

# PerformCARE<sup>®</sup>

## Progress Note Guide for Family Support Organizations

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## **I. Introduction**

### **Family Support Organizations Utilizing CYBER**

Family Support Organizations (FSOs) are nonprofit, county-based organizations that work collaboratively with PerformCare, Care Management, state agencies, and other providers to offer face-to-face family support, education, and advocacy to families. FSOs ensure that the New Jersey Children's System of Care (CSOC) is responsive to the needs of involved children and families. In addition, youth receiving Mobile Response or Care Management services through CSOC are also provided access to FSOs for family support.

FSOs utilize the Family Assessment of Needs and Strengths (FANS), an electronic assessment in CYBER, to inform and assist in collaborative treatment planning, and also inform of the development of the Family's Care Plan and identify education, advocacy, and supports needed by the family. FSOs also create progress notes in youth record to document activity with the family. This document describes the FSO use of progress notes in CYBER.

Training materials for this and other CYBER information is available in the Providers Training section on the PerformCare website, [www.performcarenj.org](http://www.performcarenj.org).

## 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](http://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 Enter, Tab and Enter or click the LOGIN button to continue.**

Above 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.



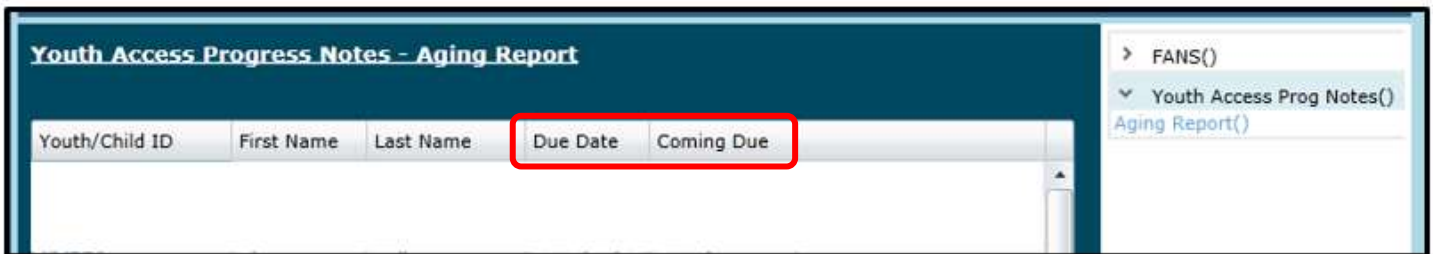
## III. Welcome Page Links to Progress Notes

After logging in, all users land on the Welcome Page. The Welcome Page within CYBER allows users the ability to track certain ongoing required activities.



### Youth Access Prog Notes

- [Aging Report](#) – Link will display the **Youth Access Progress Notes – Aging Report** in the center grid. All youth requiring a Progress Note within 15 calendar days of today’s date to remain open will be displayed.



- Due Date column shows the actual Due Date of the next progress note (due 90 days after each prior progress note)
- ‘Coming Due’ status is displayed in the Coming Due column until the due date passes; then it will display ‘Overdue’.
- Hyperlink is available to go directly to the youth’s record and complete the note.

*Note: Report NJ1370\_FSOContinuedReview was retired June 2018.*

If the user clicks a Youth/Child ID hyperlink and the user no longer has access to the youth’s record, the system will display the following pop-up message: “The search you just performed came up empty...Try searching again...”

## IV. Progress Notes

### Notation Types

Progress notes are an essential part of the electronic record for youth in CYBER. Regularly entered progress notes document what services are being provided, and the meetings and activities happening with the youth and family. FSO users have requirements to enter progress notes for each youth open to their agency in order to keep the youth record open and document the youth and family's involvement with the FSO.

Listed below are the Progress Note types available for FSO users. All FSO progress notes require the user to enter the Notation Type, Notation Sub Type, Date, Time, and Duration prior to committing.

**Date** may be selected from the calendar icon. **Time** should indicate the start time of the event documented in the progress note. If the activity began at 5:05 PM, the Time should be indicated as 5 in the H (hour) box, 5 in the M (minute) box and PM should be selected. **Duration** indicates the length of time the activity occurred. If the length of time of the activity was 30 minutes, 30 should be entered in the M box.

### Notation Sub Types

FSO Progress notes will include a sub type drop down. Each progress note type listed below allows the user to indicate a sub type that is reflective of the stage of wraparound care within which the documented activity fits. The FSP should select the sub type category which best delineates the stage of wraparound related to the activity.

- Engagement/Team Prep
- Plan Development
- Implementation
- Transition

## Draft Progress Notes

Users may save a progress note that is not ready to be committed into the youth record. If a note is created and Save Draft is selected, only the user who created the note may return to the draft note, open it, and commit the note.

In the Progress Notes area of the youth's record, the user should select **Show My Draft Progress Notes**, double click on the draft note, it will open. Review the note and then click commit to enter the note into the youth record.

**Progress Notes**

Show My Draft Progress Notes  
 Show Committed and Signed Progress Notes

Truncate Notes

Note Date	Note Type	Note SubType	Created By	Note	Hours	Mins	Cre
2018/06/08 01:00:00	FSO - Crisis Contact			Test progress note	00	00	2018

## Progress Notes that Keep a Youth Record Open

*The progress notes listed below are currently required to be entered at least every 90 days to demonstrate continued family involvement with the FSO. These notes are considered to be ongoing FSO documentation to serve as the indicator of ongoing family involvement with the FSO. A progress note, whether entered manually or automatically generated upon the submission of the FANS indicates that the FSO user is continuing to provide FSO support for a family.*

- **FSO – Child/Family Team Participation** - Used to document FSO participation in a Child Family Team (CFT). Progress note content should include a summary of the FSO role in the meeting, tasks assigned to FSO, family progress on Family Action Plan goals, etc.
- **FSO – Collateral Contacts** - Used to document contact with outside sources that have information or resources for families. Progress note content should include a summary of the purpose of the contact as well as the outcome of the contact including any next steps.
- **FSO – Contact with Family** - Used to document all contacts with a family other than face-to-face contacts. This may include communication that occurs by telephone, electronic or other methods. This also includes attempts at contacting family without connecting with the family. Progress note content will include a summary of the purpose of contact as well as the outcome of the contact including any next steps.
- **FSO – FSO Team Meeting** - Used to document any internal Family Action Plan review done by the FSO to support FSPs in their work with families and identify ways the FSP, FSO and CFT may improve supports for a family. Progress note content should include a summary of the meeting relating to the particular family with whom the FSP is working. This information may relate to a review of Family Action Plan strategies and goals, newly identified strategies to discuss with a family, etc.
- **FSO – Initial Face-to-Face Visit – FSO** - Used to document the first in-person meeting with a family and FSP for which a CMO partner is not present. FSPs should use this note type to document any FSP initial meeting with the family without a CMO partner. Progress note content will include the FSP’s introduction of the FSO support model, wraparound values, and process and identified needs.
- **FSO – Initial Face-to-Face Visit – FSO and CMO** - Used to document the first in-person meeting with a family and FSP during which a FSP and CMO partner are both present. FSPs should use this note type to document any FSP and CMO initial meeting with the family. Progress note content will include the FSP’s introduction of the FSO support model, wraparound values, and process and identified needs.
- **FSO – Ongoing Face-to-Face Visit** - Used to document FSP in-person meetings with a family beyond the initial in-person meeting. This activity includes meetings with family and other system partners. Progress note content should include a summary of the purpose of the meeting, review of progress, Family Action Plan strategies and goals, etc.
- **FSO – Other FSO Activity – Non Face-to-Face** - Used to document non face-to-face support, education, and advocacy efforts provided for a family by an FSO FSP. This note type is used to document activities such as review of documentation related to FSP meeting attendance with a family.
- **FSO – FANS Completion** - Designed to record that a FANS and Family Action Plan were completed within CYBER. This progress note type will generate automatically at the time a FANS is submitted and approved. The progress note will display the following information in a templated format:
  - Date the FANS was completed with a family, Name of FANS items scored as (2 or 3) and the item scores, and the Total FANS score.
  - The template portion of this note type should not be edited by the FSP. Additional information can be added to the note prior to completion. Users will be able to edit the template text of the FSO – FANS Completion



Progress Note, but cannot edit the information that was pulled from the FANS. The name of the FSP completing the FANS will be the signature stamp for this progress note type.

## Retired from Use:

**FSO – Continued Access** – This note was used prior to March 2018 to maintain FSO access to youth records. It may be found in Historical Access of youth records prior to March 2018. The FSO Continued Access note has been retired from use and has been removed from CYBER.

## **Progress Notes that Close a Youth Record**

There are four progress note types that close a youth's record to FSO. Three notes identify that family is no longer working with or seeking support from FSO and allow for automated closure of the youth record the following day. The three notes are:

- **FSO - Family Declined** - Used to document when the option of FSO services has been discussed with a family and a family chooses not to accept the service.
- **FSO - Family No Longer Engaged** - Used to document when a family had been engaged with a FSO for a time period but is no longer in communication with the FSO despite the FSOs outreach efforts. Progress note content should indicate that the family will transition from the FSO episode of care due to inability to contact the family. All efforts to contact the family including dates, times and method should be documented. Requirements for expected efforts are currently defined by each FSO.
- **FSO – No Family Contact** - Used to document when no contact has been established with a newly referred family, despite multiple attempts. Progress note content should indicate that the family will transition from the FSO episode of care due to inability to contact the family. All efforts to contact the family including dates, times and method should be documented. Requirements for expected efforts are currently defined by each FSO.
- **FSO – Transition** - Used to document transition from FSO supports based on the FSP or CFT determination that FSP engagement is no longer currently required within the wraparound process. This note type is used most typically when a family is transitioning as empowered and demonstrating improvements in areas they identified as needs. Progress note content should include a description of the reason for transition and details relevant to the family transition plan. This note type should be used to document a family's transition that does not fall within the categories of No Family Contact, Family No Longer Engaged, or Family Declined.

Committing the **FSO – Transition** progress note gives the Agency **14 calendar days** to access the youth's record before it is closed.

*Note: If the any of the progress notes that close a youth's record are committed, the NOTE DATE entered in the date field inside the progress note will populate the Transition Date on the Episodes Tab.*



The following progress note types will be used to inform the reporting of FSP efforts:

- FSO – Ongoing Face to Face/Home Visits
- FSO – Initial Face-to-Face Visit – FSO
- FSO – Initial Face-to-Face Visit – FSO and CMO
- FSO – No Family Contact (closes episode)
- FSO – Family No Longer Engaged (closes episode)
- FSO – Family Declined (closes episode)

## Telehealth Progress Notes

Due to the Coronavirus, COVID-19, enhancements were made in CYBER to areas of Progress Note Notation Types for all providers to identify when telehealth options are selected. These new progress notes define the service delivery when delivered in a telehealth format (not in person). Telehealth notation types will not have subtypes.

The telehealth progress notes included in CYBER are:

Progress Note Notation Types	Definition
<b>Telehealth - Audiovisual</b>	<p>Use this progress note type if a typical face-to-face service is delivered by means of <u>both</u> video and audio technology. This note indicates that a provider interacted with the youth and/or family during service session through visual and auditory communication.</p> <p><u>Examples:</u> Technology platforms may include videoconferencing applications such as (but not limited to) Skype and Zoom</p>
<b>Telehealth - Audio Only</b>	<p>Use this progress note type if a typical face-to-face service is delivered by means of audio communication only. This note indicates that a provider interacted with the youth and/or family during service session through auditory communication only.</p> <p><u>Example:</u> Telephonic contact</p>
<b>Telehealth - Support Activity</b>	<p>Use this progress note type to document collateral or other service support activity outside of the actual telehealth service delivery itself.</p> <p><u>Examples:</u> Text messaging, paperwork dropped off, etc.</p>

## Instructions on Use of Telehealth Progress Notes

Providers should continue to utilize their existing progress note types to enter necessary documentation. If the service provided is typically a face-to-face service and is provided instead via Telehealth, a second progress note is necessary to verify the method of service delivery. This information is necessary to help CSOC obtain important service delivery information and support current provider service delivery method. Non face-to-face contacts routinely conducted by telephone and other relevant activities should be documented within existing progress note types in line with standard practice.

Example: An FSO Family Support Partner is documenting the outcome of a recent meeting with the caregiver, which occurred via Video Audio Telehealth:

- 1) The FSO Family Support Partner would document the outcome of their meeting with a caregiver in a progress note as they do in current practice. The elements of this progress note type would not change.
- 2) The FSO Family Support Partner would enter a second progress note “Telehealth - Audiovisual” advising that the meeting with the caregiver took place on xx-xx-xxxx via Zoom and to refer to the specific progress note type dated xx-xx-xxxx for service details. Entry of duration is required, and no note subtypes are available for telehealth progress note types.

## V. References

### Training Support

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

FSO Training Section: <https://www.performcarenj.org/provider/training.aspx#fso>

- FSO Instructional Guide <https://www.performcarenj.org/pdf/provider/training/family-support-organizations/fso-cyber-instructional-guide.pdf>

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