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Instructional Guide to Intensive In-Community (IIC) and Behavioral Assistant (BA) Treatment Plans

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Instructional Guide to IIC and BA Treatment Plans

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I. Introduction

The Intensive In-Community (IIC) and Behavioral Assistant (BA) Treatment Plans, completed for documentation of IIC/BA treatment planning and to document planning for Social Emotional Learning (SEL) services, are submitted electronically in CYBER.

Both plan types include the Treatment Matrix that allows users to input clinical information such as a youth's Needs and Strengths, as well as Strategies, Techniques and Barriers to treatment in an associated format. The Matrix itself is presented in a tree structure instead of the accordion structure that is found in the rest of the plan. This format allows the user to see all of the associated information at once. For example, the user will be able to view the Desired Outcomes/Goals that are associated with a specific Need, as well as the Strengths, Strategies and Techniques associated with the same Need without having to open other areas of the plan.

IIC and BA Plans are a part of the automatic-approval process in CYBER. Once submitted, the plan is automatically approved because there are no service requests present.

Note: If the IIC/BA providers are providing SEL services, an IIC/BA treatment plan must be submitted prior to CMO requesting authorization. CMO will have an alert identifying the absence of an IIC Treatment Plan when making the initial request for SEL services on a CMO plan; an alert will also be triggered if the CMO is requesting continued stay in SEL and the IIC and BA Treatment Plans have not been submitted in advance of the service request.

II. Accessing CYBER

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



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

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

Before you log in, keep in mind...

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

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

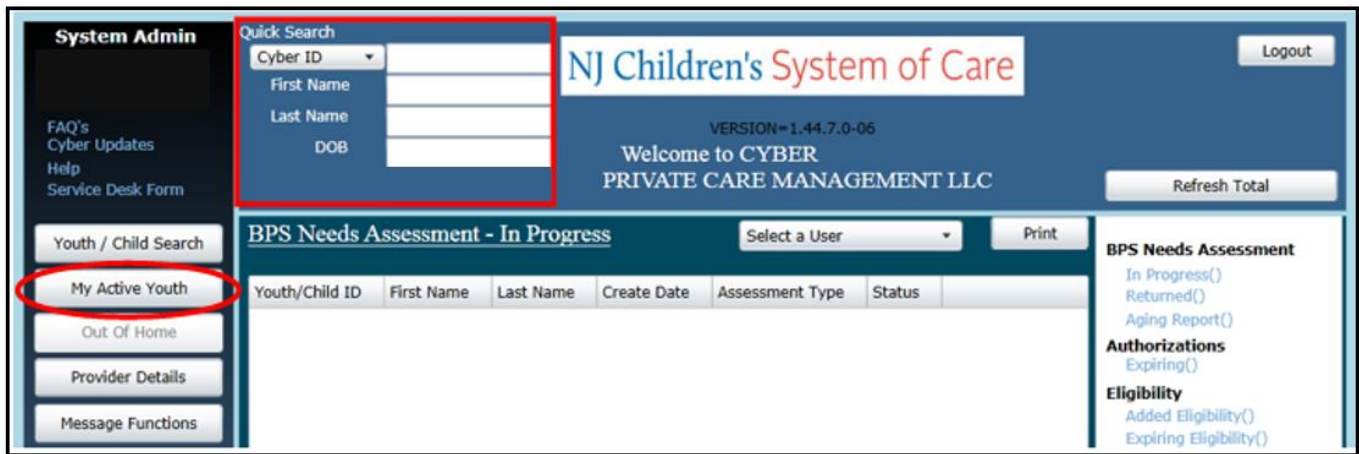
This statement will appear each time you log in.

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

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

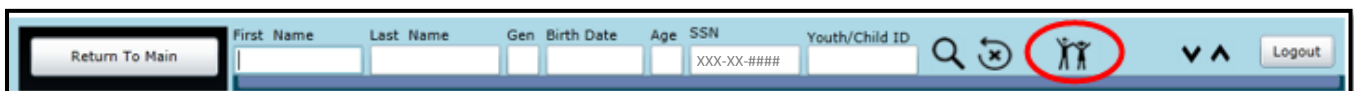
III. Locating a Youth

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



Clicking on the 'My Active Youth' button on the left side of the screen will bring up a list of youth that the logged-in user is currently open to (on the Provider tab of the youth's Face Sheet). Using the **Quick Search** function at the top of the Welcome Page allows the user to search for a specific youth they are open to by using a combination of identifiers (see above screenshot).

Users may also click Youth/Child Search and utilize the Show Active Agency Youth icon (circled below), which will show all of the youth that are open to the user's agency.



IV. Creating a New Treatment Plan

Once the correct youth's record is located, the user can click on the youth and arrive at the youth's Face Sheet. The **Treatment Plans Assessments** button on the left side of the record brings the user to the youth's Treatment Plans and Assessments grid.



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Users will need to open the pull-down menu above the grid to select which plan type they are going to create.

Assessment Type	Assessment Sub Type	To CSA Date	Assess
StrengthsAndNeedsAsmt	Routine	6 14:45:43	
TREATMENT PLAN	UCM - SC	2018/10/09 16:29:02	
TREATMENT PLAN	UCM - CR90D	2018/08/14 21:05:21	

Only one draft of each Plan Type (IIC or BA) can be opened at a time; if there is already a draft saved to the youth's record by any user within the agency, and the logged-in user attempts to create another plan, they will receive an error message and will be unable to continue. If the user is the author of the draft plan, they can edit and submit it or delete it and start new; if the user is not the author or owner, they will need to locate the plan via the Plan Approval screen.

V. The Accordions of the Treatment Plans

The following sections will review each of the accordions contained in the IIC and BA Treatment Plans; any differences for the BA plan will be highlighted.

Treatment Plan Type Selection Accordion

After selecting the Treatment Type, and clicking Add New button, a blank plan will open and the first section, Treatment Plan Type Selection opens and displays the selected Treatment Type.

Treatment Type: IIC_2 - Intensive In Community Treatment Plan v.

Copy Treatment Plan Accordion

The next accordion, Copy Treatment Plan, allows a user to select and copy a previously submitted and approved IIC/BA Treatment Plan created by the same agency to create a new plan. The purpose is primarily for the convenience of reducing the amount of time it takes to enter details that have not changed from plan to plan. If a user chooses this functionality, it is expected that the user will review the entire document thoroughly and update it appropriately so that it reflects the current treatment plan, goals and progress of the youth.

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When the Copy Treatment Plan accordion is opened, only plans that may be copied will be available.

1. Click the ID radio button to the left of the plan to select the plan.
2. Click the Copy Treatment Plan button.

The screenshot shows a window titled 'COPY TREATMENT PLAN' with the instruction 'Select a treatment plan to copy.' Below this is a table with the following columns: ID, TYPE, CREATED DATE, AUTHOR, and SUBMITTED DATE. The table contains six rows of data. A red circle highlights the radio button next to the first row (ID: BA_2 - BA_2, CREATED DATE: 2018/08/10). At the bottom of the window, a button labeled 'Copy Treatment Plan' is also circled in red.

ID	TYPE	CREATED DATE	AUTHOR	SUBMITTED DATE
BA_2 - BA_2	BA_2 - BA_2	2018/08/10		2018/08/10
BA_2 - BA_2	BA_2 - BA_2	2018/06/04		2018/06/04
BA_2 - BA_2	BA_2 - BA_2	2018/04/11		2018/04/11
BA_2 - BA_2	BA_2 - BA_2	2018/02/27		2018/02/27
BA_2 - BA_2	BA_2 - BA_2	2017/12/19		2017/12/19
BA_2 - BA_2	BA_2 - BA_2	2017/10/18		2017/10/25

All information will be copied into the new plan EXCEPT for the diagnosis. Any previously entered diagnosis is listed, but it must be selected separately and added to the plan (See [Diagnosis Accordion](#) below).

Note: After copying the plan, it is strongly recommended that the user scroll to the bottom of the plan and click save to save the plan to reduce chance of data loss.

Demographics Accordion

The Demographics Accordion in the IIC/BA treatment plan displays demographic information that is drawn directly from the Demographics tab of the Face Sheet for the youth.

The screenshot shows a form titled 'DEMOGRAPHICS' with various input fields. A red box highlights the 'Care Management Entity' and 'Care Manager' fields. A red circle highlights the 'Refresh' button at the bottom left.

Child Name:	DOB:	
Address:	Gender:	
City:	Race:	
County:	SSN: XXX-XX-####	
State:	Zip:	Medicaid #:
Parent/Guardian:	Guardian Relationship:	
Address:	Primary Phone:	
City:	Secondary Phone:	
State:	Zip:	
Current Living Situation:	Care Management Entity:	
Current LS Effective Date:	Care Manager:	
	Care Manager Phone:	
Provider Name:	Assessor Username:	
Admission Date:	Assessor Name:	
Provider Phone:	Assessor Agency:	
	Assessor Phone:	
	Assessor Email:	
	CFT Date:	
	Assessment Completion Date:	

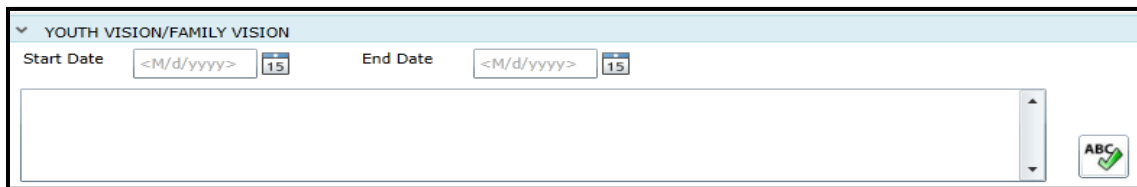
If the youth has more than one Care Manager (CM) listed as active on the Provider tab of the Face Sheet, the IIC/BA user has the option of selecting a particular CM to identify on the Demographics accordion. The Care Management Entity (CME) field has a pull-down menu to allow the IIC/BA user to choose the CM.

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Note: If there is only one open CM on the youth's Provider Tab Face Sheet, the field will default to that CM's information and a selection will not be necessary.

The 'Refresh' button located at the bottom of the Demographics accordion can be used prior to submitting the plan to update the demographics accordion. This button becomes active the first time the user saves the plan. If any of the demographic information on the youth's Face Sheet changes and the information in the plan needs to be updated, the user can click on the 'Refresh' button to pull in the most recent information from the Face Sheet.

Youth Vision/Family Vision Accordion



The Youth Vision/Family Vision accordion is where the user will document the vision, or the goals that the family and youth hope to achieve.

Note: The information entered here should not include the goals of treatment or the treating provider.

The goals may be long-term and a **Start Date** is required. An **End Date** may be the projected discharge date or a specific date that the family may have in mind. For example, the end of the school year.

Note: All text fields within the plans will have the 'ABC' button next to them. This is a Spell Check function that is similar to Spell Check in Microsoft products. Please utilize this function to ensure that the document is accurately spelled.

Matrix Accordion

The Treatment Matrix is a comprehensive tool outlining the connected and interrelated parts of the Treatment Plan in an easy-to-read 'tree' structure. It allows users to enter a Need and map its associated Strengths, Strategies, Techniques, Responsible Person, Desired Outcomes/Goals and Barriers to it in one screen without having to navigate to multiple areas of the Treatment Plan. The Matrix makes it visually easy to see the relationship between the Need and any associated information. It can be opened by clicking on the **Matrix** accordion row in the Treatment Plan. This accordion displays the tree structure of the treatment Matrix and is populated with information that the user enters to outline the plan for treatment (See section, [Using the Matrix](#) below).



Diagnosis Accordion

Users will find two separate areas in this accordion:

Existing Diagnosis Entries on File - This area will display the diagnosis entries that are marked as 'Complete' in the youth's record.

- Clicking on the '+' or the '-' button on each record will *expand* (show) or *collapse* (hide) the diagnosis details beneath.
- **Copy Diagnosis button** - Users can select and copy existing active diagnosis into the Diagnosis Details below. If user selects to copy a diagnosis and the diagnosis code is inactive*, only the Diagnosing Clinician and Date fields will copy and the message will display, "Inactive diagnoses cannot be copied. Only active diagnoses will copy." If there is only one diagnosis and it is inactive, no diagnosis will be copied. If there are multiple diagnoses, the active diagnoses will be copied.
- **Diagnosing Clinician** - A required field; this field will copy over if the user copies an existing diagnosis.
- **Date Diagnosis Rendered** - A required field; this field will copy over if the user copies an existing diagnosis. Otherwise, it will default to the current date and the user is expected to update it appropriately.

The screenshot shows the 'DIAGNOSIS' accordion. At the top, it says 'Existing Diagnosis Entries on file' and 'Certain users can copy an existing diagnosis to and/or edit the Diagnosis Details grid. Copying a diagnosis is not required.' Below this is a list of diagnosis entries with dates like '1/06/2019' and '08/16/2018'. A 'Copy Diagnosis' button is circled in red. Below the list are fields for 'Diagnosing Clinician' and 'Date Diagnosis Rendered' (set to 12/11/2019). At the bottom is a 'Diagnosis Details' grid with columns for Type, Code, Description, and Diagnosis Comments. The '+' and '-' buttons in the grid are circled in red. A 'Clear Diagnosis' button is at the bottom.

**An inactive diagnosis code is no longer available in the ICD-10/DSM-V manual*

Diagnosis Details

A user may click the '+' button to add a new diagnosis.

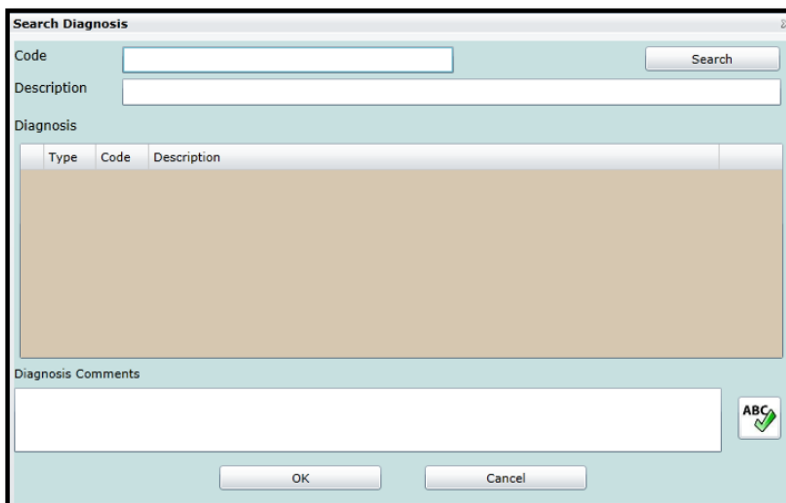
This will bring up the Add Diagnosis window.

- Users can enter an ICD-10 code into the Code field; users can also enter a description for the code they are searching for.
 - Users are encouraged to do a partial description search using just a few letters. Any errors will return no results.

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Clicking the **Search** button will run the search; the results will populate in the Diagnosis grid.

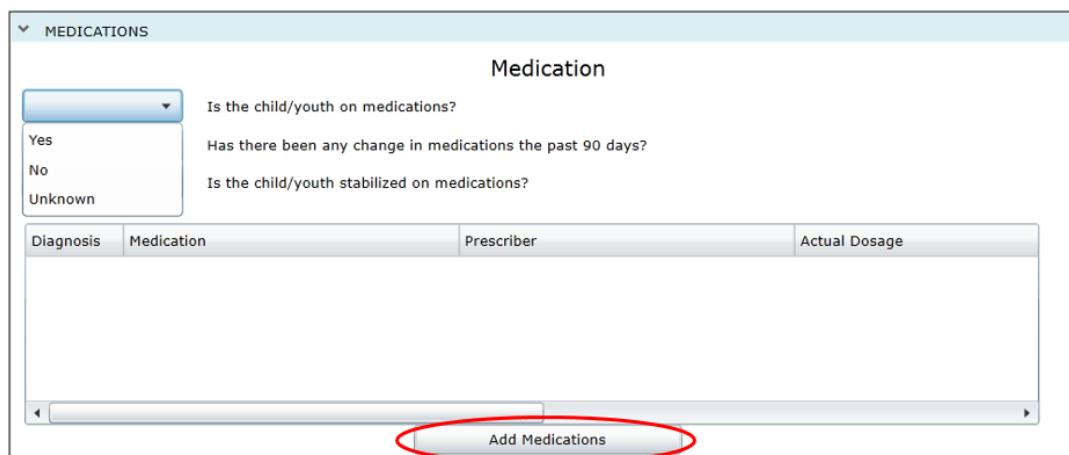
- Single-clicking on the code within the grid will select it for entry into the treatment plan.
- Users are encouraged to use the **Diagnosis Comments** box for any additional information that is necessary.
 - There are a number of ICD-10 codes which require additional documentation to further specify the youth's diagnosis. That information should be entered in the Comments.
- Clicking **OK** will add the selected diagnosis and comments to the plan.
 - The new Diagnosis will have a status of 'Incomplete' until the plan is submitted and auto-approved, at which time the status will change to 'Complete' and will be viewable from the Diagnosis accordion of new Treatment Plans. Adding the new diagnosis information into the Treatment Plan will also add it to the youth's record; the new diagnosis will be visible on the Diagnosis tab of the Face Sheet.



Note: Copying an existing Diagnosis record into the Treatment Plan will overwrite (i.e. delete) any diagnosis already added to the plan. It is recommended that users review the existing Diagnosis information before copying information.

Medications Accordion

When a user opens this accordion, there are three required questions regarding the youth and medications the youth may be taking. Complete the requirement with Yes, No, or Unknown.



If medications were previously added, they will appear in the medications grid below the questions. Clicking the Add Medications button will bring up a new window where the user may *add the current medications to the plan*. Users have two options in the Add/Edit Medications window.

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If there are Available medications:

- To associate an existing medication, the user will single-click on it in the top grid to select the record and then click the Associate button at the bottom of the window.
- The medication will then appear in the bottom grid – Associated Medications.
 - It will also appear on the plan.

If there are no Available medications to associate, the user may *add* a medication:

- Click the 'Add' button to bring up the **Add/Edit Medication Comment for a Treatment** window.

The screenshot shows a window titled "Add/Edit Medication Comment for a Treatment". It contains two main grids. The top grid, "Available Medication", has columns for Medication, Diagnosis, Prescriber, Actual Dosage, Frequency, and Reported Date. It shows two rows: one with 600 mg dosage and one with 500 mg dosage, both with a frequency of "Daily or day". The bottom grid, "Associated Medication", has columns for Medication, Diagnosis, Prescriber, Actual Dosage, Frequency, Reported Date, and Created Date. At the bottom of the window, there are four buttons: "Close", "Add" (circled in red), "Associate", and "Remove".

Each of the fields is required:

- Medication Name - When the user begins to enter the name of the medication, a menu will appear that will include the name of the medication, as it appears in the database and any/all dosage information available for it.
- Prescriber - the name of the physician prescribing the medication.
- Actual Dosage - should be entered as prescribed by the physician's script.
- Frequency - is a drop down allowing the user to select the medication frequency.
- Reported Date - should be entered as the date the user learned of the youth's use of the medication.
- Created Date - the date the medication was entered into the plan.

The screenshot shows the same window with the form fields filled out. Medication Name is "TYLENOL 325 MG ORAL TABLET (ACETAMINOPHEN) (JOHNSO)", Prescriber is "(Prescriber's Name)", Actual Dosage is "600 mg", and Frequency is "d - Daily or day". Reported Date and Created Date are both "12/11/2019". The "Diagnoses" grid has columns for Diagnosing Clinician, Diagnosis Code, and Diagnosis Description. A red circle highlights a checkmark in the first row of the Diagnoses grid. At the bottom, there are "Cancel" and "Accept" buttons.

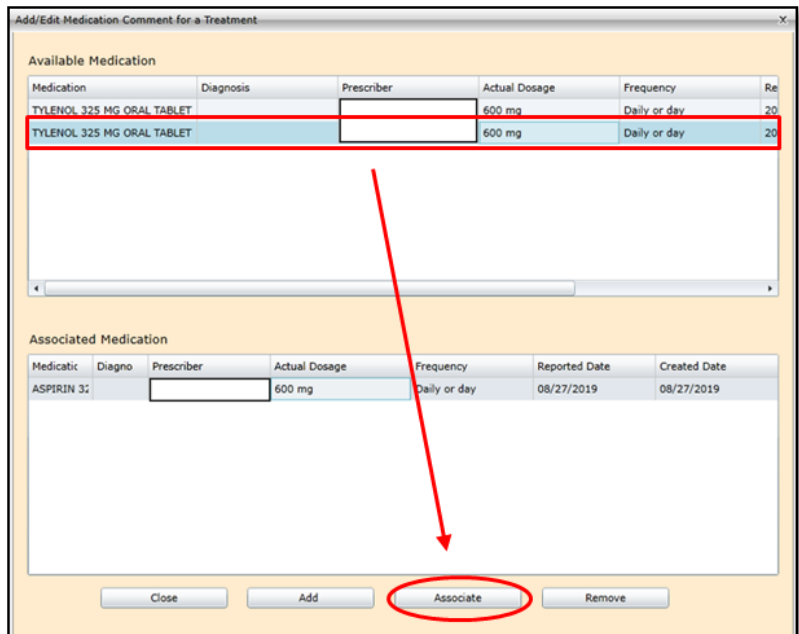
Once the 'Add/Edit Medication Comment for a Treatment' screen is completed, the user may click on the specific diagnoses to associate the entered medication with available diagnoses, and then click Accept to add the medication to the Available Medication grid.

Note: A diagnosis must be under a year old in order to be associated to the entered medication.

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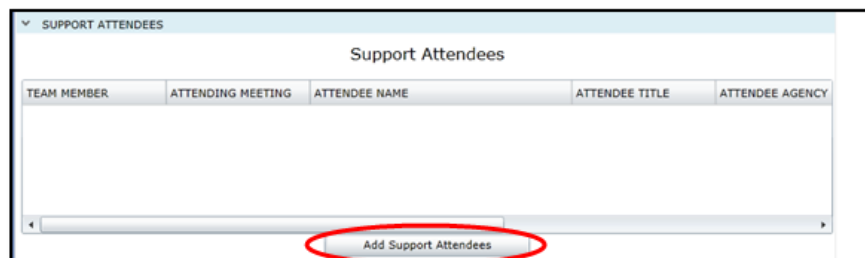
Once the medication is added to the Available Medication grid, the user should associate the Medication to the plan. The user should single-click the specific medication in the Available Medication grid to select it, and then click the Associate button to move the medication into the Associated Medications grid. When finished, click the Close button.

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



Support Attendees Accordion

The Support Attendees accordion is where users can document the individuals that were invited to, and attended the Child Family Team meeting.

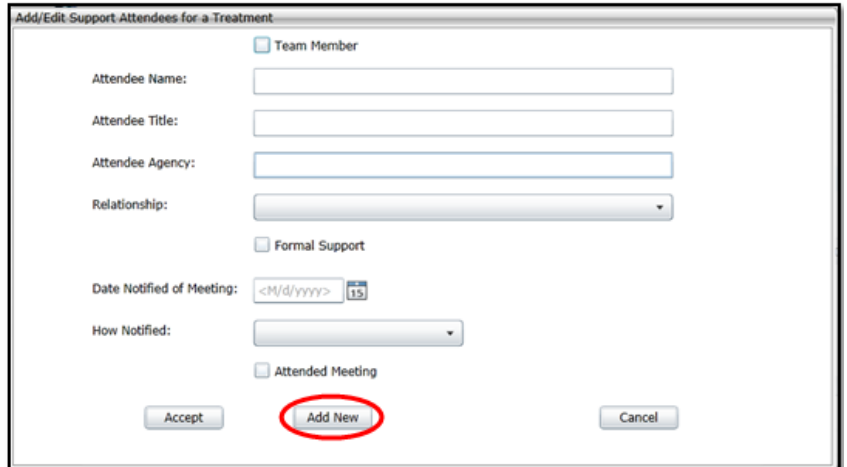


- Clicking on the **Add Supports Attendees** button at the bottom of the accordion will open the Add/Edit Supports Attendees for a Treatment window.
 - Team Member – select this option if the Support is a Team Member.

Note: Supports entered into the youth's Support tab will appear in the Supports Attendees accordion; however, supports entered in the Supports Attendees accordion will not appear in the Support tab.

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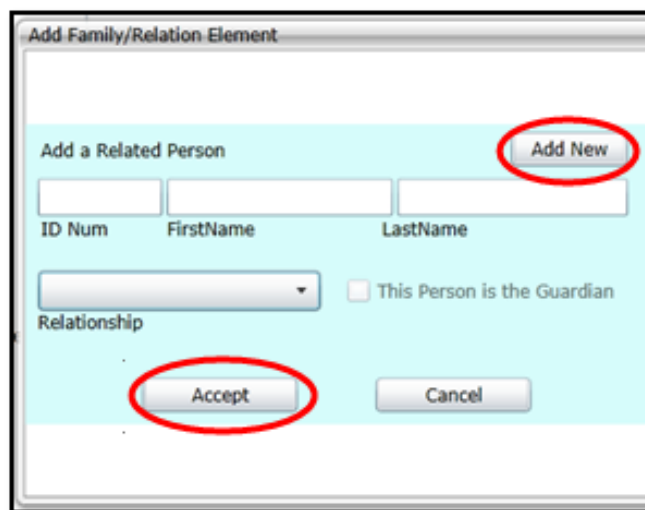
- Attendee Name* – is the name of the support attending the meeting. If the user enters the first three letters of the name, a listing of names displays. If the attendee's name is not displayed, the user can enter additional letters until a match appears. If no match appears, see [Add New Support](#) below.
- Attendee Title* – the title of the Attendee. If the attendee has no title, then enter 'NA'.
- Attendee Agency* – the agency the attendee is affiliated with.
- Relationship – a listing of family, formal and informal relationships found in the Face Sheet Supports tab.
- Formal Support – check this box if the Attendee is a 'Formal' Support.
- Date Notified of Meeting* –use the calendar to enter the required date the attendee was notified of the meeting.
- How Notified* –select from a drop-down menu displaying Email, Phone, Mail and Fax to select.



* Indicates the field is required

Add New Support

In order to add a new support, users will click the 'Add New' button at the bottom of the window. This opens the **Add Family/Relation Element** window.



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1. Clicking the 'Add New' button opens the **Add New Person to the Database** window where the user can add a new person to the Treatment Plan. The minimum information required is:
 - Enter First and Last Names
 - Enter at least one phone number
 - Select at least one classification (check box)
2. Click 'Accept'. When the user clicks 'Accept' they are returned to the Add Family/Relation Element window again. The ID Number, First Name, and Last Name fields will automatically populate based on the previous screen's entries.
3. Enter the required **Relationship** from the drop-down list
4. Select the *optional* check box, 'This Person is the Guardian'.
5. Clicking the 'Accept' button on the Add New Family/Relation window returns the user to the Add/Edit Support Attendees for a Treatment window. When the user clicks the 'Accept' button, the new person entered is added to the database.

The screenshot shows a form titled "Add New Person to the database...". It includes input fields for "First Name", "MI", "Last Name", "Address 1", "Address 2", "City, State, Zip", and "Phone Numbers". There are also several checkboxes for classification: "Agent", "Healthplan", "Insurance", "Organization", "Pharmacy", "Provider", "Related", "School", and "Site". The "Accept" button is circled in red, and a red arrow points to it from the text below.

The screenshot shows a form titled "Add New Family/Relation". It includes a "Relationship" dropdown menu and a checkbox labeled "This Person is the Guardian". The "Accept" button is circled in red.

Once the user is finished entering the attendees in the Add/Edit Supports Attendees window, the added support information will be included in the Treatment Plan.

Note: This information is not added to the Supports tab of the youth's Face Sheet.

Notepad Accordion

The Notepad is available for making notations about the youth or plan that does not fall into other accordions.

The screenshot shows a window titled "NOTEPAD" with a sub-header "Notepad". Below the header is a table with columns "DATE ENTERED", "COMMENT", and "AUTHOR". The "Add Note" button is circled in red.

Clicking the 'Add Note' button allows the user to create a note and add it to the Notepad in the plan. Once it is created and saved to the plan, it cannot be edited or deleted. This functionality may be useful if users within the same agency are transferring the plan amongst themselves for review or additional work; a manager or supervisor can enter notes here about changes that are needed, or return the plan to the author who would then review this area for comments.

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A screenshot of a software interface window. At the top left, it says "Date Entered:" followed by a date field containing "11/06/2018". Below this is a large, empty text input area. To the right of the text area is a small icon with "ABC" and a green checkmark. At the bottom of the window, there are two buttons: "Accept" and "Cancel". The "Accept" button is circled in red.

The **Date Entered** is automatically populated by the system with the current date. The 'ABC' button is a Spell check function. Please utilize this function to ensure that your information is accurately spelled for any reader reviewing the plan. Click the 'Accept' button to add the note to the Notepad grid.

Family Crisis Plan Accordion

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

- Start dates should be entered for each section.
- Start dates are noted as the date that the section was identified (for example, the date that the family determined what they define a 'crisis' to be, the date on which they will start to implement a plan for handling a crisis, etc.).
- End dates are optional and may be entered once a plan has been fully executed.

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FAMILY CRISIS PLAN

Family's Definition of a Crisis

Start date: <M/d/yyyy> [15] End date: <M/d/yyyy> [15]

Strengths/Interests to be used in a Crisis Situation

Start date: <M/d/yyyy> [15] End date: <M/d/yyyy> [15]

Risks/Triggers

Start date: <M/d/yyyy> [15] End date: <M/d/yyyy> [15]

Strategies to use in a Crisis Situation (what works)

Start date: <M/d/yyyy> [15] End date: <M/d/yyyy> [15]

What helps the Family/Caregiver in a Crisis Situation

Start date: <M/d/yyyy> [15] End date: <M/d/yyyy> [15]

Who can help in a Crisis Situation/Resources to use in a Crisis Situation

Start date: <M/d/yyyy> [15] End date: <M/d/yyyy> [15]

Are there any Medical Problems? (if Yes, please list details)

Start date: <M/d/yyyy> [15] End date: <M/d/yyyy> [15]

Additional Information

Start date: <M/d/yyyy> [15] End date: <M/d/yyyy> [15]

IIC TREATMENT PLAN

Save Save & Close Submit Return Transfer

Cancel Delete Print View Treatment Plan Review History

IIC or BA Treatment Plan Accordion

The IIC Treatment Plan accordion collects licensure information for the provider and is the same for both IIC and BA Plan and users. The only difference is the Treatment Plan accordion name will display IIC or BA according to the plan type selected.

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

- Licensed Clinician*
- Licensure*
- License Date* contains a validation against the entered date; the date must be prior to the current date and prior to the date entered into the License Expiration Date field. (The date entered should be the initial date the license was issued.)
- License Number*
- License Expiration Date* contains a validation against the entered date; the date - must be greater than the current date
- Behavioral Assistant Section
 - Name of Person is optional
- Caregiver Section
 - Name of Person is optional
- Youth Section
 - Name of Person the name of youth is automatically populated from the Face Sheet
- If copies of the Behavioral Assistance Plan were not given to the youth and to the family, please justify.

* Indicates the field is required

The screenshot shows a web-based form for creating a Behavioral Assistant Treatment Plan. At the top, a dropdown menu is set to 'BEHAVIORAL ASSISTANT TREATMENT PLAN'. Below it, the 'IIC TREATMENT PLAN' accordion is expanded. The 'CLINICIAN' section is highlighted with a red box and contains the following fields: 'Licensed Clinician', 'Licensure', 'License Date' (with a date picker), 'License Number', and 'License Expiration Date' (with a date picker). Below this is the 'BA SUPERVISOR (if different than above)' section, which includes a note: '(signing does not indicate responsibility for development or implementation of the plan, but does demonstrate awareness of the plan)'. It has the same set of fields as the Clinician section. The 'BEHAVIORAL ASSISTANT' section has a 'Name of Person' field. The 'CAREGIVER' section also has a 'Name of Person' field. The 'YOUTH' section has a 'Name of Person' field with the value 'Nicolas Lombardozi' populated. At the bottom, there is a text area for justification: 'If copies of the Behavioral Assistance Plan were not given to the youth and to the family, please justify.' The form includes a toolbar with buttons for 'Save', 'Save & Close', 'Submit', 'Cancel', 'Delete', 'Print', 'Return', 'Transfer', and 'View Treatment Plan Review History'.

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

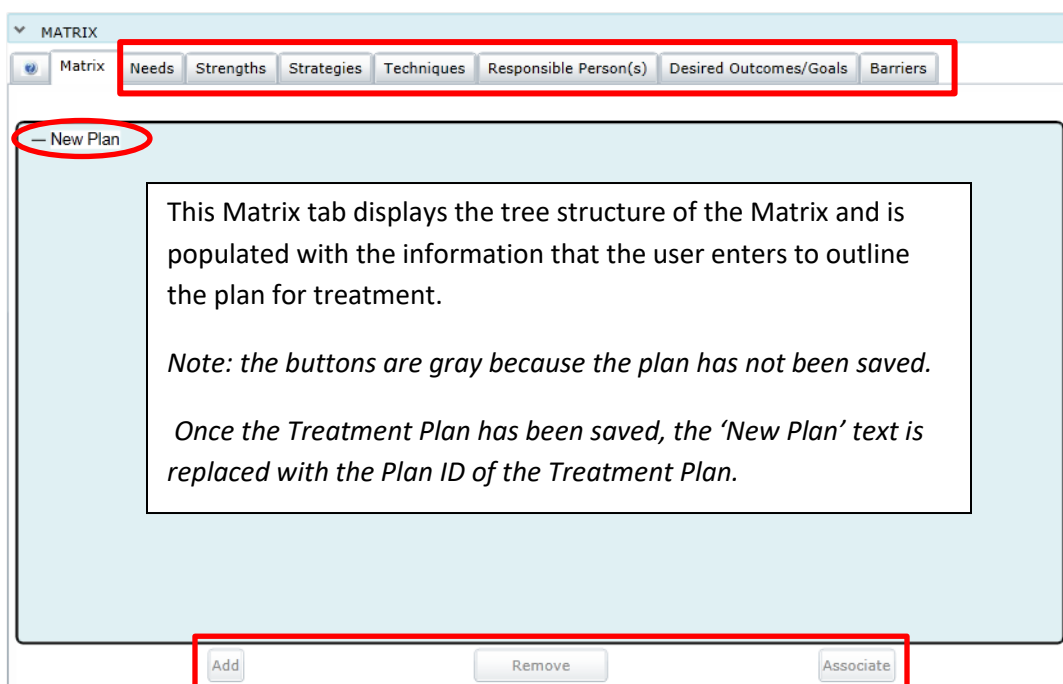
Users have the option of clicking the following buttons at the bottom of the Treatment Plan window:



- Save – This button is available to users when a plan is assigned to them. Clicking it saves the plan and all changes the user made to it while keeping them on the plan screen.
- Save & Close – This button is available to users when the plan is assigned to them. Clicking it saves the plan and all changes the user made to it and then takes the user back to the Treatment Plans/Assessments portion of the youth’s record.
- Submit – This button is used to submit the assigned Treatment Plan for review.
- Cancel – This button closes the Treatment Plan window without saving any changes to it.
- Delete – This button is used to delete the Treatment Plan assigned to the user.
- Print – This button is used to print the Treatment Plan (refer to section VI. Printing the Treatment Plans)
- Return – This button is available to CSA users who have reviewed the plan and found deficiencies which need to be sent back to the IIC or BA user for further information in order to complete the plan.
- Transfer – This button allows the user to transfer the Treatment Plan for Internal Review.
- View Treatment Plan Review History – This button allows the user to track the Treatment Plan as it is being reviewed.

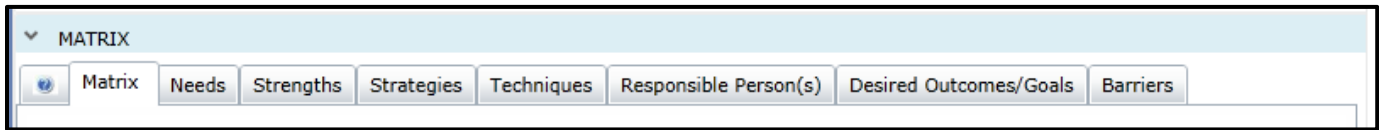
VI. Using the Matrix Accordion

Once the Matrix accordion is opened, the user initially will see a blank Matrix tab with ‘New Plan’ listed at the top. The name will change to the Plan ID number the first time the plan has been saved. Users will see multiple tabs across the top of the accordion.



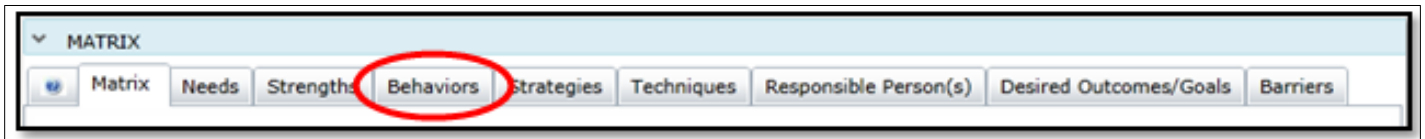
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The specific plan type (IIC or BA) will dictate which treatment matrix tabs will appear.



IIC Treatment Matrix

The BA Treatment Plan includes the Behaviors tab.



BA Treatment Matrix

The Behaviors Tab of the Matrix, only activated for BA Treatment Plan types and is discussed in a separate section of this instructional guide. See [Behaviors Tab](#) section.

Before You Begin – Two Approaches to the Treatment Matrix

How users approach the process of entering information into the Matrix Accordion will determine steps taken.

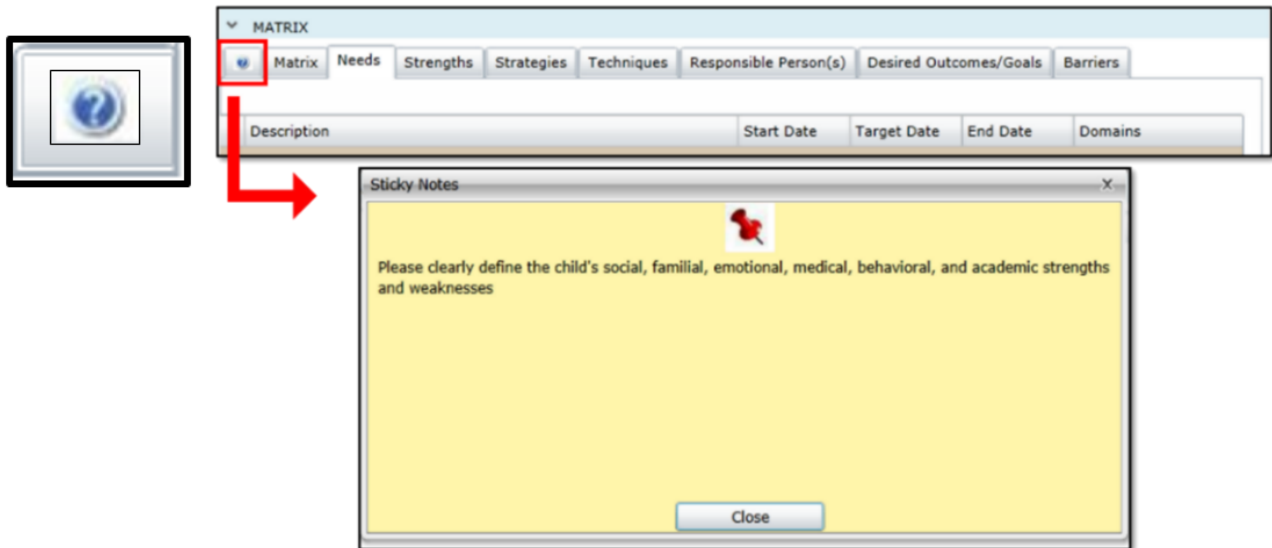
- Approach 1
 1. Progress through each tab entering data in any order
 2. Return to the Matrix tab and associate each tab's information
- Approach 2
 1. Stay on the single Matrix tab and enter all the information in specific order. The button at the bottom of the Matrix accordion, 'Associate Need', will become active only once the user single-clicks on the 'New Plan' line of the Matrix. This button is dynamic; depending upon what the user selects in the Matrix, the button will display the next level in the Matrix tree. If the user selects a Strength in the Matrix tree, this button will display 'Associate Strategy', which is the next level down in the tree.
For example, the Need is entered first, the Strengths are entered and then associated to the Need, the Strategy is entered and then associated to the Strength, etc.

Users may also enter data in a combination of the above approaches. This approach may be recommended for a user who is familiar with the functionality.

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The Tabs

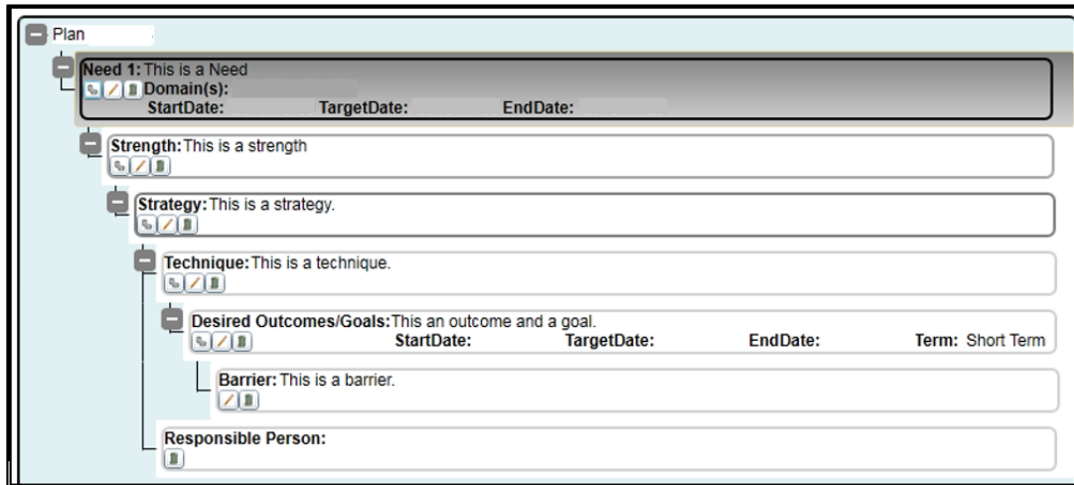
The first tab users will see in the Matrix accordion a **blue question mark**. When clicked, the user will see the Sticky Note help text:



Users will see Sticky Notes in other areas of the Matrix. Clicking on them will display text that is helpful in completing the Plan.

The Tree View or Structure

The **tree view** of the matrix is a way of displaying the information in a hierarchical format. Each item (or branch) can have a number of sub items below, visualized by indentation.



Example of a 'Tree' structure

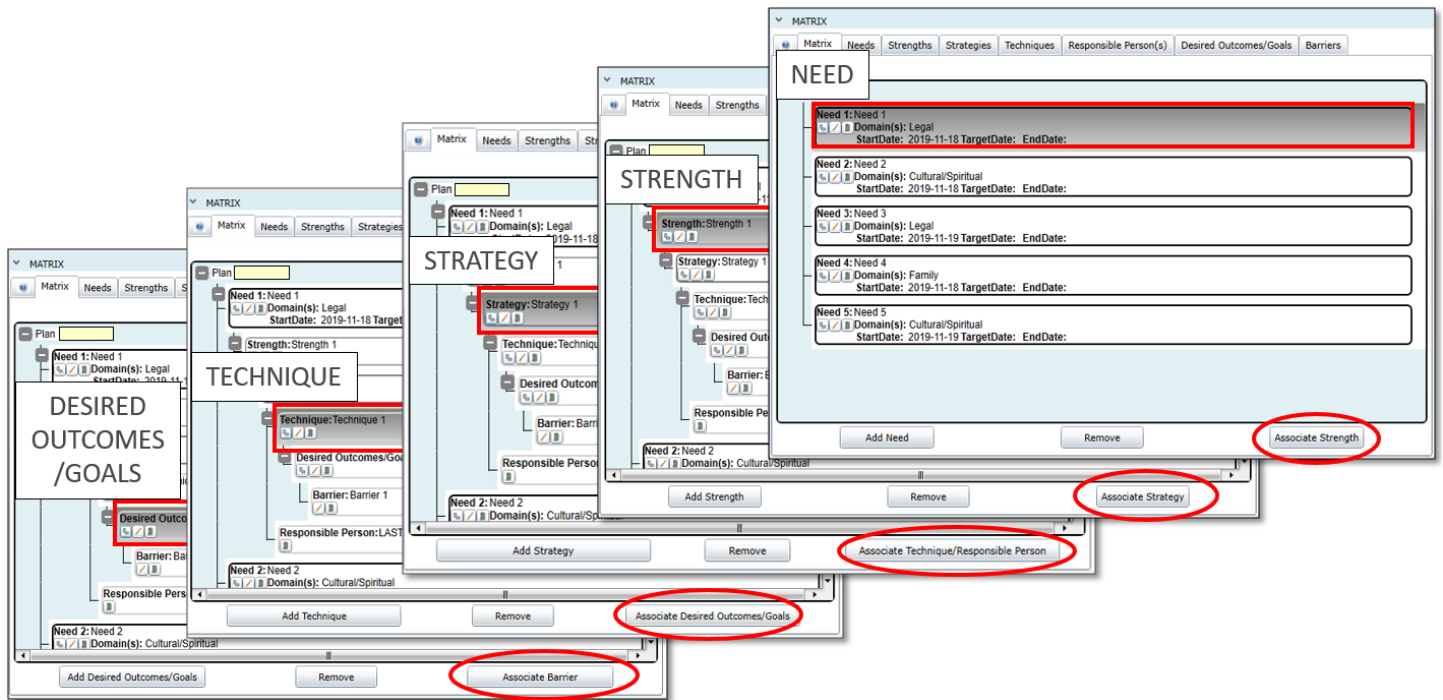
The Treatment Matrix contains the following tabs:

- Matrix – displays all the associated information about the treatment from the tabs
- Needs – identifies the youth's needs in regard to their behavioral and/or emotional symptoms
- Strengths – identifies the strengths of the youth
- Behaviors – (only included on the BA Treatment Plan) describes the behaviors of the youth
- Strategies – is a planned approach in treating a need and utilizing youth strengths
- Techniques – a component to address the strategy (measurable/countable)
- Responsible Person(s) – family, formal and informal participants in the youth's treatment
- Desired Outcomes/Goals – document each treatment goal in each program area with projected time frames for completion
- Barriers – activities or actions that interfere with, restrict or inhibit a youth's progress in treatment

The images in this guide are primarily based on the 'IIC Treatment Plan' design. The Behaviors Tab of the Matrix is detailed in another section (See [The Behaviors Tab - BA Plan only](#) section).

Matrix Dynamic Associate Button

The dynamic 'Associate' button changes each time you add a new level to the matrix.

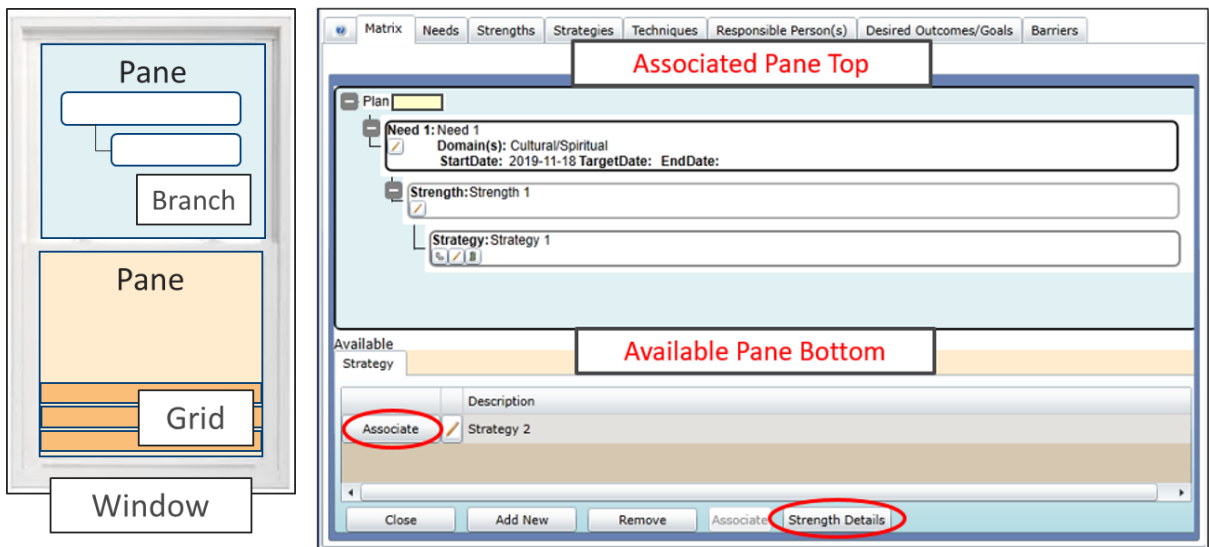


The Matrix Associate button is dynamic. This means it changes with each new level added to the plan.

1. For instance, a user can start by **adding a Need and associating it to the plan**. When the user clicks the Need in the Matrix tab the Associate button changes to Associate Strength.
2. Then the user can **add a Strength and associate it to a Need**. When the user clicks the Strength in the Matrix tab, the associate button changes to Associate Strategy.
3. The user can **add a Strategy and associate it to a Strength**. When the user clicks the Strategy in the Matrix tab the Associate button changes to Associate Technique/Responsible Person.
4. Next, the user can **add a Technique and a Responsible Person and associate it to the Strategy**. When the user clicks the Technique/Responsible Person in the Matrix tab the Associate button changes to Associate Desired Outcomes/Goals.
5. Finally, the user can **add a Barrier and associate it to the Technique**. When the user clicks the Desired Outcomes/Goals in the Matrix tab the Associate button changes to Associate Barriers.

Associating on the Matrix tab

When the user selects a level to associate to the next level, an Associate/Available window opens divided into two panes.



Upper Matrix Associate Window Example

At the top of the Associate window is the level of the Matrix that the user has selected.

If the user wants to edit the level here, they can click on the Pencil icon next to the item in the upper windowpane and it will open the Add/Edit screen.

Lower Matrix Associate Window Example

The bottom of the Associate window displays all the available entries in the next level that can be associated to the previous level. Each entry can be associated to more than one level.

The user can click on the 'Associate' button next to each entry in the lower windowpane to associate. As each entry is associated, it moves from the bottom window to the top window.

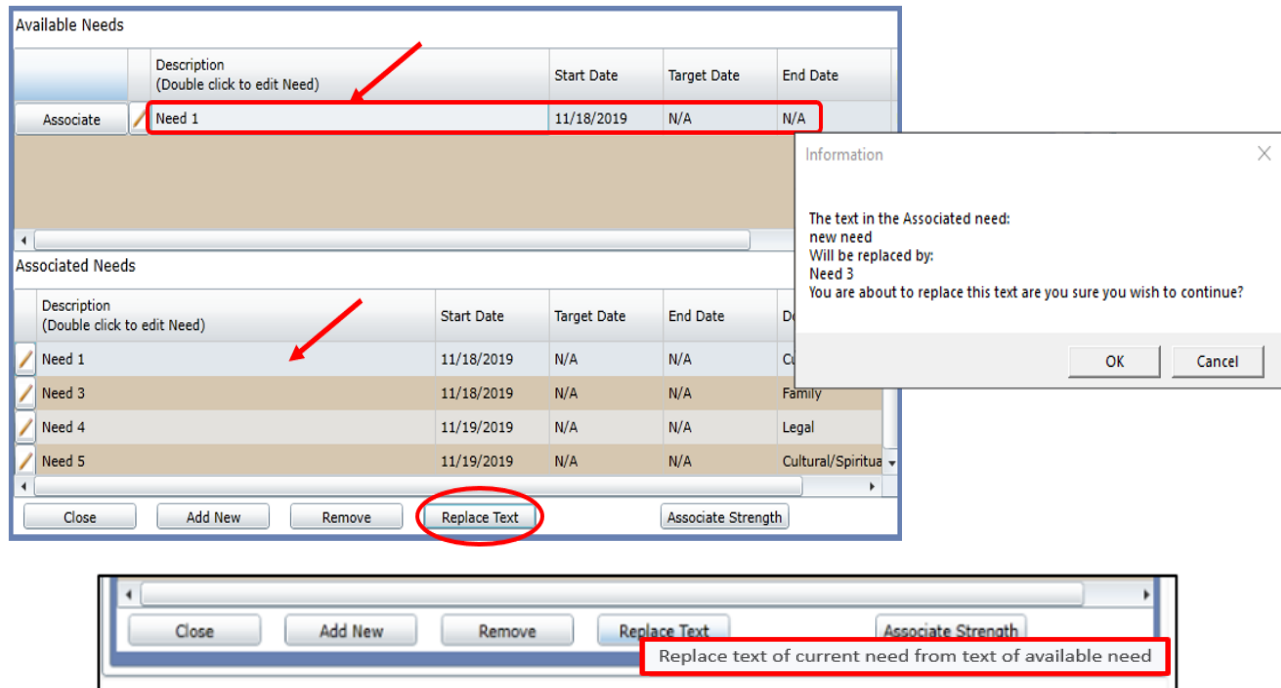
Note: The label on the bottom half of the Associate window is a dynamic title that will change according to the matrix level.

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

- **Close** – the user must use this button to close the Associate window and return the user to the Matrix tab
- **Add New** – opens the Add/Edit screen for that level of the Matrix that the user is working on.
- **Remove** – removes the selected, associated entry from the Matrix; *Note: if there are items below the selected item, they will be removed from the branch of the Matrix as well*
- **Associate** – (gray when no levels are selected) this is a dynamic button that will change depending on which level is selected in the upper Associate window

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- **(Level) Details** – this button changes dynamically depending upon what level of the Matrix the user is working on. The window that opens allows the user to see the available and associated entries of the current level, edit, add new entries, replace the text, remove the associations or associate to the next level.
 - **Replace Text** - The User may select an available entry and an associated entry and then click Replace Text to put the available entry text into the already associated entry.



Example of replacing text of current associated need with available need

User must click Close to return to the Matrix tab.

Note: To get to the Available/Associate Needs window above, the user can:

1. Click on the Matrix tab to start
2. Select one Need attached to the plan
3. Click Associate Strength button to open the Associate screen
4. Click Need Details button to open the Available/Associated Need Details screen
5. Click to select an available Need;
 - Once selected, the Replace Text button becomes and stays active
6. Click to select an associated Need

Entering Data vs. Editing Data

When entering or editing data in the individual matrix tabs, users will note different button options:

- **Accept** - will save any changes in the Add/Edit screen and return the user to the 'Available/Associated' screen
- **Cancel** – will exit the screen without saving changes
- **Treatment Matrix** – This button will show only when editing data. If changes are made, the button will save the changes and return the user to the Matrix tab.

Entering Data

Editing Data

Add/Edit Need

Need
(Entering a new Need)

Start Date: <M/d/yyyy> 15 Target Date: <M/d/yyyy> 15 End Date: <M/d/yyyy> 15

Domains

<input type="checkbox"/> Cultural/Spiritual	<input type="checkbox"/> Medical	<input type="checkbox"/> Social/Recreational
<input type="checkbox"/> Educational/Vocational	<input type="checkbox"/> Other	<input type="checkbox"/> Substance Abuse
<input type="checkbox"/> Family	<input type="checkbox"/> Psychological/Mental Hea	<input type="checkbox"/> System Barriers
<input type="checkbox"/> Legal	<input type="checkbox"/> Safety	<input type="checkbox"/> Transitional Planning
<input type="checkbox"/> Living Arrangements		

Accept Cancel

Add/Edit Need

Need
Entered need that can be modified

Start Date: 4/30/2019 15 Target Date: <M/d/yyyy> 15 End Date: <M/d/yyyy> 15

Domains

<input type="checkbox"/> Cultural/Spiritual	<input type="checkbox"/> Medical	<input type="checkbox"/> Social/Recreational
<input type="checkbox"/> Educational/Vocational	<input type="checkbox"/> Other	<input type="checkbox"/> Substance Abuse
<input checked="" type="checkbox"/> Family	<input checked="" type="checkbox"/> Psychological/Mental Hea	<input type="checkbox"/> System Barriers
<input type="checkbox"/> Legal	<input type="checkbox"/> Safety	<input type="checkbox"/> Transitional Planning
<input type="checkbox"/> Living Arrangements		

Accept Cancel Treatment Matrix

Add/Edit Strength

Strength
(Entering a new Strength)

Accept Cancel

Add/Edit Strength

Strength
Entered Strength that can be modified

Accept Cancel Treatment Matrix

Strengths, Strategies, Techniques and Barriers all have the same text box entry option.

Add/Edit Desired Outcomes/Goals

Desired Outcomes/Goals

Please clearly document specific treatment goals in each program area and projected time frame for completing each goal. Please clearly document any progress made, or lack thereof since the last JCR (if applicable).

(Entering a new Desired Outcome/Goal)

Term: Short Term Start Date: <M/d/yyyy> 15 Target Date: <M/d/yyyy> 15 End Date: <M/d/yyyy> 15

Accept Cancel

Add/Edit Desired Outcomes/Goals

Desired Outcomes/Goals

Please clearly document specific treatment goals in each program area and projected time frame for completing each goal. Please clearly document any progress made, or lack thereof since the last JCR (if applicable).

Entered Outcome that can be modified

Term: Short Term Start Date: 9/24/2019 15 Target Date: <M/d/yyyy> 15 End Date: <M/d/yyyy> 15

Accept Cancel Treatment Matrix

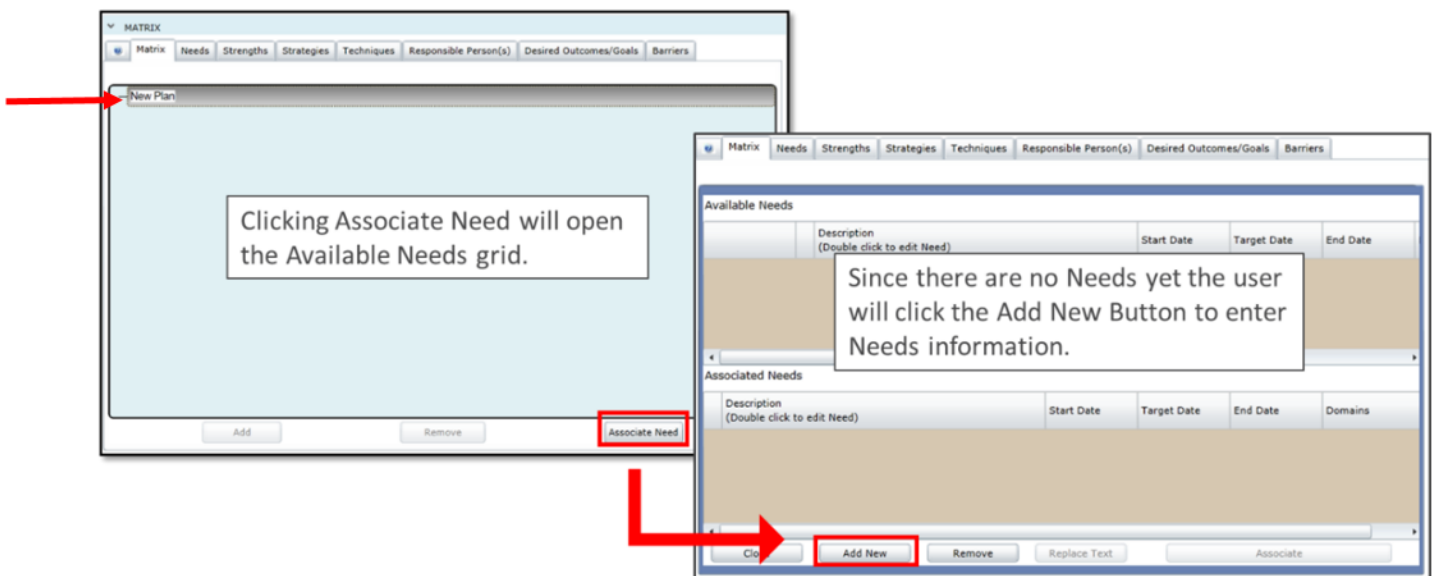
The Needs Tab

Entering Needs Using Matrix Tab

When the user single-clicks on 'New Plan' the row is highlighted in gray and the button at the bottom of the Matrix tab, 'Associate Need', is activated.

This button is dynamic; depending upon what the user selects on the Matrix tree, the button will display the next level in the Matrix tree.

For example, if the user selects a *Strength* in the Matrix tree, this button will display 'Associate Strategy', which is the next level down in the tree.



Clicking the 'Add New' button is one way to open the **Add/Edit Need** window to enter Need information.

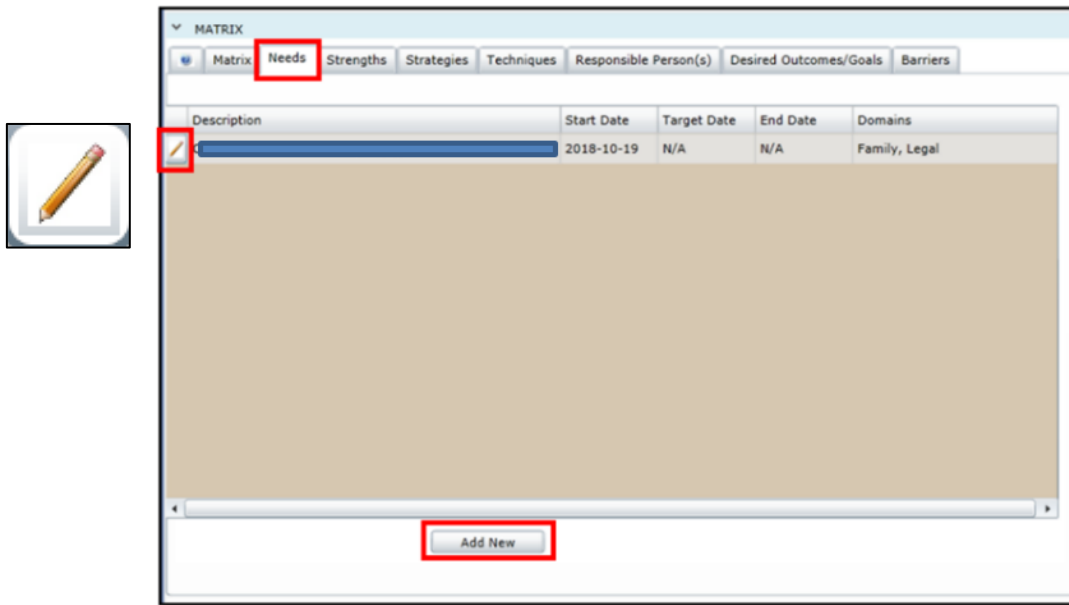
The 'Add/Edit Need' window is a dialog box with a title bar and a close button. It contains a text area for entering the need description, with the placeholder text '(Entering a new Need)'. Below the text area are three date pickers for 'Start Date', 'Target Date', and 'End Date', each with a calendar icon and the value '15'. Below the date pickers is a section titled 'Domains' with a grid of checkboxes for various categories: Cultural/Spiritual, Educational/Vocational, Family, Legal, Living Arrangements, Medical, Other, Psychological/Mental Hea, Safety, Social/Recreational, Substance Abuse, System Barriers, and Transitional Planning. At the bottom of the window are 'Accept' and 'Cancel' buttons.

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Entering Needs Using Needs Tab

If the user chooses to enter all of the information/data first, clicking on any of the tabs at the top of the accordion will open the associated screen that will initially be blank and will have an active 'Add New' button at the bottom.

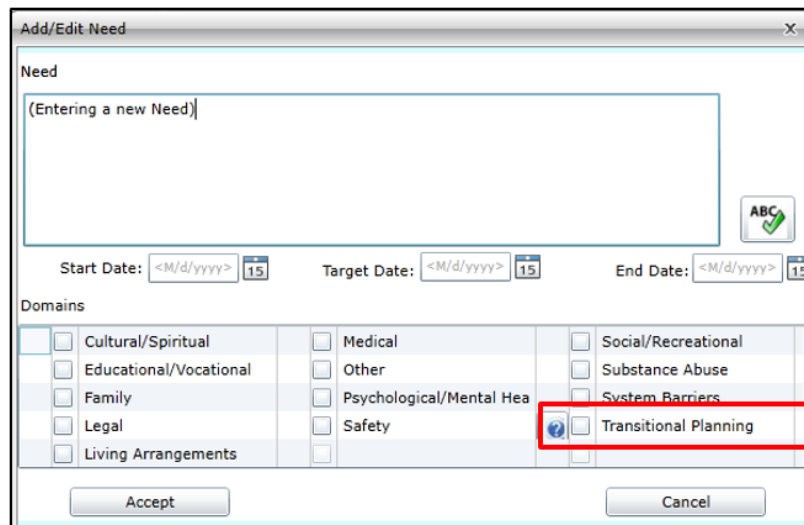
Below is an example of the Needs tab, with a Need entered.

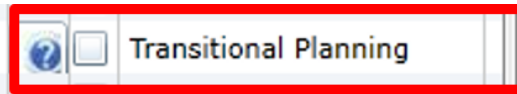


The Needs Tab window displays all of the Needs that have been entered into the Matrix. Each Need is automatically associated to the Matrix when it is entered, regardless of where it is entered. Each entry includes an Edit button, represented by the Pencil icon in the first column.

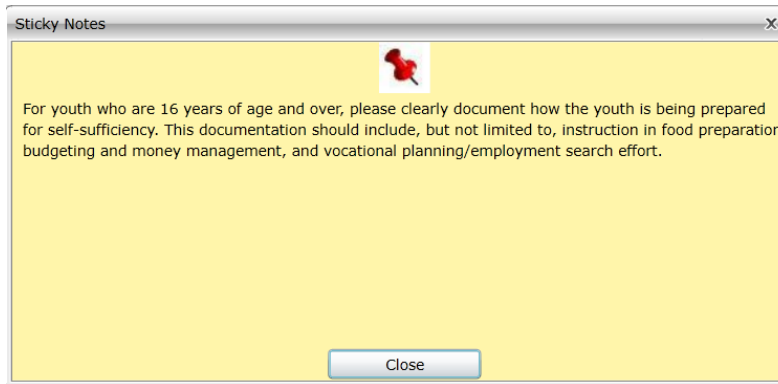
Completing a Need

Users can enter Need information using the Add/Edit Need window by clicking on the Pencil icon to the left of the need in the Matrix tree. Users must add the required Need information, and Start Date; they may also include the optional Target Date and End Date. There are 12 different Domains; users may check one or more of them.








The Transitional Planning Domain in the Add/Edit Need window contains a sticky note about youth over the age of 16 which displays the message below when the blue '?' is clicked.

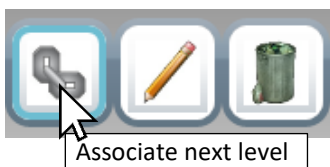


Once the user selects 'Accept', the Need is added to the Matrix.

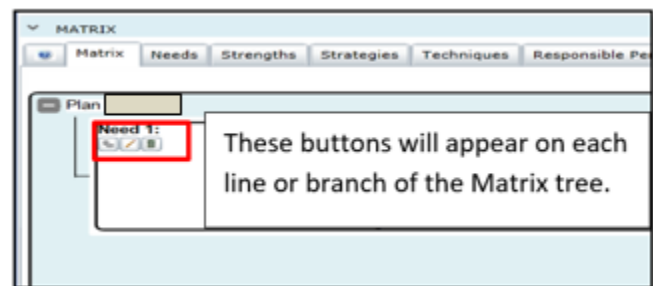
Review Needs Entries

Upon returning to the Matrix tab from the Need tab, the user can see the entered Need displayed, as in the sample below. The buttons that appear below the 'Need #' are:

-  Chain link – hovering over the icon with the mouse shows *Associate next level*; when clicked from the current level, the user is brought to the next level Associate screen.
-  Pencil – hover shows *Edit current level*; this allows the user to edit the selected item
-  Trash can – hover shows *Remove*; this removes the selected item from the Matrix; using this removes the **current level and all associated information in lower levels of the tree.**



Example of hovering mouse over the icon



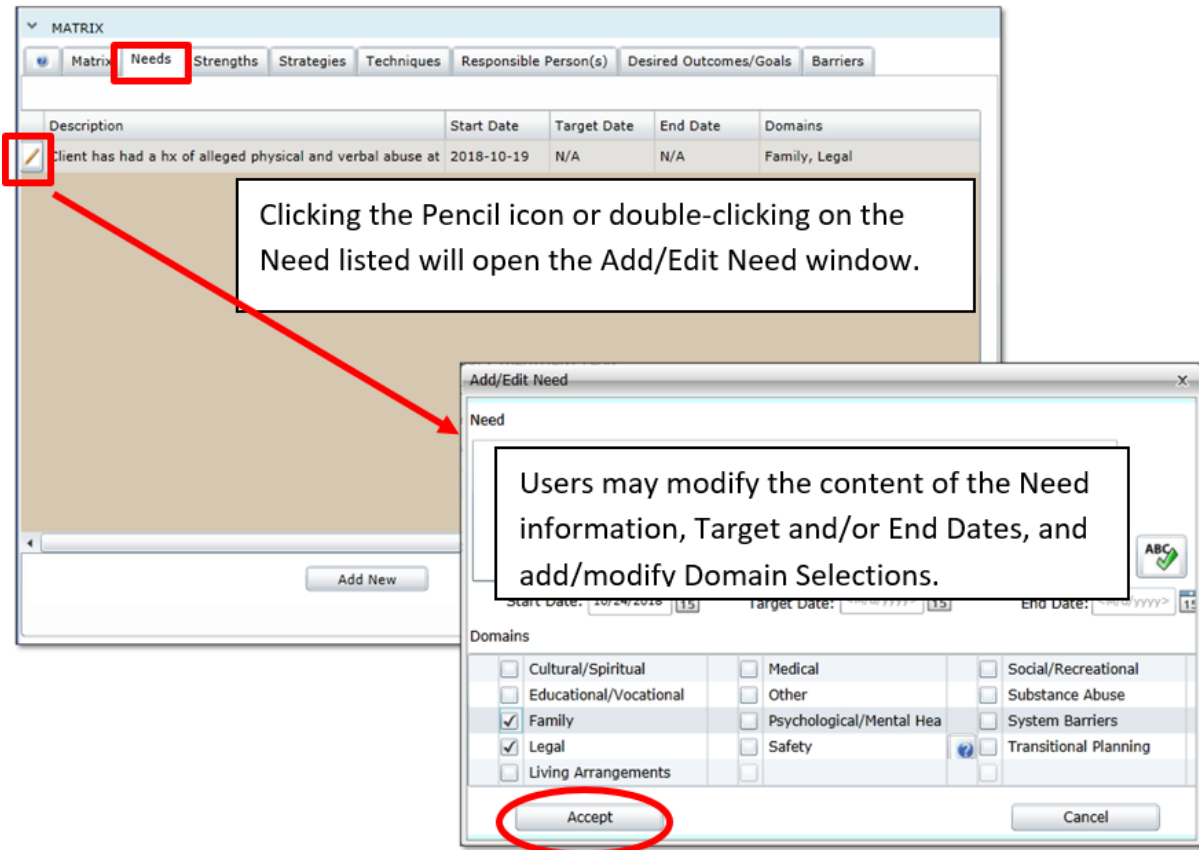
After associating each level of the tree in the Matrix, save your plan to ensure you will not lose data.

Saving will refresh the plan and close all the accordions.


Editing an Existing Need

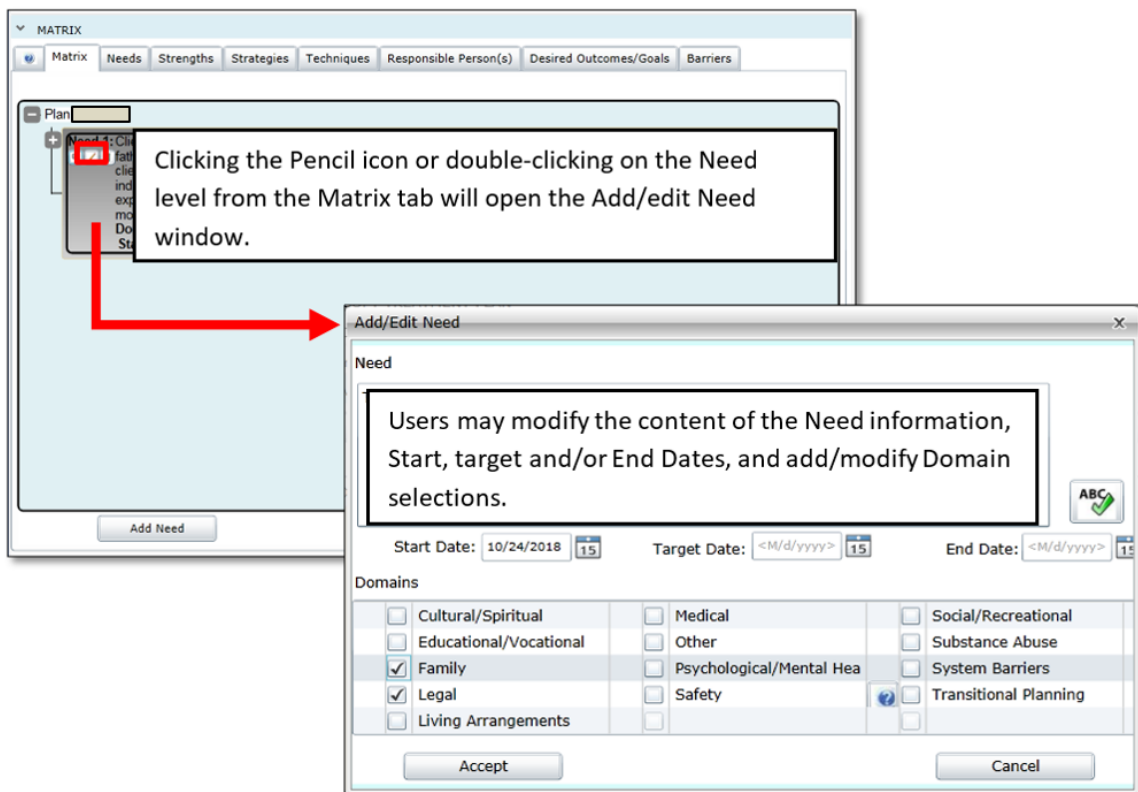
There are three ways to edit an existing Need.

1. To edit an existing Need using the Needs Tab the user can click the Pencil icon or double-click on the Need listed that they would like to edit.



When the user has entered all the information in the Add/Edit Needs window, they can click the 'Accept' button to save the Need. The Need is now displayed under the Needs tab of the window.

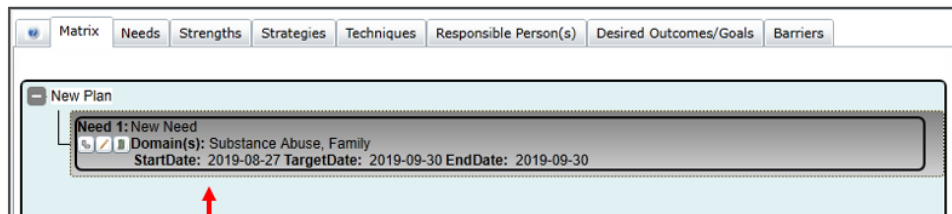
2. A user may edit an existing Need from the Matrix tab by clicking the Pencil  Icon next to the listed Need opens the Add/Edit Need window. In addition, from the Matrix tab users may simply double-click on the listed Need to open the Add/Edit Need window.



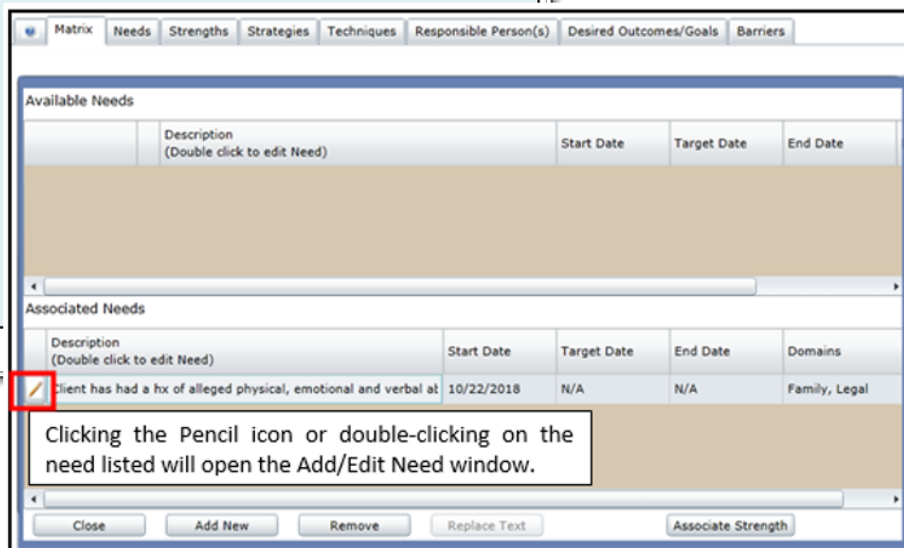
Add Need screen

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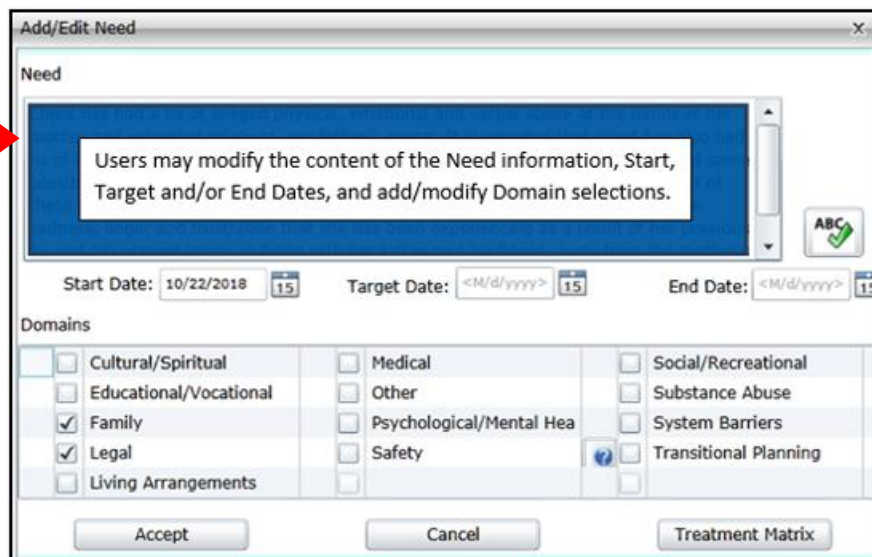
Alternately, from the Matrix tab, clicking the Add Need button opens the Associate/Available window, listing the need(s) entered. The user may click on the Pencil Icon or double-click on the needs listed in the Associate/Available window to open the Add/Edit Need screen to review or edit the need.



Selecting the need listed in the Matrix grid and clicking the Add Need button below will open the Available Needs grid.



Clicking the Pencil icon or double-clicking on the need listed will open the Add/Edit Need window.



Accept – will save any changes in the Add/Edit screen and return the user to the 'Available/Associated' screen.

Cancel – will exit the screen without saving changes.

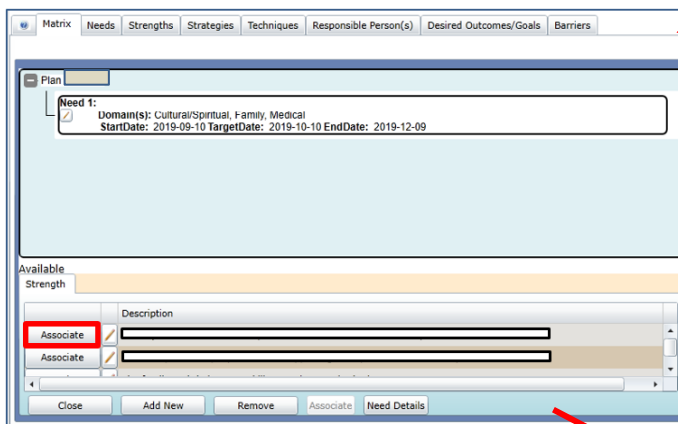
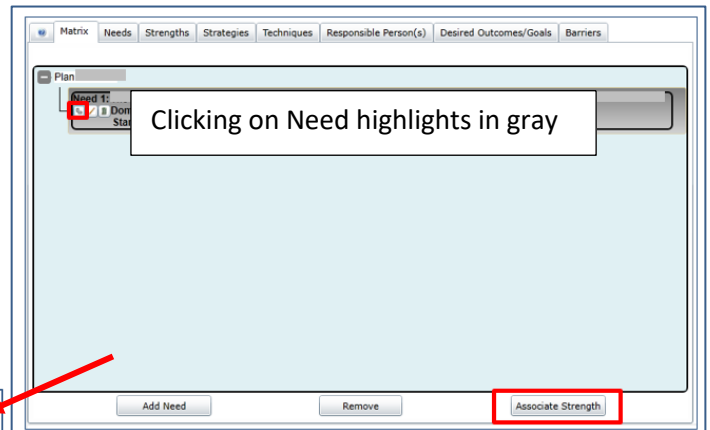
Treatment Matrix – will return the user to the Matrix tab.

Once there is a New associated to the Matrix, the user can begin entering and associating the rest of the clinical information – Strengths, Strategies, Techniques, etc. Association can only be done from the Matrix tab. The other tabs are strictly for entering information.

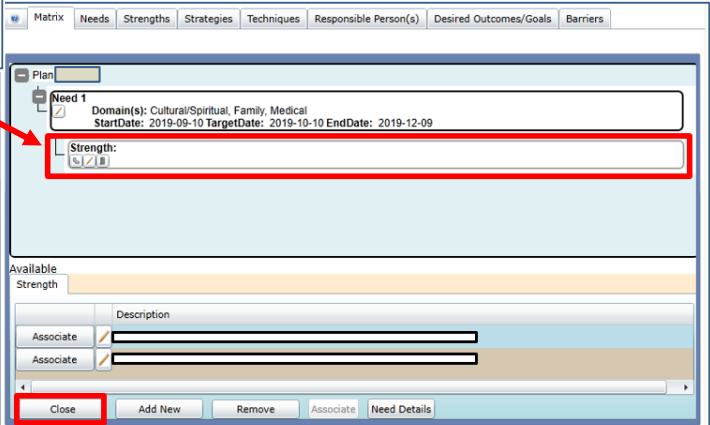
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Associate Need to Strength (Two ways)

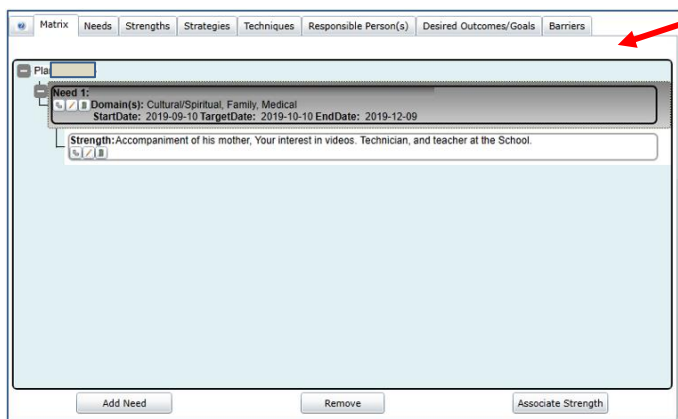
1. Clicking on the Chain Link button in the Matrix tab will open the Associate/Available window
2. Highlighting the Need and clicking 'Associate Strength' button at the bottom of the tab opens the Associate/Available window



3. Select 'Associate' button next to the existing Strength to associate it to the Need.

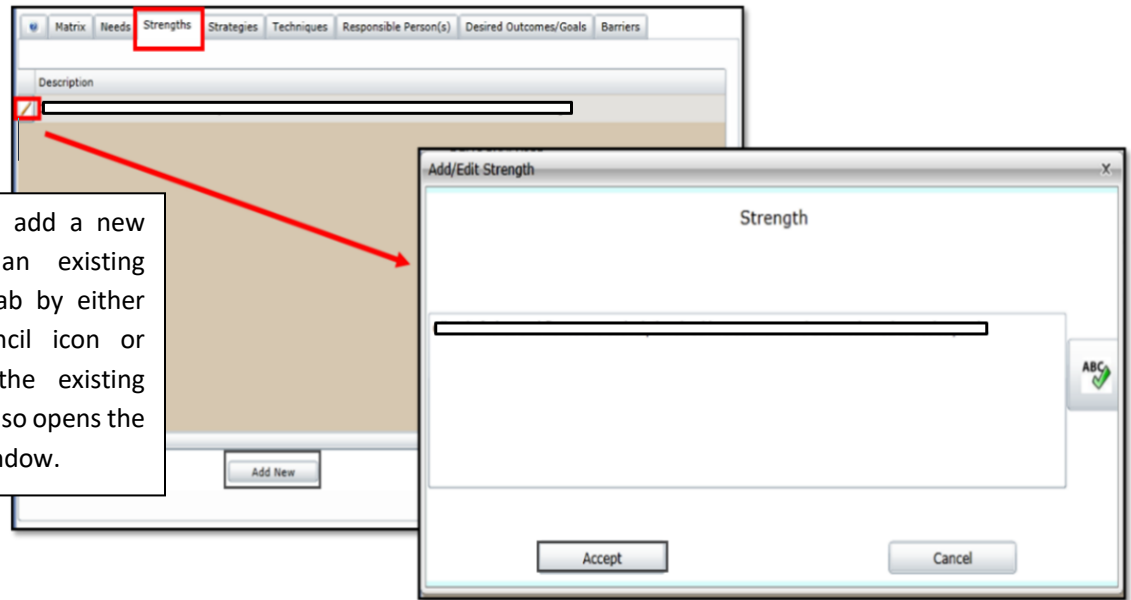


4. Click Close to return to the Matrix tab.



The Strengths Tab

Add/Edit Strength



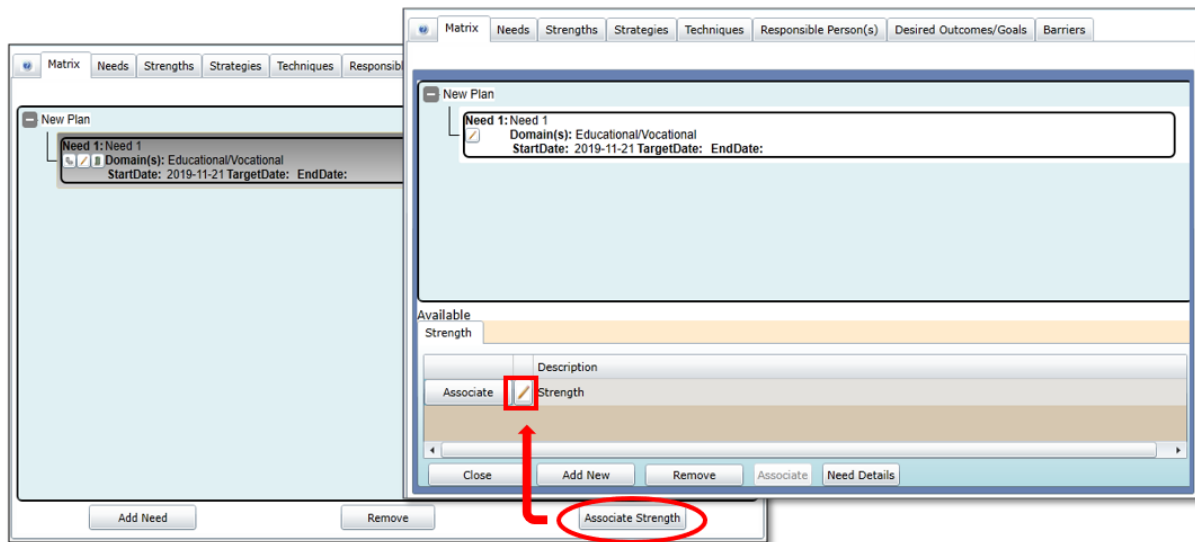
Users can choose to add a new Strength or edit an existing Strength from this tab by either clicking on the pencil icon or double-clicking on the existing Strength listed. Doing so opens the Add/Edit Strength window.

Add New Strength screen

The Add/Edit Strength screen will open anytime the user adds a new Strength. This can be done by clicking on the **Add New** button in the Strengths tab.

Users may edit an existing Strength from the Matrix tab:

- Single-click to select the Need (shown as gray) and click the activated **Associate Strength** button. The Associate/Available window will open. This displays the existing Strength that is not associated to the Need matrix level. The user can click on the Pencil icon or double-click on the Strength listed in the window. Both open the Add/Edit Strength window.



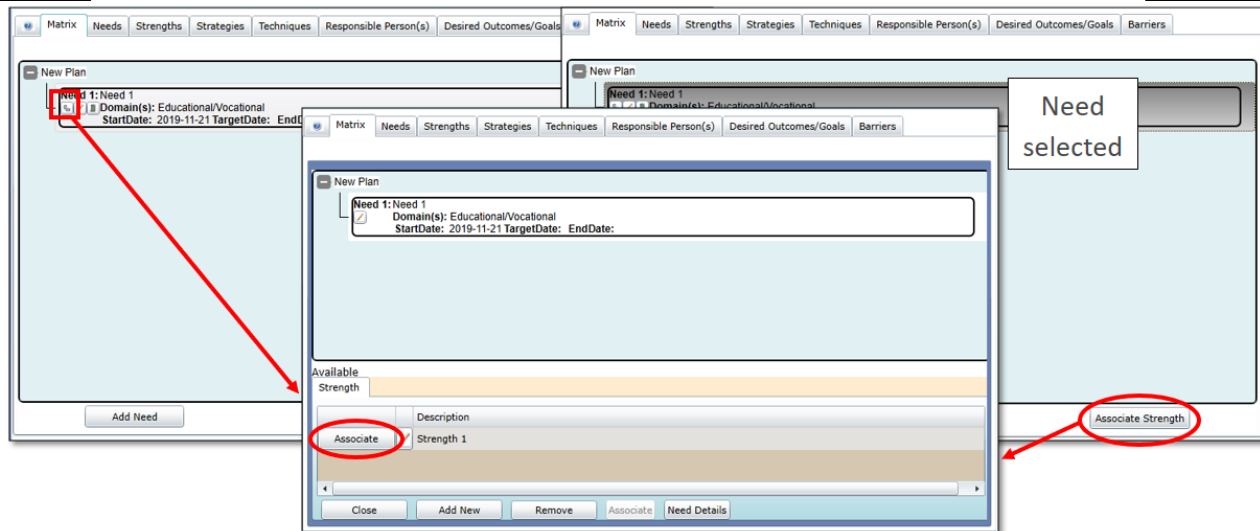
Associate Strengths

On the Matrix tab, to associate to the next level (Strength) the user can click on the **chain-link button** in the Need (option 1). Alternatively, the user can single-click the Need (highlighted in gray) that activates the **'Associate Strength'** button in the lower-right hand corner of the window (option 2).

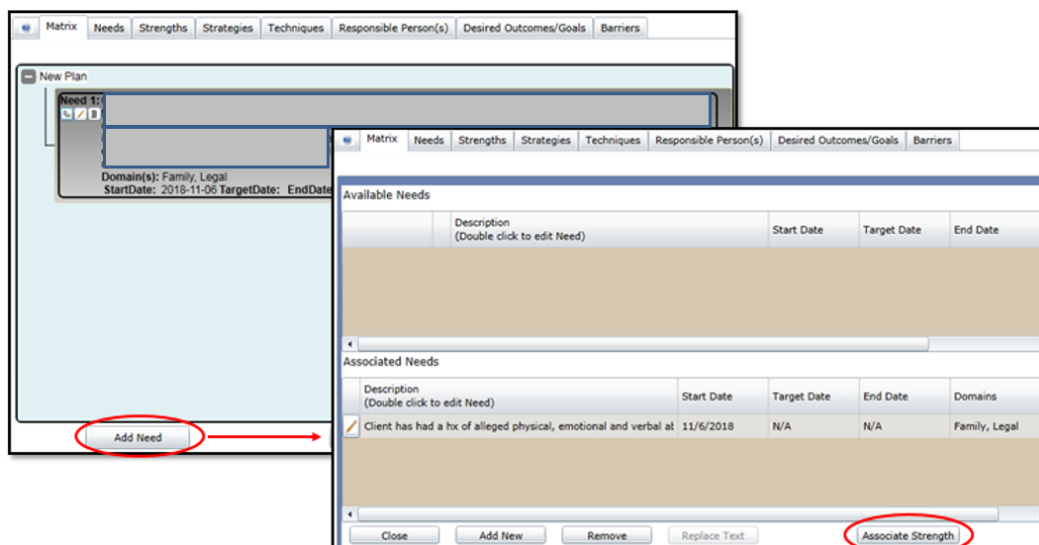
Both options open the Associate/Available window listing the available Strength at the bottom. Clicking the 'Associate' button associates the Strength to the Need. Click Close to complete the association.

Option 1

Option 2



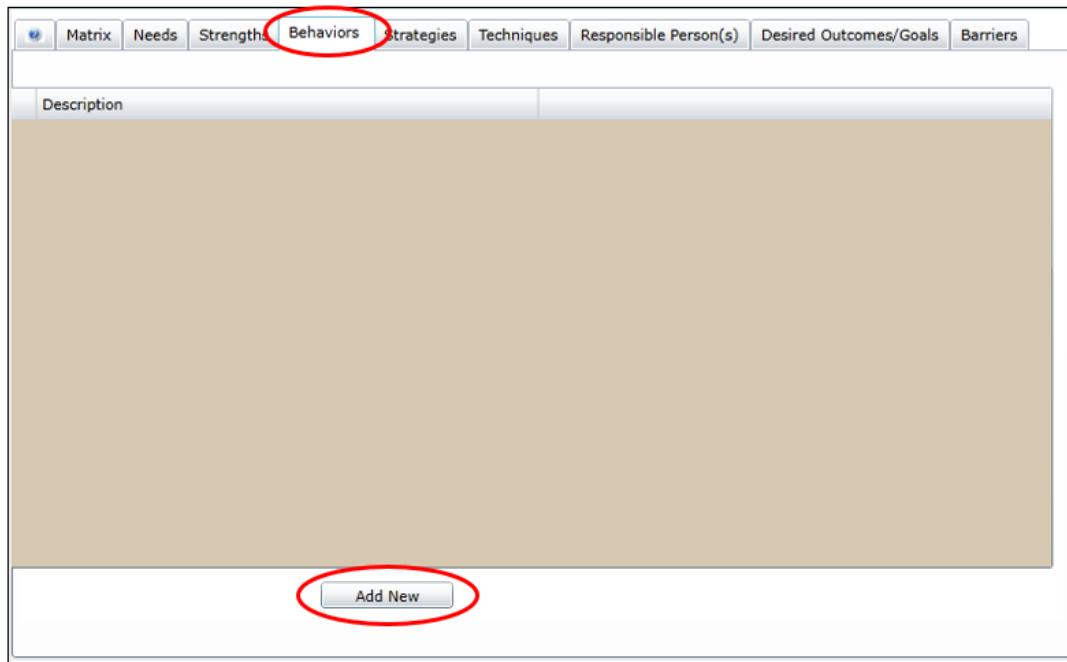
For Advanced users: If you have completed entering all your individual plan tabs, another way to add and associate parts of the matrix at the same time is to single-click an existing Need in the Matrix tab that you want to associate a Strength to. This activates the bottom row of buttons based on the selection. Clicking the **Add Need** button opens the window, listing the Available Needs and Associated Needs. If the user single-clicks an Associated Need, the 'Associate Strength' button becomes active allowing the user to add a new Strength. Additionally, the user can edit any existing branches in the lower Matrix Details window associating an existing Strength. Remember to click Close when done.



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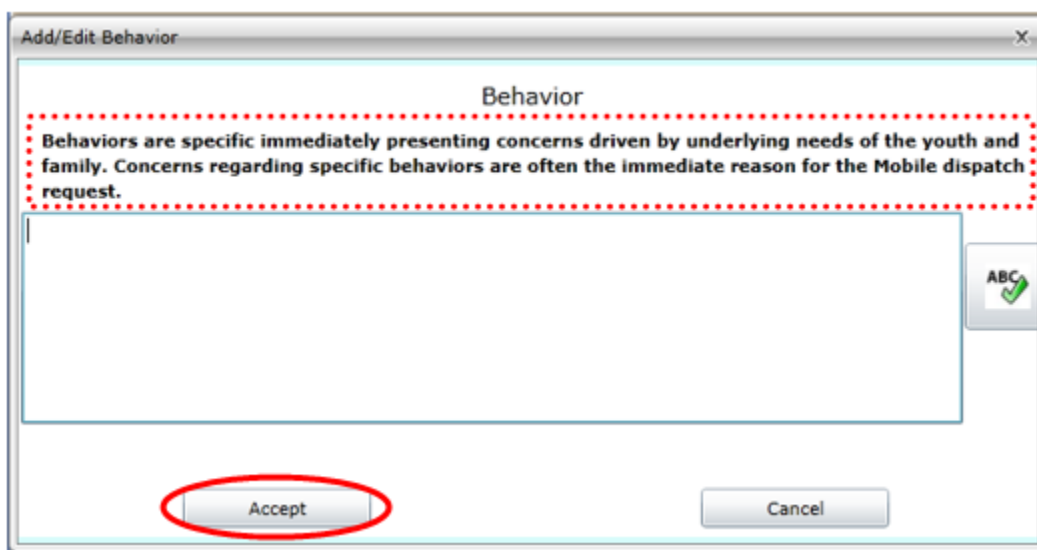
Tab - BA Plan only

The Behaviors tab is only available in BA Treatment Plans. When users select the Treatment Matrix Accordion, they can access the Behaviors tab that displays the following window.



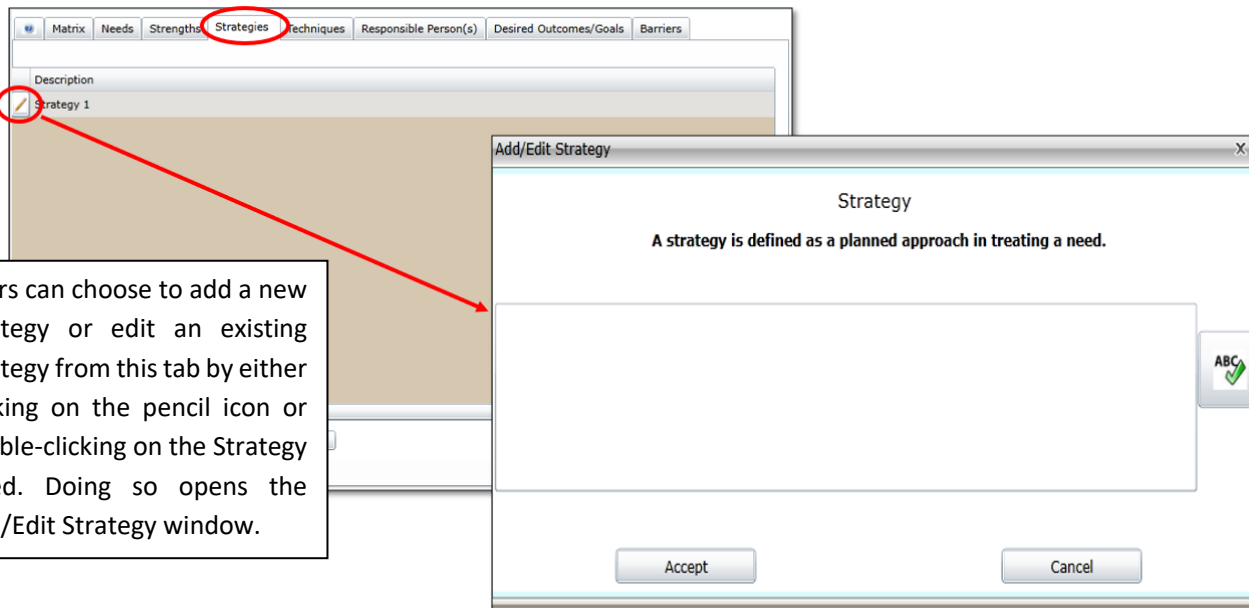
Adding Behaviors

Users can add Behaviors to the Matrix by clicking the 'Add New' button. This opens the Add/Edit Behavior window where the user can add the Behaviors as indicated in the Help text at the top of the window. When the user has entered this information, they can click the 'ABC' button to spell check the entry. Clicking the 'Accept' button will save the Behavior to the Treatment Plan Matrix tab. Here the user can associate the Behavior to the Strength level in the Matrix tab.



The Strategies Tab

Add/Edit Strategies



Users can choose to add a new Strategy or edit an existing Strategy from this tab by either clicking on the pencil icon or double-clicking on the Strategy listed. Doing so opens the Add/Edit Strategy window.

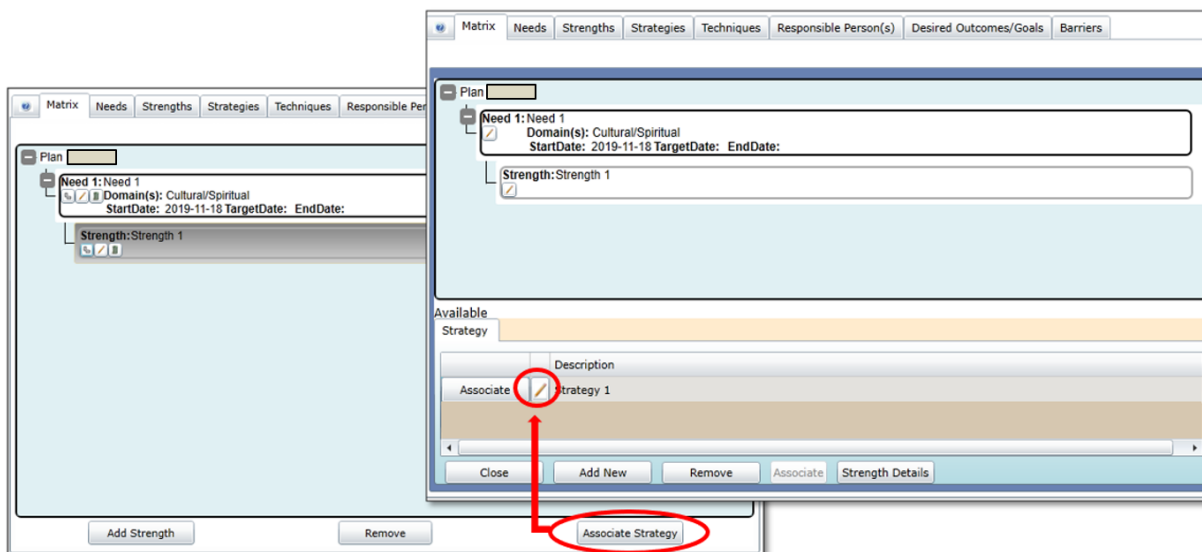
Add/Edit Strategy screen

The help text listed at the top of the Add/Edit Strategy window states, 'A strategy is defined as a planned approach in treating a need'.

The Add/Edit Strategy screen will open anytime the user adds a new Strategy. This can be done by clicking on the **Add New** button in the Strategies tab.

Once the user has entered a Strategy, to edit the existing Strategy via the Matrix tab (see below), single-click to select a Strength (shown as gray), click the activated **Associate Strategy** button, and the Associate/Available window will open. This displays the entered Strategy. Now the user can:

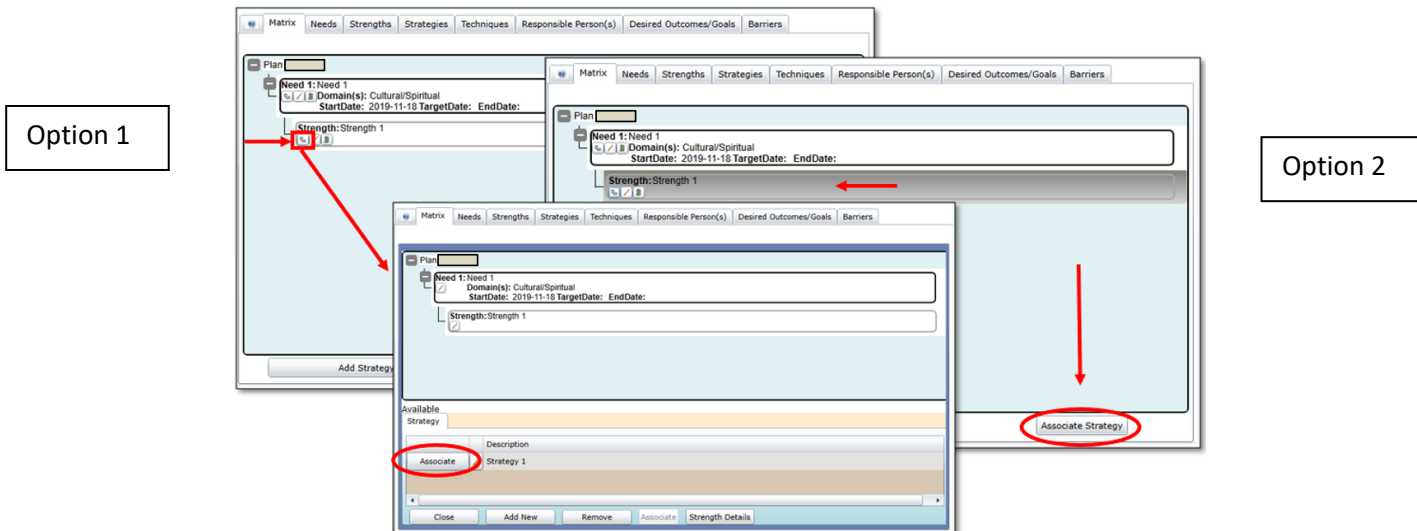
- Click on the Pencil icon or double-click on the Strategy listed in the Associate/Available window. Both actions open the Add/Edit Strategy window for editing.



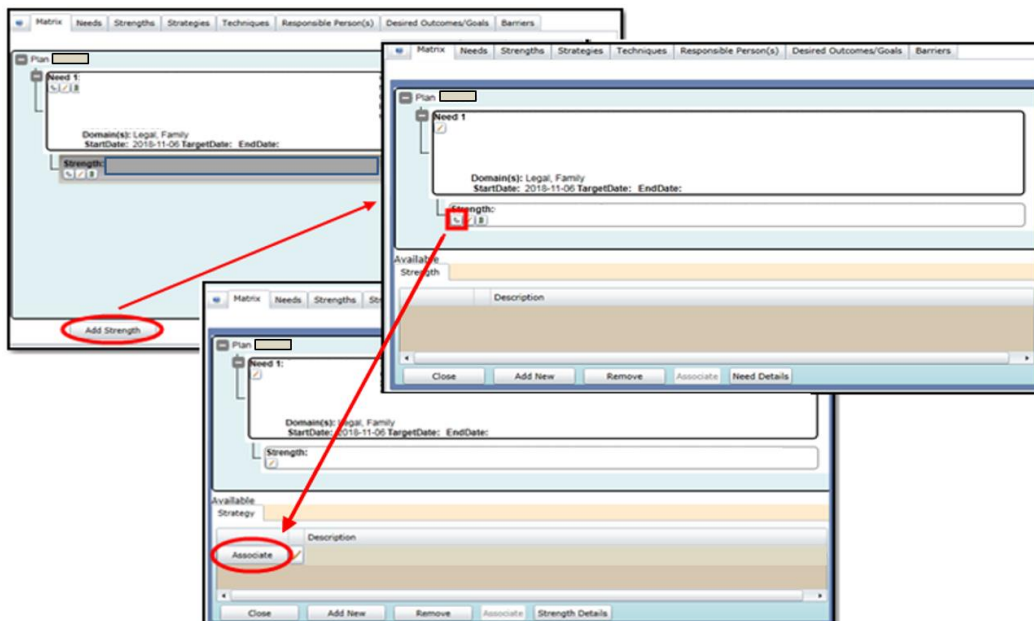
Associating a Strategy

On the Matrix tab, to associate to the next level in the Matrix (Strategy) the user can click on the **chain-link button** in the Strength (option 1). Alternatively, the user can single-click the Strength (highlighted in gray) that activates the **'Associate Strategy'** button in the lower-right hand corner of the window (option 2).

Both options open the Associate/Available window listing the available Strategy at the bottom. Clicking the 'Associate' button associates the Strategy to the Strength. Click Close to complete the association.



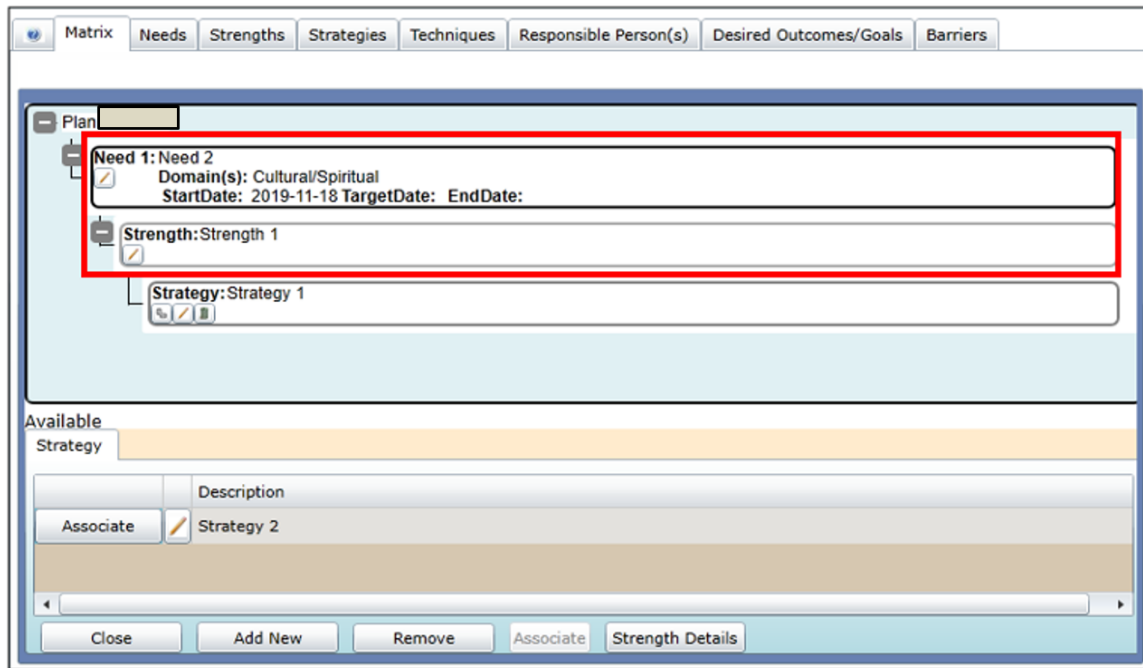
For Advanced users: Another way to add and associate Strengths and Strategies at the same time is to single-click the existing Strength in the Matrix tab that you want to associate a Strategy to, this activates the bottom row of buttons. Clicking **Add Strength** button opens the current Associate/Available window listing the Associated and Available Strengths, but also has an Associate Strategy **chain link** button (for the next level). Select an existing Associated Strength and clicking the 'Associate' button associates the Strategy in the Matrix to the Strength. Remember to click Close when done.



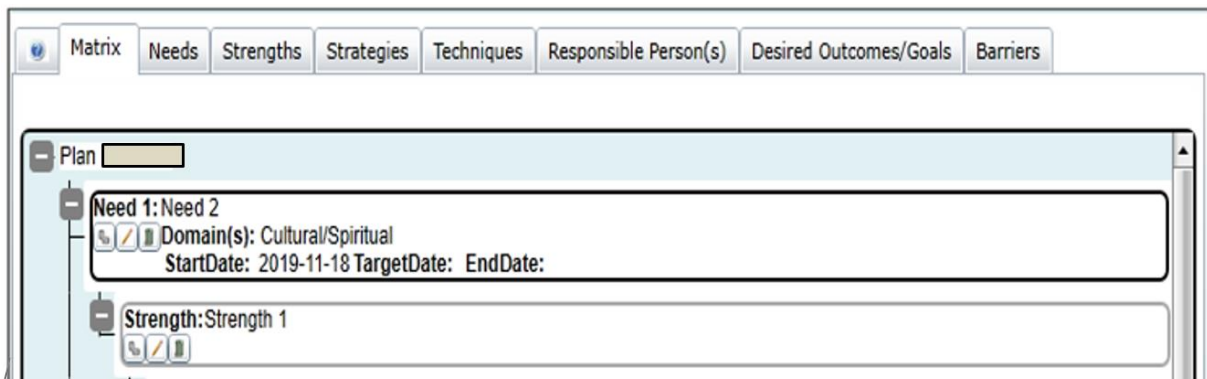
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The window below shows an associated Strategy.

Note: the Need and the Strength can both be edited from this window by clicking the Pencil icon on each entry.

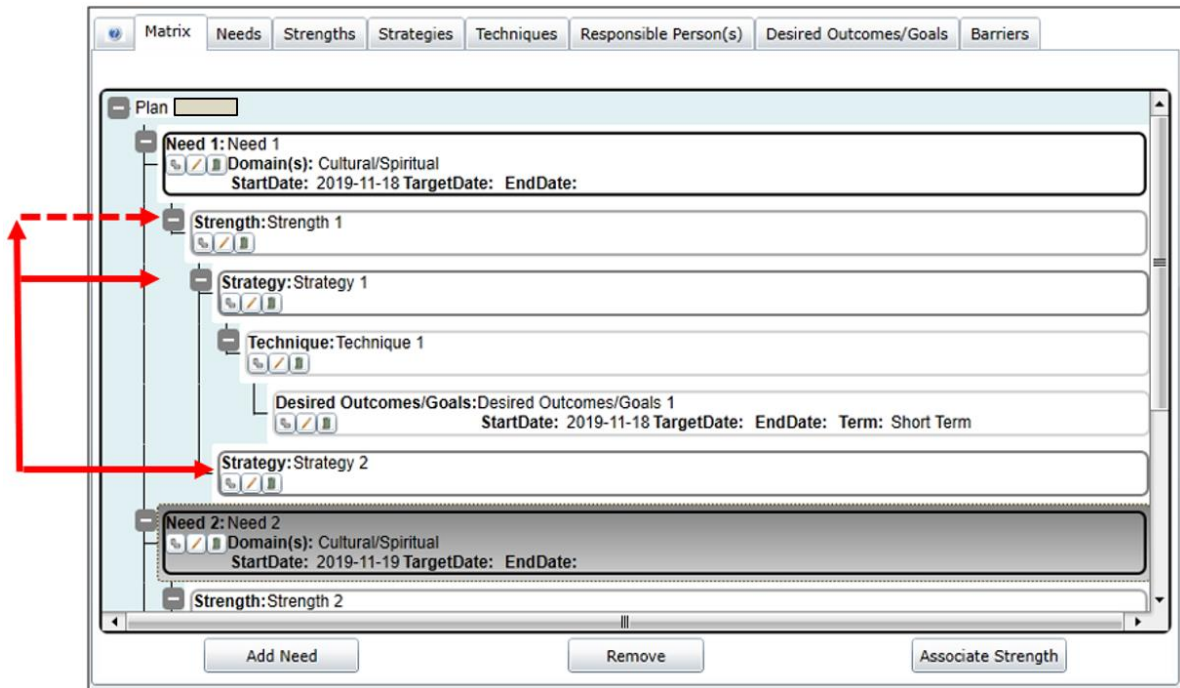


Once a Strength is associated to a Need, it is displayed in the Matrix tab. If the user needs to edit the Strength, they can do so from the Matrix tab by double-clicking on the listed Strength to open the Add/Edit Strength screen.



Associating Multiple Items

Users can associate more than one Strength, Strategy, Technique, etc. to a Need by continuing to add new entries and associating them. If there is more than one entry in the Associate/Available Window's 'Available' grid, the user can continue to associate the available entries to the Need (or Strength, Strategy, etc.).



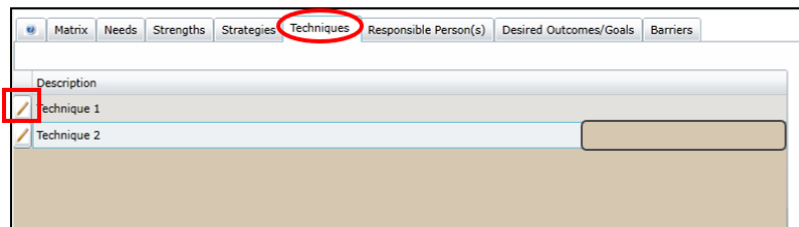
The screen shows two Strategies associated to the same Strength. Connecting lines are a visual representation of their association to the Strength. A Need can have any number of associated Strengths and a Strength can have any number of associated Strategies, etc.

If a Strength is associated to more than one Strategy under separate Needs and is edited, it will show as edited everywhere it is associated in the Matrix.

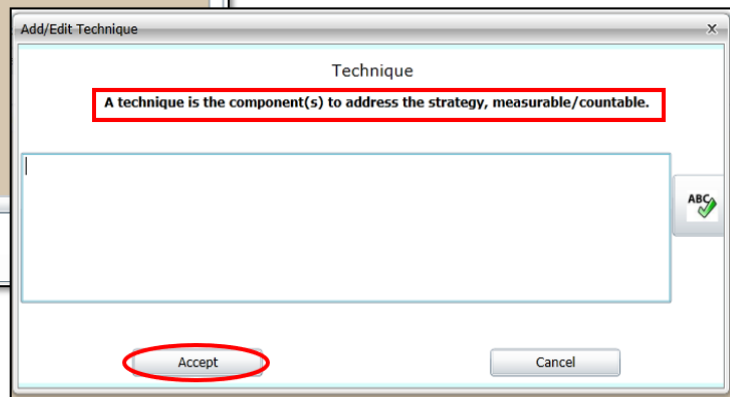
Once Strategies have been associated to the Strength, the user can associate Techniques and Responsible Persons to the Strategy. Clicking on the **chain link** icon next to the appropriate Strategy opens the Associate/Available window.

The Techniques Tab

Add/Edit Techniques



Users can choose to add a new Technique or edit an existing Technique from this tab by either clicking on the pencil icon or double-clicking on the Technique listed. Doing so opens the Add/Edit Technique window.



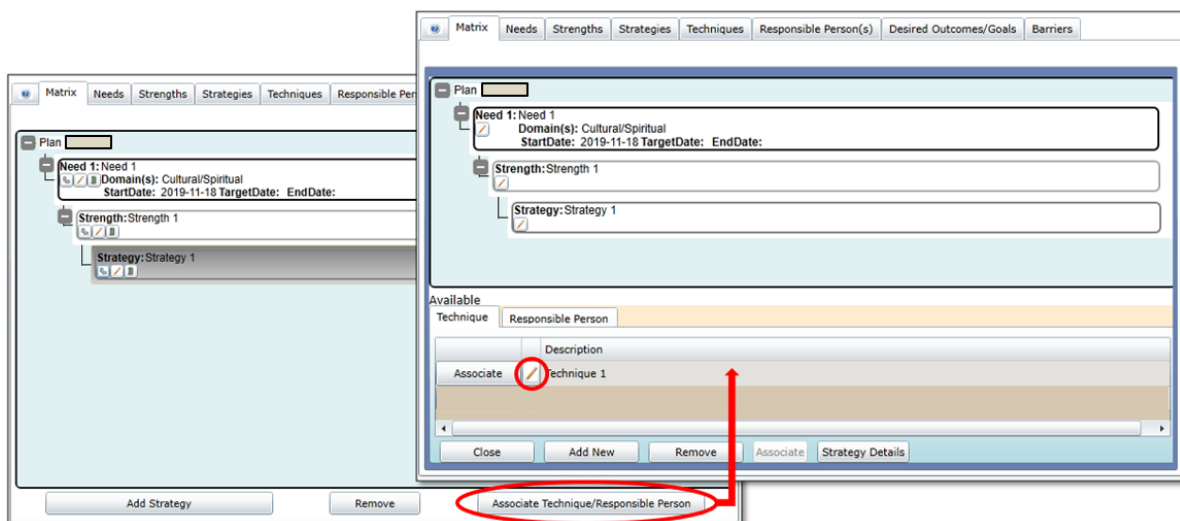
Add/Edit Technique screen

The help text listed at the top of the Add/Edit Technique window states, 'A technique is the component(s) to address the strategy, measurable/countable'.

The Add/Edit Technique screen will open anytime the user adds a new Technique. This can be done by clicking on the **Add New** button in the Techniques tab.

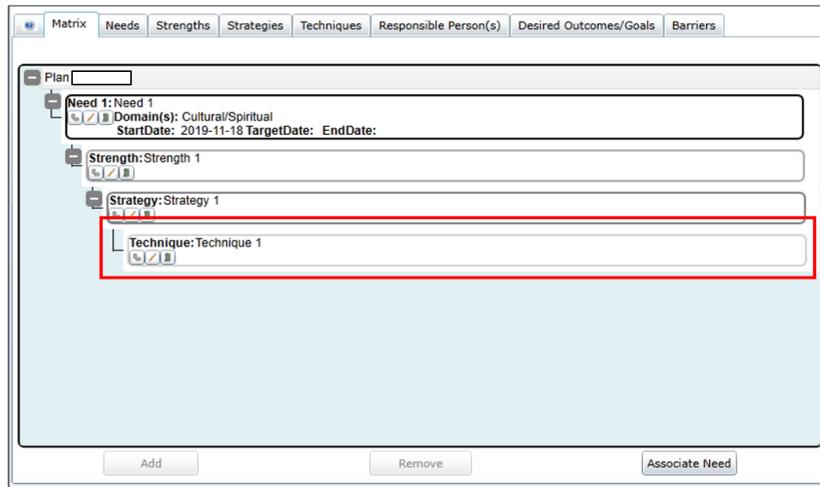
Once the user has entered a Technique, to edit the existing Technique via the Matrix tab (see below), single-click to select a Strategy, click the activated *Associate Technique* button, and the Associate/Available window will open. This displays the entered Technique. Now the user can:

- Click on the Pencil icon or double-click on the Technique listed in the Associate/Available window. Both actions open the Add/Edit Technique window for editing.



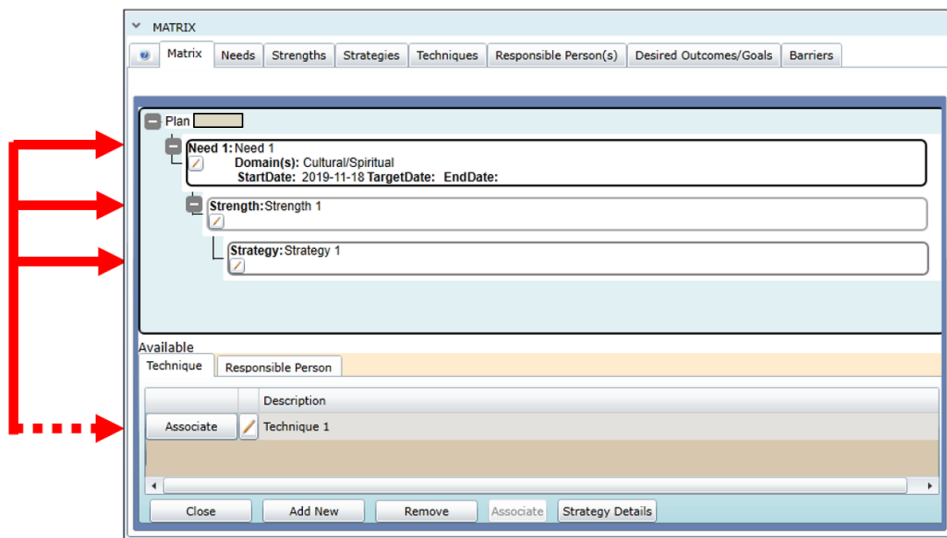
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Once a Technique is associated to a Strategy, it is displayed in the Matrix tab. If the user needs to edit the Technique, they can do so from the Matrix tab by double-clicking on the listed Technique to open the Add/Edit Technique.



Next, the user can then move onto associating a Responsible Person to the Technique. More than one person can be associated, if appropriate. Users will use the Responsible Person tab that is next to the tab for Techniques.

Associating a Technique



On the Matrix tab, to associate to the next level the user can click on the **chain-link button** in Strategies (not shown). Alternatively, the user can single-click on the Strategies and this activates the '**Associate Technique**' button in the lower-right hand corner of the window making it available to click.

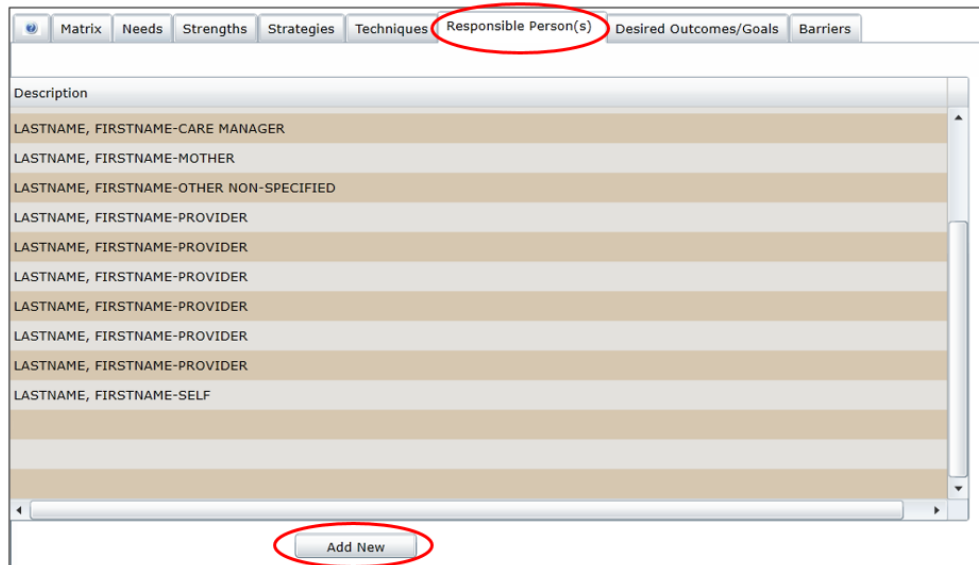
Both options open the *Associate/Available window* at the bottom (shown). Clicking the 'Associate' button (circled) associates the Technique to the Strategy.

Another option on this screen is to add a new Technique by clicking the 'Add New' button, which will open the Add/Edit Technique window.

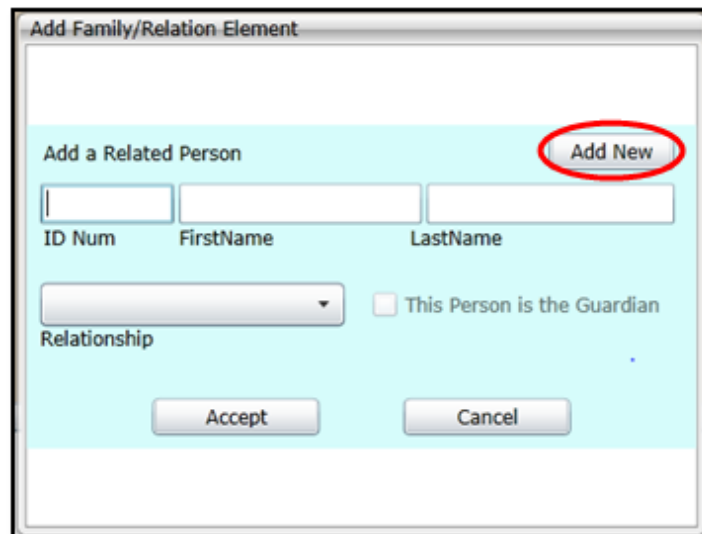
Click Close to complete the association.

The Responsible Person(s) Tab

When the Responsible Person(s) tab opens, users may find Formal/Informal Support entries in the Responsible Person(s) Tab that they did not manually enter. These are from the Supports tab of the youth's Face Sheet. Users may choose to associate the existing Responsible Person(s), add new Responsible Person(s) or not associate them at all to the current plan.



From the Responsible Person(s) tab, users can add new Responsible Person(s) from this screen by clicking the 'Add New' button, which opens the Add/Edit Family/Relation Element window.



The 'Add New' button opens the Add New Person to the Database window.

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Adding a New Person

The user will need to enter the First and Last Name and at least one phone number, and select a category for the new person.

When the user clicks 'Accept', the individual's information is available to be associated to the Matrix; however, the information does not appear on the youth's Face Sheet once the plan is approved.

The Supports added through the Matrix are contained within the Treatment Plan and are not associated to the Supports found on the Face Sheet.

Note, it is highly recommended that users add Supports through the Supports Tab of the youth's Face Sheet. This capability is dependent on the user's security access in CYBER.

The screenshot shows a form titled "Add New Person to the database...". It has several input fields: "First Name", "MI", "Last Name", "Address 1", "Address 2", "City, State, Zip", and "Phone Numbers". There are also checkboxes for "Agent", "Healthplan", "Insurance", "Organization", "Pharmacy", "Provider", "Related", "School", and "Site". The "Accept" button is circled in red.

The Desired Outcomes/Goals Tab

Add/Edit Desired Outcomes/Goals

The screenshot shows a window titled "Add/Edit Desired Outcomes/Goals". It contains a table with the following data:

Description	Start Date	Target Date	End Date	Terms
<input checked="" type="checkbox"/> Client and family look to decrease client's anxiety level so that she is more c	2018-10-23	N/A	N/A	Long Term

Below the table is an "Add New" button. A red arrow points from this button to a dialog box titled "Add/Edit Desired Outcomes/Goals". The dialog box contains the following text:

Desired Outcomes/Goals

Please clearly document specific treatment goals in each program area and projected time frame for completing each goal. Please clearly document any progress made, or lack thereof since the last JCR (if applicable).

Users are expected to enter the Term, either Short Term or Long Term, and Start Date for the Desired Outcome/Goal.

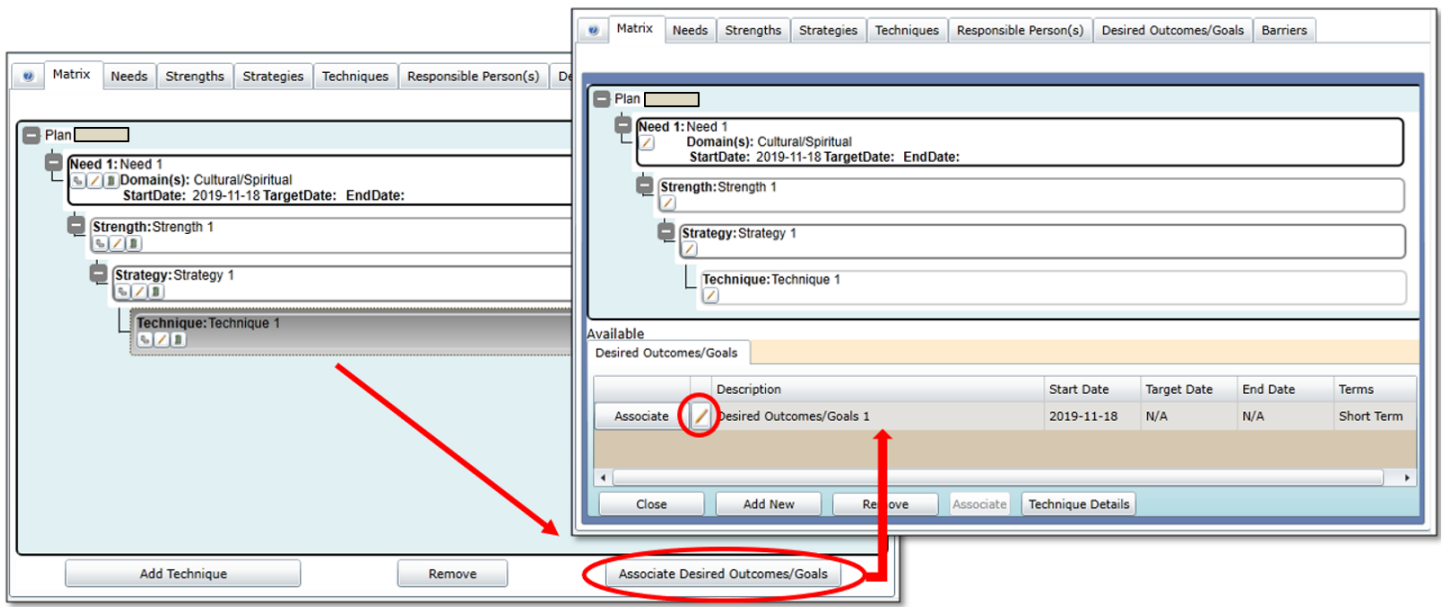
Term: Short Term Start Date: <M/d/yyyy> 15 Target Date: <M/d/yyyy> 15 End Date: <M/d/yyyy> 15

The "Accept" button is circled in red.

Add New Desired Outcome/Goals screen

On the Desired Outcomes/Goals tab, the user can select **Add New** and the Add/Edit Desired Outcome/Goal window will open. Users are also expected to enter the Term, either Short Term or Long Term, and Start Date for the Desired Outcome/Goal. (Target Date and End Date is not required.). User can then click the 'Accept' button to add the entry to the window of the Desired Outcomes/Goals tab.

The help text listed at the top of the Add/Edit Desired Outcomes/Goals window states, 'Please clearly document specific treatment goals in each program area and projected time frame for completing each goal. Please clearly document any progress made, or lack thereof since the last JCR (if applicable)'.

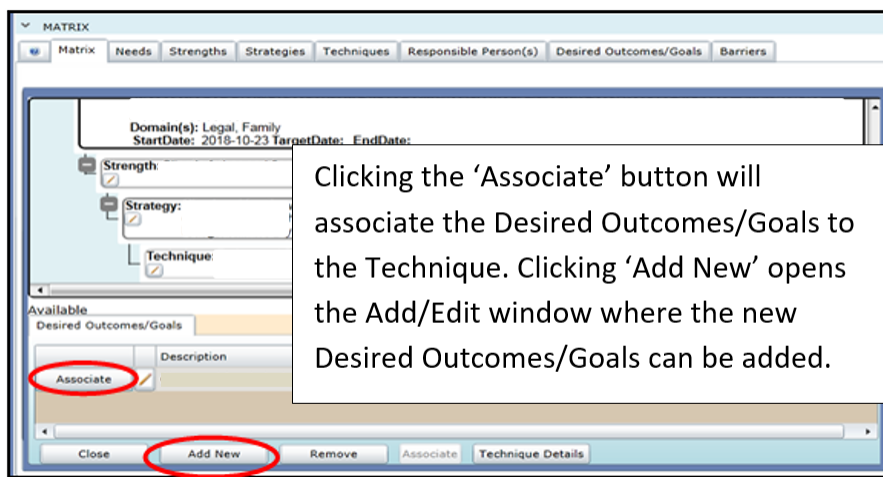


Once the user has entered a Desired Outcome/Goal, to edit the existing item via the Matrix tab (see below), single-click to select a Technique, click the activated *Associate Desired Outcomes/Goals* button, and the split screen Associate/Available window will open. This displays the entered items. Now the user can then edit any item by:

- Clicking on the Pencil icon or double-clicking on the listed in the Associate/Available window. Both actions open the Add/Edit window for editing.

The user may also double-clicking the Desired Outcome/Goal listed in the Matrix tab. This action also opens the Add/Edit Desired Outcome/Goal Window.

Associating Desired Outcomes/Goals



Once a Desired Outcome/Goal is associated to a Technique, it is displayed in the Matrix tab.

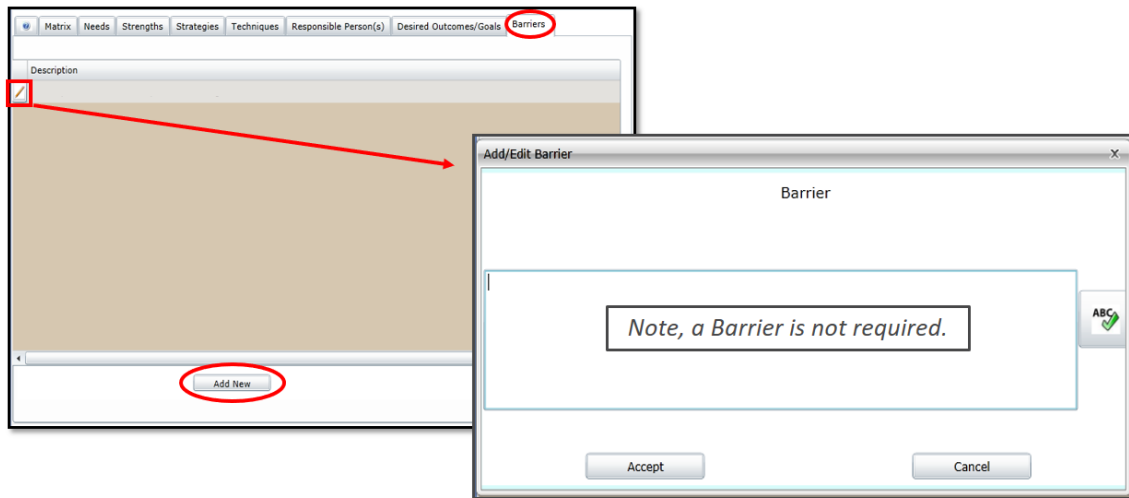
The Barriers Tab

Add/Edit Barriers

On the Barriers tab, the user can select **Add New** and the Add/Edit Barriers window will open.

Users can also choose to edit the Barriers from this window by either clicking on the Pencil icon or double-clicking on the Barriers in this window. Doing so will open up the Add/Edit Barrier window.

Note: A Barrier is not required to be entered.

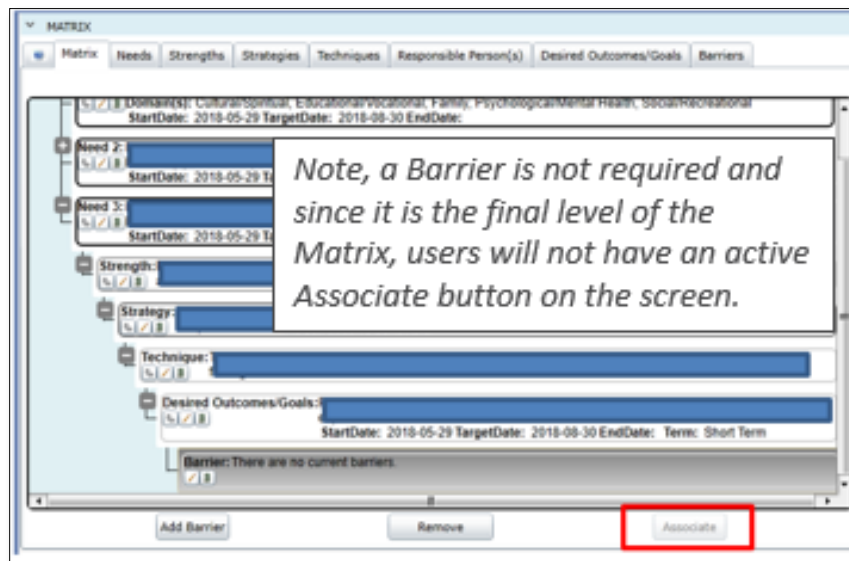


Add New Barrier screen

Associating Barriers

The image shows a screenshot of the 'Plan' view in the software. A tree view on the left shows a hierarchy: Plan > Need 1: Need 1 > Strength: Strength 1 > Strategy: Strategy 1 > Technique: Technique 1 > Desired Outcomes/Goals: Desired Outcomes/Goals 1. A red arrow labeled '1' points to the 'Desired Outcomes/Goals 1' item. Below this tree, there are buttons for 'Add Desired Outcomes/Goals' and 'Remove'. A second red arrow labeled '2' points to the 'Associate Barrier' button, which is circled in red. To the right of the main window, a smaller window titled 'Associate/Available Window' is shown. It has tabs for 'Responsible Person(s)', 'Desired Outcomes/Goals', and 'Barriers'. The 'Barriers' tab is active, showing a list of available barriers. A red arrow labeled '3' points to the 'Associate' button next to 'Barrier 1' in this list, which is also circled in red. A text box on the right explains the process: 'Single-click to select the branch to begin the association (shown in gray). Click 'Associate Barrier' button. The split screen will appear and display the Associate/Available Window (below).'

Clicking the 'Associate' button will associate the selected Barrier to the selected Desired Outcome/Goal.



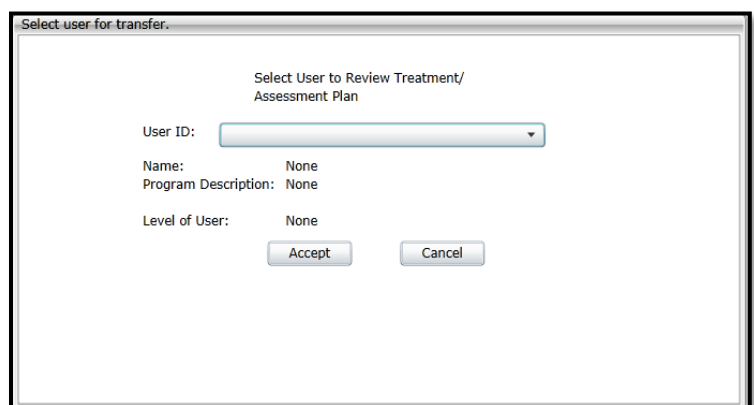
VII. Submitting or Transferring a Treatment Plan for Internal Review

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

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

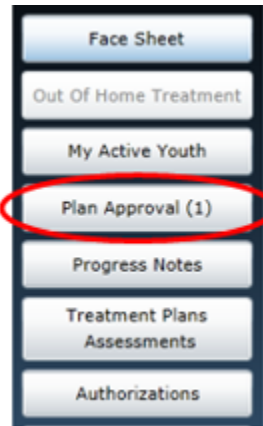


Clicking on the Transfer button will bring up the Select User for Transfer window, where the user can select someone within their agency to transfer the plan to; keep in mind that any user that the plan is transferred to can submit it to PerformCare.



Users may also choose to use the Plan Approval screen; this may be helpful if a supervisor needs to submit a plan for a Licensed Clinician that is not available/out of the office.

The Plan Approval screen can be accessed via the button bar on the left-side of a youth's record.



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

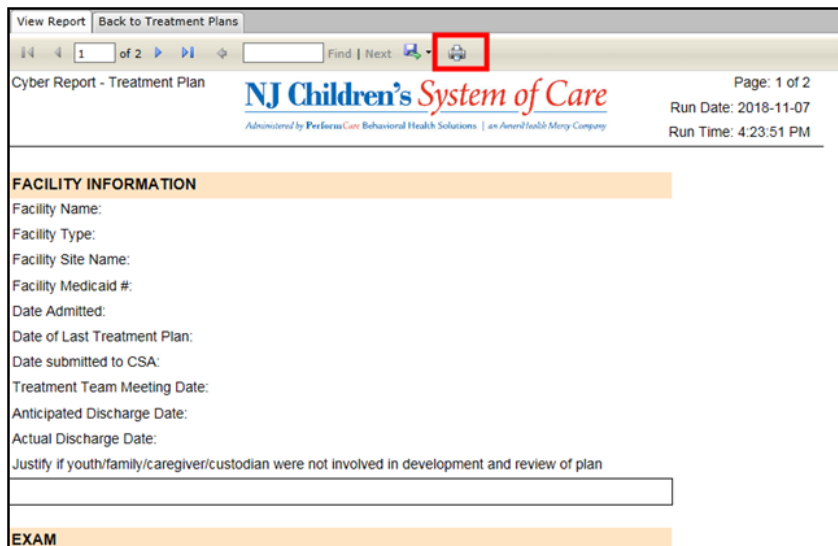
The screenshot shows the 'Plan Approval' window with the following sections:

- Plan Selection:** A grid with columns 'Plan' and 'Plan Type'. The first row has 'BA_2' (checked) and 'IIC_2' (unchecked). Below it are 'Assessment' and 'IIC_2'.
- Filters:** 'Doc Type' set to 'ALL'. Checkboxes for 'Past Due', 'Due Today', and 'Due Tomorrow' are checked. 'Program' is set to 'PRIVATE CARE'. 'Assigned To' is 'All Users - All'. There are 'Select All', 'Clear All', 'OR', 'FROM', 'TO', and 'Refresh' buttons.
- Plan Type Selection:** A grid with columns 'Plan Type' and 'Plan Type'. The first row has 'BA_2' (checked).
- Filtered Plans (1):** A table with columns: PLAN, PLANTYPE, ASSIGNEDTO, RETURN HISTORY, YOUTH/CHILD, DUE DATE, REQUESTOR. It contains one row: BA_2, BA_2- In Progress.
- My Plans (2):** A table with columns: PLAN, PLANTYPE, ASSIGNEDTO, YOUTH/CHILD, DUE DATE, REQUESTOR, AGENCY. It contains two rows: BA_2, BA_2- In Progress and IIC_2, IIC_2- In Progress.

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

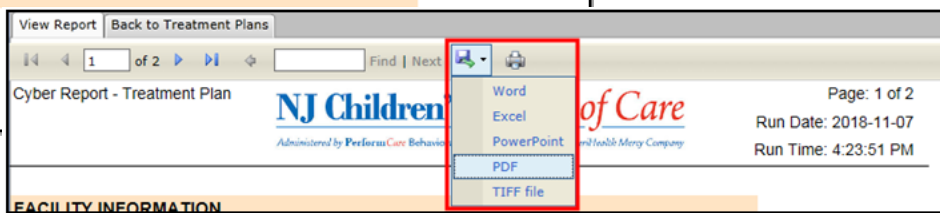
VIII. Printing the Treatment Plans

Both plan types, IIC and BA, may be printed; once the plan is saved, the user will have access to the Print button at the bottom of the plan. Clicking Print will generate a print version of the document in a new window.



Although users can print directly from CYBER by using the print icon in the top button bar, it is recommended that a user export the report to a PDF and then print from Adobe.

Clicking on the blue disk in the button bar above the report (highlighted above) will give the user the option to export the report into a PDF. Once the user selects PDF as the desired format, the report will export. The user can then print it or save it to their own system.



IX. References

PerformCare website:

Providers – Training Section: <http://www.performcarenj.org/provider/training.aspx>

- General Trainings for all CSOC Providers Section - Instructional Guide to the CYBER Face Sheet
<https://www.performcarenj.org/pdf/provider/training/care-management-organization/cyber-face-sheet.pdf>
- Providers – Security Section
 - Instructional Guide for CYBER Security Administrators
<http://www.performcarenj.org/pdf/provider/training/security/role-based-security-system-admin.pdf>

PerformCare Customer Service
www.performcarenj.org/ServiceDesk
1-877-652-7624