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I. Introduction

This release gives Individual Support Services (ISS) providers their own Treatment Plan in CYBER. Previously, this provider group was using the Intensive In-Home (IIH) Treatment Plan, which included validations which did not apply to ISS providers.

This plan is an exact duplicate for the IIH Treatment Plan; the validations on Diagnosis and Licensure have been removed.

This Treatment Plan is part of the automatic-approval process in CYBER; once submitted, the plan will automatically be approved because there are no service requests included.

Please note: this Treatment Plan is specifically for those users that are providing ISS services; those that are providing Behavioral Interventions (ABA) are to use the Functional Behavioral Assessment (FBA) and Behavioral Support Plan (BSP). Those providers that are providing Clinical Therapeutic services to families should continue using the IIH Treatment Plan.

IIH CYBER users must have the appropriate security added to their user profile in order to have access to an ISS Treatment Plan. Users should contact their local Systems Administrator for assistance.
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.

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 this PHI by logging in as a CYBER User.

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/ " 
III. Creating a New Treatment Plan

In order to create a new Treatment Plan, the user must first locate the correct youth’s record. There are a number of search options available to users.

Clicking on the “Your Caseload” button on the left-side of the Welcome Screen will bring up a list of the youth that the logged-in user is 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 a user to search for a specific youth using a combination of identifiers; please note that a user can only locate the record for a youth that is open to their program. Users may also utilize the Agency Caseload button via the Youth/Child Search button on the left side of the Welcome Page, as well.

Once the correct youth’s record is located, the user will click on the “Treatment Plans Assessments” button on the left-side of the record to access the appropriate screen.

Clicking here will bring up the youth’s Treatment Plans and Assessments screen.

Users will click on the drop-down menu above the grid to select the IIS – Treatment/Service Plan, and then click the “Add New” button. The new document will generate.
IV. The Accordions of the Treatment Plan
The plan is divided up in accordions; users can click on the “+” or “-” buttons in the upper-right hand corner of the document to open or close every accordion at the same time. Clicking on the individual accordion headings will open just the selected accordion.

IV. a. Copy Treatment Plan

The first accordion allows a user to copy a previously submitted/approved ISS Treatment Plan to create the new one; if a user choses to use this functionality it is expected that they review the entire document and update it appropriately so that it reflects the current treatment plan, goals and progress of the youth.
In the Demographics accordion, users will find basic demographic information about the youth, much of it is automatically populated from the youth’s Face Sheet. If the youth has more than one Care Management Entity (CME) or Care Manager (CM), either of these fields will display a drop-down menu; users should make sure that the correct entities are chosen here. Also, if any of the demographic information needs to be updated, the user can make the changes to the youth’s Face Sheet and click the Refresh button at the bottom of this accordion (the button will be active once the user saves the document).

The CFT Date field (Child Family Team) will automatically fill with the date the plan is created; the user can back-date this if necessary. The Assessment Completion Date field should be filled with the date of the most recent assessment; this may be an assessment completed by another agency.

IV. c. The Youth/Family Vision Accordion

The user should document the goals of the youth and family here; please note this should not document the goals of the worker who is working with the family. Goals may include decreasing certain behaviors, increasing a youth’s ability in a certain area.
IV. d. The Treatment Matrix Accordion

The Treatment Matrix is a comprehensive tool outlining the Needs, Strengths, Strategies, etc. in an easy-to-read structure. The Matrix 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; it is also visually easy to see the relationship between the Need and any associated information.

Once the Matrix accordion is opened, the user will initially see a blank Matrix window with “New Plan” listed at the top – this will change to the Plan ID number once the plan has been saved or submitted. This area will display the tree structure of the Matrix and will be populated with the information that the user enters to outline the plan for treatment. Users will see multiple tabs across the top of the accordion; users may choose to enter all of the information using the tabs and then associate it to the Need via the Matrix. Doing so will allow the user to enter their information in any order they chose; users can enter information via the Matrix, but they have to follow the steps of the Matrix – i.e. the Need is entered first, the associated Strength(s), Strategy(s), etc. The user cannot go out of that order if they enter information through the Matrix.
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. 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.

The first tab users will see in the accordion will be a blue question mark. When clicked, the user will see the following message:

The message appears as a “sticky note”; users will see these in some areas of the Matrix and clicking on them will bring up information that may be useful in completing the Plan.

If users chose to enter all of their information/data first, clicking on any of the tabs at the top of the accordion will open the associated screen, which will initially be blank with an active “Add New” button at the bottom. Below is an example of the Needs tab, with a Need entered.
This grid will show all of the Needs that have been entered into the Matrix; each Need will automatically be associated to the Matrix when it is entered — regardless of where it is entered from. Each entry will include an Edit button, represented by the pencil icon in the first column. Clicking here will bring up the Add/Edit screen, which also appears when the user clicks the “Add New” button at the bottom of the window – the same screen will appear if the user clicks on the “Associate Need” button from the Matrix.

Users will enter the description of the Need in the text box, select a Start Date, Target Date and End Date; the End Date is optional and is typically entered once the Need has been met. The appropriate Domain(s) must also be selected and will typically match up with the domain in which the Need was identified in (from the associated assessment).
Once the user selects “Accept”, the Need will be added to the Treatment Plan and the Matrix.

*Note: There is a sticky note for Transitional Planning which reads, when the blue “?” is clicked:

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

- Chain link – Associate to the next level; when clicked from the Need, the user will be brought to the Strengths Details screen.
- Pencil – Edit the line item
- Trash can – Remove the line item from the Matrix; using this will also remove any associated information in lower levels of the tree.

These buttons will appear on each line or level of the Matrix tree.

Once there is a Need associated to the Matrix (and the Treatment Plan), the user can begin associating the rest of the clinical information – Strengths, Strategies, Techniques, etc. Associations can only be done from the Matrix tab; the other tabs are strictly for entering information. Clicking on the Chain Link button the Need, or clicking the “Associate Strength” button at the bottom of the tab will bring up the Associate Strengths window.
In the above example, the Need has been selected – by single-clicking on it – and the dynamic “Associate” button has changed to “Associate Strength”. (Double-clicking on the Need will open it for editing.)

At the top of the Details window will be the level of the Matrix that the user is working on; meaning, the selected Need and all of the information associated with it. If the user had three Needs entered into the Matrix, and was associating a Strength to the second Need, only that Need would appear here.

*Please note: the user can edit any part of the Matrix from this window by clicking on the pencil icon next to the item in the top window (see the Need in the above example).
The Available grid in the lower half of the window will list the Strengths that have been entered into the Treatment Plan (they have been entered here using the “Add New” button or on the Strength tab at the top of the accordion) but have not yet been associated to this Need; each Strength can be associated to more than one Need. To associate an already entered Strength, as seen in the above example, the user can click on the “Associate” button next to the entry in the lower grid.

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 working on. In the above example, because the user is working in the Strengths Detail window, the button displays “Need Details”. Clicking here will bring the user back a level in the Matrix to the Need Details. If the user was working on Techniques, the button would be labeled “Strategy Details” and the user would be brought to that window.
- **Close** – this button will close the Details screen and return the user to the Matrix window.
- **Add New** – will open the Add/Edit screen for that level of the Matrix that the user is working on.
- **Remove** – will remove the selected item from the Matrix, as well as any item(s) associated to it in the tree. For example, if a Need has a Strength and Strategy associated to it, and the user choses to remove it from the Matrix, the Need, Strength and Strategy will all be removed.
  - Note: the item(s) that is removed from the Matrix is not deleted from the Treatment Plan. It is taken off of the Matrix but remains on the individual tabs.
- **Associate** – will dynamically change depending upon the level of the Matrix the user is working on. For example, when the user selects the Strength in the Matrix window, the button will change to “Associate Strategy” – this is the next level down in the Matrix tree.

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

The Add/Edit window will open anytime the user adds a new Strength; this can be done on clicking on the “Add New” button in the Available screen or on the Strength tab of the accordion.

*Please note that the user can return to the Matrix from this (or most of the) Add/Edit window by clicking the “Treatment Matrix” button; clicking here will also save the information entered.*
Once the user is satisfied with the Strength, they can associate the appropriate one(s) to the Need by clicking on the Associate button in the grid.

The above example shows the Strength associated to the Need on the Matrix; the Strength no longer displays in the Available grid at the bottom of the window. It will appear here again for this Need only if it is removed from the Matrix; it will be available to associate to other Needs – users will see it on the Strength tab and here on the Available screen for another Need.

To associate to the next level in the Matrix, which is Strategy, the user will click on the chain-link button under the Strength in the Matrix window or on the “Associate Strength” button in the lower-right hand corner of the window.

The above example shows an associated Strategy; note that the Need and the Strength can both be edited from this window by clicking the pencil icon on each entry.
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 Available grid, the user can continue to associate the available entries to the Need (or Strength, Strategy, etc.).

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

*Please note that when an item is edited, that edit carries across all instances in which that item appears in the Matrix.

Once Strategies have been associated to the Strength (and ultimately, the Need), the user will associate Techniques and Responsible Person to the Strategy. Clicking on the chain-link icon next to the appropriate Strategy will bring the user to the Techniques and Responsible Person Details window.
The above example shows the Need, an associated Strength, an associated Strategy (the one that the user is working on, i.e. associating a Technique to) and an available Technique. The user can associate the Technique by using the Associate button; the user can also add a new Technique by clicking the Add New button. The Add/Edit screen will appear once the button is selected.

The help text listed at the top of the window states “A technique is the component to address the strategy; measurable/countable”. Once the user enters the text and clicks “Accept”, the Technique will be added to the Available grid in the Details window.

Once a Technique is associated to a Strategy, 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 in the same Available screen, next to the tab for Technique.
Users may find entries in the Available grid that they did not manually enter; these have been pulled into the Treatment Plan Matrix from the Formal/Informal Supports tab of the youth’s Face Sheet. Users can also add new individuals from this screen by clicking the “Add New” button, which will open the Add/Edit window.

In order to add a new person to the Matrix, as well as the Formal/Informal Supports tab of the youth’s Face Sheet, the use will click on the “Add New” button – this will open the Add New Person to the Database window.

The user will need to enter the First and Last Name, Zip Code and at least one phone number, and select a category for the new person. Once the user clicks “Accept”, the individual’s information will be available to be associated to the Matrix and will be on the youth’s Face Sheet once the plan is approved.

The next level of the Matrix is the Desired Outcomes/Goals. When the user goes to add a new Desired Outcome/Goal, the Add/Edit screen will open.
Users are expected to “clearly document specific treatment goals in each program area and projected time frames for completing each goal”. Users are also expected to include the term – short or long term, start and end date for the outcome/goal. (Target Date is not required.)

The final area to associate to the Need is Barriers.

Clicking the “Associate” button will associate the Barrier to the Desired Outcome/Goal; clicking “Add New” will open the Add/Edit screen for a new Barrier to be added. Please note that a Barrier is not required and since it is the final level of the Matrix, users will not have an active Associate button on the screen.
IV. e. The Diagnosis Accordion

The Diagnosis accordion is where the user will document all diagnosis information for the youth.

Users will find three 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; this will include both DSM-IV/ICD-9 and ICD-10 diagnosis.
    - Clicking on the “+” button on each record will expand it to show all of the diagnosis details.
    - Copy Diagnosis button
      - Users can copy existing diagnosis into the current plan; as of October 1, 2015 only ICD-10 codes can be copied.
    - Expand All/Collapse All buttons
      - When clicked with either expand or collapse all of the diagnosis records that appear in the top grid.

- **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.

- **Diagnosis Details** (previously presented as Axis grids; Axis were removed when ICD-10 went into effect.)
  - Users who are going to enter in new diagnosis information will click on the “+” button to add new. This will bring up the Add Diagnosis window.
Users can enter an ICD-10 or ICD-9/DSM-IV code into the Code field; users can also enter in a description if they have it for the code they are searching for.

- By default, the checkbox for Cross Walk DSM-IV is automatically selected, which allows users to search using the DSM-IV codes; the search results will show all ICD-10 codes which are the equivalent to the code entered.
- Users are encouraged to do a partial search unless they are sure of the code or description they are entering. Any errors will return an unsuccessful search.

Clicking Search will run the search; the results will populate 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 that gives further specificity to the youth’s diagnosis. That information should be entered here.

Clicking OK will add the diagnosis to the plan.

- Adding the new diagnosis information into the Treatment Plan will also add it to the youth’s record; the new diagnosis will be automatically added to the Diagnosis area of the record and 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.

Please note – copying an existing Diagnosis record into the Treatment Plan will overwrite (i.e. delete) any information already added to the plan. It is recommended that users review the existing Diagnosis information before adding information manually.
IV. f. The Medications Accordion

The Medications Accordion is where users will document all of the medications that the youth is currently taking.

Users will find three questions at the top of the accordion, which are required; there is a drop-down menu for each with the options of Yes, No and Unknown.

To document current medications, users will click the “Add Medications” button below the grid, which will open the Add/Edit Medications window.

Any medications that are currently in the youth’s record will appear in the top grid – Available Medications. (Any medications entered into the youth’s record from the past year will appear here.)
To add an existing medication to the Treatment Plan, users will single-click on the record in the top grid and then click the “Associate” button at the bottom of the window; this will place the medication into the Associated Medications grid at the bottom of the window and will also place it on the Plan.

To add a new medication to the record and associate it to the Treatment Plan, the user must click the “Add” button; this will bring up the Add/Edit screen.

The user will complete each of the fields and click “Accept” to add the record; please note that the association of a diagnosis to the medication is not required. If there is a diagnosis record in the grid at the bottom of the window, the user may single-click on it to select it, and then click “Accept”; doing this will associate the medication to the diagnosis, which will then appear in the Medications grid.

The new medication will now appear in the Available Medications grid; users will need to select it, click the “Associate” button so that it is associated to the plan.

*The Reported Date should be entered as the date the user learned of the youth’s use of the medication.

Please note that the new medication will appear in the youth’s record once the Treatment Plan has been submitted and approved.

If the user needs to document a medication that does not appear in the Add/Edit screen, the information should be documented in the Notepad accordion.
IV. g. The Support Attendees Accordion

This accordion is where users will document the individuals that are involved in the youth’s care and treatment; typically these individuals attend the Team Meeting/Child Family Team Meeting (CFT).

Clicking on the “Add Supports” button at the bottom of the blank accordion will bring up the Add/Edit Supports Attendees window.

![Add/Edit Supports Attendees for a Treatment](image)

Completing each of the fields will add the individual to the Treatment Plan; as the user types a name into the Attendee Name field, they will get a menu of options – these names are pulled from the Formal/Informal Supports tab of the youth’s Face Sheet.

In order to add a new person to the youth’s record, the user must click the “Add” button.

![Add Family/Relation Element](image)

In the next window – Add Family/Relation Element – the user will click on the “Add New” button on the right-side of the window. This will bring up the Add New Person to the Database window.
Users must enter the First and Last Name, zip code and at least one phone number for the individual; at least one category must also be selected before clicking “Accept”. Once the record is completed, the information is added to the Formal/Informal Supports tab of the youth’s Face Sheet.

IV. h. The Notepad Accordion
The Notepad can be utilized by the user to document additional information, such as medications that are not available to add to the plan, information regarding the current course of treatment, other services the youth/family may be receiving, etc.

IV. i. The Family Crisis Plan Accordion
This accordion is used to document how the family can and will respond to a crisis situation (including risks and triggers for crisis, what assistance the caregiver can rely on during a crisis, etc.).
IV. j. The ISS Treatment Plan Accordion
There are a number of fields in this accordion where a user will document their credentials; there are no requirements (i.e. validations) within this accordion.

<table>
<thead>
<tr>
<th>CLINICIAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Licensed Clinician:</td>
</tr>
<tr>
<td>Licensure:</td>
</tr>
<tr>
<td>License Date: &lt;M/d/yyyy&gt;</td>
</tr>
<tr>
<td>License Number:</td>
</tr>
<tr>
<td>License Expiration Date: &lt;M/d/yyyy&gt;</td>
</tr>
</tbody>
</table>

**BA SUPERVISOR (if different than above)**

ISS users should only complete the fields that relate to them and/or their supervisor that is supervising treatment.

V. How to Transfer a Treatment Plan for Internal Review
Users may want to, or be required to, send their Treatment Plans to a supervisor within their agency for review prior to submitting to PerformCare. Users may also want to transfer a plan to another worker within their agency for further work. 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 that will bring up a list of individuals within the user’s agency they may transfer to; once the user selects someone and clicks “Accept”, the plan will now belong to that other user – they will be the owner and have the ability to edit the document.

Users may also choose to use the Plan Approval screen to transfer the plan to another user within their agency; this may be helpful if a supervisor needs to submit a plan for a worker who is not available or out of the office and not able to log into the system.

The Plan Approval screen can be accessed via the left-side button bar within a youth’s record.
The Plan Approval window will now open; the only options that the user will see are those plan types that are currently in the user’s agency – meaning they are in draft or have not been submitted to PerformCare.

The user will find any Treatment Plans that have not yet been submitted in the Filtered Plans grid, based upon the selections made in the top two grids. To assign a plan to themselves, a user will select the plan and click on the “Assign” button that is below the Filtered Plans grid. This will bring up a window where the user will select their own name – doing this, and then clicking “Accept” will assign the plan to them. The plan will then appear in the My Plans grid at the bottom of the window; the user can double-click on the record in the grid to open the plan.

Users with a Plan Level 2 or 3 designation in their CYBER security profile will have the ability to assign plans to other users within their agency; this is functionality typically used by managers, supervisors, directors, etc.