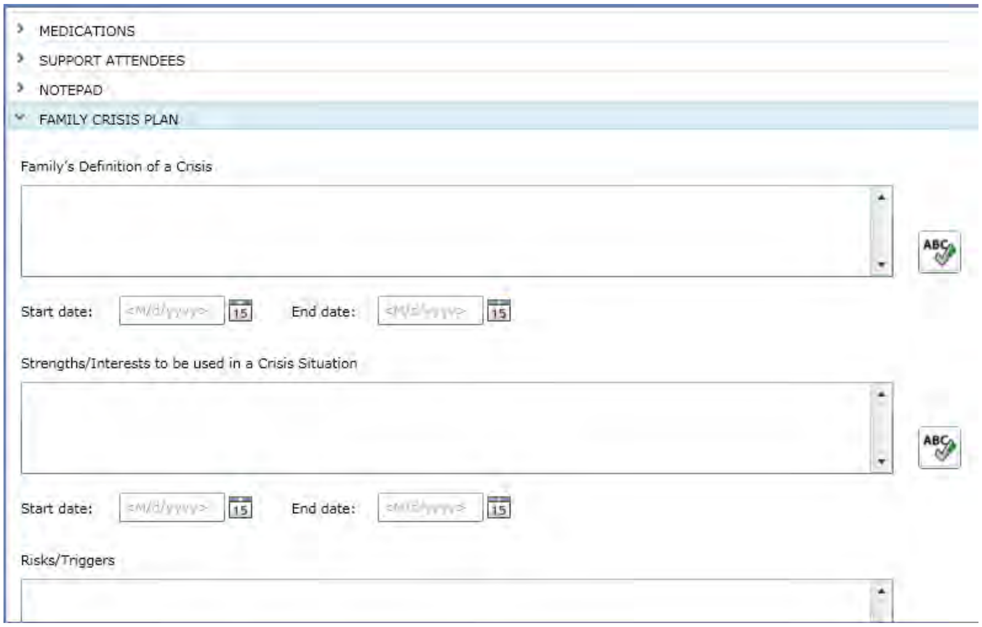


  - Please note – users must input the first and last name, zip code, at least one phone number and select at least one of the categories for the new person on the left-side of the window before clicking Accept.
- Once the user completes the Add/Edit Supports Attendees screen (example on the top of page 13), the added support information will be added to the Formal/Informal Supports tab of the youth’s Face Sheet.

- Please note that all fields are required; the user cannot Accept the record into the Treatment Plan unless all fields are completed.

IV.e The Family Crisis Plan Accordion

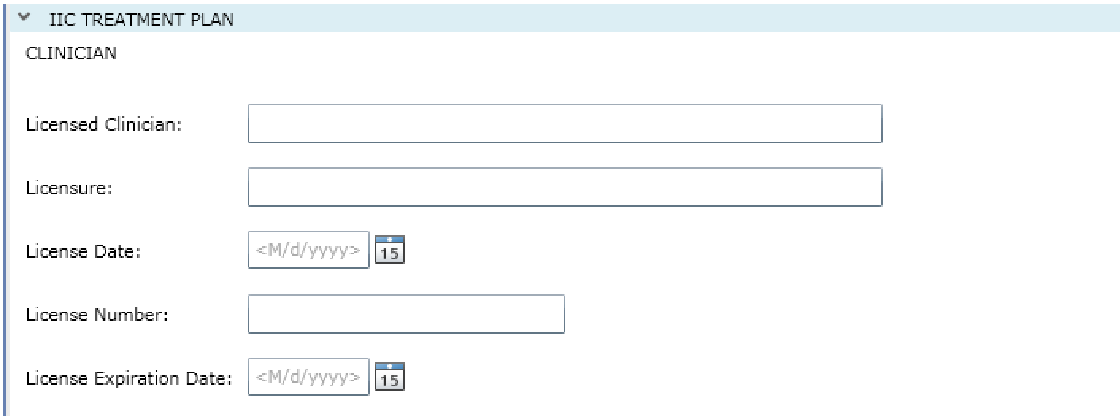
The Family Crisis Plan Accordion, and the associated questions, has been added to the IIC and BA Treatment Plans.



The Family Crisis Plan accordion is used to document how the family can and will handle a crisis situation (including risks and triggers for crisis, what helps the caregiver during a crisis and who can help in a crisis situation).

IV.f The IIC or BA Treatment Plan Accordion

The first five fields in this accordion are now required and some contain validations.


IIC TREATMENT PLAN

CLINICIAN

Licensed Clinician:

Licensure:

License Date: <M/d/yyyy> 15

License Number:

License Expiration Date: <M/d/yyyy> 15

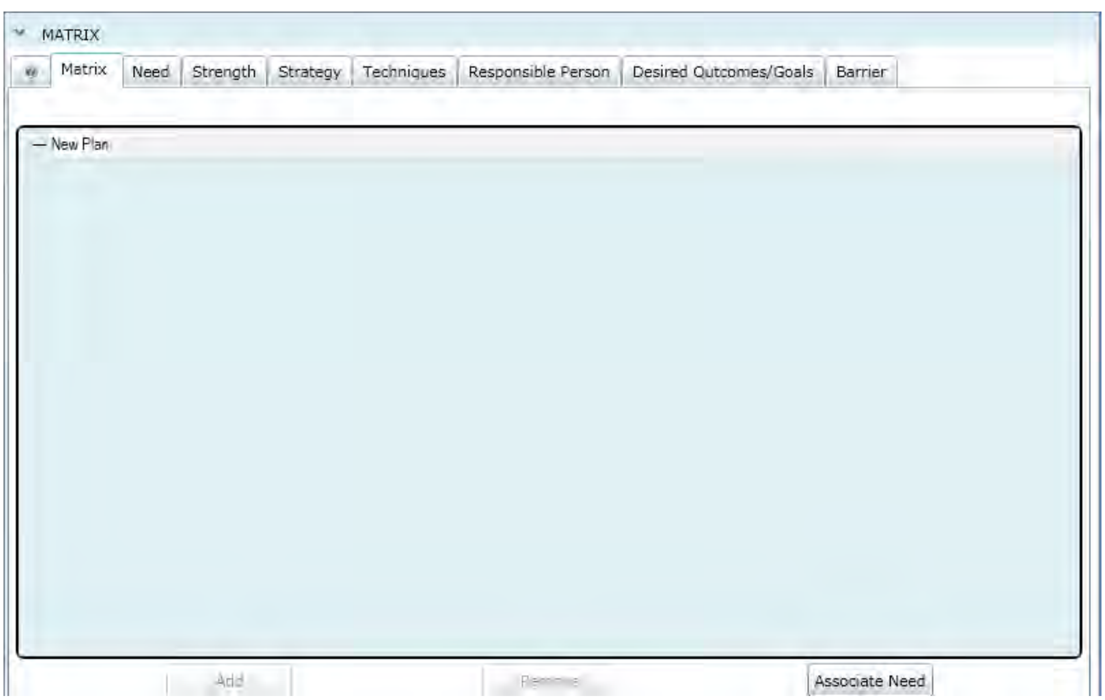
- Licensed Clinician is required*
- Licensure is required
- License Date is required and contains a validation against the entered date; the date must be prior to the current date and prior to the date entered into the License Expiration Date field. (The date entered should be the initial date the license was issued.)
- License Number is required
- License Expiration Date is required and contains a validation against the entered date; the date must be greater than the current date

If the plan is being completed by a non-licensed provider (an MA, for example), a Licensed Clinician must be managing the work of the non-licensed provider and should review the plan prior to submittal; that individual's licensure information would be entered into these fields.

V. The Treatment Matrix

Users will notice that many accordions that were in the Treatment Plan previously are now absent; the information has been consolidated into one place – the Treatment Matrix. The Treatment Matrix is a comprehensive tool outlining the Needs, Strengths, Strategies, etc in an easy-to-read tree structure. The Matrix allows users to enter a Need and map its associated Strengths, Strategies, Techniques, Responsible Person, Desired Outcomes/Goals and Barriers to it in one screen without having to navigate to multiple areas of the Treatment Plan; it is also visually easy to see the relationship between the Need and any associated information. The Matrix can be opened by clicking on the appropriate accordion in the Treatment Plan.

Once the Matrix is opened, the user will initially see a blank Matrix window with "New Plan" listed at the top (this will change to the Plan ID Number once the plan has been saved or submitted). This area will display the tree structure of the Matrix and will be populated with information as the user inputs data (see example in screenshot on page 25). Users will see multiple tabs along the top of the accordion; users may chose to enter all information using the tabs and then associate it to individual Needs through the Matrix. Doing so will allow the user to enter information in any order (users can navigate to any of the tabs, enter information and do not need to go in any specific order); users must follow the hierarchy of the tree if entering directly into the Matrix (meaning, a Need is entered first, then the associated Strength(s), Strategy(s), Technique(s), etc. By entering information using only the Matrix the user cannot enter a Technique before entering a Need.).



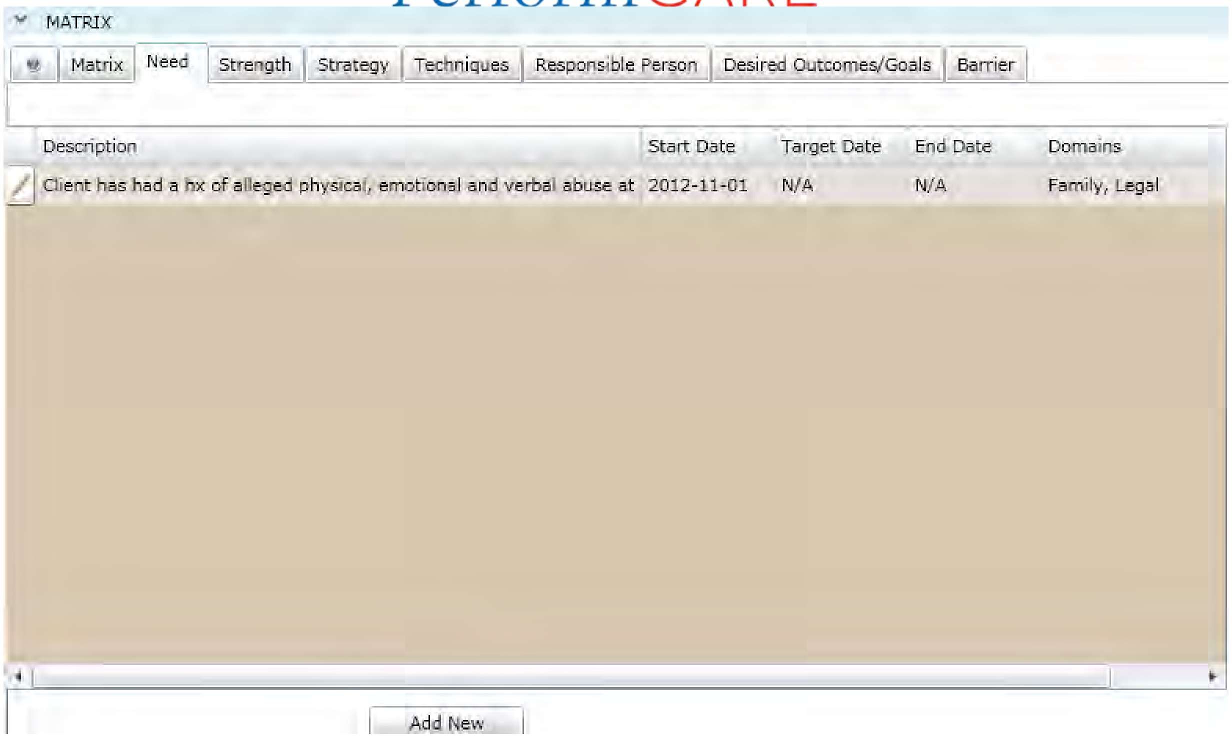
*Note – BA Treatment Plans will also have a Behaviors tab available on the Matrix; it will be located between Strength and Strategy and will appear as such in the Matrix.

The button at the bottom of the Matrix accordion – Associate Need – will become active only once the user single-clicks on the “New Plan” line of the Matrix. This button is dynamic; depending upon what the user selects in the Matrix, the button will display the next level in the Matrix tree. For example, if the user selected a Strength, this button will display “Associate Strategy” because Strategy is the next level in the Matrix.

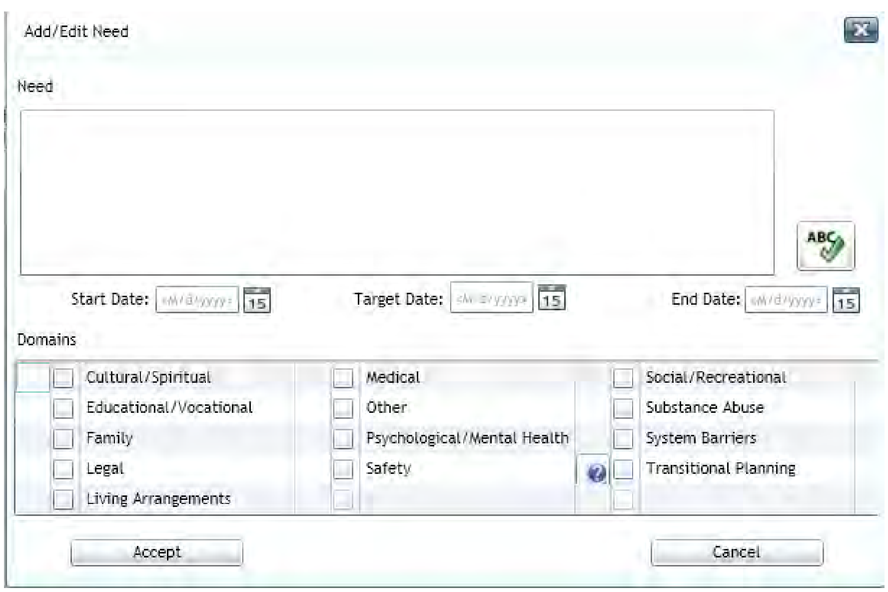
The first tab users will see in the Matrix accordion will be a blue question mark. When clicked on, the user will see the following message;

The message appears as a “sticky note”; users will see these in some areas of the Matrix and clicking on them will bring up information that may be useful in completing the Treatment Plan.

If users chose to enter all of their data first, clicking on any of the tabs at the top of the accordion will open up the associated screen. The screen will be blank, with an active “Add New” button at the bottom. Below is a screenshot of the Needs tab, with a Need entered.

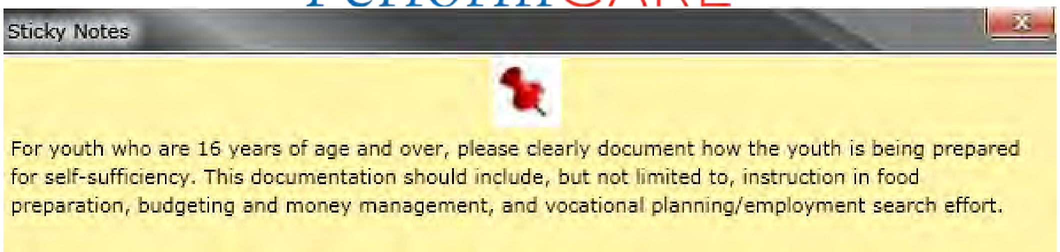


This grid will show all of the Needs that have been entered into the Matrix. Each entry will include an Edit button, represented as a pencil in the first column. Clicking here will bring up the Add/Edit screen (which also appears when the user clicks the Add New button in the bottom of the window; this screen will also appear the first time the user is working in the Matrix and clicks on the “Associate Need” at the bottom of the accordion.)



Users will enter the description of the Need in the text box, select a Start Date, Target Date and End Date, and then select the appropriate Domain(s) for the need. (The Need, a Start Date and at least one Domain must be entered.)

- Note – there is a Sticky Note for Transitional Planning which reads (when the “?” is clicked on):



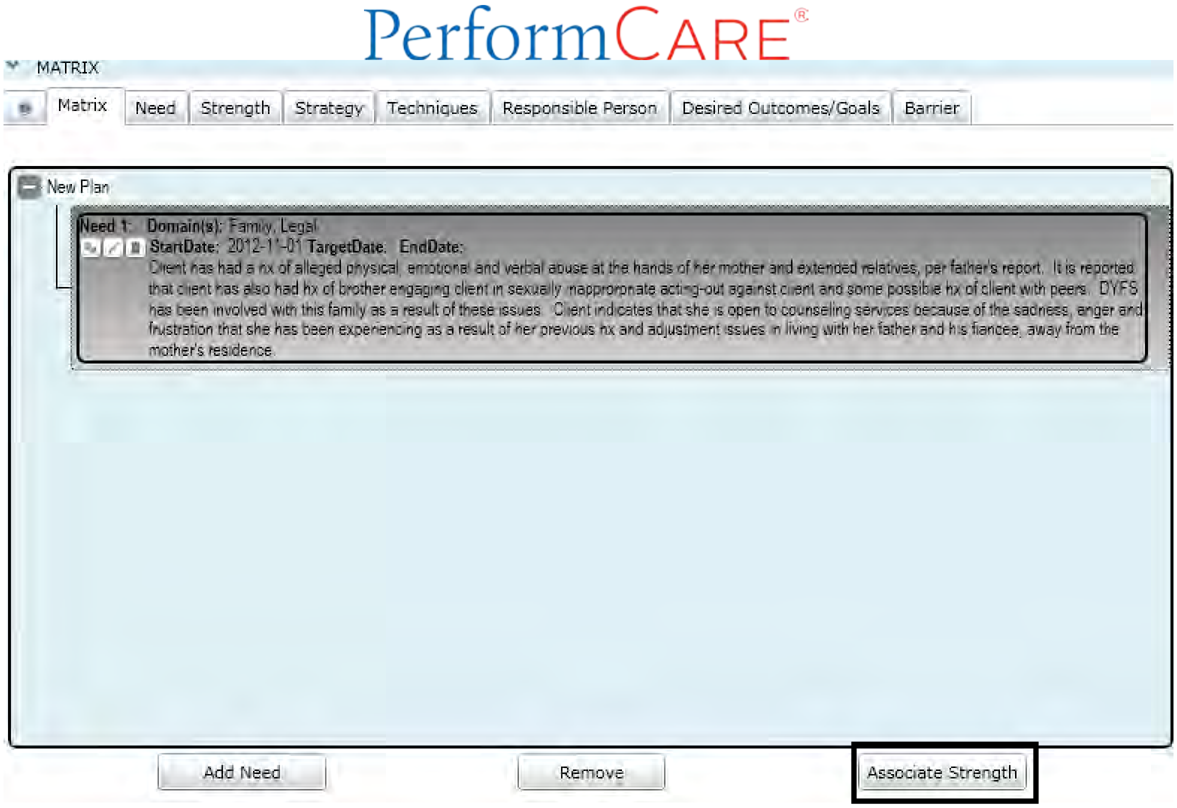
Once the user selects Accept, the Need will be added to the Treatment Plan; each new Need is automatically associated with the Treatment Plan on the Matrix as it is entered; they do not need to be manually associated to the plan.

Upon returning to the Matrix from the Need tab (by clicking on the Matrix tab), the user will see the entered Need displayed as in the sample above. The buttons that appear below the "Need" label are;

- Chain link – Associate the next level – when clicked from the Need, the user will be brought to the Strengths Details screen; the button will bring the user to the association screen for the next item in the Matrix tree
- Pencil – Edit line item information
- Trash can – Remove line item and all associated information

These buttons will appear on each line of the Matrix.

Once there is a Need associated with the Treatment Plan, the user can begin associating the rest of the clinical information – Strengths, Strategies, etc. to the Need. Associations can only be done from the Matrix; users can also add information via the Matrix. Users can only enter information into the tabs. Clicking on the chain link button on the Need, or clicking the "Associate Strength" button at the bottom of the accordion, will bring up the Associate Strength window.



(In the above example, the Need has been selected in the Matrix and the dynamic "Associate" button has changed to "Associate Strength".)

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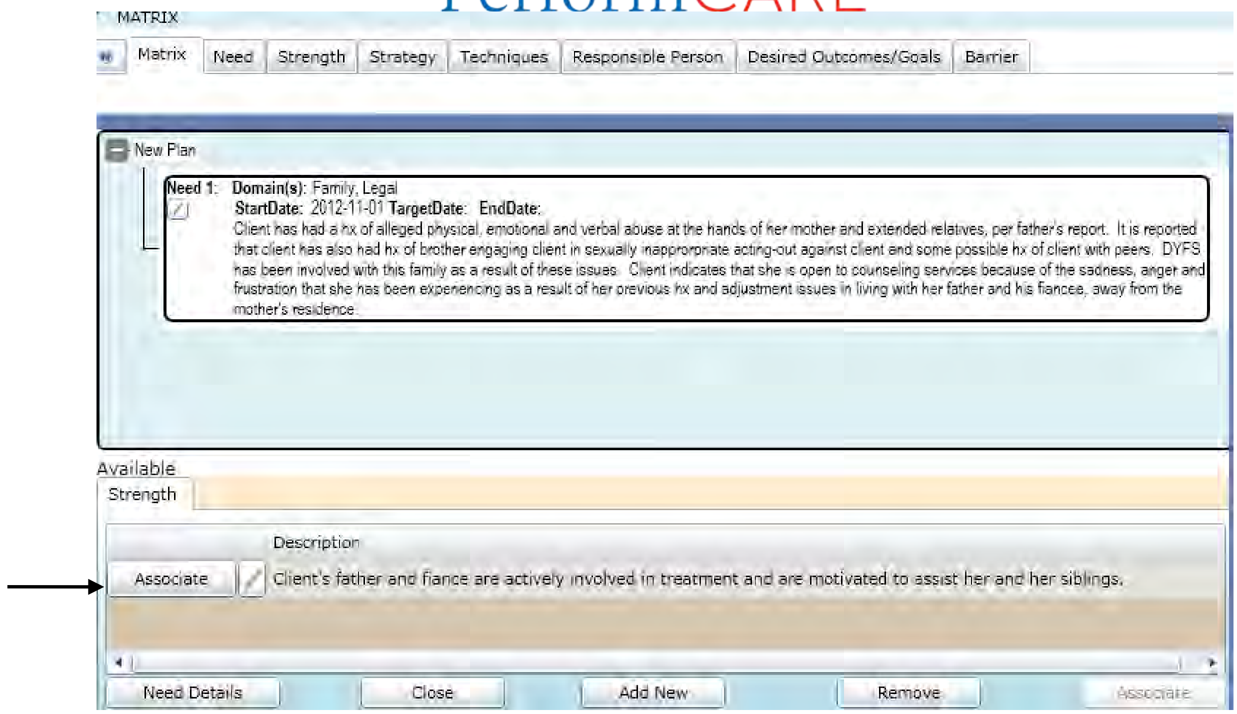


At the top of the Details window will be the level of the Matrix that the user is working in; meaning, the selected Need and all of the information associated with it. If the user had three Needs entered into the Matrix, and was associating a Strength to the second Need, that Need would appear in the top portion of the window.

- Please note that the user can edit any part of the Matrix from this window by clicking on the pencil icon next to the item in the top window (see the associated Need in the above example).

The Available grid in the lower half of the window will list the Strengths that have been entered into the Treatment Plan but have not yet been associated (they have been entered here using the Add New button or on the Strength tab at the top of the accordion). To associate an already entered Strength, as seen in the above example, the user can click on the Associate button next to the entry on the grid.

The buttons at the bottom of the window are as follows;

- Details - this will change dynamically depending upon what level of the matrix the user is on. In the above example, because the user is in the Strength Details window, the button says "Need Details". Clicking here will bring the user back (or up) a level in the Matrix to the Need Details. If the user was in the Techniques Details window, the button would be labeled "Strategy Details" and the user would be brought to that window when clicking the button.
- Close – clicking this button will close the Details screen and return the user to the full Matrix window
- Add New – will open the Add/Edit screen for the level of the Matrix the user is adding
- Remove – will remove the selected item from the Matrix, as well as any items associated below it
- Associate – this will change dynamically; in the above example, when the user selects the Strength in the Matrix window this button will change to "Associate Strategy" (it will bring the user to the next level on the Matrix).

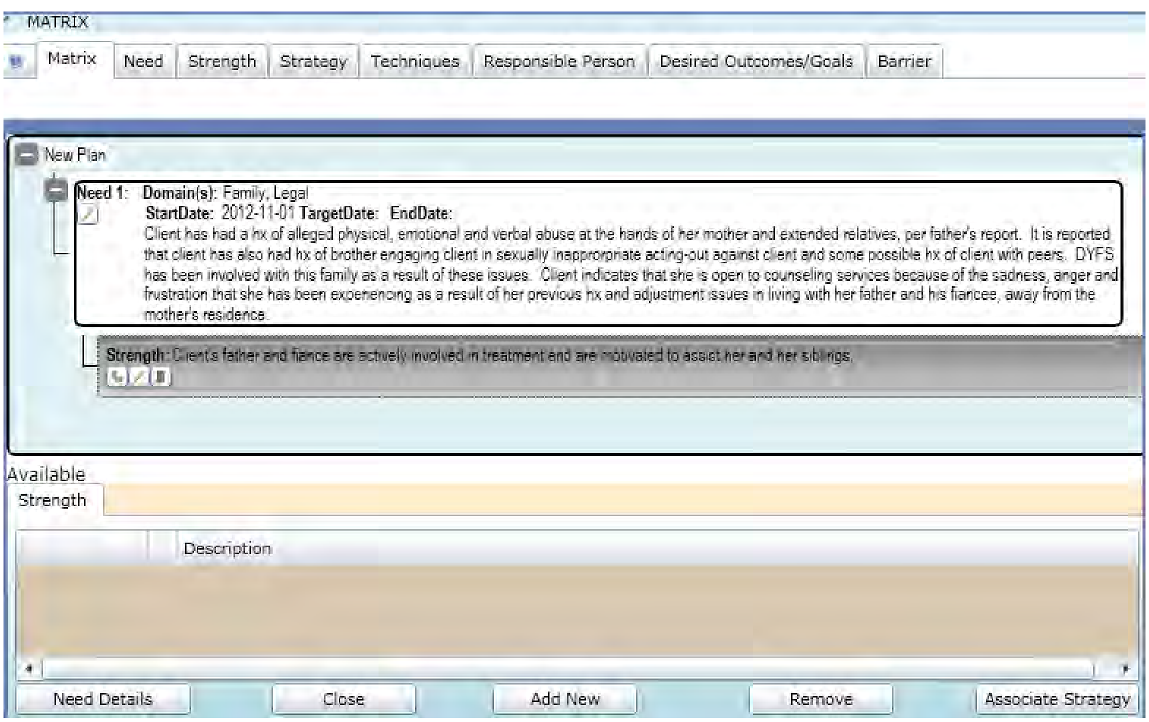
Users can choose to edit the Strength from this grid by either clicking on the pencil icon or double-clicking on the Strength in either the Available grid or in the Matrix window. Doing so will open up the Strength Add/Edit window.

This is the same window that will open when the user adds a new Strength to the system using either the Add New button in this window or the Add New button in the Strength tab.

- Please note that the user can return to the Matrix from this (or most of the) Add/Edit window by clicking on the Treatment Matrix button. Clicking this button will also save the information entered here.

Once the user is satisfied with the Strength(s), they can associate the appropriate one(s) to the Need by clicking on the Associate button in the grid.

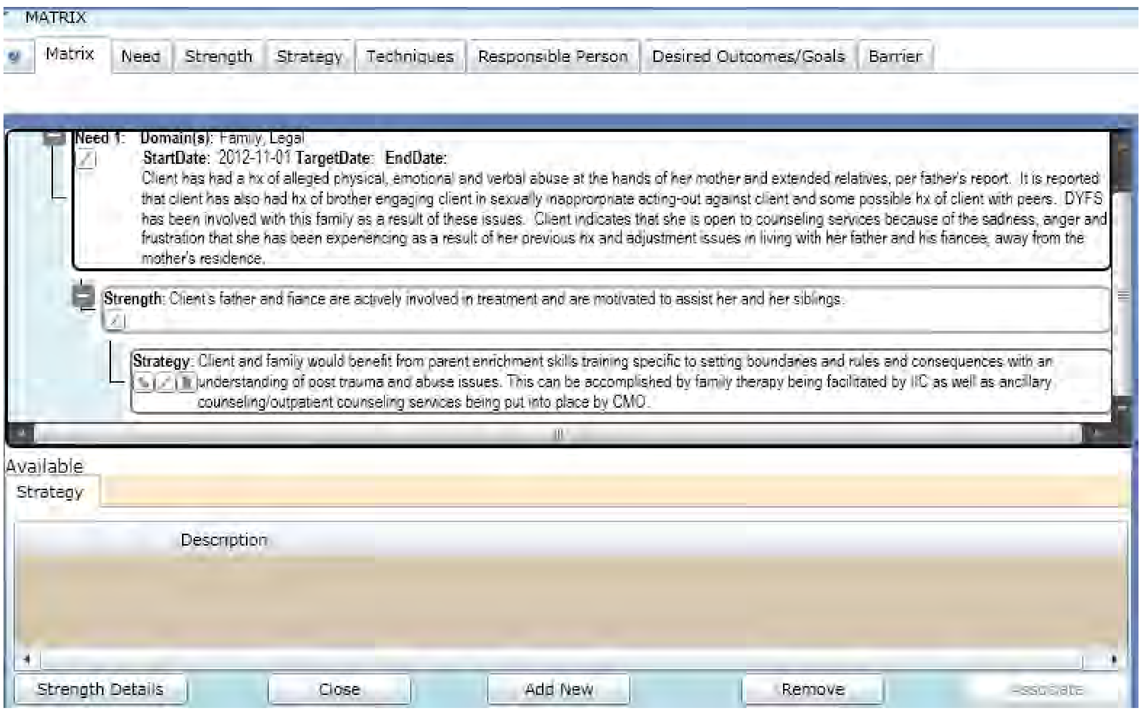
- Reminder – users cannot associate anything to the Need from the individual tabs at the top of the accordion; associations can only be done from the Details screens/through the Matrix.



The above example shows the Strength associated with the Need on the Matrix; the Strength no longer displays in the Available grid at the bottom of the window. It will appear here again for this Need only if it is removed from the Matrix by clicking on the garbage can icon or by selecting the Strength and clicking on the Remove button at the bottom of the window.

- Note – the Strength will still be available to be associated to other Needs in the Matrix; users will see it on the Strength tab and will also see it on the Details screen when they are working with a Need other than the one it is already associated with.

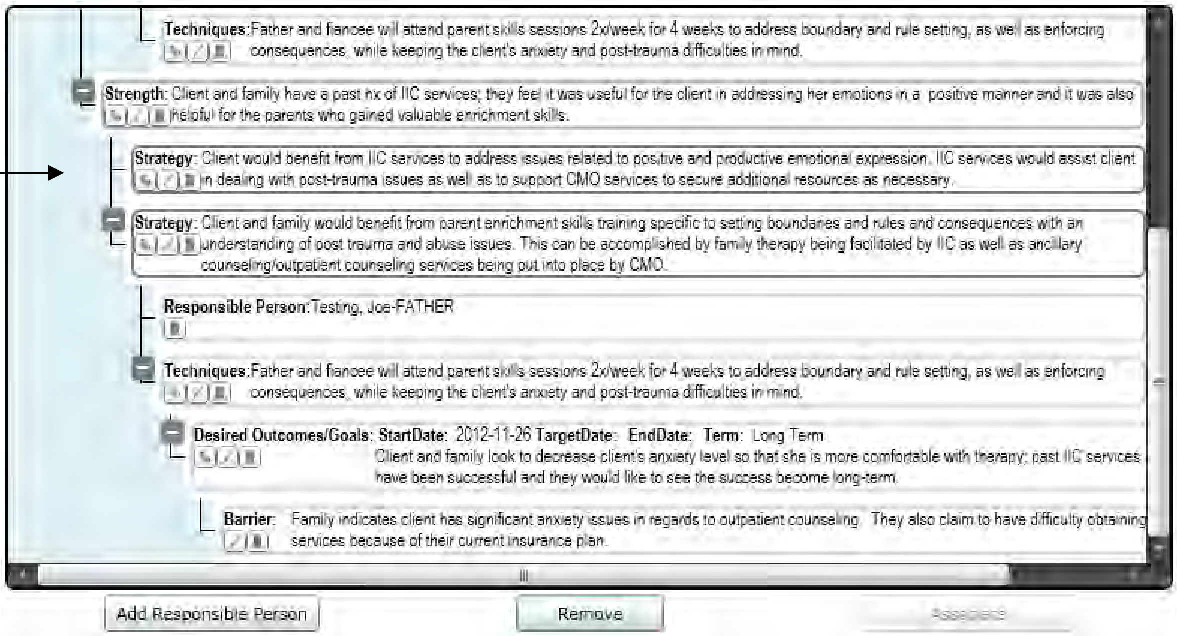
To associate to the next level in the Matrix, which is a Strategy, the user will click on the chain-link button under the Strength in the Matrix window or on the Associate Strategy button in the lower-right hand corner of the window.



The above example shows an associated Strategy; note that the Need and the Strength can both be edited from this window by using the pencil icon on each entry.

- Note – there is a Remove button available for use at the bottom of the Details window; it functions the same way that the trash can icon will function on each entry. By selecting an item in the tree, such as the Strength, the user can remove it from the Matrix. Users must remember, and will be reminded by the system via a warning message, each time they use the Remove or trash can button, that by removing an item from the tree they will also be removing any associated information below it. In the above example, removing the Strength would also remove the associated Strategy. The Strategy would again appear in the Available grid in the lower half of the Details window. Using the Remove functionality does not delete the entry from the Treatment Plan; it only removes it from the Matrix.

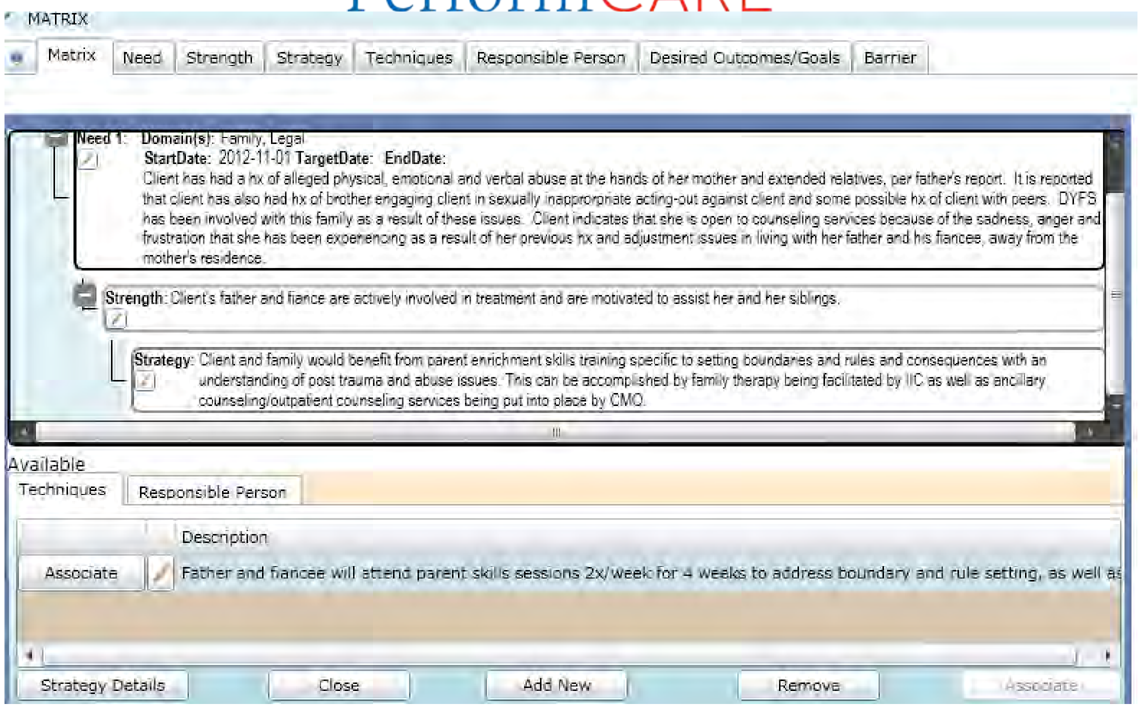
Users can associate more than one Strength, Strategy, Technique, etc. to a Need by continuing to add new entries and associating them.



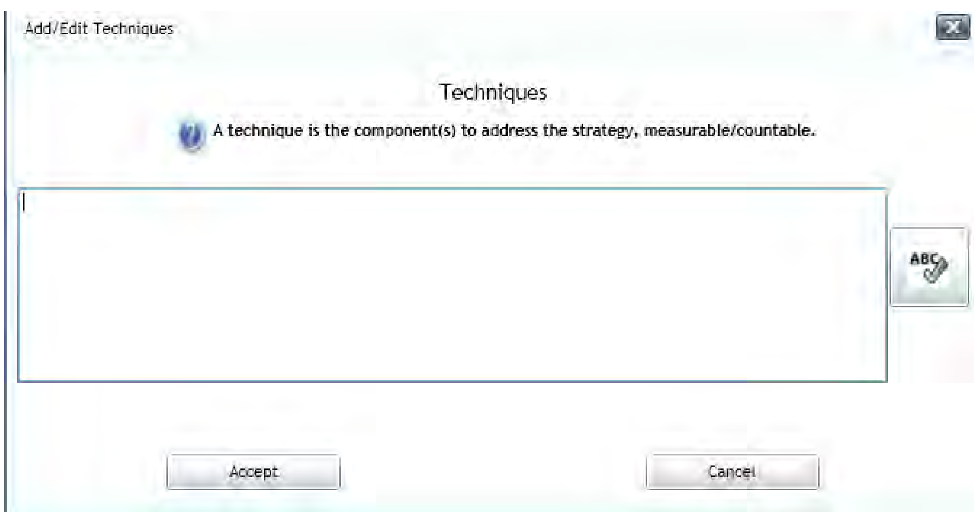
The above example shows two Strategies associated to the same Strength. Users will notice that the connection can be seen using lines that connect each level back to the Need it is ultimately associated to or it is addressing. A Need can have any number of associated Strengths, a Strength can have any number of associated Strategies, etc.

- Please note that when an item is edited, that edit carries across all instances that the item appears in the Matrix. For example, one Strength can be associated to multiple Needs. If the user edited one instance of the Strength, that change would show in all areas that the Strength is associated.

Once Strategies have been associated to the Strength (and ultimately, the Need), the user will associate Techniques and Responsible Person to the Strategy. Clicking on the chain-link icon next to the appropriate Strategy will bring the user to the Techniques and Responsible Person Details window.



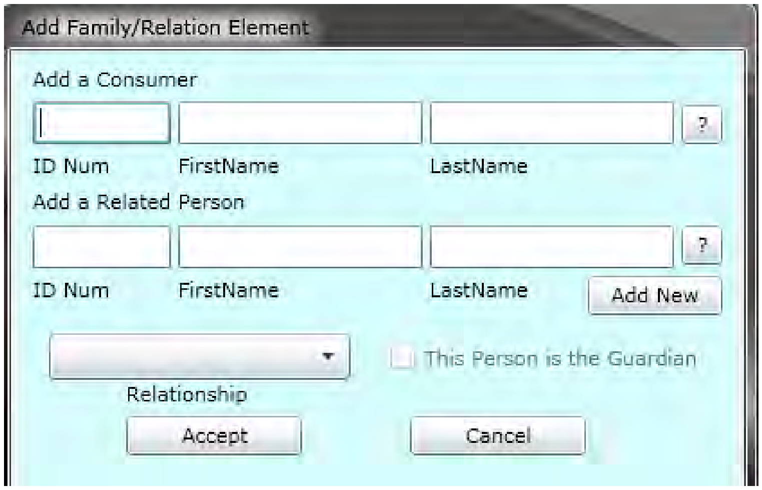
The above example shows the Need, an associated Strength, an associated Strategy and an available Technique. The user can associate the Technique by using the Associate button; the user can also add a new Technique by clicking the Add New button. The Add/Edit screen will appear once the button is selected.



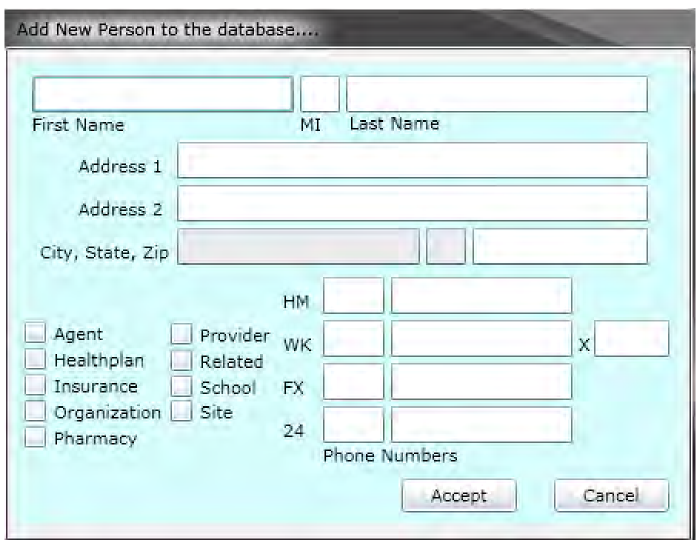
The help text listed at the top of the window states, "A technique is the component(s) to address the strategy, measurable/countable". Once the user enters the text and clicks Accept, the Technique will be added to the Available grid in the Details window.

The user can associate any Technique that appears in the Available grid; once a Technique is associated to the Strategy, the user can then move on to associating a Responsible Person (or People) to the Technique.

Users may find entries in the Available grid that they did not manually enter; these have been pulled into the Treatment Matrix from the Formal/Informal Supports tab of the youth's Face Sheet. Users also have the option of adding new individuals from this screen (as well as from the Responsible Person tab), but clicking the Add New button. Doing so will bring up the Add Family/Relation Element window.

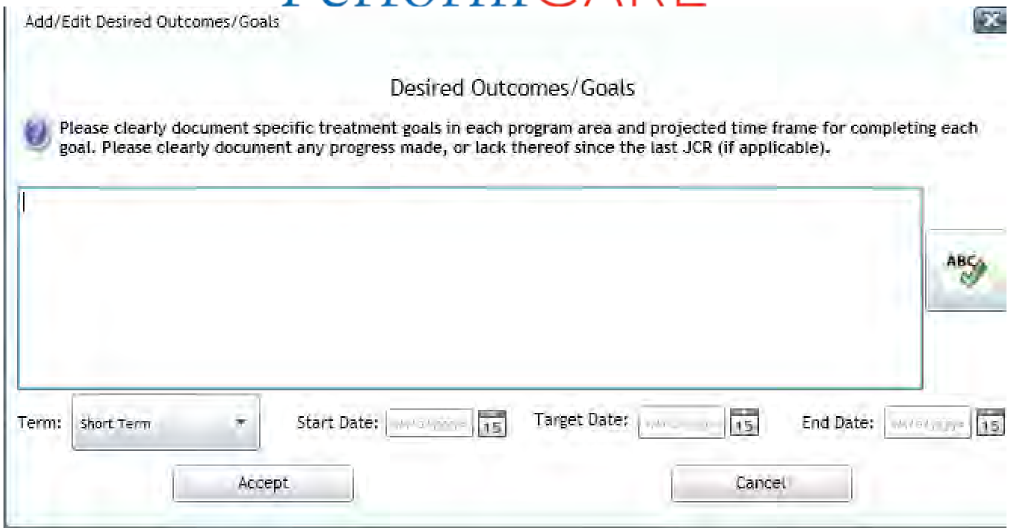


In order to add a new person to the Matrix (as well as the Formal/Informal Supports tab of the youth's Face Sheet), the user will click on the Add New button. Doing so will bring up the Add New Person to the Database window.



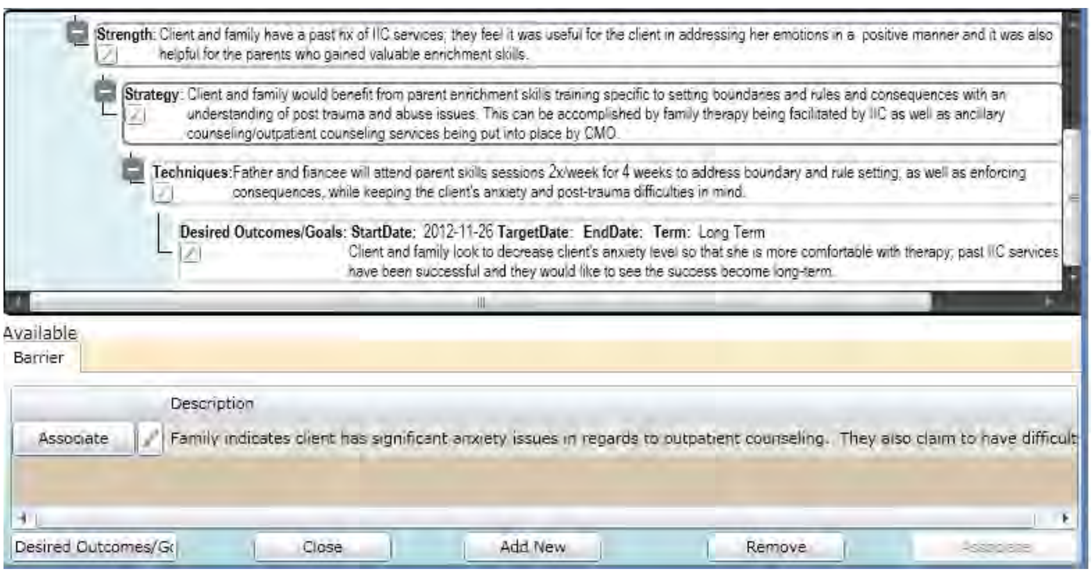
The user will need to enter the First and Last Name, Zip Code, at least one Phone Number and select a category for the new person. Once the user clicks Accept, the individual's information will be available to be associated to the Matrix and will be on the youth's Formal/Informal Supports tab once the plan is approved.

The next level in the Matrix that the user will associate is the Desired Outcomes/Goals (formally known as Unmet Needs in the previous version of the Treatment Plan). When the user goes to add a new Desired Outcome/Goal, the Add/Edit screen will open.



Users are expected to "clearly document specific treatment goals in each program area and projected time frames for completing each goal". Users are also expected to include the term – short or long term, start and end date. (Target Date is not required.)

The final area to associate in the Treatment Matrix is Barriers.



Clicking on the Associate button will associate the Barrier to the Desired Outcomes/Goals; clicking Add New will open the Add/Edit screen for the user to add a new Barrier to the system.

The Barrier is the final level of the Matrix so users will not see an active Associate button on this details screen and will not see an Associate button on the Barrier within the Matrix.

Techniques: Father and fiancee will attend parent skills sessions 2x/week for 4 weeks to address boundary and rule setting, as well as enforcing consequences, while keeping the client's anxiety and post-trauma difficulties in mind.

Desired Outcomes/Goals: **StartDate:** 2012-11-26 **TargetDate:** **EndDate:** **Term:** Long Term

Client and family look to decrease client's anxiety level so that she is more comfortable with therapy; past IIC services have been successful and they would like to see the success become long-term.

Barrier: Family indicates client has significant anxiety issues in regards to outpatient counseling. They also claim to have difficulty obtaining services because of their current insurance plan.

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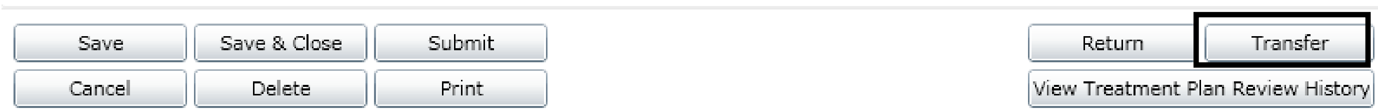
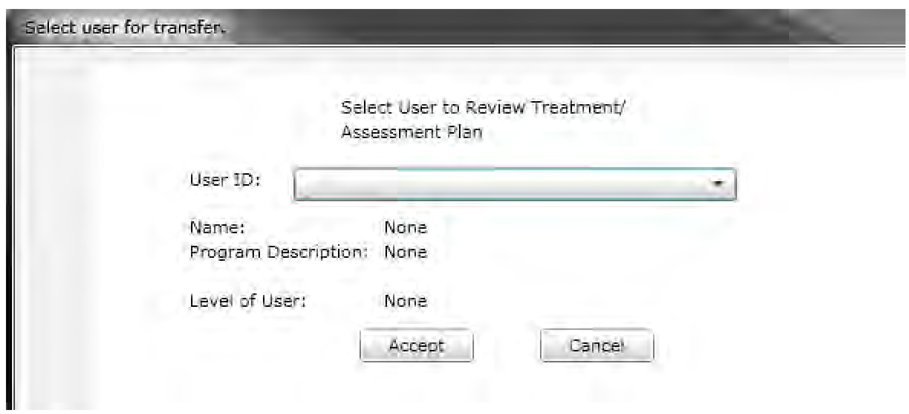
VI. How to Transfer an IIC or BA Treatment Plan for Review Internally

Users may want, or be required to, send their Treatment Plan to a supervisor within their agency for review prior to submitting to PerformCare. Users may also need to transfer a plan to another worker within their agency for further work. In either case, the user can transfer the plan using functionality within the plan itself; users may also use the Plan Approval screen.

To transfer using the functionality within the plan, users will navigate to the bottom of the plan to find the Transfer button.



Clicking on the Transfer button will bring up the Select User for Transfer window, where the user can select someone within their agency to transfer the plan to; keep in mind that any user that the plan is transferred to can submit it to PerformCare.



Users may also choose to use the Plan Approval screen; this may be helpful if a supervisor needs to submit a plan for a Licensed Clinician that is not available/out of the office. The Plan Approval screen can be accessed via the button bar on the left-side of a youth's record.

Once clicked on, the Plan Approval window will open. The user will select the Plan and then the Plan Type from the top grids. The only options that will appear are those plan types that are currently in the user's agency in draft form.

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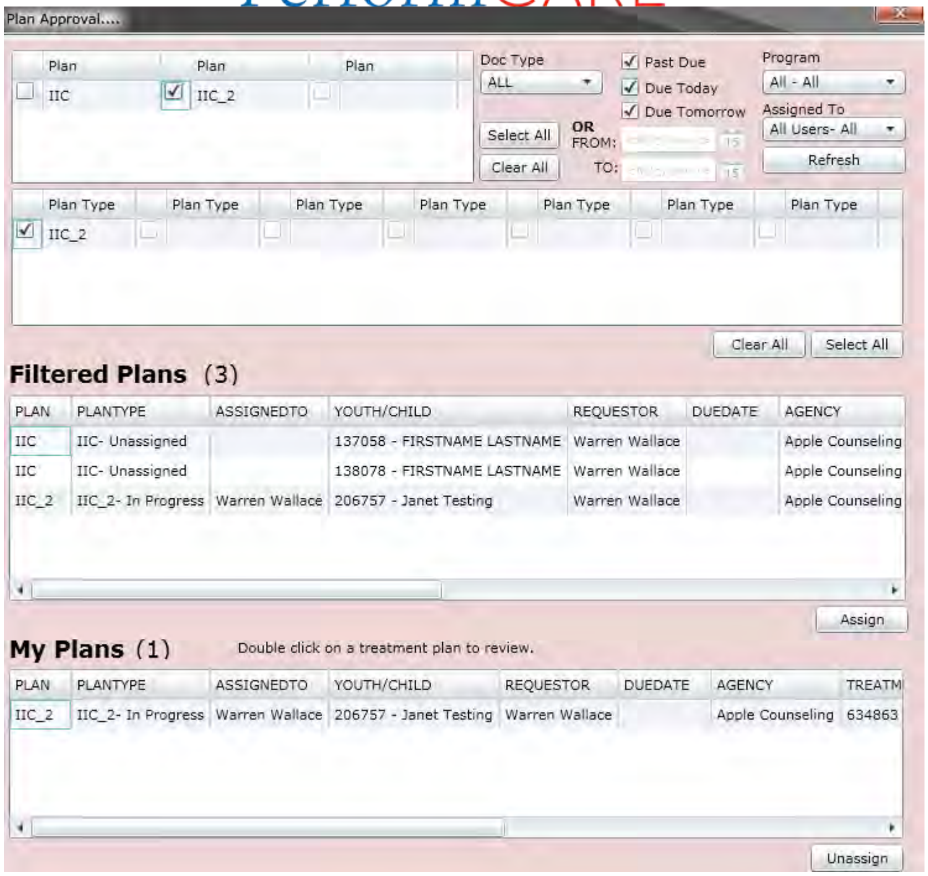

The user will find any IIC or BA Treatment Plans that have not been submitted to PerformCare in the “Filtered Plans” grid. To assign the plan to themselves, or to another user within the agency, users will click on the “Assign” button that is below the Filtered Plans grid. This will bring up a window, where the user will select the individual to assign the plan to. If the user assigns to themselves, they will then see the plan appear in the My Plans grid at the bottom of the window. Double-clicking on a plan in that grid will bring the user to that Treatment Plan.

VII. Changes for Care/Case Managers

Care/Case Managers who work with IIC/BA will now have the ability to see the approved IIC/BA Treatment Plans on their Welcome Page.

Above is an example of a Care/Case Manager's Welcome Page, with the Service Plans – Approved grid in the center of the screen. Users will find the IIC/BA Treatment Plans by the Plan Type column, which can be found by scrolling over to the right side of the grid. Clicking on the Youth ID will bring the user to the Treatment Plans and Assessments grid for the youth, where the user will find the approved IIC/BA Treatment Plan.

- Note – the CM is expected to review the IIC and/or BA Treatment Plan to ensure that the goals are consistent with those in the CM ISP. If the goals are not consistent, the IIC and/or BA plan cannot be returned for changes. A new plan will need to be submitted by the IIC/Licensed Clinician.