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Instructional Guide for the Behavioral Support Plan (BSP) for IIH Providers

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Instructions for Use

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I. Introduction

PerformCare began managing Intensive In-Home (IIH) services in 2014 – both Clinical Therapeutic and Behavioral Support services. This guide will cover the Functional Behavioral Assessment (FBA), which was introduced into the Cyber system first, and how it interacts and is attached to the Behavioral Support Plan (BSP); these are the documents that the Behavioral Support providers will utilize to document the observed behaviors and interventions that will be utilized to address the behaviors.

*Note: please provide as much information as possible in all aspects of the BSP (as well as the FBA).

The BSP cannot be submitted without an associated FBA; the FBA can be in progress/draft, as long as it is being completed by the user's agency. (An associated FBA created by another agency must have already been approved.) If the FBA has not yet been submitted, it will be submitted to PerformCare at the time the user submits the BSP.

Please note that the BSP should not include any Aversive Interventions or Restrictive Consequences. If a restrictive procedure is necessary (only for safety reasons), the user must include a specific plan for the procedure; without it, the BSP will be returned to the user for more information before PerformCare authorizes on-going services. Please refer to the FBA & Initial BSP Quality Review form for more information.

Please note that all IIH providers will have access to all IIH-service related documents in Cyber; it is up to the user to ensure they are accessing and using the documents that relate to their service. For example, if a BSP is entered into a record for a youth that is receiving Clinical Therapeutic services, it will be returned and the user must complete an IIH Treatment Plan.
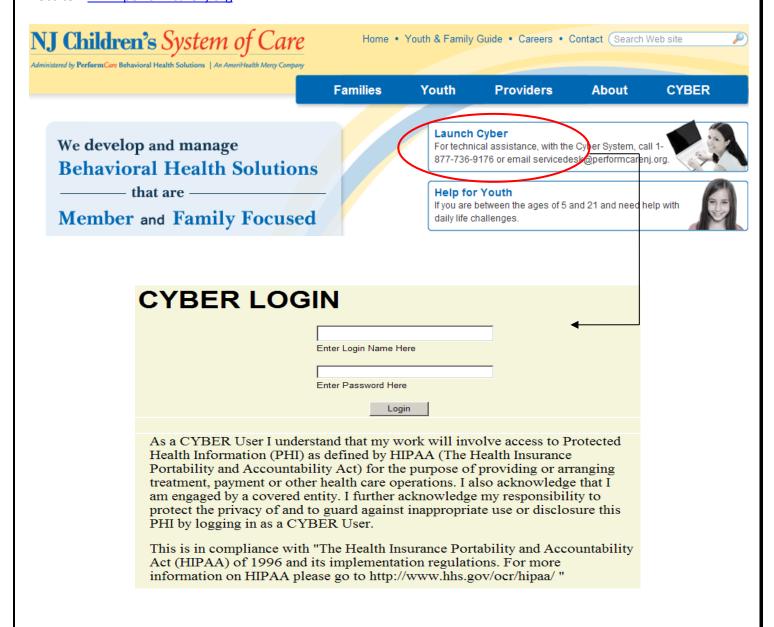
**The initial BSP is due into Cyber 20 business days after the start of the authorization along with the associated FBA; on-going BSPs are due every 90 days. Because BSPs are reviewed by the Clinical department at PerformCare, it is highly recommended that agencies submit their BSP no later than 14 days prior to the end of the authorization (approximately every 75 days). **

User Tip: Save & Save often!! The system may time you out and you will lose a great deal of information; if you save your BSP as you work on it you will reduce the risk of losing a lot of information should the system time you out. A good rule of thumb to follow is the hit the Save button at the bottom of the document each time you complete an accordion; because some areas of the BSP are very large users may want to consider doing this more often.

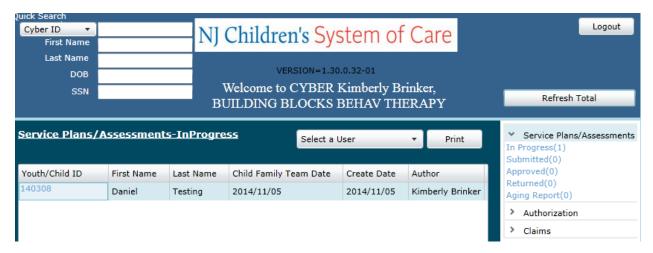# PerformCARE®

II. Accessing CYBER

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

III. Update to the Welcome Page

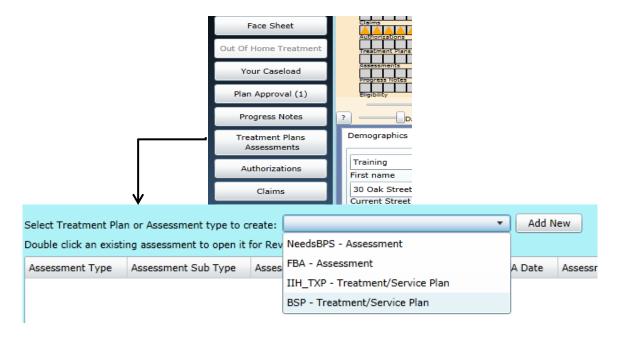The IIH Welcome Page has been updated so that the BSP information appears in the appropriate links.

All of the links under Service Plans/Assessments have been updated to include the BSP.

The Aging Report will now include the BSP in its calculations. Both the FBA and BSP are due 20 business days after the start of the Tracking Element and Authorization for the agency (users can find that date on the Tracking Element tab of the youth's Facesheet). They will be marked as "Coming Due" 3 calendar days prior to the due date and will appear as "Overdue" if they are not submitted once the due date passes.

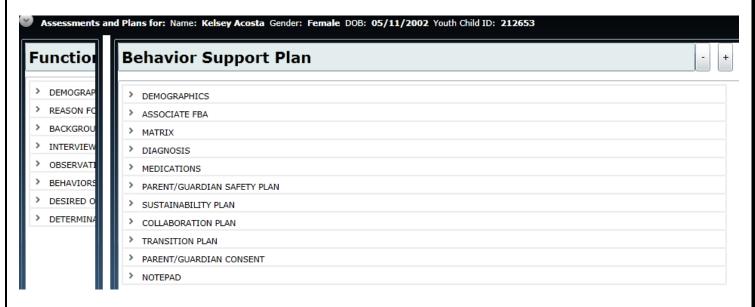# IV. Creating a new BSP and Associating an FBA

To create a new BSP, users must navigate to the Treatment Plans and Assessments screen within a youth's record.

Users will find the option to start a new BSP in the pull-down menu above the grid.

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Clicking the Add New button will open the new document. Please note that if another user within the agency has started a BSP for the same youth the user will be unable to create another one.

Initially, the BSP will take up approximately half of the Cyber screen **unless** there is only one FBA in the youth's record. In that case, the system will automatically associate the FBA to the BSP and open both documents. (The FBA will appear on the left-hand side of the screen.)

If the user sees a blank screen next to the BSP, they will need to associate an FBA to the BSP; once that action is completed the user can chose to open the FBA to populate the rest of the screen.

Users will see a new area above the BSP – Copy Assessments and Plans. Hovering over this area with your mouse will open a grid that will contain any existing, approved BSPs that are in the youth's record. The FBA that is associated to the BSP will also appear here once it has been associated to the BSP (automatically or manually).

Double-clicking on an existing BSP or associated FBA in the grid will open it in the other half of the screen. *Users have the option of copying from an existing, approved BSP to create their new BSP; for copying an existing BSP into a new BSP (this would occur for on-going BSPs, not for the initial), please see page 25 for more information on that functionality.

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At the bottom of the BSP, users will find the following functionality buttons:

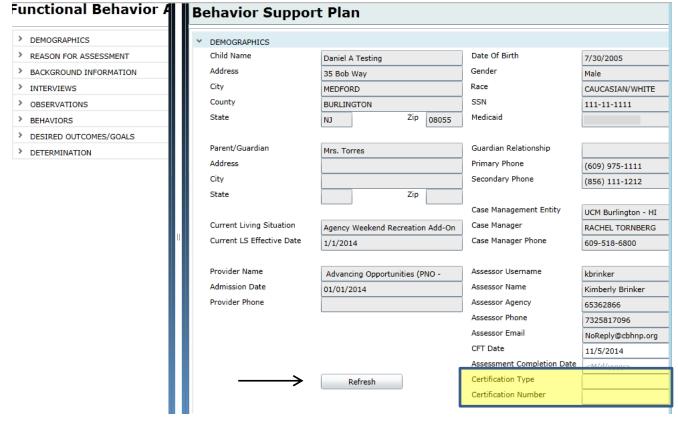| Save | Save & Close | Select Action ▼ | Update Status |
| Print | Cancel | View Review History | |

These buttons will perform the following functions:

- Save – will save the document; it is highly recommended that users save their document often in order to ensure they do not lose a great amount of information should something happen to their Internet connection or they get timed out of the system
- Save & Close – will save and then close the document
- Select Action menu will contain the following options:
    - Submit – will submit the document internally to another user with an "MGR" (Manager) or "SUP" (Supervisor) designation on their profile; those users can use Submit to submit to PerformCare. If the associated FBA has not been submitted yet, it will be submitted with the BSP.
    - Return – used when the document has been submitted internally and needs to be returned to the author for changes.
    - Transfer – used to transfer the document internally; BSPs can be transferred internally for work, editing, review, etc. before submission.
    - Delete – can be used once the document has been saved; cannot be used once it has been submitted.

V. The Accordions of the BSP

a. Demographics

This area will pull information from the youth's Face Sheet; if any changes need to be made the user will need to save the document, make the changes on the Face Sheet and return here. Clicking the Refresh button at the bottom of the accordion will update the information.
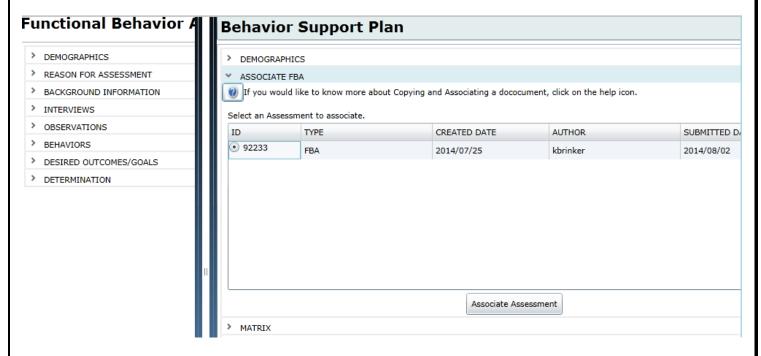
If the youth has more than one Care Manager currently opened in their record, the user will need to select the appropriate individual from the pull down menu that will appear in the "Case Manager" field.

The Assessment Completion Date will pre-populate with the date the plan was created; the user should change this date to reflect the date of the associated FBA.

Two fields that are not pre-populated but are required are the Certification Type and Certification # fields, which are highlighted above. The Certification Type field drop-down contains BCBA and BCaBA as options; the field for Certification # has a character limit of 50 characters.

b. Associate FBA - if there is an FBA already associated to the BSP the user does not need to utilize this accordion. Otherwise, users will need to come here to associate the appropriate FBA – this will most likely be the most recent assessment. The user can associate a different FBA, if needed, than the one automatically associated by using this accordion to over-ride the auto association.

There is a "?" button at the top of this accordion; when clicked, a note will pop-up that will read;

> "Users may display a previously submitted BSP or the associated FBA on the left side of the screen in order to copy information into the current BSP. To display the BSP/FBA on the left, the user must double-click it in the top grid.
>
> To copy from an FBA to a BSP, the FBA must first be associated to the BSP. Users will be unable to copy from an associated FBA that was created by another agency. Associating an FBA to a BSP will overwrite any previous FBA association. Editing information in the BSP that was copied from an FBA will not modify the FBA."
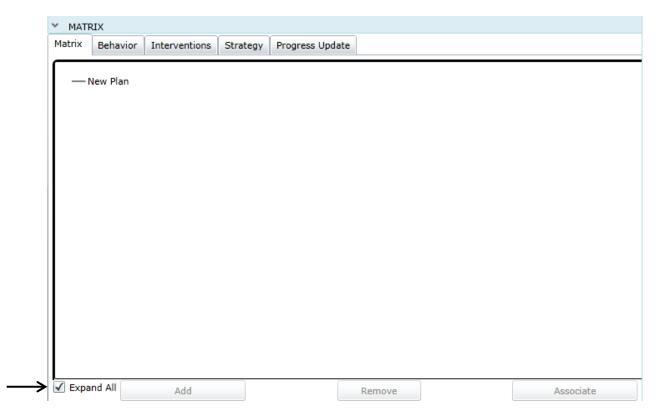
Please note: users can associate an FBA to the BSP that was created by another agency, but they cannot copy from that FBA into the BSP. Only FBAs that were created by the user's agency can copied from.

Clicking on the radio button that is to the left of the ID in the grid will associate the FBA to the BSP; the user can now view the FBA by selecting it from the Copy menu above the BSP.   The user will receive a pop-up message stating that the FBA has been successfully associated to the BSP.

The next accordion is the Matrix.

c. The Matrix – a comprehensive tool outlining the Behaviors, Interventions, Strategies and Progress Update in an easy-to-read tree structure. The Matrix allows users to enter a Behavior and map its associated Interventions, Strategies, and a Progress Update to it in one screen without having to navigate to multiple areas of the Treatment Plan; it is also visually easy to see the relationship between the Behavior and any associated information. The Matrix can be opened by clicking on the appropriate accordion in the Treatment Plan.

Once the Matrix is opened, the user will initially see a blank Matrix window with "New Plan" listed at the top; a Plan ID will appear here once the document has been saved, which is an identifier in the system.
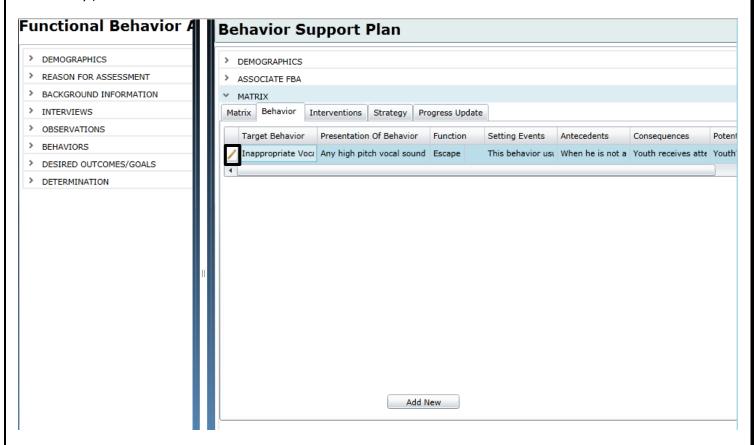
This area will display the tree structure of the Matrix and will be populated with information as the user inputs data. Users will see multiple tabs along the top of the accordion; users may choose to enter all information using the tabs and then associate it to individual Behaviors through the Matrix – this is the preferred and recommended process to follow. Doing so will allow the user to enter information in any order (users can navigate to any of the tabs, enter information and do not need to go in any specific order); users must follow the hierarchy of the tree if entering directly into the Matrix (meaning, a Behavior is entered first, then the associated Interventions, Strategies, etc. By entering information using only the Matrix the user cannot enter a Strategy before entering a Behavior.).

The Associate button at the bottom right corner of the accordion will become active only once the user single-clicks on the New Plan or Plan ID in the Matrix. This button is dynamic; depending upon what the user selects in the Matrix, the button will display the next level in the Matrix tree. For example, when the user clicks on New Plan/Plan ID, the button will change to "Behaviors".

*Please note – there is a checkbox at the bottom of the Matrix accordion, "Expand All". By selecting it, all text boxes for all areas of the Matrix will appear within the accordion; by de-selecting it, the areas will condense to show minimal information on the Matrix. Users can then click on the individual areas – such as a Behavior or Intervention – to open it and review all of the contained information.

If users chose to enter all of their data first, clicking on any of the tabs at the top of the accordion will open up the associated screen. The screen will be blank, with an active "Add New" button at the bottom. Below is a screenshot of the Behavior tab, with a Behavior entered. (Note that a user can edit any entries by clicking on the pencil icon to the left of the entry.)

This grid will show all of the Behaviors that have been entered into the Matrix. Clicking the edit button or double-clicking on the entry in the grid will bring up the Add/Edit screen (which also appears when the user clicks the Add New button in the bottom of the window.)

(There is an option of "Other" with an associated text box for Function of the Behavior.)
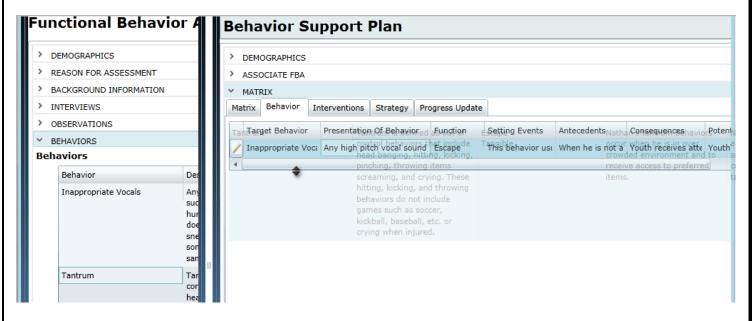
*Please note: the BSP should include the most critical behaviors that are documented in the FBA (those that pose a danger to self, others, property) and that will be addressed during treatment; keep in mind that the behaviors that are being addressed may change over time and as progress is or is not made.

Users have the option of copying the Behaviors from the FBA into the BSP if the FBA was created by the user's agency; the user can edit the Behavior once it is copied over and it does not affect the original information in the FBA. To copy information into the BSP from the FBA, users will follow these steps;

    a. Using a "drag and drop" feature to copy individual Behaviors, users will:
        i. Single click on the Behavior in the FBA –holding down the left mouse button.
        ii. Drag the Behavior record over to the Behavior tab of the Matrix in the BSP.
        iii. Let go of the left mouse button (drop) when you see the blue arrows appear on the Behaviors record; make sure to be hovering over the grid on the Behaviors tab of the BSP. (Users will see a transparent image of the Behavior they are dragging over, as seen in the example below; the blue arrows will appear towards the left side of the record they are dragging. If you see a red circle in its place, this indicates that the record cannot be dropped in that location – this may also occur if the user is attempting to drop the Behavior into any other tab in the Matrix.)
    b. Using a "drag and drop" feature to copy the entire Behavior (and Desired Outcomes/Goals) accordion, users will:
        i. Single click on the heading of the FBA (the title area of the document) – holding down the left mouse button.
           1. Drag the FBA title over to the title area of the BSP.
           2. Once the user lets go of the mouse button (drops the information), they will receive a confirmation message stating that the information was copied over. The Behaviors from

the FBA will copy over into the corresponding area on the Matrix; the Desired Outcomes/Goals will copy over into the Interventions area on the Matrix.
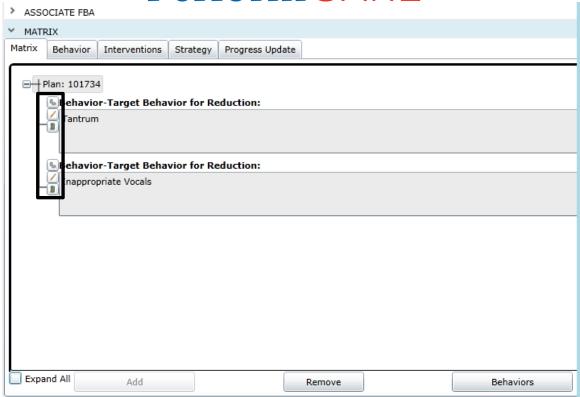

When the user copies a Behavior from the FBA into the BSP, the only field that will not map exactly (due to differing field titles) will be -

- "Name of Behavior" text field will be copied into the "Target Behavior for Reduction" text field of the BSP.

Once the user returns to the Matrix, they will see the associated Behaviors; the Behaviors do not need to be manually associated to the Matrix, this process happens automatically. If a user does not want a Behavior associated to the Matrix, they can utilize the Remove button at the bottom of the Matrix (or the remove button on the Behavior record that appears on the Matrix). Initially the Behaviors will appear to be collapsed with only some information showing. To show the entire Behavior, the user will need to check off the "Expand All" option at the lower left-hand corner of the Matrix accordion.

*Please note: when copying from the FBA into the BSP, a user will not receive a validation if they attempt to copy an item over more than one time. This was done so that, if necessary, a user can copy a Behavior or Desired Goal/Outcome into the BSP and edit it more than once.
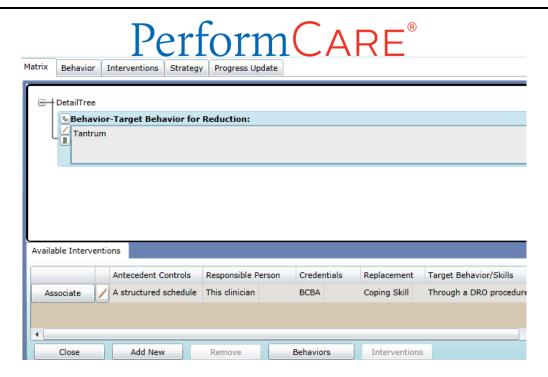
The buttons that appear on each of the Behaviors are as follows;

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

These buttons will appear on each line of the Matrix.

Once there is a Behavior associated with the BSP, the user can begin associating the rest of the information – Interventions, Strategies, and Progress Update. Associations can only be done from the Matrix tab; the other tabs are strictly for entering information. Clicking on the chain link button on the Behavior, or clicking the "Associate Intervention" button at the bottom of the accordion, will bring up the Associate Intervention window. (Please note that in order to use the Associate Intervention button, the user needs to first single-click on a Behavior.)

At the top of the Details window will be the level of the Matrix that the user is working in; meaning, the selected Behavior and all of the information associated with it; users can work on only one Behavior at a time. If the user had three Behaviors entered into the Matrix, and were associating an Intervention to the second Behavior, that Behavior would appear in the top portion of the window. In the above example, the only information the user sees is the Behavior they are working on; once an Intervention is associated it will also appear in the window.

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

The Available grid in the lower half of the window will list the Interventions that have been entered into the BSP but have not yet been associated to this Behavior; each Intervention can be associated to more than one Behavior (they have been entered here using the Add New button or on the Intervention tab). To associate an already entered Intervention, the user can click on the Associate button next to the entry on the grid. The Intervention will then move into the Matrix window and will no longer appear in the Available grid; it will appear here again for a different Behavior.
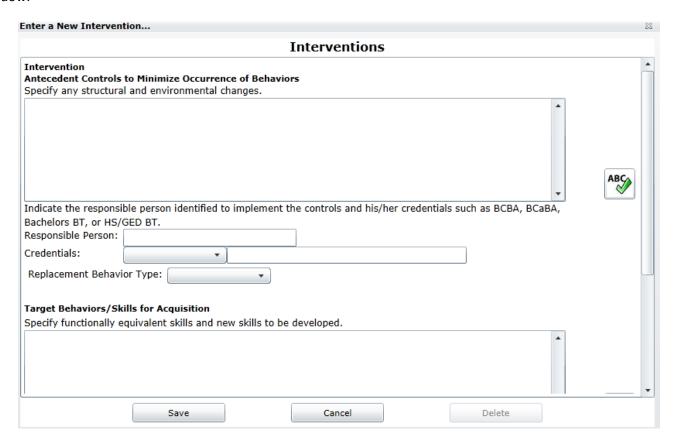
The buttons at the bottom of the window are as follows;

- Details - this will change dynamically depending upon what level of the matrix the user is on. In the above example, because the user is in the Intervention Details window, the button says "Behavior Details". Clicking here will bring the user back (or up) a level in the Matrix to the Behavior Details. If the user was in the Strategies Details window, the button would be labeled "Intervention Details" and the user would be brought to that window when clicking the button.
- Close – clicking this button will close the Details screen and return the user to the full Matrix window.
- Add New – will open the Add/Edit screen for the level of the Matrix the user is adding
- Remove – will remove the selected item from the Matrix, as well as any items associated below it (i.e., if a Behavior already has an Intervention and Strategy associated and is then removed, the associated Intervention and Strategy are also removed; the information is not deleted from the BSP but it is no longer a part of the Matrix)

- Associate – this will change dynamically; in the above example, when the user selects the Intervention in the Matrix window this button will change to "Associate Strategy" (it will bring the user to the next level on the Matrix).

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

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

Users will complete the Intervention window; all fields are required. Clicking Save will save the information so that it can be associated to the selected Behavior. **Please note – users must associate at least one Intervention to a Behavior on the Matrix in order to submit the BSP.

Users have the option of copying a Desired Outcome/Goal from the FBA into the Interventions tab of the Matrix if the FBA was created by the user's agency. To do so, the user will follow the same steps as when copying a Behavior from the FBA.

      a. Using a "drag and drop" feature to copy individual Desired Outcomes/Goals, users will:
          i. Single click on the record in the FBA –holding down the left mouse button.
          ii. Drag the record over to the Interventions tab of the Matrix in the BSP.
          iii. Let go of the left mouse button (drop) when you see the blue arrows appear on the record; make sure to be hovering over the grid on the Interventions tab of the BSP. (Users will see a transparent image of the Behavior they are dragging over, as seen in the example below; the blue arrows will appear towards the left side of the record they are dragging. If you see a red circle in its place, this indicates that the record cannot be dropped in that location – this may also occur if the user is attempting to drop the Behavior into any other tab in the Matrix.)

      b. Using a "drag and drop" feature to copy the entire Desired Outcomes/Goals accordion, users will:
          iv. Single click on the heading of the FBA (the title area of the document) – holding down the left mouse button.
             3. Drag the FBA title over to the title area of the BSP.
             4. Once the user lets go of the mouse button (drops the information), they will receive a confirmation message stating that the information was copied over. The Desired Outcomes/Goals will copy over into the Interventions area on the Matrix.

When the user copies a Desired Outcome/Goal from the FBA into the Interventions of the BSP, the only field that will not map exactly (due to differing field titles) will be -
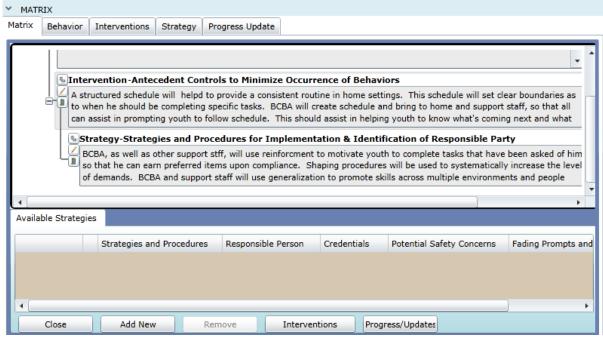
- The FBA Desired Outcome/Goal "Functionally Equivalent Skill/Behavior**"** text field will copy into the "Target Behaviors/Skills for Acquisition" text field in the BSP Intervention.

***Please note**: the user will have to complete the rest of the Interventions record in order to save it and to ultimately submit the BSP; there are more items that need to be documented on the Intervention screen than in the Desired Outcomes/Goals screen of the FBA. Every field is required.

The next step is to associate or enter new Strategies to the Intervention(s).
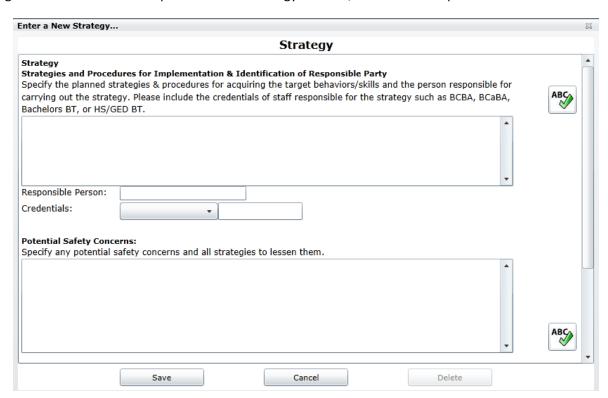
To associate a Strategy to the Intervention, the user will click on the chain-link button on the Intervention in the Matrix window or on the Associate Intervention button in the lower-right hand corner of the window.
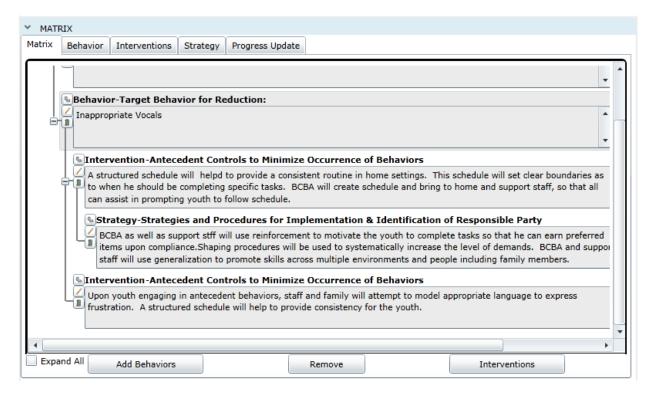
The above example shows an associated Strategy.

Users can associate more than one Intervention, Strategy, etc. to a Behavior by continuing to add new entries and associating them. Below is an example of the Add Strategy window; all fields are required.

Also included in the window is Fading Prompts and Transfer of Skills; please specify strategies for training of Parent/Legal Guardian and the criteria for fading. Once the user has entered the needed Strategies, they can associate them to the Intervention.

Clicking on the Close button on the Details screen will bring the user to the main Matrix tab, which will display the full Matrix tree.
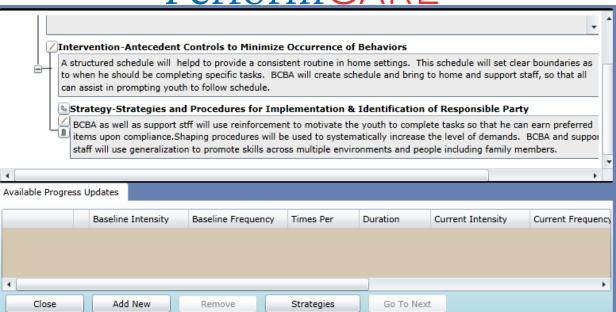

The above example shows two Interventions associated to the same Behavior. Users will notice that the connection can be seen using lines that connect each level back to the Behavior it is ultimately associated to or it is addressing. A Behavior can have any number of associated Interventions; an Intervention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

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

Once Strategies have been associated to the Intervention (and ultimately, the Behavior), the user will associate the Progress Update to the Strategy. Clicking on the chain-link icon next to the appropriate Strategy will bring the user to the Progress Update window.

The above example shows the Intervention and an associated Strategy; the user may find that they need to use the scroll-bar to the right of the Matrix window to see all of the information – in this case the user will need to scroll up to see the Behavior. The user can associate the Progress Update by using the Associate button if there was one already entered; the user can also add a new Update by clicking the Add New button. The Add/Edit screen will appear once the button is selected.
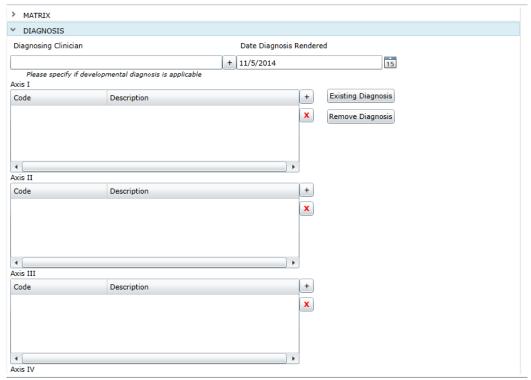

The Progress Update also includes the Update from Last 90 Day Review Period. For this text box, please summarize updated data analysis findings from the last 90 day review; specify dates, measurable outcomes, strengths, new skills, transfer of skills and sustainability of skills.

Users are required to enter and associate at least one Progress Update in order to submit the BSP; if this is the initial BSP and there is no update, users will need to enter NA into each field and save the record.

**Please note – when the user copies from an existing BSP to create the new BSP, the Progress Updates will not copy over into the new document.

d. Diagnosis Accordion

Users must input the following information into the accordion – without it they will be unable to submit the plan; also these fields must be completed in the order they appear in;

- Diagnosing Clinician
- Date Diagnosis Rendered – will pre-populate with the current date; users are expected to update it with the correct information
- Axis I – this field is required.

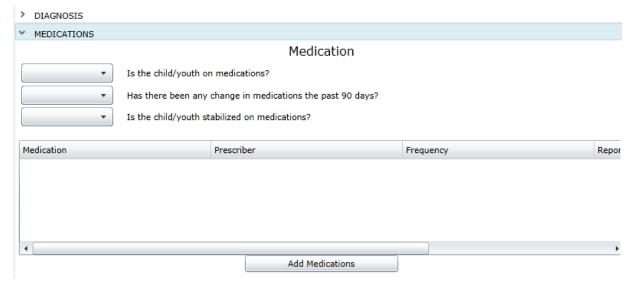Users can enter Axis I by utilizing one of the buttons next to the grid;

- The "+" sign will bring up a search box; users can enter the diagnosis code or description to search the database for the appropriate diagnosis to add to the record.
- The "Existing Diagnosis" button – when clicked will bring up a screen that will show all of the diagnosis records that are currently entered into the youth's record.

The user can copy an existing diagnosis into the BSP by selecting it from the grid and clicking the "Copy" button. Once the diagnosis is copied into the BSP it can be edited; when the BSP is approved, the diagnosis information will create a new record here and will be available for use in future plans.
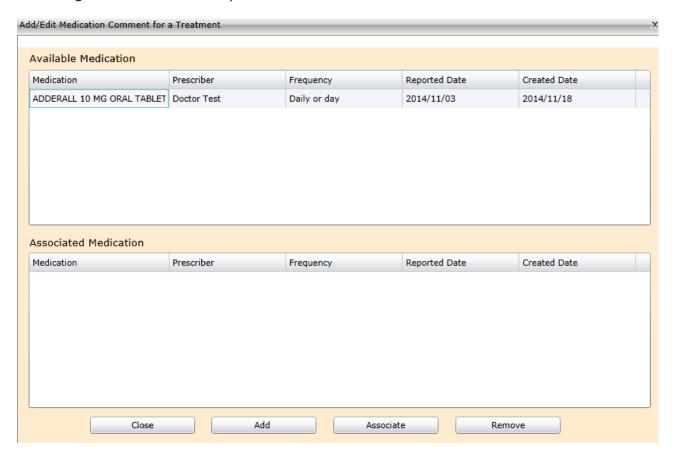
e. Medications

The Medications accordion allows a user to add any medications that the youth is currently taking to the current plan.

The three questions at the top of the accordion are required.

Clicking on the Add button will bring up the following window, which will allow the user to enter new medications or associate existing medications to the new plan.

Users will find the current medications – those that are currently in the youth's record – in the top grid (Available Medications). The bottom grid will show those that have been associated to the BSP. To associate an existing medication;

- Single-click on the medication record in the top Available Medications grid.
- Click the Associate button at the bottom of the window.
- The medication will appear in the Associated Medications grid and will appear in the BSP.

To enter a new medication;

- Single-click on the Add button at the bottom of the window.
- The Add New window will appear;

Add/Edit Medication Comment for a Treatment

Medication Name: tri

TRI-LINYAH   ORAL KIT 1 BLISTER PACK in 1 PACKET
TRI-LINYAH   ORAL KIT 3 BLISTER PACK in 1 CARTON
TRI-LINYAH   ORAL KIT 6 BLISTER PACK in 1 CARTON
TRI-LO-MARZIA   KIT 3 POUCH in 1 CARTON (68180-8
Tri-Lo-Sprintec   KIT 6 POUCH in 1 CARTON (0093-
TRI-LUMA FLUOCINOLONE ACETONIDE; HYDROQUINONE; TRE
TRI-MED ACETONIDE 40 MG/ML INJECTABLE SUSPENSION (
Tri-Med Medical OXYGEN 1 L/L RESPIRATORY (INHALATI
TRI-NEFRIN 4 MG-25 MG ORAL TABLET (CHLORPHENIRAMIN
Tri-Norinyl   KIT 3 BLISTER PACK in 1 CARTON (52
Tri-Norinyl   KIT 6 BLISTER PACK in 1 CARTON (52
TRI-NORINYL TRIPHASIC 0.5 MG-1 MG-0.5 MG ORAL TABL
TRI-NORINYL TRIPHASIC 0.5 MG-1 MG-0.5 MG ORAL TABL
TRI-NORINYL TRIPHASIC 0.5 MG-1 MG-0.5 MG ORAL TABL
TRI-NORINYL TRIPHASIC 0.5 MG-1 MG-0.5 MG ORAL TABL
TRI-NORINYL TRIPHASIC 0.5 MG-1 MG-0.5 MG ORAL TABL
TRI-NORINYL TRIPHASIC 0.5 MG-1 MG-0.5 MG ORAL TABL
TRI-OTIC 0.1%-1%-1% OTIC SOLUTION (HYDROCORTISONE)
TRI-P ORAL INFANT DROPS 10 MG-20 MG-10 MG/ML ORAL
TRI-PHEN-CHLOR 5 MG-10 MG-40 MG-15 MG ORAL TABLET,

Prescriber:
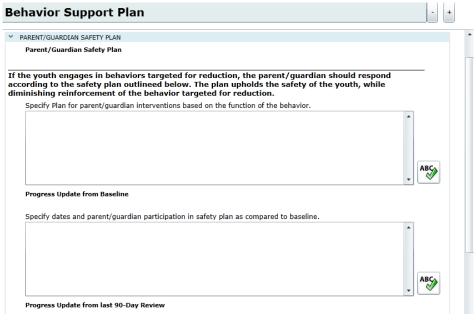
Frequency:

Reported Date:

Created Date:

Please note that all fields in this window are required.

Users can type in the first three letters of the medication and a menu will appear (see example above). Choosing a medication will then allow the user to enter the Prescriber, Frequency (from a drop down menu that contains the typical pharmaceutical frequencies) and the Reported Date (the date on which the user learned the youth was taking the medication).

Clicking the Accept button in the window will add the medication to the Available grid, where the user will need to associate it to the BSP.
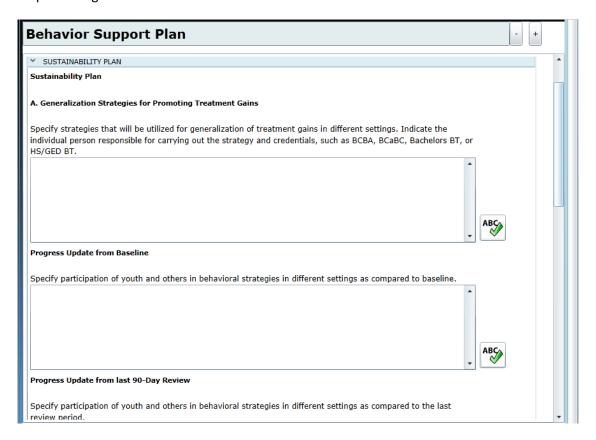
f. Parent/Guardian Safety Plan Accordion

The first field – Specify plan for parent/guardian interventions based on the function of the behavior." Is a required field; it must be completed in order for the user to submit the BSP.

The Progress Update from Baseline field is required; as is the Progress Update from Last 90-Day Review. If this is the first BSP, please enter "N/A" to indicate that there is no update at this time.

g. Sustainability Plan Accordion

This accordion is where the user will document how the treatment team – the BCaBA, BCBA, etc. – will utilize strategies to maintain and promote gains in treatment.
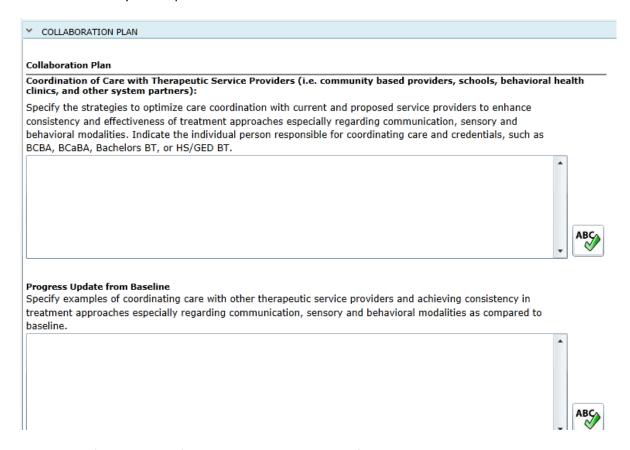

This window also includes Maintenance Strategies for Promoting Treatment Gains; specific strategies should be included here that will be utilized for maintenance of treatment gains.

All of the fields within this accordion are required in order to submit the document. *Please note, if there is no Progress Update from the last 90-day review because this is the first BSP, the user can enter N/A.

h. Collaboration Plan Accordion

The accordion allows the user to document how care and the planning of care is coordinated with other service providers such as community-based providers and behavioral health clinics.
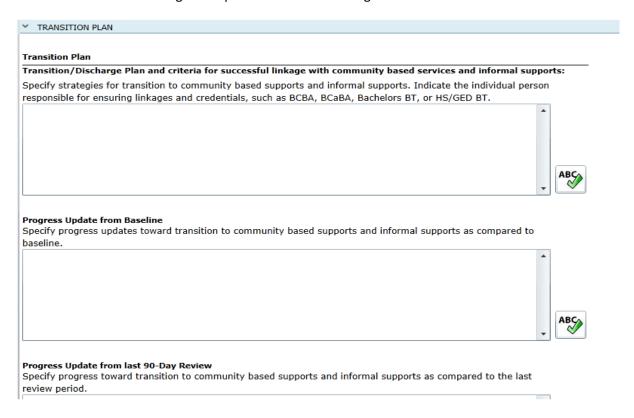

All fields are required. *Please note, if there is no Progress Update from the last 90-day review because this is the first BSP, the user can enter N/A.

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i. Transition Plan Accordion

Although youth and families receiving these services are likely to be admitted into the program for long periods of time, ultimately the goal is to connect the family to community based supports and to assist them in utilizing informal supports for assistance in maintaining the improvements seen through treatment.

All fields are required. * Please note if there is no Progress Update from the last 90-day review because this is the first BSP, the user can enter N/A.

j. Parent/Legal Guardian Consent Accordion

This is where the user will indicate that consent has been received from the parent/legal guardian for treatment; users can also download and print a copy of the consent form from this accordion, if needed.

Checking the attestation – "This provider attests that the parent/legal guardian has reviewed the written Behavior Support Plan and has given informed consent as evidenced by signing the "Behavior Support Plan Consent" form" – indicates that this step has been completed; it must be checked-off in order to submit this BSP.

The Download button allows the user to download the Consent form as a PDF to print.

k. Notepad Accordion

This accordion is used as a communication tool between the provider and the Reviewer at PerformCare; if there is information that does not fit elsewhere in the plan, the user can enter it here. If PerformCare returns the Plan to the user, this is where the user should look to find information regarding why the plan was returned and what changes or additions need to be made before resubmitting it.

*Please note: if printing the BSP, the Notepad will not print as it is not part of the plan itself.

VI. Copying an existing BSP

Users have the option of copying an existing, approved BSP to create the new BSP; this can only be done with BSPs that were created within the user's agency.

Once the user has created a new BSP, they will need to navigate to the top of the screen where they will find the Copy Assessments and Plans Grid.

Here, the user will find a list of the plans and assessments that are available for use with this BSP. Clicking on the appropriate BSP from the grid (most likely the most recently one), will open it in the window next to the new BSP.

The user can copy the BSP into the new document by using "drag and drop" functionality; the user will single-click on the heading of the existing BSP and dragging the heading over to the same heading area in the new BSP.

The user will receive a confirmation message asking if they want to copy; if the user clicks the "Ok" button, the BSP will copy over in the new document. The areas that do not copy over are as follows:

- **Progress Update on the Matrix**
- **Any of the Progress Update from Baseline fields**
- **Any of the Progress Update from Last 90-Day Review fields**
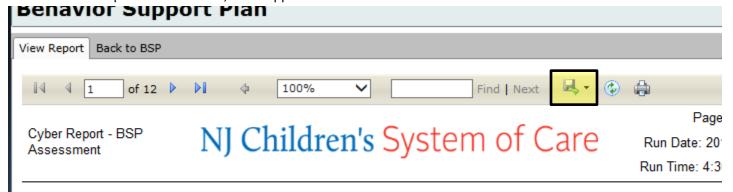- **Parent/Guardian Consent**
- **Notepad**

*Please note that only BSPs created by the user's agency can be copied into a new BSP.

VII. Printing the BSP

As with most documents in Cyber, the BSP can be printed. (The FBA can also be printed by following the same steps.)

1. The BSP must be saved first before the user will be able to print.
2. Clicking on the "Print" button at the bottom of the document will first generate a warning message to the user, alerting them that it may take a while to load the print version.
3. Once the print version loads, it will appear in a new window

4. It is **highly recommended** that users do not print directly from Cyber; doing so will take an extended period of time.
   a. Clicking on the Export icon – highlighted in the above example – will give the user export options – the most frequently used is a PDF.
   b. Clicking "Export" will export the BSP into a PDF which can then be printed and/or saved.
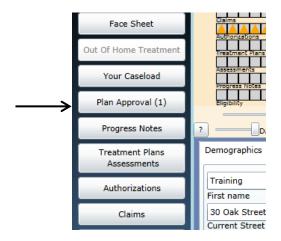
VIII. Plan Approval

The Plan Approval screen can be used for the following tasks:

- Opening a plan or assessment assigned to the logged-in user
- Locating a plan or assessment and determining its current owner and status
- Assigning a plan or assessment to self
- Assigning a plan or assessment to another user in the agency

The Plan Approval button can be found on the left-side button bar from within any youth's record.

The button itself may display a number, as seen in the above example. This number represents the number of plans or assessments currently assigned to the logged in user. These may be documents the user authored or that were transferred to the user for work, review or approval before sending to PerformCare.

The screen is laid out as follows;

The top grid will give the user 'high level' options to choose from which will assist in filtering the rest of the screen; IIH users will only see the IIH Treatment Plan (TXP), FBA and BSP. Please note – the only options that will appear will be those that are in the user's agency currently, meaning they are not submitted/approved.

The user can also change the time-frames for the selected documents – due dates or timeframes; if a user is opened to more than one agency, they can select the agency or program name from the Program menu at the upper right. If a user is a Plan Level 2 or 3, they can choose to see plans or assessments assigned to a specific user within the agency (Plan Level 1 users can only see the documents assigned to their own ID). Any selections made at the top will narrow down the selections available in the Plan Type grid.

Here, the user can chose a specific type of plan/assessment to see in the Filtered Plans grid. Again, only the types that are currently owned by users within the agency will appear here. Once the user choses the type(s) of plan to view, the Filtered Plans grid will populate with information.

The user will find the following information in the grid;

- Plan
- Plan Type
- Assigned To: the current user that 'owns' the document; might be the originator or author, may also be an individual within the agency that the document was transferred or assigned to
- Youth/Child – the ID and name of the youth the document is for
- Requestor – the author
- Due Date – note: all BSPs will follow this schedule;
    - Initial BSP due 20 business days after the start of the Tracking Element (in the youth's Face Sheet)

- On-going BSP due 90 calendar days after the last approved BSP (*should be submitted approximately 75 days after, allowing for review and possible return time)

- Agency
- Treatment Plan ID – number assigned to the document (can be used if having technical difficulties and user contacts the service desk for assistance)
- Return History – will house the ID of the individual that returned the document to the original user; may be internal ID or that of a PerformCare Clinical Reviewer (Treatment Plans are not reviewed by PerformCare upon submission; the FBA and BSP may be electronically returned after the initial review)
- Current PGM Indicator – identifier for the program
- Original PGM Indicator
- Date Submitted to CSA
- Assessment Date

The user will find any plans or assessments currently assigned to them in the grid below – My Plans. If the user needs to assign a document to themselves, or as a Plan Level XX user assign to someone else within the agency, they must single-click on the document in the Filtered Plans grid and then click on the Assign button below the grid.

A new window will appear where the user can select who to assign the document to; Plan Level 1 users can only chose themselves. Clicking on Accept button will assign the document to that individual and it will appear in their My Plans grid. (The number of documents assigned to them will increase, which will update the number that appears on the Plan Approval button out on the Face Sheet.)