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Instructional Guide for
CMO- Annual Review ISP

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Instructional Guide to CMO-Annual Review ISP

Table of Contents

I. Introduction

The Care Management Organization (CMO) Annual Review plan type is for use by the CMO provider during the required Annual Review process. This guide will review the functionality in CYBER for the Annual Review plan and the overall expectations and requirements of the Annual Review process.

The Annual Review plan is due each year on the anniversary of the youth's start date with CMO. The Annual Review plan type uses the same structure as the routine CMO 90-Day (CR-90D) plan type. An Annual Review link will appear on the Welcome Page beginning 90 calendar days prior to the Annual Review due date; it provides the CMO with notification of the upcoming review and allow for a full authorization cycle to conduct the Annual Review meeting and the corresponding documentation.

It will remain on the Aging Report until the CMO-AR plan has been submitted by CMO and approved by the CSA.

The CMO users will be blocked from submitting a CMO-CR90D ISP from 60 calendar days prior to the Annual Review date based on the General CMO Tracking Element, until the CMO-AR ISP has been submitted and approved. During this time, a CMO user will still be able to submit SC, SU and TISP plan sub-types if needed. Once the CMO-AR ISP has been approved, CYBER will block submission of the CMO-AR plan type until 60 days prior to the Annual Review date the following year.

The CMO user will only be permitted to submit the CMO-AR ISP if there is a corresponding C/F Team Annual Review progress note posted in the youth's record with in the last 60 calendar days. If the user attempts to submit a CMO-AR plan with no C/F Team Annual Review progress note, or one that was committed more than 60 days prior to submission, the user will receive a pop-up and will be blocked from submitting the plan until the C/F Team Annual Review progress note is entered. Once submitted to the CSA, the review turnaround time will be five (5) business days.

Note: Traditionally the CMO does not complete the ISP process for youth who are in a CSOC OOH treatment program, as the OOH provider completes the JCR. However, the CMO-AR ISP will be the exception to this. The CMO will be required to complete a CMO-AR ISP for all youth within the CMO each year, including those currently in OOH treatment.

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II. Accessing CYBER

CYBER can be accessed via the PerformCare website – www.performcarenj.org . The link is available under the CYBER menu at the top of the home page or the button at the bottom of the page. Users must log into CYBER with their Username and Password.
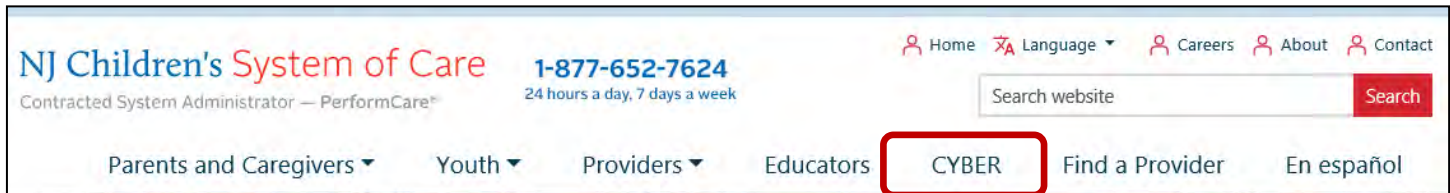
Each provider organization has at least two CYBER Security Administrators, and your agency's CYBER Security Administrators can set up a login and temporary password. Access will be based upon login type and security levels.

Before logging in, keep in mind…

- Every time CYBER is launched, the **Username and Password is required, then click the LOGIN button to continue**.
- Users are required to **change their password every 90 days.**

Above the login area is a statement that, CYBER users acknowledge their responsibility to protect the privacy of and to guard against the inappropriate use or disclosure the Protected Health Information (PHI) contained within the system.

This statement will appear during each log in.

Please also check the link: **CYBER Access Requirements** page on the PerformCare website for the most up-to-date technical requirements (such as browser compatibility and operating systems) needed to access CYBER.

At the bottom of the login page is the version of CYBER. The server number is the last 2 digits at the end (-XX). This is helpful to note when requesting assistance.
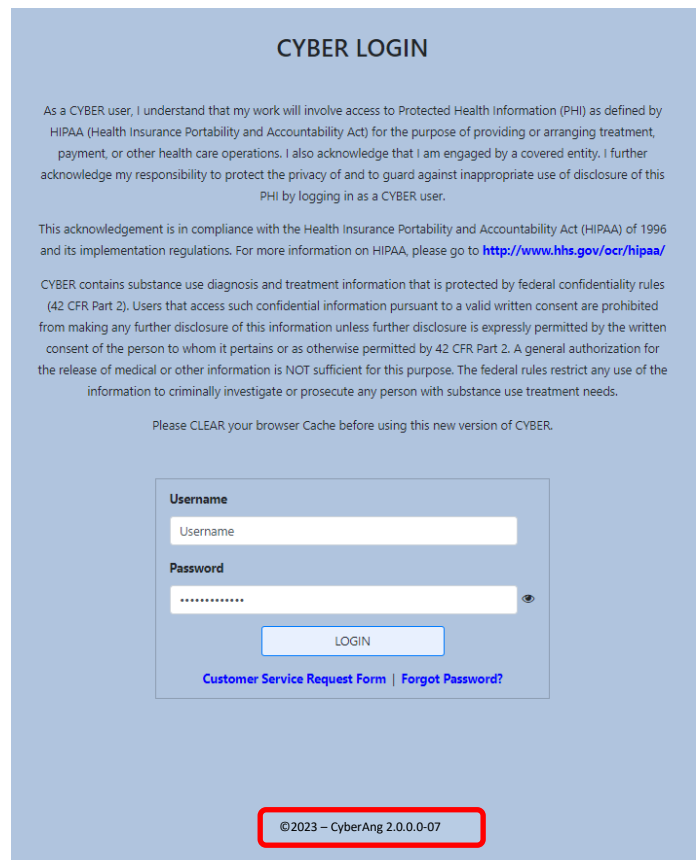
For technical support, please use the **Customer Service Request Form** link under the login.

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III. Annual Review Process

The CMO is responsible for facilitating an Annual Review of the youth's enrollment in the CMO and the correlating services with the CFT. The process expectations include:

- At the Annual Review CFT meeting, the treatment team will conduct an in-depth review of youth's current needs, progress, and the treatment plan. This meeting should be conducted prior to the General CMO Tracking Element Annual Review date.
- The Strengths and Needs Assessment (SNA) associated with the CMO-AR plan must be fully updated, reflect current functioning in all domains, and support continued CMO services at the current level (Moderate or High). Comments should be detailed and specific and clinically support the rating. The SNA should also support all current services the youth is receiving.

The **C/F Team Annual Review** progress note must be completed and Committed prior to submission of the CMO-AR plan.

The **C/F Team Annual Review** progress note will be a brief, clear, and concise summary of the CFT meeting. (Please do not copy the regular CFT progress note as the Annual Review note.) All aspects of the progress note should be completed with CMO continued stay criteria as the focus.

The functionality associated with the CMO-AR plan does not address the content of the C/F Team Annual Review progress note, however, this will be part of the CSA review process and the plan may be returned in the event of insufficient content in the progress note.

The C/F Team Annual Review progress note should address the following: What are the youth's current needs - emotional, behavioral, and medical, etc.? Do the youth's needs support current CMO level or is a change in level indicated?

1) What services have the youth/family received within the last year, and what are the outcomes? Describe youth/family progress or regression.
2) Is youth involved with other system partners (DCPP, JDC, etc.) that require CMO coordination of care?
3) OOH Services (if applicable)**:** Describe the need for continued OOH treatment and state the estimated length of stay.
4) What is the anticipated time frame for transition and what goals still need to be accomplished? What is the transition plan? Have community-based referrals and linkages been determined?

Within the CMO-AR plan, all fields (Youth/Family Vision, Needs, Strengths, Strategies, Diagnosis, etc.) should all be updated and be current. The Discharge tab should also be completed with each submission and should reflect the current transition plan for the youth.

IV. Welcome Page

The CMO Welcome Page functionality will be updated to include the CMO-AR plan type and to provide an alert for the CMOs in the Aging Report of an upcoming Annual Review. The CMO-AR plan will appear under the heading **Service Plans/Assessments** and will be reflected in all of the current category links as appropriate.

Within the **Aging Repor**t link, the CMO-AR is available. This will appear beginning **90 calendar days** prior to the Annual Review date based upon the General CMO Tracking Element and will remain on the Aging Report until the CMO-AR plan has been submitted to the CSA, reviewed and approved.

When the CMO-AR plan has been submitted to the CSA, the Plan Type column in the Aging Report will display **(AR@CSA)** next to the plan type.

V. CMO-Annual Review (CMO-AR) Plan

The CMO-AR is a plan type available to the CMO, and its completion is required as part of the Annual Review process. The CMO-AR plan type can be created by accessing the Treatment Plans Assessments grid within a youth's CYBER record. The drop-down to select a treatment plan or assessment can then be accessed. The CMO user will select '**CMO – Treatment/Service Plan'** and then click **Add New** button.

When the treatment plan opens in the Treatment Plan Type Selection tab, select '**CMO - Annual Review'**.

The CMO will be able to submit the CMO-AR ISP beginning **60 calendar days** prior to the Annual Review date based upon the CMO Episode Start Date (Day and Month). If the CMO user attempts to select the CMO-AR plan type prior to this, the following pop-up validation message will appear, and the user will be prevented from creating the selected plan type:

The CMO will be unable to create and/or submit a CMO-CR90D ISP beginning **60 calendar days** prior to the Annual Review date based upon the General CMO Tracking Element until the CMO-AR ISP has been approved by the CSA. During this time, the CMO user may continue to submit the following plan types if appropriate and necessary: BHH Transition, Family Crisis Plan, Initial ISP, Service Change, Service Update and Transition ISP. If the CMO user attempts to select the CMO-CR90D ISP during this time, the following pop-up validation message will appear, and the user will be prevented from creating the selected plan type:

The CMO-AR plan will have all the same validations as the CR90D plan, as well as the same tabs and the same buttons at the bottom of the page. The CMO-AR plan will also require an associated SNA. The CMO-AR plan will go through the Treatment Plan Hierarchy. The CMO-AR plan will not be auto-routed or auto-approved.

In order to submit the CMO-AR plan, there must be a corresponding C/F Team Annual Review progress note committed less than or equal to 60 calendar days prior to the plan submission. If the user attempts to submit a CMO-AR plan with no C/F Team Annual Review progress note or one that was committed more than 60 days prior to submission the system will save the plan, the user will receive the following validation pop-up and they will be prevented from submitting the plan:

Please note: If the CMO-AR ISP is returned to the CMO by the CSA, the CMO user will not be required to commit another C/F Team Annual Review progress note even if the existing note is now more than 60 calendar days old. However, if the reason for return indicates that information from the existing C/F Team Annual Review progress note is missing or needs to be updated, a new note will need to be posted for the CSA to approve the CMO-AR ISP upon resubmission.

Once the CMO-AR ISP is approved by the CSA, it will no longer appear on the Welcome Page Aging Report.

VI. Progress Notes

The CMO will also receive two (2) new progress note types with this release, **CMO Outreach Efforts** and **Family Choice**. These two new progress note types will be accessed and utilized in the same manner as existing progress notes.

Users with current access to view CMO progress notes will have access to view the CMO Outreach Efforts and Family Choice progress notes. This progress note type should be utilized to document the following and should contain the following information:

- **CMO Outreach Efforts** – This progress note type allows CMOs to document specific outreach efforts that were attempted, but that did not result in any defined care management activity with the family. CMO representatives should use this progress note type to document any outreach efforts through which no contact was made with the family. For instance, this progress note type would be used when a scheduled face-to-face visit was attempted but no family was home with whom to meet.

- **Family Choice** – This progress note type documents instances in which timeframes for required care management activities are outside of the identified standard, based on the family's request and needs. CMO representatives should use this note type for any delay in standard timeframe for activity that was based on a family's request.

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VII. References

PerformCare website

- Providers Training page: https://www.performcarenj.org/provider/training.aspx
- Care Management Organization (CMO) section:
  https://www.performcarenj.org/provider/training.aspx#cmo

PerformCare Customer Service

www.performcarenj.org/ServiceDesk

1-877-652-7624