# **Out-of-Home Providers Overview**

Joint Care Review and the Youth Record

August 2023 –(02095)

PerformCARE®

Delivering **High-Quality** Service and Support

## **Objectives of this Training**

#### PerformCARE®

- CSOC, PerformCare and CYBER
- Workflow from Admission through Transition\*
- Welcome Page
- Locating the Youth Record/Assigning Youth to Staff
- Treatment Planning for OOH
- Understanding the Face Sheet
- Progress Notes/Doc Upload
- Historical Access/Reporting
- Contacting PerformCare
- References/Acronyms

### CSOC and PerformCare

The Children's System of Care (CSOC) is a division of the Department of Children and Families in the State of New Jersey. The Division services youth with emotional and behavioral health challenges, children with developmental and intellectual disabilities and their families, as well as youth who are struggling with substance use challenges.

The Children's System of Care is committed to providing these services based on the strengths and needs of the child and family in a family-centered, community-based

environment.





PerformCare is the Contracted Systems Administrator or the CSA for the System of Care administering the services included within the System of Care in New Jersey.

Our staff include Member Service Specialists who are the first point of contact within the call center, a full clinical team including a dedicated Review team a dedicated unit just for DCP&P involved youth, and units for Billing and Eligibility, Reporting, Training and Quality Improvement. CYBER is an Internet-based repository (database) with security to manage and control access to youth records by multiple providers.

CYBER contains health information about children in the State of New Jersey with behavioral health, developmental and intellectual disability and substance use challenges. It also contains the work and documentation of the many providers who assist those youth.

You as a provider will be using the functions of CYBER to document admission and transition of youth in your care.

# NJ Children's System of Care

Contracted System Administrator - PerformCare®

### **OOH Admission Process**

- Admit through YouthLink\* or CSA manually entered admission:
  - ✓ Receive full edit access to the Youth record (exception: Demographics tab)
  - ✓ View all historical plans, assessments, progress notes in youth record
  - ✓ Receive initial authorization (120 days)
  - ✓ Start of episode begins with admission date



\*See <u>References</u> for YouthLink documentation

### OOH Continued Stay Process

- All providers attend Child Family Team (CFT) meeting (Care Management, OOH, family, etc.)
- CMO documents CFT meeting in CFT progress note entered into youth record
- Submit Strengths and Needs Assessment within 30 days prior to JCR submission (S&N is not reviewed and cannot be returned)
- Start JCR at least 2 weeks before due date (every 90 days after initial)
  - ✓ Associate to Strength and Needs Assessment
  - Submit JCR to CMO
  - CMO submits to CSA
  - CSA reviews plan/assessment
  - OOH monitors for returned plans (Welcome page or plan approval screen)
  - On approval OOH receives continuing stay authorization (90 days)

### **OOH Transition Process**

- CFT meeting determines youth will transition to another OOH
- CFT progress note is entered by CMO approving Transition decision
- OOH upload TJCR Checklist and required documents into youth record Doc tab
   ✓ Use 'Document Upload Crosswalk' to determine appropriate documents
- Submit Strengths and Needs Assessment within 30 days prior to JCR submission (S&N is not reviewed and cannot be returned)
- Start Transition JCR at least 2 weeks before due date Submit TJCR to CMO / CMO submits to CSA
  - CSA reviews plan/assessment
  - OOH monitors for returned plans (Welcome page or plan approval screen)
  - On approval, OOH receives 90 day continuing stay authorization and TJCR creates an OOH referral
- Other OOH programs review referral and schedule to meet youth
- If youth is not admitted, continue to create <u>JCR</u> every 90 days for continuing stay
- Youth is admitted into another OOH
- Create DJCR with <u>discharge date on or after exit</u>

## TJCR Checklist – Document Upload

#### PerformCARE®

### https://www.performcarenj.org/pdf/provider/tjcr-referral-checklist.pdf

#### DOCUMENT UPLOAD REQUIREMENT CHECKLIST TRANSITIONAL JOINT CARE REVIEW (TJCR)

#### YOUTH NAME:

#### CYBER ID:

#### DATE OF SUBMISSION:

PLEASE THOROUGHLY REVIEW THE FOLLOWING INFORMATION: Immediately upon the TJCR treatment team meeting, the treating OOH provider shall complete and upload the following checklist along with the below identified required documents in order to assure that all necessary information is available for review at the time of the IOS determination. OOH provider should not submit the TJCR until all documents are uploaded and CMO enters their CFT Progress Note. TJCRs with incomplete documents will be returned.

#### MINIMAL REQUIREMENT:

- TJCR Document Upload Requirement Checklist (along with required uploaded documents)
- □ CFT Note (approving TJCR)
- OTHER REQUIRED DOCUMENTS (see italicized information for requirement criteria):
- Psychiatric Evaluation\* (within the last six months\*\*):
  - IS REQUIRED if youth is prescribed psychotropic medication;
  - > IS REQUIRED if youth had a psychiatric hospitalization within the last six months.
  - IS REQUIRED if youth is actively seeing a psychiatrist.
  - \*\*If the evaluation is more than six months old, CM must provide the evaluation along with an accompanying updated report from the treating psychiatrist. If youth is prescribed psychotropic medication, the report should specify current diagnosis, current medication name/dosage, and noted response to medication.

\*A Neuropsychological Evaluation is acceptable in lieu of a psychiatric evaluation if youth is IDD eligible. Please see IDD Specific Evaluations and Reports on page 2 for requirements.

- Specialty Evaluations (within the last twelve months):
  - > NOT REQUIRED if specialty criteria is not applicable to youth.
  - > IS REQUIRED if youth presents with fire setting or sexual behavior needs and meets criteria "b" below:
    - a. NOT REQUIRED if youth is currently being treated at a specialty treatment setting pending transition to another CSOC OOH treatment setting for the same treatment issue (e.g. step down treatment for sexual behavior). Instead, the treating provider may enter their treatment recommendations/risk level directly within the TJCR
    - b. IS REQUIRED for all youth referred from a non-specialty treatment setting due to sexual behavior or fire setting OR youth referred from a specialty treatment setting if there is a new behavior that did not previously warrant a specialty evaluation
  - Fire Setting Evaluation (w/in last 12 months; must include documented risk level)
  - Psychosexual Evaluation (w/in last 12 months; must include documented risk level)

- □ Substance Use (SU) Assessment (within last 30 days) DO NOT UPLOAD SU ASSESSMENTS!
- Substance Use Consent Form
- IS REQUIRED if the youth presents with a substance use need.
- Due to disclosure protection under 42-CFR Part II, CMO is required to submit substance use evaluations via fax to PerformCare at (877) 949-6590 along with the required Substance Use Consent Form which is located at <u>http://www.performcarenj.org/provider/forms.aspx</u>. Please check box if assessment was faxed so that PerformCare is aware that one was completed.
- IDD Specific Evaluations/Reports
  - IS REQUIRED if youth is deemed IDD Eligible:
    - Report(s) that capture the youth's level of functioning and special needs within the domains of communication, mobility, life skills, cognition, sensory, and/or special equipment. Such reports may include, but are not limited to: psychological evaluation, IEP, FBA, Behavior Support Plan, Adaptive Functioning Assessment, etc.
    - C2C Application (required if youth is deemed IDD Eligible)
    - Child Adaptive Behavior Summary (CABS) (required if youth is deemed IDD Eligible or if the DD module was completed within the OOH Referral Request/SNA as part of the TJCR. CABS must have been completed within the last six months)
    - Neuropsychological Evaluation w/in last 6 months\* (may be submitted in lieu of Psychiatric Evaluation):
      - IS REQUIRED if youth is prescribed psychotropic medication;
      - > IS REQUIRED if youth had a psychiatric hospitalization within the last six months.
      - > IS REQUIRED if youth is actively seeing a neurologist.
      - \*If the evaluation is more than six months old, CM must provide the evaluation along with an accompanying updated report from the treating neurologist. If youth is prescribed psychotropic medication, the report should specify current diagnosis, current medication name/dosage, and noted response to medication.
- □ Other Reports/Evaluations (as applicable):
  - Most recent IEP Cover Sheet which verifies classification type (required if educationally classified).
  - Medical reports (required if youth has a medical condition such as pregnancy, diabetes, allergies, cardiac condition, seizures, etc. Report must specify any special needs and accommodations that the youth requires).
  - Hospital Intake Assessment/Discharge Summary (if hospitalized within the last 6 months).
  - Court order(s) related to treatment\*
  - Original BPS or Psychological Evaluation (that was used for current OOH placement)
  - Other documents that were utilized for purposes of IOS determination:

\*IF THE YOUTH IS INVOLVED WITH COURT, IN ADDITION TO UPLOADING APPLICABLE COURT DOCUMENT(S), PLEASE CLEARLY DOCUMENT THE STATUS OF COURT INVOLVEMENT, INCLUDING, BUT NOT LIMITED TO, COURT HEARINGS, LEGAL CHARGES, PROBATION INFORMATION, COURT ORDERS, SUBPOENAS, ETC. WITHIN THE TJCR.

#### ©2023 PerformCare

### Document Upload Crosswalk

The **Document Upload Crosswalk** is helpful in identifying and determining the type and subtype of the document being uploaded.

See <u>References</u> for the Instructional Guide to Document Upload

| OOH DOCUMI  | ENT UPLOAD C      | ROSSWALK                              |
|---|-------------------|---------------------------------------|
| DOCUMENT  | CYBER DOC<br>TYPE | CYBER DOC SUB-TYPE                    |
| BPS (if not in CYBER) <i>or</i> CCIS<br>Psychosocial Assessment                   | Clinical          | Community BPS Assessment              |
| Neurology Update**  | Clinical          | Other Applicable<br>Reports/Documents |
| Neuropsychological Evaluation   | Clinical          | Other Applicable<br>Reports/Documents |
| OOH Referral Request<br>(Document Upload Requirement<br>Checklist)                | Clinical          | Other Applicable<br>Reports/Documents |
| Other applicable<br>evaluations/reports   | Clinical          | Other Applicable<br>Reports/Documents |
| Psychiatric Update***   | Clinical          | Other Applicable<br>Reports/Documents |
| Transition Joint Care Review (TJCR)<br>(Document Upload Requirement<br>Checklist) | Clinical          | Other Applicable<br>Reports/Documents |
| Substance Use Assessment  | N/A               | N/A                                   |

\*\*Required if youth is deemed IDD Eligible or if the DD module was completed within the OOH Referral Request/SNA as part of the TJCR.

\*\*\*Required if Psychiatric/Neuropsychological Evaluation is more than six months old

## PerformCARE®

## OOH Discharge Process (out of CSOC)

- CFT Meeting determines youth will transition out of CSOC OOH
- CFT Note is entered by CMO approving transition out
- Submit Strengths and Needs assessment within 30 days prior to JCR submission (S&N is not reviewed and cannot be returned)
- Create Discharge Joint Care Review with discharge date on or after actual exit
- Submit DJCR with associated Strengths and Needs assessment to CMO
  - CMO submits to CSA
  - CSA reviews plan/assessment
  - OOH monitors for returned plans (Welcome page or plan approval screen)
  - On approval Youth is transitioned out of CSOC
    - Youth remains open for 14 calendar days
    - Episode ends with Transition/Discharge date on plan

### Welcome Page

PerformCARE®

After logging in, OOH users land on the Welcome Page. The Welcome Page within CYBER allows users the ability to view OOH activity.

| NJ Children's System (<br>Contracted System Administrator - Perfor   | Welcome to CYBER           ImcCare*         User Name:         User Group: COH   | Lógóut  |
|--|--|---|
| Security Administrator<br>Youth / Child Search<br>My. Active Youth<br>Out of Home<br>Provider Details<br>Message Functions<br>System Functions<br>Reporting<br>Historical Access<br>Anomaly Management | <ul> <li>Ouid Search</li> <li>First Name</li> <li>Joint Care Review - In Progress</li> <li>Joint Care Review - In Progress</li> <li>Ste Name</li> <li>Youth/Child ID</li> <li>First Name</li> <li>Last Name</li> <li>Author</li> <li>Child Family Team Date</li> <li>Create Date</li> <li>Plan Type</li> </ul> • This is the CYBER Welcome screen that opens after logging into the system.* • The Welcome Screen is the main access point for many of the different functions that are contained within CYBER. • Login level of security determines access. • To get from one place to another in CYBER requires the user to point and click with their mouse on the appropriate menu item, link or button. | Refresh Totals         Joint Care Review         In Progress(0)         Submitted(0)         Awaiting Approval(0)         Approved(0)         Rejected(0)         Aging Report(0)         Assessments         Authorizations         Eligibility         YouthLink View         Deactivated Users |
|  | © 2020 - CyberAng 1.0.0.396-06 • FAQ's • CYBER Updates • Help • Customer Service Request • Training Information  |   |

\*User views, links and buttons may vary depending on the user type and security levels.

©2023 PerformCare

### Welcome Page Links

Joint Care Review In Progress(1) Submitted(0) Awaiting Approval(0) Approved(0) Rejected(0) Aging Report(0) Assessments In Progress() Authorizations Expiring() Admission Summary() Eligibility Added Eligibility()

Expiring Eligibility()

Terminated Eligibility()

3560 Auto Term()

YouthLink View

New To YouthLink()

New to Prov Queue()

Accepted()

Scheduled() Recently Admitted()

Approved CON()

Not Approved CON()

Deactivated Users

Progress/Assigned Work()

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

### Joint Care Review

- Displays status of plans in progress through submission
- Aging Report displays Coming Due and Overdue plans

#### Assessments

• Displays assessments in progress

### Authorizations

• Displays authorizations that will expire in the next 30 days

### Admissions

• Admission summary for the program(s) specific to the user

### Eligibility

Displays youth eligibility

### YouthLink View

• Displays statuses of referrals on YouthLink

**Deactivated Users (**only visible to Supervisors and above)

### Welcome Page Links

#### PerformCARE®

In the top left of the Welcome Page, the Security Administrator information is displayed including all the Security Administrators' names and phone numbers.

Youth/Child Search is an alternate search option once you have left the Welcome Page.

**My Active Youth** is a function that allows an agency to assign specific youth to specific staff. Once youth are assigned, the staff need only click the button to view his/her assigned list.

**Out of Home** this area opens YouthLink, Messages and the Out-of-Home Provider map

**Provider Details** opens PIF, Annex A and other provider information

**Message Functions** displays YouthLink messages reflecting status changes for referrals

**System Functions** opens the Manage Access area where users can reset their passwords or Security Administrators can manage user IDs

**Reporting** is an area available to security Level 3 users only and contains existing reports for their agency or provider type

**Historical Access** is an area where users can view and print transitioned youth records (youth that are no longer open to the agency)

**Anomaly Management** lists various anomalies in the youth records such as missing address data, open to the provider but no Medicaid, no progress notes, etc.

Youth / Child Search

Security Administrator

My Active Youth

Out of Home

```
Provider Details
```

Message Functions

System Functions

Reporting

**Historical Access** 

Anomaly Management

## Headers and Footers

#### PerformCARE®



©2023 PerformCare

### Locating the Youth Record

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



• Youth/Child Search on the Face Sheet

| Return To Main | First Name | Last Name | Gender | Birth Date | Age | SSN | Youth/Child ID |        |       |                     |
|----------------|------------|-----------|--------|------------|-----|-----|----------------|--------|-------|---------------------|
| Face Sheet     |            |           | *      | MM/DD/YYYY |     |     |                | Search | Clear | Active Agency Youth |

©2023 PerformCare

### Active Agency Youth

PerformCARE<sup>®</sup>

Go to the **Youth / Child Search** and click **Active Agency Youth**. This will display a list of all youth open to the Agency.

|                                    |                    |               |                  |                |                 |                  | Cle            | ar 🗸   | Active  | Agency `     | 101 |
|------------------------------------|--------------------|---------------|------------------|----------------|-----------------|------------------|----------------|--------|---------|--------------|-----|
| Active Agency                      | Youth              | _             |                  |                |                 |                  | /              | /      |         |              | ×   |
| Multiple record<br>the search. 142 | is match the searc | ch pattern. S | select the desir | ed record from | n the list belo | w or click Close | and refine     |        | 🔒 Print | Clear Search |     |
| First Name                         | Last Name          | MI            | Gender           | DOB            | Age             | SSN              | Youth/Child ID | Opened | Program | Read Only A  |     |

The Active Agency Youth is a list of all youth open to the agency. The column headings can be sorted or filtered, and the Print button allows the list to be exported and printed. Double-clicking on any row in the Active Agency Youth will open the Face Sheet for that youth's Electronic Health Record.

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

A designated user at your agency would:

- Review new Active Agency Youth
- Assign new youth to specific users
  - 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.

### Suggested Workflow for Youth Management

#### PerformCARE®

- 1. Review Agency Active Youth using the icon
- 2. Click the youth record to open
- 3. Click Provider tab when the record opens; click Add Provider

| Dashboard    | Demographics         | Episodes P | Provider Supports | Dx/Med E    | Eligibility | Insurance   | Legal | Doc*       |          |       |               |                |
|--------------|----------------------|------------|-------------------|-------------|-------------|-------------|-------|------------|----------|-------|---------------|----------------|
| Active Provi | ders   All Providers | _          |                   |             |             |             | -     |            |          |       | Clear Searc   | h Add Provider |
| User         | First Name           | Last Name  | Туре              | Agency Type | р           | rogram Name |       | Start Date | End Date | Email | Agency Med ID | Phone          |

4. You must know and type the name and of the OOH user to add the Provider to the Youth/Child Record. Begin typing the name and it will appear in the Provider field.

| dd Provider To Youth/ | Child Record | × |
|-----------------------|--------------|---|
| Provider              |              |   |
| Program               |              |   |
|                       | No Data      |   |
| Start Date            | End Date     |   |
|                       | Accept       |   |

5. Select the specific Program that the youth and user are both connected to. Enter the Start Date only.

6. Click Accept. The User can now access the youth from their My Active Youth list.

### Treatment Plans (Joint Care Review)

To create a new Treatment Plan, users will use the 'Select Treatment Plan or Assessment type to create' drop down menu above the grid to select the document to create – a Treatment Plan or Strength And Needs Assessment. Once a selection is made, the user will click the Add New button, which will create the new document.

| Select Treatment Plan    | or Assessment type to creat  | e:                  | Select an Assessment/Tre | atment Plan           | ÷        | Add New | Q           |
|--------------------------|------------------------------|---------------------|--------------------------|-----------------------|----------|---------|-------------|
| Double click an evicti   | na according to append the   | Poujow/Edit         | OOH - Treatment/Servic   | e Plan                |          |         |             |
| Double click all existin | ng assessment to open it for | Neview/Eait         | Strengths And Needs As   | sessment              |          |         |             |
| Assessment Type          | Assessment Sub Type          | Assessment /CFT Dat | te Author                | Submitted to CSA Date | Assessme | nt ID   | Create Date |

When the plan opens, the user can select the Treatment Type. The four plan types are listed in the drop down menu.

| TREATMENT PLAN TYPE SELECTION |   |
|-------------------------------|---|
| Treatment Type:               | OOH - Joint Care Review 🔷   |
|                               | OOH - Discharge Joint Care Review<br>OOH - Joint Care Review<br>OOH - No CSA Review<br>OOH - Transition Joint Care Review |

### **Treatment Plan**

Treatment plans, as well as assessments, are in a *tabular* format. The user can click through each tab from left to right to complete the plan. Moving from tab to tab will auto save the plan.

| Treatment Plan Type Selection       Copy Treatment Plan       Demographics       Youth Vision/Family Vision/Fami | on       Strengths       Needs       Strategies       Barriers       Unmet Needs       Diagnosis       Medications       Service Request       Support Attendees       Notepad       Facility Information         •       Treatment Plan Type Selection       •       Copy Treatment Plan         •       Demographics       •       Pouth Vision/Family vision         •       Strengths       •       Needs         •       Needs       •       Strategies |
|--|--|
| TREATMENT PLAN TYPE SELECTION  | <ul> <li>Barriers</li> <li>Unmet Needs</li> <li>Diagnosis</li> <li>Medications</li> <li>Service Request</li> <li>Support Attendees</li> <li>Notepad</li> <li>Facility Information</li> <li>Exam</li> <li>Target Behaviors/Discharge</li> </ul>   |

©2023 PerformCare

The Copy Treatment Plan tab allows the user to select a previously approved plan to copy from. The plan must have been created by the agency during the current episode.

Choosing to copy a previous plan will copy almost the entire former plan into a new plan. The diagnosis will not be copied and must be actively selected and entered in the Diagnosis tab.

It is the user's responsibility to review and edit the copied plan and make any necessary changes so that the information is accurate and current; <u>copied plans with</u> no updates will be returned.

| TYPE       | CREATED DATE | AUTHOR | SUBMITTED | DATE |  |
|------------|--------------|--------|-----------|------|--|
| OOH - TICR |              | 1      |           |      |  |
| OOH - JCR  |              |        |           |      |  |
| DOH - ICR  |              |        |           |      |  |
| DOH-JCP    |              |        |           |      |  |
| DOH - ICR  |              |        |           |      |  |

### PerformCARF®

## **Demographics** Tab

**Demographics** tab will automatically populate information about the youth, Parent/Guardian and Care management from the youth's Face Sheet and record.

The **Care Manager field** may be a drop-down menu; this will occur if the youth has two open Care Managers in their record. In this case, the user should ensure that the current Care Manager is selected.

The '**Refresh**' button is gray until the plan is saved once; then it will become available. If changes to the face sheet are made before the plan is submitted, the 'Refresh' button may be used to bring recently updated information from the face sheet into the plan.

The bottom of the tab contains the two fields that are editable (and required) – the **Child Family Team** Date (CFT Meeting) and the Assessment **Completion Date**.

| Care Management Entity | LIDM . |  |
|------------------------|--------|--|
| Care Manager           | 1      |  |
| Care Manager Phone     |        |  |

| Assessor Phone             |            |      |
|----------------------------|------------|------|
| Assessor Email             | -          |      |
| CFT Date                   | 08/07/2023 |      |
| Assessment Completion Date | 08/07/2023 | 1111 |



Andicaid 2

Refresh

Guardian Relationshi

DEMOGRAPHICS

Child Name

Address City

County

State

Parent/Guardian

### Youth Vision/Family Vision

**Youth Vision/Family Vision** should include long-term goals for the youth, family and what the treatment team is working towards; if the team is working towards discharge, goals that need to be accomplished in order to discharge the youth should be included here. (The youth's future plan should be specified here; if there is no family involvement, it should reflect the youth's vision/long-term plan.)

The End Date is not a required field but can be completed if there is an anticipated discharge date; Start Date is a required field and must be current.

|            | FAMILY VISION |          |            |  |  |  |
|------------|---------------|----------|------------|--|--|--|
| Start Date | 02/28/2023    | End Date | 05/28/2023 |  |  |  |
| 1          |               |          |            |  |  |  |
|            |               |          |            |  |  |  |

| 1 |  |
|---|--|
|   |  |
|   |  |

Note the corner of the text field – this indicates the field will expand as you type.

#### PerformCARE®

### Strengths

Include the strengths of the youth as noted by each member of the treatment team; may also include the strengths of any members of the treatment team.

Strengths should be positive qualities, skills, or abilities that can be built upon to attain the vision and address the needs; these strengths must be current strengths.

Strength Begin Date and Person Linked to Strength are required fields; Strength End Date is optional, if there is an anticipated discharge date that can be entered here.



| Describe Strength:         |            |   |  |
|----------------------------|------------|---|--|
| Strength Begin Date:       | MM/DD/YYYY |   |  |
| Strength End Date:         | MM/DD/YYYY |   |  |
| Person linked to Strength: |            | + |  |
|                            |            |   |  |
|                            |            |   |  |

*Person Linked to Strength* is a table that takes time to load. Type first three letters of the person's first name and wait for the list to appear.

### Adding New Person

To add a new person linked to Strengths, click the plus sign '+', then when the 'Add New Person' screen opens, enter at minimum:

- 1. First Name
- 2. Last Name
- 3. Check one 'classification' check box
- 4. Enter one phone number

| Person linked to Strer | ngth: | + |
|------------------------|-------|---|
|                        |       |   |

| First Name                                       |                                 | Mi Last Name         |       |
|--|---------------------------------|----------------------|-------|
| Address 1<br>Address 2<br>City, State, Zip       |                                 |                      |       |
|  |                                 | Phone Nu             | mbers |
| Agent Healthplan Insurance Organization Pharmacy | Provider  Related  School  Site | нм<br>WK<br>FX<br>24 | X     |

Needs

This area should reflect the priority needs that will be addressed as determined by the Child Family Team; each need must be entered separately – they cannot be combined.

Include the needs that are identified on the Strength and Needs Assessment; should be specific as to the behaviors that are to be addressed for the youth to attain the vision.

The Description of Need, Start Date, at least one Domain and Progress are all required fields; Progress must be in-line with the rest of the information documented in the SNA and JCR. The End Date may be entered if the need has been met; the target date may be the date the treatment team is planning to complete services to address the need, or it may be the planned discharge date.

It is important that providers elaborate on the status of each need so it is clear when a youth has achieved a task to the best of their ability and will begin to focus on another area of need.

| dd/Edit Needs          |                             |                       | ×  |
|------------------------|-----------------------------|-----------------------|----|
| Description of Need:   |                             |                       |    |
|                        |                             |                       | į, |
| Start Date:            | End Date:                   | Target Date:          |    |
| MM/DD/YYYY             | MM/DD/YYYY                  | MM/DD/YYYY            |    |
| Domains:               |                             |                       |    |
| Cultural/Spiritual     | Medical Health              | Social/Recreational   |    |
| Educational/Vocational | Other                       | Substance Use         |    |
| ] Family               | Psychological/Mental Health | System Barriers       |    |
| 🗆 Legal                | □ Safety                    | Transitional Planning |    |
| Living Arrangements    |                             |                       |    |
| Progress:              | ±1                          |                       |    |



## Strategies

### PerformCARE®

Users must first enter a **Strength** and **Need** to create the **Strategy**. Select the Strength to be utilized, the Need that will be addressed, and then enter in a description of the Strategy.

| STRATEGIES |       |            |            |             |             |          |                    |       |
|------------|-------|------------|------------|-------------|-------------|----------|--------------------|-------|
| STRENGTHS  | NEEDS | START DATE | END DATE   | TARGET DATE | DESCRIPTION | PROGRESS | RESPONSIBLE PERSON |       |
|            |       |            |            |             |             |          |                    | 1 mil |
|            |       |            |            |             |             |          |                    |       |
| -          |       |            |            |             |             |          |                    |       |
|            |       |            | Add Strate | gies        |             |          |                    |       |

There <u>must be a strategy entered for every need</u> <u>entered</u>; each strategy must be entered individually.

Include information on what will be implemented to build on the youth's strengths in order to address the needs and help the youth achieve the vision. Users can also include what type of supports – formal and informal – will be utilized to achieve the vision.

| Specify Strengths:        |           |            |              |           |
|---------------------------|-----------|------------|--------------|-----------|
|                           |           |            |              |           |
|                           |           |            |              |           |
| D                         |           |            |              |           |
| Specify Needs:            |           |            |              |           |
|                           |           |            |              |           |
| 0                         |           |            |              | 1         |
| <u> </u>                  |           |            |              |           |
| escription of Strategies: |           |            |              |           |
|                           |           |            |              |           |
|                           |           |            |              |           |
|                           | End Date: | MM/DD/YYYY | Target Date: | MM/DD/YYY |
| Start Date: MM/DD/WW      |           |            |              |           |
| Start Date: MM/DD/WW      |           |            |              |           |

#### PerformCARE®

### Barriers

**Barriers** should reflect anything that would impede the implementation of strategies and/or make addressing the Needs difficult; if a new service is being requested on the plan and its purpose is to address the barrier, that information can be included here as well.

<u>Barriers are not required</u> on the plan and should only be utilized if barriers are present. (An example of a barrier would be lack of parent transportation or lack of family involvement.)

| BARRIERS    |            |                 |               |
|-------------|------------|-----------------|---------------|
| DESCRIPTION | RESOLUTION | DATE IDENTIFIED | DATE RESOLVED |
|             |            |                 |               |
|             |            | Add Barrier     |               |

| Barrier Description:   |     |
|--|-----|
|  |     |
|  |     |
| Barrier Resolution:  |     |
|  |     |
| Date Barrier Identified:         Date Barr           MM/DD/YYYY         IIII | vvv |

#### PerformCARE®

### **Unmet Needs**

**Unmet Needs** may include what need is not being focused on at this time and what is preventing it from being addressed.

<u>Unmet Needs are not required</u> on the plan and should only be utilized if there are needs not being addressed but need to be documented/tracked. These may be addressed in the future.

| UNMET NEEDS             |                    |                 | _             |
|-------------------------|--------------------|-----------------|---------------|
| UNMET NEEDS DESCRIPTION | UNMET NEEDS REASON | DATE IDENTIFIED | DATE RESOLVED |
|                         |                    |                 |               |
|                         |                    |                 |               |
|                         |                    | Add Unmet N     | Veed          |

| and the second second       |            |  |
|-----------------------------|------------|--|
| Inmet Need Description:     |            |  |
|                             |            |  |
| Inmet Need Reason:          |            |  |
|                             |            |  |
| Date Unmet Need Identified: | MM/DD/YVVY |  |
| Unmet Need Date Resolution: | MM/DD/YYYY |  |

### Diagnosis

**Diagnosis** should reflect the most current diagnosis within the last 12 months.

The **Diagnosing Clinician**, **Date Diagnosis Rendered** and **Diagnosis** are all required fields.

To copy a diagnosis, expand and select a diagnosis in the top grid and click 'Copy Diagnosis'.

To add a diagnosis, click on the '+' button. This will bring up a search window, where users can search for the appropriate code using either the code itself or the description (partial searches are accepted).



OK

Cancel

### **Medications**

**Medications** tab has three required questions that must answered Yes, No, or Unknown.

#### 1. Add Medication

Clicking 'Add Medications' will open the 'Add/Edit Medication Comment for a Treatment' window.

Users add new medications that show in the Available Medications box.

2. Associate added medication

Once a new medication is added, selecting it and clicking Associate will include the new medication on the plan.



#### PerformCARF®

in dosages.

#### PerformCARE®

### Service Request

#### Service Request is not a required section.

Continued stay within the facility does not need to be requested; it is assumed that if the user has submitted a routine JCR that the youth will remain admitted in the current program.

Service Request should not be included in a Discharge JCR because the youth is being discharged from care there are no additional services that should be requested.

Service Request can be used as needed. If entered, a Service Request must be associated to a Need and a Strategy in the plan.



| Specify Need               |            |   |
|----------------------------|------------|---|
| Associate Strategy         |            | 1 |
| Medicaid ID                | Search     |   |
| Provider                   |            |   |
| Service Code               |            |   |
| Frequency                  |            |   |
| Start Date:                | 09/08/2023 |   |
| End Date:                  | 12/06/2023 |   |
| Units                      |            |   |
| Per Unit<br>Cost(optional) |            |   |
|                            |            |   |

## TJCR Specific - Search for OOH Providers

When selecting a TJCR an additional tab appears - **Search for OOH Providers** – which allows the current OOH provider to choose other providers based upon the CFT discussion/agreement. Selected providers here are not a guaranteed match; the match is based upon the youth's age, gender and clinical needs. The information provided in this tab does assist the clinical reviewer in assessing the type of services that are being sought.

- Select the Intensity of Service and click Search Providers button. All providers in that IOS will be displayed.
- Click the row of the provider in the IOS Search
- Click Add Provider
- The Provider will be displayed in the Recommended Providers box below.

| SEARCH FOR O | OHPROVIDERS          |   |                                    |
|--------------|----------------------|---|------------------------------------|
|              |                      |   | Search For Providers               |
|              | Intensity of Service |   | Search Providers                   |
| rovider Name | Туре                 | CSAP-IDD<br>Detention Alternative Program   | Phone                              |
|              |                      | Detax<br>EDR.HT<br>EDRU<br>Group Hame<br>Group Hame/Level 1 for I/DD<br>Group Hame/Level 2 for I/DD<br>Intensive PCH for I/DD<br>Intensive Residential Treatment Services | No data to show                    |
|              |                      | Intensive-IDD<br>OCH IDD Respite<br>Out of State Program<br>Out of State Residential for I/DD<br>Psychiatric Community mome<br>Psychiatric Community Momes for I/DD       | Add Provider Recommended Providers |
| rovider Name | Type                 | Residential Treatment Center<br>Residential Treatment Center Behavioral Health/Substance Use<br>Residential Treatment Center for BH/DD                                    | Phone                              |

#### PerformCARE®

### Support Attendees

Support Attendees tab allows for entry of all members who were invited/attended the last Child Family Team Meeting. This tab must be updated in every JCR.

Type the first few letters into the **Attendee Name** field and wait for the list to pull up the menu names; <u>Title</u>, and **Agency** are required text fields; any text may be entered if the attendee is not a provider). <u>Date Notified and How</u> <u>Notified are required</u>.

A new individual can be entered in the Strengths tab if they are not on the list.

| TEAM MEMBER | ATTENDING MEETING | ATTENDEE NAME | ATTENDEE TITLE | ATTENDEE AGENCY | RELATIONSHIP | DATE NOTIFIED | FORMAL SUPPORT | HOW NOTIFIED |
|-------------|-------------------|---------------|----------------|-----------------|--------------|---------------|----------------|--------------|
| YES         | YES               |               |                |                 |              |               | YES            | EMAIL        |
| YES         | YES               |               |                |                 |              |               | NO             | EMAIL        |
| YES         | YES.              |               |                |                 |              |               | YES.           | EMA/L        |
| YES         | YES               |               |                |                 |              |               | YES            | EMAIL        |
| YES         | YES               |               |                |                 |              |               | YES            | EMAIL        |
| YES         | YES               |               |                |                 |              |               | YES            | EMAIL        |

| _                        | 🗍 Team Member  | _ |
|--------------------------|----------------|---|
| Attendes Name:           |                | [ |
| Attendes Titlé:          |                |   |
| Attendee Agency;         |                |   |
| Relationship:            | 1              |   |
|                          | Formal Support |   |
| Date Notifed of Meeting: | MM/DD/YYYY     |   |
| How Notified:            | 1              |   |
|                          |                |   |

**Notepad** tab is used for communication with PerformCare as the plan is being reviewed.

**Returned Plans** - if the plan is returned to the user for additional information, the Reviewer at PerformCare will list what is missing or what is necessary to include in the plan for it to be approved and services authorized. A progress note will also be entered with the same information.

OOH users can add details in the Notepad to support the request for services, before submitting a plan.

| NOTEPAD      |         |                 |
|--------------|---------|-----------------|
| DATE ENTERED | COMMENT | AUTHOR          |
|              |         | No data to show |
|              |         | Add Note        |

©2023 PerformCare

## **Facility Information**

**Facility Information** is for information about the OOH user's agency where the youth is currently admitted, including an anticipated discharge date from the program.

<u>Please note</u>: All Dates are required except for Actual Transition Date until Transition.

A Treatment Team Meeting Date <u>must be</u> <u>entered</u> and must occur after the last JCR and prior to submission of the current JCR.

| Facility Name:                         |                           |                |                 |                |
|--|---------------------------|----------------|-----------------|----------------|
| Facility Type:                         |                           |                |                 |                |
| Facility Site Name:                    |                           |                |                 |                |
| Facility Medicaid #:                   |                           |                |                 |                |
| Date Admitted:                         |                           |                |                 |                |
| Date of Last Treatment Plan:           |                           |                |                 |                |
| Date Submitted to CSA:                 |                           |                |                 |                |
| Treatment Team Meeting Date:           |                           |                |                 |                |
| Anticipated Transition Date:           |                           |                |                 |                |
| Actual Transition Date:                | MM/DD/YYYY                |                |                 |                |
| Justify if youth/family/caregive       | r/custodian were n        | ot involved in | development and | review of plan |
| All members assisted in the review and | I development of this pla | in.            |                 |                |

#### Text Box – Required

Justify if youth/family/caregiver/custodian were not involved in development and review of plan. This should include specific information regarding the circumstances surrounding the lack of family, etc., involvement.

### PerformCARE®

#### PerformCARE®

PerformCare

Exam

**Exam tab** contains information about the youth's latest medical examinations; dates entered should not be more than one year old.

| EXAM                              |            |      |
|-----------------------------------|------------|------|
|                                   |            |      |
| Date of most recent physical:     | 09/22/2022 | ;;;; |
| Date of most recent hearing exam: | 08/15/2022 |      |
| Date of most recent vision exam:  | 09/17/2022 | :::: |
| Date of most recent dental exam:  | 12/07/2022 |      |

©2023 PerformCare

### Target Behaviors/Discharge

**Target Behaviors/Discharge** should include information on the discharge plan, both short- and long-term plans, if applicable. There must be a working discharge plan entered in this section, along with current recommendations for post-discharge treatment and youth's progress toward the discharge goal(s).

<u>If the user is completing a TJCR</u>, specific information that describes why the youth is being recommended for another level of care and any recommendations for treatment after the transition should be detailed in this tab.

This should include:

- Treatment needs that were addressed in current episode of care and any previous episodes of OOH treatment
- Treatment interventions that were successful and/or unsuccessful in current episode of care and any previous episodes
- Behaviors/needs that warrant a different OOH intensity of service
- The youth/young adult's perspective on proposed transition (when applicable)
- Justification as to why another OOH treatment episode is in the youth and family's best interest
- Barriers for reintegrating the youth to the community at this time
- Community reintegration plan for child/youth/young adult

### PerformCARE®

| T   | ARGET BEHAVIORS/DISCHARGE  |
|-----|--|
| Tra | nsition Criteria (Checked for 'YES')   |
| V   | Engage in education most of the time   |
| V   | Attends 75% or more of all expected activities   |
|     | Consistent abstinence from substance use   |
| 2   | Demonstrates social skills with others   |
| 2   | Understands risk and benefits of medications   |
| 2   | Enjoys social interaction  |
| 2   | Home visits completed with limited incident  |
| 2   | Demonstrates ability to resolve conflict   |
| 2   | Can name positive supports   |
| D   | Psychiatric symptoms are reduced   |
| 2   | Youth usually employs pro-social problem solving skills  |
| 2   | Youth better controls and/or seeks assistance with risky impulses                                |
| Tra | nsition Plan and Transition Planning Activities  |
| M   | Please describe your Transition Plan and your transition planning activities (Checked for 'YES') |
|     | Unplanned Transition (Checked for 'YES')   |
| D   | Transition Less than 30 Days (Checked for 'YES')   |

|   | lanning Activities  |
|---|---|
| П Рали сектор усил Малилия Фа   | and your transform planning activities (Chachet Activities  |
| Unstanted Tanjillion (Checked for   | es)   |
| C banadide Land thiel all files ( (Steel                                      | d the T(N)  |
| Efforts made to locate runaw  | / ()f relevant)   |
|   |   |
|   |   |
| List the details of the events :  | d circumstances leading to decision to transition   |
| -   |   |
|   |   |
|   |   |
|   |   |
| List the name and address of  | te individual (or agency) to whom the child/youth will be transitioned and the rationale for planning a transition to that individual (or ag  |
| List the name and address of  | we individual (or agency) to whom the child/youth will be transitioned and the rationale for planning a transition to that individual (or ag  |
| List the name and address of  | re individual (or agency) to whom the child/youth will be transitioned and the rationale for planning a transition to that individual (or ag  |
| List the name and address of<br>Describe your recommendation                  | te individual (or agency) to whom the child/youth will be transitioned and the rationale for planning a transition to that individual (or ag<br>no for intensity and frequency of services to youth and/or family post-transition |
| List the name and address of<br>Describe your recommendation                  | te individual (or agency) to whom the child/youth will be transitioned and the rationale for planning a transition to that individual (or ag<br>na for intensity and frequency of services to youth and/or family post-transition |
| List the name and address of<br>Describe your recommendation                  | te individual (or agency) to whom the child/youth will be transitioned and the rationale for planning a transition to that individual (or ag<br>ns for intensity and frequency of services to youth and/or family post-transition |
| List the name and address of<br>Describe your recommendati                    | te individual (or agency) to whom the child/youth will be transitioned and the rationale for planning a transition to that individual (or ag<br>na for intensity and frequency of services to youth and/or family post-transition |
| List the name and address of<br>Describe your recommendati<br>Franktion date: | te individual (or agency) to whom the child/youth will be transitioned and the rationale for planning a transition to that individual (or ag<br>ns for intensity and frequency of services to youth and/or family post-transition |

## Family/Natural Support Engagement Plan

All sections of the Family/Natural Support Engagement Plan are required for JCR and TJCRs.

The plan must document visitation plans, family therapy plans, who is approved to participate has permission to visit and who is not permitted to visit and any reasons for restriction.

This section is not required for the Discharge JCR.

| Family/Natural Support Engagement Plan |
|--|
| Purpose                                |
|  |
|  |
|  |
| Who May Participate                    |
|  |
|  |
|  |
| Restrictions (and why)                 |
|  |
|  |
|  |
| Other                                  |
| 1                                      |
|  |
|  |

### Target Behaviors/Discharge

If the youth is reported as missing from the program, this should be supported by the appropriate information being documented in the associated Assessment.

If the user is completing a DJCR, the date entered in **Actual transition date** will be the date that CYBER will enter as the transition date (End date) into the Episodes tab of the youth's Face Sheet. This date must be the current date or a date in the past. A future date cannot be entered.

Below the field for Actual transition date, the user will find a drop-down list of reasons for discharge; <u>this</u> <u>field is required to submit the DJCR</u>. The options are as follows:

- AMA Discharge (youth is being discharged against the advice of the provider)
- AWOL
- Higher IOS
- Hospitalization
- Independent Living
- Juvenile Detention/JJC
- Lateral IOS
- Lower IOS
- Return Home
- Shelter
- Transition to DDD
- Other/Successful (if 'Other' is selected a Comment is required)
- Other/Unsuccessful (if 'Other' is selected a Comment is required)

| Transition date: MM/DD/YYYY                       |  |
|---|--|
| Actual transition date: MM/DD/YYYY                | Transition Reason: Transition Reason Comment   |
| Family/Natural Support Engagement Plan<br>Purpose | AMA Discharge: Child/Youth was discharged against advice of treating provider; includes parent/guardian removal as well as youth signing self out of treatment once reaching age of majority.<br>AWOL: Child/Youth was unsuccessfully discharged due to runaway for 5+ days.<br>Higher IOS: Child/Youth discharged to a higher IOS program (including IRTS) within the CSOC OOH continuum.<br>Haspitalization: Child/Youth as discharged due to being hospitalized for psychiatric or medical reasons.<br>Independent Living: Youth has completed treatment and discharged to a Transitional/Independent Living trogram or has secured independent housing, apartment, etc.<br>Juvenile Detention/JJC: Child/Youth was discharged to a Livenile detention center or a program through the Juvenile Justice Commission.<br>Lateral IOS: Child/Youth was discharged to a Livenile OOS pool due to OOH continuum. |
| Who May Participate                               | Lower IOS: Child/Youth was discharged to a lower IOS program within the CSOC OOH continuum.<br>Return Home: Child/Youth discharged to parent or lepal guardian.<br>Shelter: Child/Youth was used for program.<br>Transition to DDD: Youth is being discharged from CSOC services and is transitioning to DDD.<br>Other/Successful: Child/Youth was successfully discharged due to a reason other than mentioned above; in this case an open text field entry is required.<br>Other/Insuccessful: Child/Youth was unsuccessfully discharged due to a reason other than mentioned above; in this case an open text field entry is required.  |

The Treatment Plan will attempt to associate to a current Strength and Needs Assessment (SNA) to be submitted.

The Assessment must be submitted within the last 30 days (prior to the plan being submitted).

<u>The CFT meeting date in the plan must also match the Assessment Date entered in the assessment</u>. If it is outside of that time-frame, the system will be unable to associate it.

The SNA should reflect the information documented in the JCR and vice versa; all information should reflect the youth's current level of functioning and should document what has taken place since the last JCR.

| SSOCIATED ID | TYPE                           | CREATED DATE | AUTHOR | SUBMITTED DATE |
|--------------|--------------------------------|--------------|--------|----------------|
|              | Strengths And Needs Assessment |              |        | 07/17/2023     |
|              |                                |              |        |                |
|              |                                |              |        |                |
|              |                                |              |        |                |

<u>Save</u>: saves the document at the current point and the document remains open. Users are encouraged to save often so that information is not lost if there is an internet connectivity or CYBER issue

<u>Save & Close</u>: button saves and closes the document at the current point

Submit: will submit the document either for internal or CMO review depending on user's security levels

<u>Cancel</u>: If the plan has not been saved the use of Cancel will close the document and any changes the user just made will be lost.

Delete: deletes the document only if it has <u>never</u> been submitted to CMO

<u>Print</u>: will be active once the document has been saved

<u>Return</u>: returns the document to anyone who has been assigned to the plan

<u>Transfer</u>: allows a user to send the document to any other user within the agency

<u>View Treatment Plan Review History</u>: displays who is currently assigned to the document and the current status



©2023 PerformCare

### Locating Returned Plans

#### PerformCARE®

**Returns can cause delays to authorization and transitioning**. 7-10 days after a plan is submitted, it is important to check on the status of a plan. When a plan is submitted to CMO, it may take from 1 to 3 days to reach the CSA after submission. PerformCare has 5 business days to review a plan. The next plan cannot be started until the prior plan is approved. If a plan is returned, it must be reviewed and re-submitted. There are two places to easily locate returned plans:

**Welcome Page** – if the agency is using the *My Active Youth* function, returned plans will appear on the welcome page under **Joint Care Review** – **Rejected**.

**Plan Approval** window – Click **Plan Approval** button on the left side and the pink window will open. Click **Doc Type – ALL** and the filtered plans will appear. Click the **PLANTYPE** column heading to sort and identify returned plans.



**Progress Notes** – Following a plan review a CSA progress note will be entered into the record with the results of the review.



### The Face Sheet

### PerformCARE®

#### Demographics

- Location
- Physical attributes
- Language
- Race/Ethnicity
- Preferred Method of Contact

Episodes

Providers

Supports

Diagnoses/Medications

Eligibility

Insurance

Legal

Doc Upload

| Dashboard Demographics Epi  | isodes Provider Supports Di   | r/Med Eligibility Insurance Le  | gal Doc*                       |  |
|---|-------------------------------|---|--------------------------------|--|
| Youth Specific Information  |                               |   |                                | Print Selection                        |
| Legal Name:<br>Address Type:<br>Preferred Name:<br>Date of Birth:<br>Age:<br>Gender:<br>Race:<br>Ethnicity: | Out of Home Treatment Address | Current Address:<br>Languages Spoken:<br>Youth Primary Phone:<br>Youth Secondary Phone:<br>Youth Email: | You<br>Acti                    | th Marital Status:<br>ive YL:          |
| Flags for Special Occurrences<br>DCPP Involved  |                               |   |                                |  |
| Parent/Caregiver  |                               |   |                                | Eligibility                            |
| Primary 1<br>Name:<br>Phone:<br>Email:  |                               | Primary 2<br>Name:<br>Phone:<br>Email:  |                                | Medicaid/NJ FamilyCare:<br>Active TPL: |
| Current Episodes  |                               |   | Current Service Authorizations | с — <u>П</u>                           |

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 youth record.

### **Progress Notes**

### PerformCARE®

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.

#### Click New Progress Note

- Select Notation Type
- Enter Date
- Enter Time activity started
- Enter Duration (how long was the activity)
- Enter details of the note in the text box
- Commit or Save Draft

If Note is in draft:

- Select Show My Draft Progress Notes
- Double click to reopen note for editing, click Commit

| Notation Type<br>Billable - Clinical Note | Date<br>08/22/2023 |                | Time H | <b>M</b> | AM | ОРМ | Dur H | <b>M</b><br>45 |  |
|---|--------------------|----------------|--------|----------|----|-----|-------|----------------|--|
| Notation Sub Type                         | 2                  |                |        |          |    |     |       |                |  |
| This is a sample progress note.           |                    |                |        |          |    |     |       |                |  |
|   |                    |                |        |          |    |     |       |                |  |
|   |                    |                |        |          |    |     |       |                |  |
|   |                    |                |        |          |    |     | 16    |                |  |
|   |                    |                |        |          |    |     |       |                |  |
|   |                    | Save Draft Cor | mmit   | 1        |    |     |       |                |  |

| 1                               | Progress Notes                           |                         | Filter Notes |  | Clear Search   | J | New Progress Note                    |  |
|---------------------------------|--|-------------------------|--------------|--|----------------|---|--------------------------------------|--|
| ○ Show All Draft Progress Notes |  |                         | Print        |  | Truncate Notes |   | Print Progress Note Grid             |  |
| (                               | ○ Show My Draft Progress Notes           |                         |              |  |                |   |                                      |  |
| ۲                               | Show Committed and Signed Progress Notes |                         |              |  |                |   |                                      |  |
|                                 |  |                         |              |  |                |   |                                      |  |
|                                 | Note Date Note Type                      | Note SubType Created By | Note         |  | Progra         | m | Program Type Hours Mins Created Date |  |

©2023 PerformCare

### Document Upload

Document Upload is CYBER functionality that allows users with specific security in their ID to upload and view uploaded documents in a youth's record. Uploaded documents can be found on the Doc Tab of a youth's Face Sheet.

Access to this functionality is managed by your CYBER Security Administrator.



OOH users may upload evaluations to support the youth's transition to another program.

## Document Types/Sub Types for OOH Upload

PerformCARE®

Document upload is used to support the process of admitting a youth into an OOH program, as well as assist in the transition of a youth from the OOH program to another IOS or to their community.

| Document Type     | Sub-Type  |   | View? | Examples of Acceptable                          |
|-------------------|---|---|-------|---|
|                   |   |   |       | Documents                                       |
| Clinical          | <ul> <li>Clinical Summary Template</li> </ul>                 | Y | Y     |   |
|                   | <ul> <li>Clinical Updates</li> </ul>                          | Y | Y     |   |
|                   | <ul> <li>Community Bio Psychosocial<br/>Assessment</li> </ul> | Y | Y     | BPS Assessment<br>completed outside of<br>CYBER |
|                   | <ul> <li>Cover Letter with SRTU Checklist</li> </ul>          | N | Y     |   |
|                   | <ul> <li>IEP/Educational Info</li> </ul>                      | Y | Y     | IEP cover sheet                                 |
|                   | <ul> <li>Medical Information</li> </ul>                       | Y | Y     |   |
|                   | <ul> <li>OOH-CABS (13 pages)</li> </ul>                       | Y | Y     | In support of CSAP-IDD                          |
|                   | <ul> <li>Other Applicable Reports/Documents</li> </ul>        | Y | Y     | TJCR Doc Upload Checklist                       |
|                   | <ul> <li>Psychiatric Evaluation</li> </ul>                    | Y | Y     | Psychiatric Eval                                |
|                   | <ul> <li>Psychological Evaluation/Assessment</li> </ul>       | Y | Y     | Psychological Eval                              |
|                   | <ul> <li>Specialty Assessment/Evaluation</li> </ul>           | Y | Y     | Specialty Evals such as Fire                    |
|                   |   |   |       | Setting   |
| Court Orders/     | <ul> <li>CMO 14 Day Plans</li> </ul>                          | N | Y     |   |
| Subpoenas         | <ul> <li>Court Orders for</li> </ul>                          | N | Y     |   |
|                   | Information/Appearance  |   |       |   |
|                   | <ul> <li>Court Ordered Guardianship</li> </ul>                | N | Y     |   |
|                   | <ul> <li>Court Ordered Treatment/Eval</li> </ul>              | N | Y     | Dispositional Court Order                       |
|                   | o Subpoenas   | N | Y     |   |
| Intermediate Unit | <ul> <li>IU Admission Note</li> </ul>                         | N | Y     |   |
|                   | <ul> <li>IU Consent Form</li> </ul>                           | N | Y     |   |
|                   | <ul> <li>IU Interventionist Supporting</li> </ul>             | N | Y     |   |
|                   | Document (ISD)  |   |       |   |

\*CABS must have been completed within the last six months.

### Doc Upload

#### 1. Click Add New Document button

- File Upload window will appear
- 2. Click Select Type of Document Clinical

#### 3. Click Select Subtype of Document

- Clinical Summary template
- Clinical Updates
- Community Bio Psychosocial Assessment
- IEP/Educational Info
- Medical Information
- Other Applicable Reports/Documents
- Psychiatric Evaluation
- Psychological Evaluation/Assessment
- Specialty Assessment/Evaluation

#### 4. Enter a comment into the Comment text box

 Date of assessment, the specific type of specialty assessment/evaluation, applicable dates for a court order, or IEP effective date.

#### 5. Click Browse

- Clicking on the Browse button will open up the user's local files and allow a search
- 6. Click Upload



| File Upload                                   | × |
|---|---|
| Select Type of Document                       |   |
| Clinical                                      |   |
| Select Subtype of Document                    |   |
| ÷   |   |
|   |   |
| Clinical Summary Template<br>Clinical Undates |   |
| Community Bio Psychosocial Assessment         |   |
| IEP/Educational Info                          |   |
| Medical Information                           |   |
| OOH-CABS                                      |   |
| Other Applicable Reports/Documents            |   |
| Psychiatric Evaluation                        |   |
| Psychological Evaluation/Assessment           |   |
| Specialty Assessment/Evaluation               |   |
| Choose File No file chosen                    |   |
| NOTE: File cannot exceed 20 MB in size.       |   |
| Upload Cancel                                 |   |

### PerformCARE®

### **Two Important Facts**

- Uploaded files cannot exceed 20 MB in size;
  - Error message will be unable to complete the upload
  - Split a large document into two separate files
  - Re-scan documentation into two (or more) separate files in order to upload the information into the record
- The only documents that can be uploaded into a youth record are files with file extensions: .PDF, .BMP, .GIF, .JPEG, .JPG, .PNG, .TIF, .TIFF.
  - All other formats will be rejected and the user will need to convert their document into one of the accepted formats.

| Acceptable file formats:  |  |  |  |  |  |  |  |
|---|--|--|--|--|--|--|--|
| . <b>PDF</b> – Portable Document Format                               |  |  |  |  |  |  |  |
| . <b>BMP</b> – Bitmap Image File                                      |  |  |  |  |  |  |  |
| .GIF – Graphic Interchange Format                                     |  |  |  |  |  |  |  |
| . <b>JPEG or</b> . <b>JPG</b> – Joint Photographic<br>(Experts) Group |  |  |  |  |  |  |  |
| . <b>PNG</b> – Portable Network Graphics                              |  |  |  |  |  |  |  |
| . <b>TIF or</b> . <b>TIFF</b> – Tagged Image Format (File)            |  |  |  |  |  |  |  |

Make a pdf or scan the document into a pdf, .bmp, .gif, .jpeg, .jpg, .png, or .tif

**Name the document as per the convention** – Youth's CYBERID - Document Type - Date Completed.

 For example, a user uploading a Transition ISD for youth 23456, which was signed on January 1, 2023, should name the file <u>23456 PsychEval 01012023</u>.

**Browse for the document -** once a file is selected, the user will see it appear in the Selected Files area. Check the size of the document.

- Clicking the Upload button will run the upload; the user will see the progress bar 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.

### Document Upload Grid

**OPEN the Document** - Double-clicking on a record in the grid will open up the document in a new window; users may be asked if they want to open or save the document, depending upon the type of document they have selected. The selected document may be printed by simultaneously clicking Ctrl/P.

**CLOSE the Document** - To close the document once it has been opened, the user must click on the "X" in the upper right-hand corner of the document window. If the user clicks on the back button in their browser, they will be logged out of the system.

| Doc Status       | Document Type | Document Sub Type          | Description | Date Uploaded | File Name | Uploaded By | Program Name |
|------------------|---------------|----------------------------|-------------|---------------|-----------|-------------|--------------|
| New Doc Uploaded | Clinical      | Cover Letter With SRTU Ch  |             |               |           |             |              |
| New Doc Uploaded | Clinical      | Other Applicable Reports/D |             |               |           |             |              |

If a document is uploaded to CYBER in error, the user must submit a written request to PerformCare using the Customer Service Request Form at <u>www.performcarenj.org/ServiceDesk</u> in order to have the document corrected in the youth's record. Only PerformCare has the ability to correct uploaded documents.

**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.

Each column can be filtered or sorted. Click the menu at the top of each column.

Youth/Child DOB  $\equiv$ 

| Security Administrator<br>Youth / Child Search<br>My Active Youth<br>Out of Home<br>Provider Details<br>Message Functions<br>System Functions | Quick Search<br>Youth/Child ID<br>First N<br>Last N<br>Historical Access<br>Clear Search | lame DOB MM/DDD  | oov    |     |                 |      |         |
|---|--|------------------|--------|-----|-----------------|------|---------|
| Reporting   | Youth/Child ID   | Youth/Child Name | Gender | Age | Youth/Child DOB | Code | Expirat |
| Historical Access   |  | 1                | FEMALE |     |                 |      | -       |
| Annual Adamana  |  |                  | MALE   |     |                 |      |         |
| Anomaly Management  |  |                  | MALE   |     |                 |      |         |
|   |  |                  | MALE   |     |                 |      |         |
|   |  |                  | MALE   |     |                 |      |         |
|   |  |                  | MALE   |     |                 |      |         |
|   |  |                  | MALE   |     |                 |      |         |
|   |  |                  | MALE   |     |                 |      |         |
|   |  |                  | FEMALE |     |                 |      |         |
|   |  |                  | FEMALE |     |                 |      |         |
|   |  |                  | MALE   |     |                 |      |         |
|   |  |                  | FEMALE |     |                 |      |         |
|   |  |                  | MALE   |     |                 |      |         |
|   |  |                  | MALE   |     |                 |      |         |
|   | 1.00   |                  | MALE   |     |                 |      |         |
|   | 4  |                  | MAI F  |     |                 | -    |         |

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

OOH Section: Guide to YouthLink, reports, Certification of Need, Welcome Page, Strength and Needs Assessment, Document Upload

Annex A Addendum Section:

• Guide to the Annex A Addendum

General Section: Document Upload, Face Sheet Design

Clinical Criteria for all levels of care

Security Section: CYBER Password Reset Functionality, Security Administrator Guide, Role Based Security

Forms: <u>https://www.performcarenj.org/provider/forms.aspx</u>

 See the OOH providers section for forms: CABS (Provider version), TJCR Checklist, etc.

Clinical Criteria: https://www.performcarenj.org/provider/clinical-criteria.aspx

DIVISION OF CHILDREN'S SYSTEM OF CARE

### References - Acronyms

#### PerformCARE<sup>®</sup>

#### Out-of-Home OOH Plan Types

SNA – Strength and Needs Assessment (also known as CANS)
DJCR – Discharge Joint Care Review (plan for transition out of CSOC)
JCR – Joint Care Review (routine 90-day plan for continued stay)
TJCR – Transition Join Care Review (plan to transition to other OOH within CSOC)
NOCSA – Plan type for OOH that is not reviewed by CSA (submitted as required by program)

#### **Behavioral Health Services**

- IIC Intensive in-Community provider
- BA Behavior Analyst
- MRSS Mobile Response and Stabilization Services
- CMO Care Management Organization
- FSO Family Support Organization
- OOH Out-of-Home Provider
- CCIS Children's Crisis Intervention Services
- PHP Partial Hospital Provider
- MST Multisystemic Therapy
- FFT Family Functional Therapy
- IU Intermediate Units

### CSOC – Children's System of Care

### PC – PerformCare





Clinical, Billing or Technical issues or questions should be reported to the Service Desk.

### Click the link for the secure Customer Service Request Form <u>www.performcarenj.org/ServiceDesk</u>

Complete the form by identifying:

- The Requestor's name (person reporting the issue), agency and contact information
- Select a type of issue
- Describe the question, technical problem or issue
- Upload screenshots of the issue or identify youth records

### Secure Email

PerformCARE®

Request Form replies may be communicated via Secure Email. Review the *Quick Reference Guide to Secure Email* on how to register and open secure emails.

| Secure: Jest   | /      | Amerillealth<br>Caritas<br>Registration  |
|--|--------|--|
| PerformCare email address     3:46 PM     To     Your email address     Quick reply all Reply Forward Delete     3 attachments View Download   | □<br>= | Password Policy ×  Password's must be 10-14 characters long. At least one digit (0-9) is required. At least one symbol character is required. Both uppercase and low-case characters are required. Your username may not appear in the password. |
| Arriver it feature     The service message from Amerikealth Caritas.     Click here by 2019-04-06 20:46 UTC to read your message.     After that, open the attachment.     More Into     Dive Into     Dive Constant and its continue are examined assign for the     entropy denses of the continue are examined assign for the     entropy denses of the continue are examined assign for the     entropy denses of the continue of the continue are examined assign for the     entropy denses of the continue of the continue are examined assign for the     entropy denses of the continue of the continue are examined assign for the     entropy denses of the continue of the continue are examined assign for the     entropy denses of the continue of the continue are examined assign for the     entropy denses of the continue of the continue are examined assign for the     entropy denses of the continue of the continue are examined assign for the     entropy denses of the continue of the continue are examined assign for the     entropy denses of the continue are examined assign for the     entropy denses of the continue are examined assign for the examined assign for     entropy denses of the continue are examined assign for the examined assign for the     entropy denses of the continue are examined assign for the examined |        | Create your account to read secure email.<br>Email Address: Your email address<br>First Name:  |
|  |        | Continue   |

#### http://www.performcarenj.org/pdf/provider/training/security/quick-reference-guide-to-secure-email.pdf

©2023 PerformCare

### Need Assistance?

Training questions? Email the PerformCare Training Unit:

<u>PCNJTraining@performcarenj.org</u>

PerformCare:

- Phone 1-877-652-7624
- Customer Service Request Form

www.performcarenj.org/ServiceDesk

Policy and Contracting questions: 1-609-888-7200

- CSOC Service Line Manager
- Annex A Contracting

Important Contact Information for CSOC Providers:

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



PerformCARE®

Care is the heart of our work.

