

Family Support Organization Functionality in CYBER

Family Assessment Needs (and) Strengths (FANS)

May 2019 - 01287

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Objective of this Training

The objective of this training is to provide an overview of FSO Functionality for the **Family Assessment for Needs (and) Strengths (FANS)**. In this training we will:

- Define the FANS
- Review Welcome Page FANS links
- Understand FANS Due dates
- Create and edit FANS
- Moving FANS (Return, Submit, Transfer)
- Understand FANS assessment status
- Using the Plan Approval screen (assign, unassign)
- Review Progress Notes
- How to contact PerformCare
- References

What is the FANS

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

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

The screenshot displays a web-based assessment interface. At the top, there are five tabs: 'Demographics', 'Support', 'Education', 'Advocacy', and 'Summary'. The 'Advocacy' tab is currently selected. Below the tabs, the section is titled 'ADVOCACY'. There are two main sections, each with a dropdown menu and a text area for comments.

ABILITY TO COMMUNICATE
This item relates to the importance of family "voice and choice", including teamwork, decision making, and problem solving. It enables you to communicate even negative or difficult messages without creating conflict or mistrust.

Comments

ABILITY TO ADVOCATE
This item refers to your ability to advocate for yourself, your youth, and your family with various systems and agencies including schools, child welfare, health, juvenile justice, NJ CSOC partners, etc.

Comments

Welcome Page FANS Links

The screenshot shows the PerformCARE welcome page. At the top, there is a 'Quick Search' section with a 'Cyber ID' dropdown and input fields for 'First Name', 'Last Name', 'DOB', and 'SSN'. The 'NJ Children's System of Care' logo is prominently displayed. Below the search fields, there is a 'Refresh Total' button. On the left side, there is a vertical navigation menu with buttons for 'Youth / Child Search', 'Your Caseload', 'OOH Treatment', 'Provider Details', 'Message Functions', 'System Functions', and 'Historical Access'. The main content area is titled 'FANS - In Progress' and contains a table with columns: 'Youth/Child ID', 'First Name', 'Last Name', 'Create Date', 'Author', 'Status', and 'Plan Type'. Two rows of data are visible, both with a status of 'In-Progress' and plan type of 'FANS'. A dropdown menu is open over the table, listing the following links: 'FANS()', 'In Progress()', 'Submitted()', 'Returned()', 'Approved()', 'Aging Report()', and 'Youth Access Prog Notes()'. The 'Aging Report()' link is highlighted with a red box.

Youth/Child ID	First Name	Last Name	Create Date	Author	Status	Plan Type
			2017/10/19		In-Progress	FANS
			2017/10/19		In-Progress	FANS

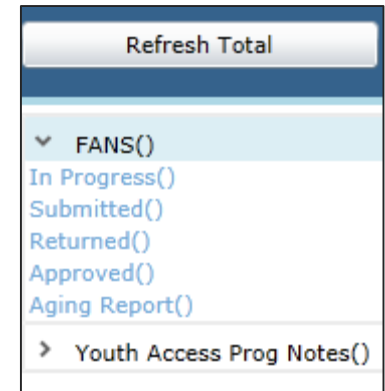
This is a close-up of the dropdown menu from the screenshot. It shows the following links: 'FANS()', 'In Progress()', 'Submitted()', 'Returned()', 'Approved()', 'Aging Report()', and 'Youth Access Prog Notes()'. The 'Aging Report()' link is highlighted with a red box.

FANS that appear in the status links are only displayed to the users who have a FANS currently assigned to them.

Welcome Page FANS Links

FANS links show the status of FANS assessments

- In Progress – FANS started, but not submitted
- Submitted – FANS submitted to a supervisor for review
- Returned – FANS returned to a previously assigned user
- Approved – FANS submitted with no validation issues and approved
- ***Aging Report*** – shows Coming Due FANS and Overdue FANS.



Initial FANS

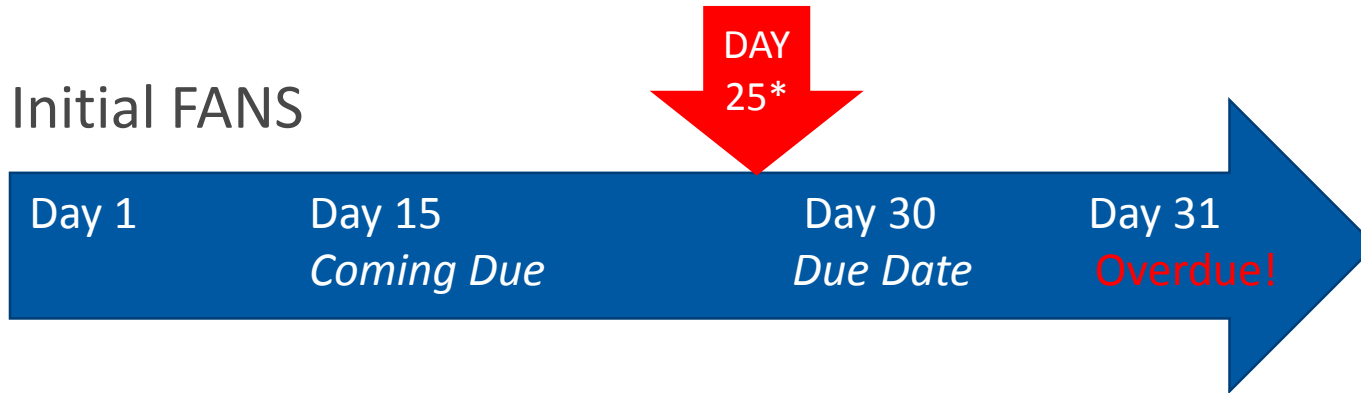
- Initial FANS is required **within 25 calendar days** after youth is opened to FSO.
- *Coming Due* status appears **15 calendar days before the FANS Due Date**.
- *Overdue* means the Due Date has passed.
- *Due Date* is 30 calendar days after youth is opened to FSO.

Ongoing FANS

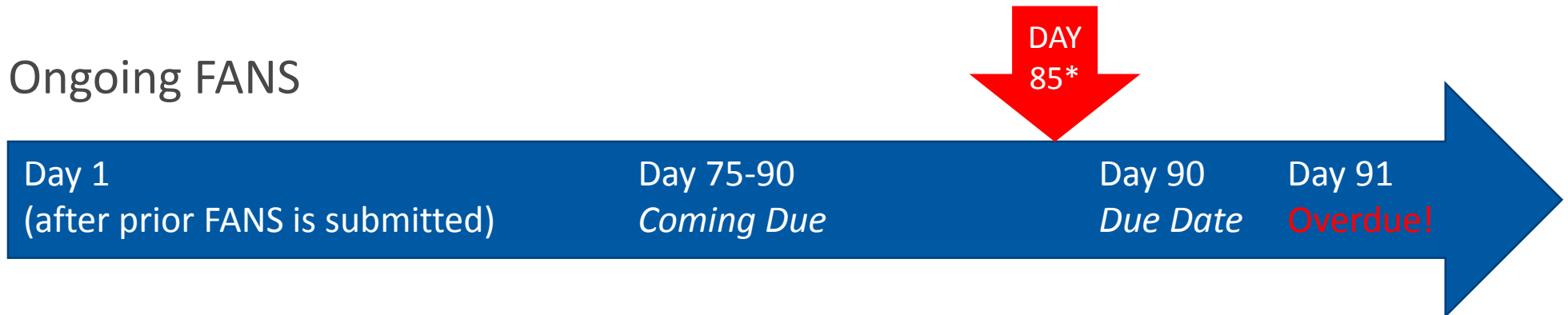
- Ongoing FANS is required **every 85 calendar days** after the Initial FANS
- *Coming Due* status appears **15 calendar days before the FANS Due Date** (days 75-90).
- *Overdue* means the Due Date has passed.
- *Due Date* is 90 calendar days after the previous FANS was submitted.

Coming Due / Overdue

Initial FANS



Ongoing FANS



*FSO Business Rules require the Initial FANS to be submitted by Day 25 and subsequent FANS by Day 85 following the prior FANS submission.

Creating FANS

- To access the FANS assessment type, the FSO Security Administrator must insure that the user has the FSO Security group added to the CYBER user ID.
- If this group is not added, there will be no option to add the FANS assessment to a youth's record.

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

Select Treatment Plan or Assessment type to create: Add New

Double click an existing assessment to open it for Rev

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

Longitudinal Outcomes Report

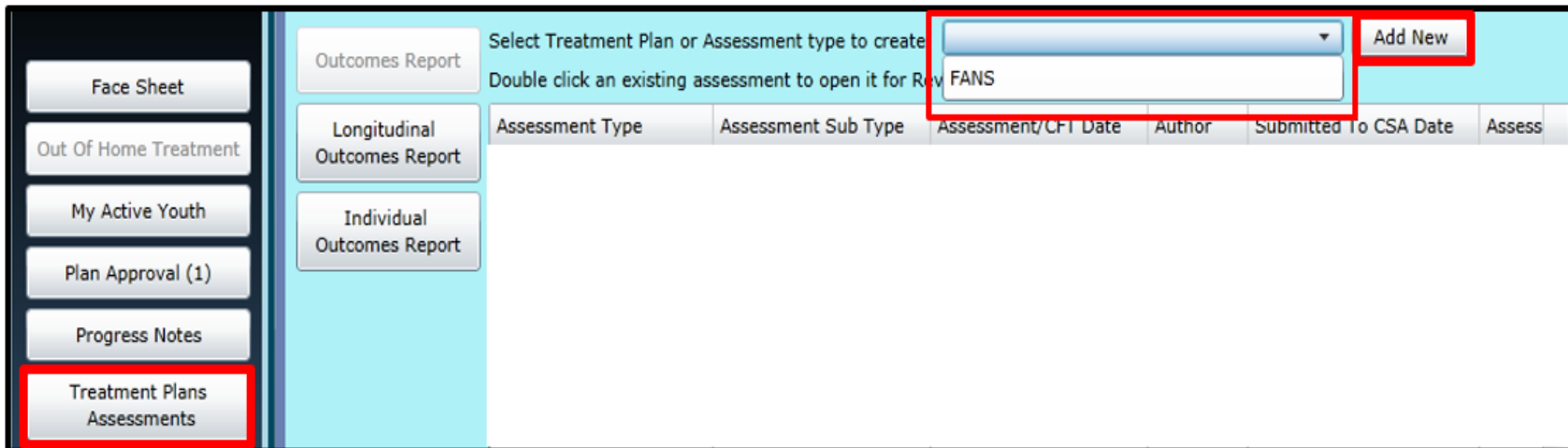
Individual Outcomes Report

Creating FANS Cont'd

To access the FANS, click on the **Treatment Plans and Assessments** button within a youth's CYBER record.

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

Clicking "Add New" will open the new assessment.



Editing FANS

Once a FANS is started, it may be saved and edited prior to submitting it for approval.

When a FANS is transferred to another user, the original user can no longer access it to edit. Only the user to whom it has been assigned to may edit the assessment.

Select Treatment Plan or Assessment type to create: Add New

Double click an existing assessment to open it for Review/Edit

Assessment Type	Assessment Sub Type	Assessment/CFT Date	Author	Submitted To CSA Date	Assessment ID
FANS	FANS	2019/03/04			1665
TREATMENT PLAN	MRSS - TICP	2019/02/15		2019/03/20 14:29:25	1647
CATAsmt	Initial	2019/02/15		2019/03/20 14:19:59	1694
TREATMENT PLAN	UCM - IniISP	2019/03/04		2019/03/05 19:59:08	1636
StrengthsAndNeedsAsmt	Routine	2019/02/22		2019/02/27 15:42:42	1653
TREATMENT PLAN	UCM - FCP	2019/02/13		2019/02/14 16:29:02	1625
TREATMENT PLAN	MRSS - IniICP	2019/02/03		2019/02/06 16:27:05	1620

Users can click on the **Treatment Plans and Assessments** button from within a youth's CYBER record to access the Treatment Plans and Assessments screen.

Once the Treatment Plans and Assessments screen opens, a grid containing all the plans and assessments for the youth is displayed. Double-click on the FANS in the row to edit.

Editing FANS

The FANS will have the following tabs:

- Demographics
- Support
- Education
- Advocacy
- Summary

The screenshot displays a web application interface for editing FANS. At the top, there is a search bar with fields for First Name, Last Name, Gen, Birth Date, Age, SSN, and Youth/Child ID. To the right of the search bar are buttons for Search, Clear, Agency Cases, and Logout. Below the search bar is a tabbed interface with five tabs: Demographics, Support, Education, Advocacy, and Summary. The Demographics tab is currently selected and highlighted with a red border. The main content area is titled 'DEMOGRAPHICS' and contains several input fields for user information:

Child Name:	<input type="text"/>	DOB:	<input type="text"/>
Address:	<input type="text"/>	Gender:	<input type="text"/>
City:	<input type="text"/>	Race:	<input type="text"/>
County:	<input type="text"/>		
State:	<input type="text"/>	Zip Code:	<input type="text"/>
		Medicaid #:	<input type="text"/>

Each question on the Support, Education, and Advocacy Tab is required.

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

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

Determining Ratings

The rating range is from 0-3 (0 being the lowest rating and 3 being the highest rating). Each rating has a specific description of the degree or level describing the question in each tab. A comment is also required for any section rated as a 2 or 3.

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

*** CAREGIVERS' COLLABORATION**
This item refers to how well you and the other adults involved in the raising of your youth work together.

0 - Healthy collaboration. We usually work together regarding issues of the development and well-being of our youth. We are able to negotiate disagreements related to our youth.

1 - Mostly healthy collaboration. Generally good collaboration with occasional difficulties negotiating miscommunications or misunderstandings regarding issues of the development and well-being of our youth.

2 - Limited healthy collaboration. Moderate problems of communication and collaboration between us with regard to issues of the development and well-being of our youth.

3 - Significant difficulties with collaboration. Minimal collaboration and destructive or sabotaging communication regarding issues related to the development and well-being of our youth.

Comments

FANS Summary Tab

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

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

The screenshot shows a web application interface for the FANS Summary Tab. At the top, there are navigation tabs: Demographics, Support, Education, Advocacy, and Summary. The main heading is "SUMMARY OF NEEDS AND FAMILY ACTION PLAN". Below this is a descriptive paragraph. The "Support" section is empty. The "Education" section is empty. The "Advocacy" section contains "ABILITY TO COMMUNICATE: RATING - (2)", a "Comment" field with the text "This is an example of a comment appearing when a section is rated 2 or 3.", and a "Strategy" text box. At the bottom, the "Total Score" is displayed as "2". A toolbar at the very bottom includes buttons for Print, Cancel, Save, Save & Close, Review History, Select an Action, and Update Status.

The screenshot shows a web application interface for the FANS Summary Tab. At the top, there are navigation tabs: Demographics, Support, Education, Advocacy, and Summary. The main heading is "SUMMARY OF NEEDS AND FAMILY ACTION PLAN". Below this is a descriptive paragraph. The "Support" section contains "CAREGIVERS' COLLABORATION: RATING - (2)", a "Comment" field with the text "This is an example of a comment appearing when a section is rated 2 or 3.", and a "Strategy" text box. The "Education" section contains "KNOWLEDGE OF COMMUNITY RESOURCES: RATING - (3)", a "Comment" field with the text "This is an example of a comment appearing when a section is rated 2 or 3.", and a "Strategy" text box. The "Advocacy" section contains "ABILITY TO ADVOCATE: RATING - (2)", a "Comment" field with the text "This is an example of a comment appearing when a section is rated 2 or 3.", and a "Strategy" text box. At the bottom, the "Total Score" is displayed as "7". A toolbar at the very bottom includes buttons for Print, Cancel, Save, Save & Close, Review History, Select an Action, and Update Status.

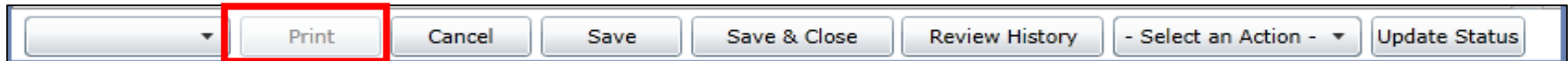
Examples of two different FANS Summaries where tabs require a different number of comments and strategies.

Reminders

Every section on the Support, Education, and Advocacy Tabs **is required for submission.**

- If a section is rated 2 or 3, a complete comment that supports the rating is also required.
- It is optional to enter a comment for a question rated 0 or 1 if it supports the rating or to provide additional information to support or aid in the development of an action plan.
- Only comments with ratings of 2 or 3 will be displayed on the Summary Tab.



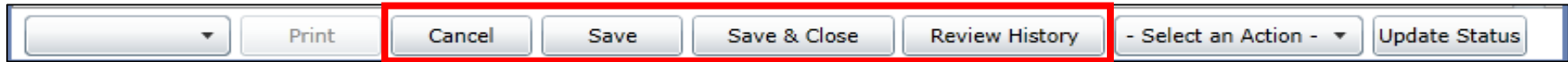


The buttons' functions are as follows:

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



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



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

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

Save & Close – saves the document and closes the assessment, returning the user to the Treatment Plans Assessments grid.

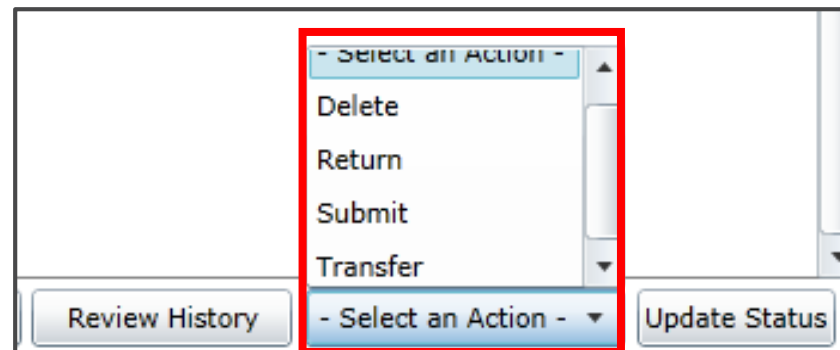
Review History – will open a pop-up window with a history of the users that have had the document assigned to them and any action taken on the assessment such as transfer, return, or submit.

- A Plan Level 1 user may find this functionality helpful when determining if their manager or supervisor (Plan Level 2 or 3 user) has submitted their submitted FANS to PerformCare (or the CSA). This is also a useful screen to utilize to see if the assessment has been approved.

Moving Fans - Delete



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



Action Options include:

- **Delete** – If the FANS status is *In Progress*, the assigned user will be able to delete the assessment. If the assessment has been submitted to the CSA, the FANS can no longer be deleted and the Delete button will be unavailable.

Moving Fans – Return

Return – Used when the current assigned user needs to return it to the author; typically used after the assessment has been submitted for internal review, but prior to final submission to the CSA.



Select user for return

Select User for Return

User ID:

Name: None

Program Description: None

Level of User: None

Moving Fans – Submit



Submit – Submits the assessment either to an internal reviewer or to the CSA based on Plan Level Hierarchy.

- After selecting Submit and Update Status, if there are any missing required fields, the system will pop up a message listing each missing field and the tab the field is located in. The missing fields will be displayed in red.
- If there are no missing fields, the system will open the Select User for Review screen. If your agency is set up for Plan Level Hierarchy, the FANS will be subject to the following levels:

- Plan Level 1 users must submit the assessment to a Plan Level 2 or 3 user
- Plan Level 2 users may submit the assessment to Plan Level 3 users, or directly to the CSA.
- Plan Level 3 users may submit the assessment directly to the CSA.

A dialog box titled "Select user for review." with the subtitle "Select User to Review Treatment/ Assessment Plan". It contains a "User ID:" dropdown menu with "Submit to CSA" selected. Below it are three rows of text: "Name: None", "Program Description: None", and "Level of User: None". At the bottom are three buttons: "Accept", "Send to CSA", and "Cancel".



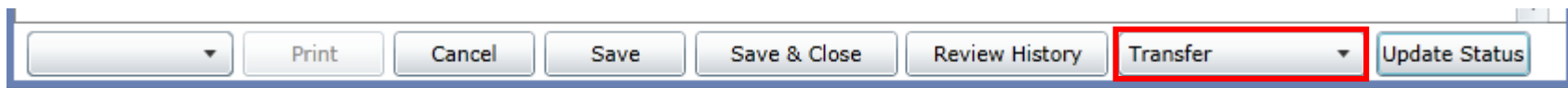
When the FANS assessment is submitted to the CSA

- The assessment will be automatically approved.
- The system will then automatically create the FSO – FANS Completion Progress Note in draft form, which will include all questions, rated a 2 or 3 on the FANS.
- Users can only add to the progress note template, not edit the information that is drawn from the FANS.



Moving FANS – Transfer

Transfer – allows the user to transfer an In Progress assessment to another user within the FSO agency.



Select user for transfer.

Select User to Review Treatment/
Assessment Plan

User ID:

Name: None

Program Description: None

Level of User: None

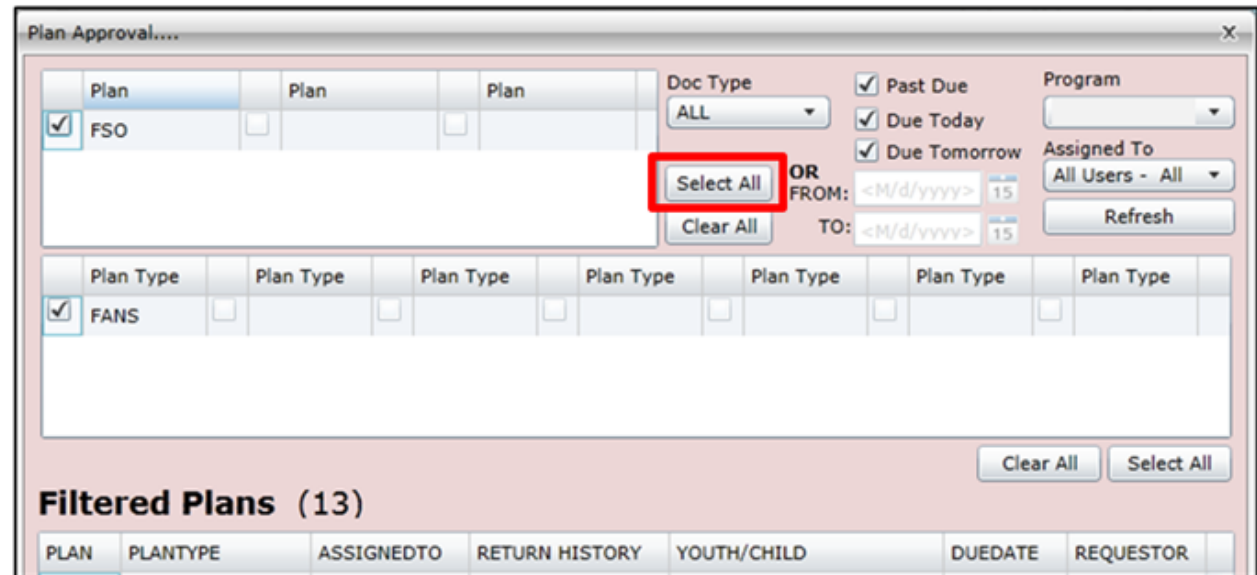
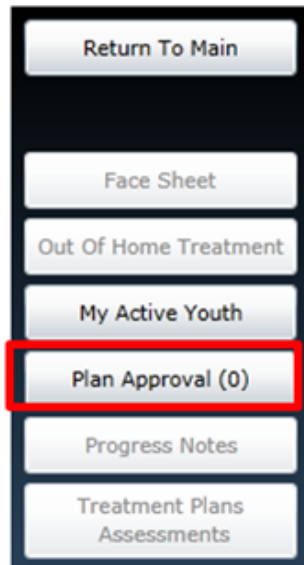
As work progresses, the FANS will be in moving into statuses that define where the assessment is in the process:

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

Note: that upon submission to the CSA, FANS assessments are automatically approved.

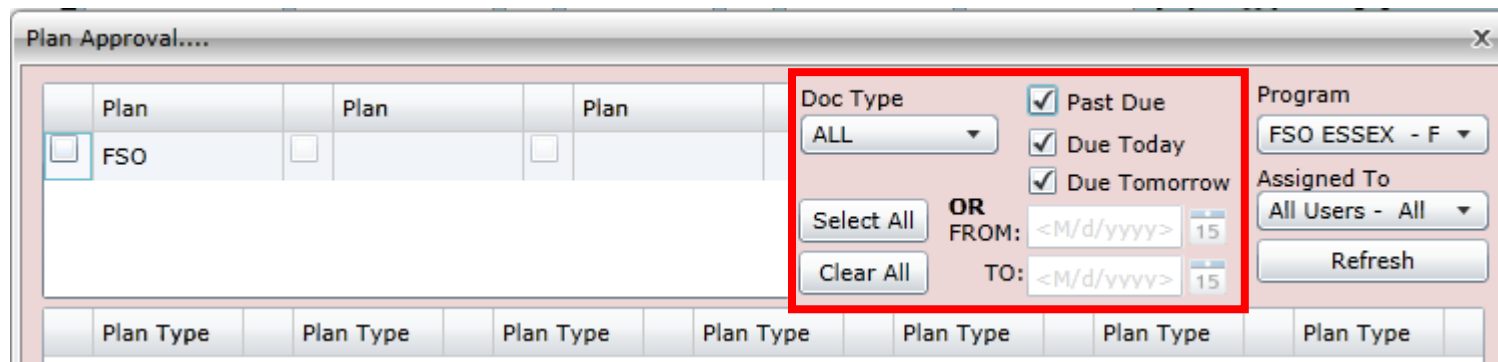
- The Plan Approval screen is the one screen where all users at an agency can see who is assigned to plans/assessments in the different statuses.
- The Plan Approval screen allows FSO users the option to reassign FANS assessments to other users within their agency.
 - This can be very beneficial if a user started an assessment and then was unable to complete it.
 - A Plan Level 2 or 3 user may reassign an 'In Progress' FANS assessment to another user in Plan Approval.
- FSO users with Plan Level 1, Plan Level 2, or Plan Level 3 Security Groups will have access to the Plan Approval screen by clicking the Plan Approval button.

Using the Plan Approval Screen Cont'd



- In the Plan grid, FSO users will see an **FSO checkbox**. Clicking the FSO box will allow assessment/plan types that FSO has created in the Plan Type area.
- The user can check the **FANS checkbox** from the Plan Type grid and the Filtered Plans grid will display all the FANS currently assigned to the Agency.
- Clicking the **Select All button** will populate all the grids with available information.
- The grids will show the plans and assessments that are currently active at the agency in statuses of Unassign, Transfer, Return, In Progress (all not currently submitted to the CSA).

Using the Plan Approval Screen Cont'd



- The “Doc Type” menu gives the user the option to look at Treatment Plans only (TXP), Assessments only (ASMT), or All. If the user makes a selection here, it will cause the Plan grid (to the left of the menu) to show only what is applicable and available to the user.
 - For example, if the user were to select “ASMT”, the Plan grid would only show Assessments that are available for the user to select.
- Next to this area are the checkboxes for timeframes. These timeframes are associated to the plan or assessment due dates. If the user enters a timeframe into the boxes here, they will be unable to select any of the other options listed above.

Using the Plan Approval Screen – Filtered Plans Grid

Filtered Plans (159)

PLAN	PLANTYPE	ASSIGNEDTO	RETURN HISTORY	YOUTH/CHILD	DUE DATE	REQUEST
FSO	FANS - In Progress					
FSO	FANS - In Progress					
FSO	FANS - In Progress					
FSO	FANS - In Progress					
FSO	FANS - In Progress					

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

Using the Plan Approval Screen – Assign Plan

Filtered Plans (159)

PLAN	PLANTYPE	ASSIGNEDTO	RETURN HISTORY	YOUTH/CHILD	DUE DATE	REQUEST
FSO	FANS - In Progress					
FSO	FANS - In Progress					
FSO	FANS - In Progress					
FSO	FANS - In Progress					

Assign

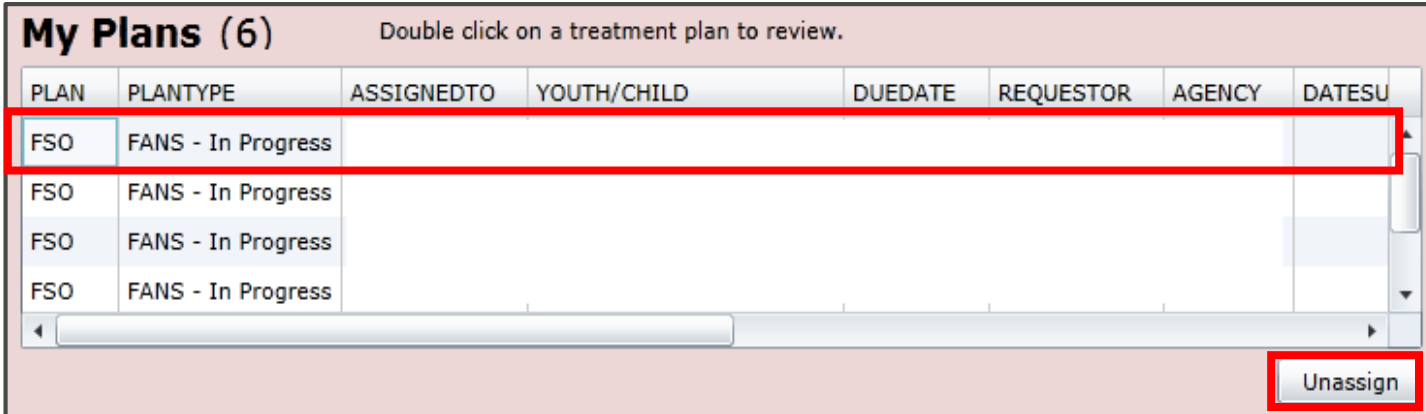
Assign a user to the selected treatment plan document(s).

Assign User

Accept Cancel

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

Using the Plan Approval Screen – Unassign Plan



The screenshot shows a web interface titled "My Plans (6)" with a subtitle "Double click on a treatment plan to review." Below the title is a table with the following columns: PLAN, PLANTYPE, ASSIGNEDTO, YOUTH/CHILD, DUE DATE, REQUESTOR, AGENCY, and DATESU. The table contains four rows, all with "FSO" in the PLAN column and "FANS - In Progress" in the PLANTYPE column. A red box highlights the first row. Below the table is a horizontal scrollbar. In the bottom right corner of the interface, there is a button labeled "Unassign", which is also highlighted with a red box.

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

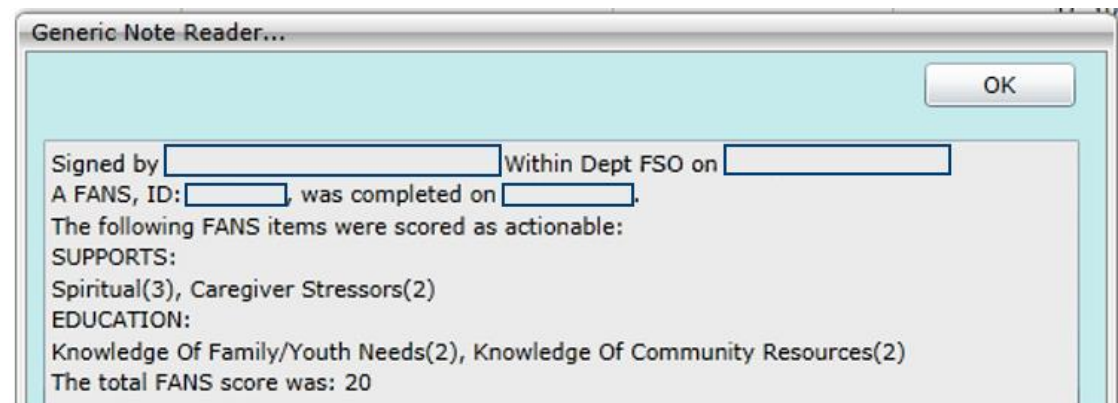
- Double-clicking on an entry in this grid opens the document up to the user, who will be able to work on the document, transfer it to another user within the agency (if need be), or submit it directly to the CSA if they have the correct security.
- Users have the option of **Unassigning a plan** or assessment from their own ID; doing this will set the status in the Filtered Plans grid to Unassigned.
 - This process leaves the document unattached and incomplete and is not recommended. The document will remain unassigned until it is manually assigned by a user. The document will remain available to everyone to be re-assigned.

Submit FANS - Automated Progress Note

FSO – FANS Completion - Designed to record that a FANS and Family Action Plan were completed within CYBER. *This progress note type will generate automatically at the time a FANS is submitted and approved.*

The progress note will display the following information in a templated format:

- Date the FANS was completed, name of FANS items scored as (2 or 3) and the item scores, and the total FANS score.
- The template portion of this note type cannot be edited by the user. Additional information can be added to the note prior to completion.
- Users will be able to edit the template text of the FSO – FANS Completion Progress Note, but cannot edit the information that was pulled from the FANS.
- The name of the user who submitted the FANS to the CSA will be the signature stamp for this progress note type.



Troubleshooting - Maintaining Access to Youth Records

Complete and *submit* your FANS!

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

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

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

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

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

Commit your draft progress notes!

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

Technical Issues that may appear in CYBER should be reported to the Service Desk.

Report Issues using the Service Desk Request Form:

<https://apps.performcarenj.org/HelpDesk/csareqajax.aspx/> or go to the Providers section of the PerformCare website and clicking the link for the Request Form at the bottom.

Email Service Desk servicedesk@performcarenj.org and please include:

- Name and Username of person reporting the issue
- Description of the behavior or issue
- Location in CYBER
- Date and time of incident
- Screen shots of the issue or exported reports
- Please do not include PHI in your message.

Call PerformCare 877-652-7624 and let them know you are having a technical issue.

References

PerformCare Training web page:

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

FSO Section:

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

General Section:

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

Email the PerformCare Training Unit:

- PCNJTraining@performcarenj.org

Policy questions, requests to change functionality:

- CSOC Service Line Manager

Important Contact Information for CSOC Providers:

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

Care is the
heart of
our work.

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