USER MANUAL

Behavioral and Integrated Health Record Software
User Manual

Spring 2018

ABOUT Fidelity_{EHR}

Fidelity_{EHR} is a customizable data collection and evaluation system designed to enhance and support team-based service delivery to families and youth. Some of the key features of Fidelity_{EHR} are as follows:

- **Graphical Dashboards** - provide real-time data on key elements for the Youth.
- **Assessment Creator** - builds and deploys unique assessments for the Youth and their Families.
- **Document Storage** - upload and share documents with other Team Members.
- **Lexicon** - organization-specific terminology.

Fidelity_{EHR} is a **secure** system that complies with all HIPAA/HITECH requirements for protected health information. Our cloud-based websites are secured with SSL technology to ensure all data is encrypted. User passwords are protected against unauthorized access with advanced cryptographic hash functions. Individual Youth and Family data is secure, even when using our flexible data-sharing features that allow collaboration with Team Members at the office, in town, or even another region.

Fidelity_{EHR} is a **flexible** system that can be customized to meet an individual organization's needs while maintaining system-wide consistency. Organizations can have up to 11 levels of hierarchy and an unlimited number of User Roles for their Staff. Each User Role can be configured with dozens of access and permission options.

Fidelity_{EHR} is a **user-friendly** system with a modern interface, intuitive menus, tool-tips, and on-screen help features to guide the user.

Fidelity_{EHR} is a **team-based** system where team members (including family members) are given the ability to collaborate and share information seamlessly.

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ACCESSING FIDELITYEHR

FidelityEHR can be accessed from any device with a secure internet connection by using an Internet browser. Google Chrome is the recommended browser for optimal use. The FidelityEHR login page is:

https://www.my.fidelityehr.com

Each user is assigned a unique username and initial password by an Administrator. This information is used to access FidelityEHR with the appropriate roles and permissions. Passwords are required to be reset upon first login and, for security reasons, should not be shared with any other person.

INITIAL LOGIN

The first time a user logs into FidelityEHR, a required user agreement must be accepted and the password changed:

1. Access the FidelityEHR login page at https://www.my.fidelityehr.com.

2. Enter the designated username and password provided by your System Administrator.

3. Click **Login**.

4. Read the FidelityEHR Behavioral and Integrated Health Record Software Terms & Condition of Use and check the box to confirm.

5. Click **Continue**.
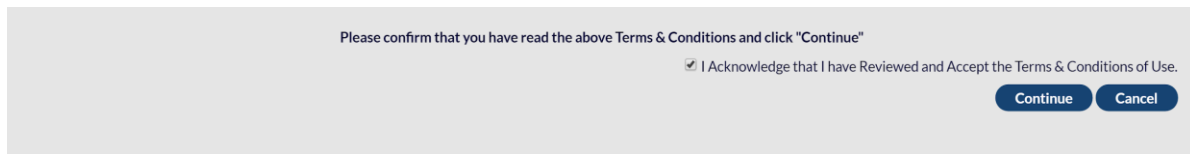
6. Change the password by entering the current password, and then enter a

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new password. The new password must be entered twice to confirm.

Please change your password before before you can login.

Current Password

New Password ℹ️

Confirm New Password

Change Password

Password Help ✖

Passwords must be between 8 and 16 characters in length and contain at least 1 number and 1 special character [!@#$%^&* ()_]

7. Click **Change Password** .

8. Click **Continue** on the password change confirmation screen.

9. The system is directed to the login page where the username and NEW password can be used to access the Fidelity$_{EHR}$ system.

LOG IN

1. Access the Fidelity$_{EHR}$ login page at https://www.my.fidelityehr.com.

2. Enter the designated Username and Password.

3. Click **Login** .

Fidelity$_{EHR}$

Welcome back! Please login below.

Username

Password

Login

Forgot Password?

RESET PASSWORD

Users have the ability to reset a password that has been lost or forgotten. This feature can be used once in a 24-hour period. It is **not** available if the user account has become locked, which occurs after 5 failed login attempts. If the user account is locked, it must be unlocked by a System Administrator.

The system will use the email address on record for the username in order to send password reset instructions and confirmation. Therefore, it is important to keep this email address up-to-date.

HIPAA law requires a user to change passwords every 90 days. The system will prompt you to do so every 90-days.

To reset a forgotten password:

1. Click the **Forgot Password?** hyperlink on the Login page.

2. Enter the Username of the account with the lost password into the text box.

3. Click **Submit**.

4. In order to confirm that a human user is requesting the password change, a generic security question is asked.

5. Enter the answer: Blue

As an added Security measure, please answer the following Security Question to receive your password.

Username:	aaconfig
Question:	What color is the sky?

Blue

(You have 5 total attempts)

Submit

Go Back to Login

6. Click **Submit** .

7. Check the email address associated with the user account for notification of a temporary password.

Dear Karen Demerly,

We have received a password reset request for your account.

Please click on the blue link below and enter the temporary passcode to continue with your password reset.The reset request will expire in 24 hours.

URL: https://choices.fidelityehr.com/ResetPassword.aspx?Id=ylU5ygTMS7Amu82UX9FqbXXQ==&F=htm

Passcode: qy8ge80m

If you are unable to click on blue link, please copy and paste the information into the address bar at the top of your web browser window.

The recommended web browser to user with FidelityEHR is Chrome.

If you have any questions or encounter any issues logging in, please contact your System Administrator.

Thank You!

8. Click the hyperlink in the email to be directed to the Fidelity_{EHR} login page.

9. Enter the temporary password provided in the email.

10. Change the password by entering the current password provided in the email and then enter the new password. The new password must be entered twice to confirm.

Password Help

Passwords must be between 8 and 16 characters in length and contain at least 1 number and 1 special character [!@#$%^&* ()_]

11. Click **Change Password** .

12. Click **Continue** on the password change confirmation screen.

13. The user is directed to the login page where the username and NEW password can now be used to access the Fidelity$_{EHR}$ system.

TO LOGOUT

Click on the name of the Configuration in the upper right hand corner of the page to open a dropdown menu, and select **Log Out.**

11 Fidelity EHR Demo Sandbox

Go to Admin Settings
Change Password
User Settings
Last Name   Log Out
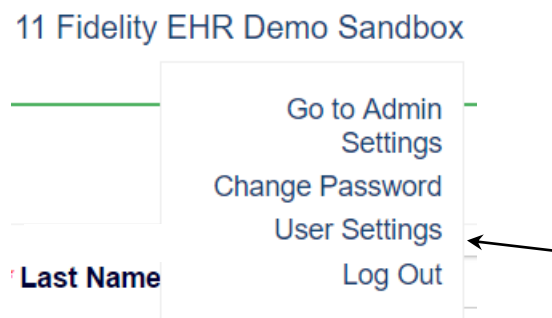
Note that the system is set to automatically log a User out if idle for 60 minutes or more. Be aware that if you are in the process of entering data, and have not yet saved your work, there may be loss of data. Be sure to save your work periodically to avoid this from happening.

ADDING, ENROLLING, AND COMPLETING A NEW YOUTH RECORD

With approprite Permissions, a User can add a New Youth Record, add Enrollment, and complete information within the Youth Record.

ADDING A NEW YOUTH RECORD

To add a New Youth Record to your configuration, open the Menu Navigation Bar and select Enrollment -> Add a New Youth Record.

Alternatively, you can click on the "Add a New Youth Record" Quick Link on the Home Page Clipboard.

OR
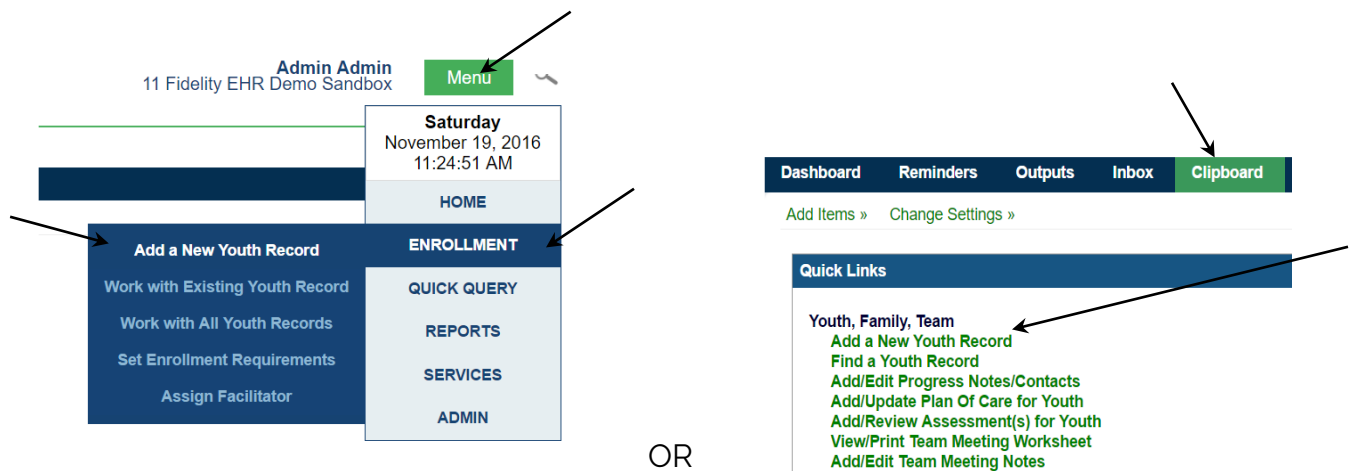
The system will ask if you would like to use a Referral Form.

First, this Manual will provide direction to Add a New Youth Record *without* using a Referral Form.

ADDING A NEW YOUTH RECORD WITHOUT USING A REFERRAL FORM

Enter the youth information in all required fields (as indicated with a red asterisk) and click the **Save** button.

New Youth Record

* First Name:	Middle Initial:	* Last Name:
Preferred Name:		
* Gender: Select		Case Number:
* Race: Please Select one or more		Medicaid Number:
* Ethnicity: Select		
* Date of Birth: __/__/____		
* Street 1:	Street 2:	
* City:	* State: Select	
* Zip Code: _____-____	Email:	* Youth Smoking Status: Select
* Phone 1: (__) ___-____ Select	Phone 2: (__) ___-____ Select	
County / Jurisdiction of Residence: Select		
County / Jurisdiction with legal and/or financial responsibility (if different): Select		

Save **Cancel**

If Medicaid Number is a required field but is not available when creating the Youth Record, please follow these guidelines for placeholders:

- Medicaid Numbers starting with "+" will be considered as pending in the system. *Example: +00000000.*
- Medicaid numbers starting with "N" will be considered a special number for missing data. *Example: N00000, could be used for all youth with missing numbers.*

When you click the **Save** button, the system will conduct a search of existing records to see if the Youth is already in the system. Youth records are searched by Case Number, then Medicaid Number, then Youth Name and Date of Birth. Two youths with the same name and birth date *can* be added as long as their Case Numbers and Medicaid IDs are different. If no duplicate is found, you are given the option of filling in other details for the current Youth Record, or adding additional Youth Records.

Youth record added successfully! Would you like to fill in other details for the youth record?

- Click 'Yes' to fill in other details (or)
- Click 'No' to add new youth record

Yes   No

If a possible duplicate record is found, the following message box is displayed:

The following match was found based on the data entered!

- You can click the button "Cancel" and check back the data entered (or)
- You can click the option "Select" and use the existing record !

Cancel

	Name	Case Number	Medicaid Number
Select	Zarby, Donald		

When this occurs, your options are:

- **Cancel** the Add function and check your data, or
- **Select** the duplicate existing Youth Record shown at the bottom of the window.

Once you make your choice, you will be returned to the Youth Record.

ADD A NEW YOUTH RECORD USING THE REFERRAL FORM

Users have the option of adding a new Youth Record using a Referral Form, and will be asked "Would you like to Add a New Record using a Referral Form?". If you click the Yes button, the Referral Form will display on screen.

Would you like to Add a New Record
using a Referral Form?

Yes   No

To complete the Referral Form, enter all required information about the Youth (noted by a red asterisk *).

Referral - New Youth Record

* First Name: [_____]	Middle Initial: [___]	* Last Name: [_____]
* Gender: [Select ▼]	Preferred Name: [_____]	Case Number: [_____]
* Race: [Please Select one or more ▼]		Medicaid Number: [_____]
* Ethnicity: [Select ▼]		
* Date of Birth: [__/__/____]		
* Street 1: [_____]	Street 2: [_____]	
* City: [_____]	* State: [Select ▼]	
* Zip Code: [_____-____]	Email: [_____]	
* Phone 1: [(__)___-____] [Select ▼]	Phone 2: [(__)___-____] [Select ▼]	
* Youth Smoking Status: [Select ▼]		
County/Jurisdiction of Residence: [Select ▼]	County/Jurisdiction with legal and/or financial responsibility (if different) [Select ▼]	

SSN#: [__-__-____]

Private Insurance Name: [_____]

Who created this referral for Wraparound?

- ☐ DDSN - Autism Division
- ☐ DJJ
- ☐ DSS
- ☐ Parent/Caregiver
- ☐ School
- ☐ DDSN - ID/RD Division
- ☐ DMH
- ☐ Other community member
- ☐ Private Provider

What other state agencies are involved in the care of the youth?

- ☐ DDSN - Autism Division
- ☐ DJJ
- ☐ DSS
- ☐ DDSN - ID/RD Division
- ☐ DMH
- ☐ School

Is the Youth committed to and/or in the custody or guardianship of DHR/DSS OR DJS?

☐ No ☐ Yes Which Agency?: [_____]

DJS/DSS Contact Name: [_____] DJS/DSS Contact Phone: [(__)___-____]

DJS/DSS Contact Email Address: [_____]

Continue to scroll down to enter details about the Caregivers (Parents/Guardians), including if the Caregiver is the Legal Guardian and has Medical Consent for the Youth.

Caregiver 1		Caregiver 2	
First Name/ MI:	[____] / [__]	First Name/ MI:	[____] / [__]
Last Name:	[_____]	Last Name:	[_____]
Gender:	Select ▾	Gender:	Select ▾
Race:	Please Select one or more ▾	Race:	Please Select one or more ▾
Ethnicity:	Select ▾	Ethnicity:	Select ▾
Relationship:	Select ▾	Relationship:	Select ▾
Primary caregiver?	☐	Primary caregiver?	☐
Legal guardian?	☐	Legal guardian?	☐
Has medical consent for youth?	☐ Yes ☐ No	Has medical consent for youth?	☐ Yes ☐ No
Parent/Guardian consent signed?	☐ Yes ☐ No	Parent/Guardian consent signed?	☐ Yes ☐ No
Parent/Guardian Release of Info signed?	☐ Yes ☐ No	Parent/Guardian Release of Info signed?	☐ Yes ☐ No
Medical Status Form signed?	☐ Yes ☐ No	Medical Status Form signed?	☐ Yes ☐ No
Court order, if not custody of biological/adoptive parent?	☐ Yes ☐ No	Court order, if not custody of biological/adoptive parent?	☐ Yes ☐ No
Parental rights terminated?	☐ Yes ☐ No	Parental rights terminated?	☐ Yes ☐ No
Consent for Fidelity Assessment signed?	☐ Yes ☑ No	Consent for Fidelity Assessment signed?	☐ Yes ☑ No
Date signed:	_/_/___	Date signed:	_/_/___
Same as youth address?	☐	Same as youth address?	☐
Address		**Address**	
Street 1:	[_____]	Street 1:	[_____]
Street 2:	[_____]	Street 2:	[_____]
City:	[_____]	City:	[_____]
State / Zip Code:	Select ▾ / [____-____]	State / Zip Code:	Select ▾ / [____-____]
Email:	[_____]	Email:	[_____]
Same as Youth Phone Number 1?	☐	Same as Youth Phone Number 1?	☐
Phone 1:	(__)__-____ Select ▾	Phone 1:	(__)__-____ Select ▾
Phone 2:	(__)__-____ Select ▾	Phone 2:	(__)__-____ Select ▾

Only two Family Members can be identified as Primary Caregiver and/or Legal Guardian. If two family members have already been identified as Primary Caregivers and/or Legal Guardian in the Family Tab of the Youth Record, the Referral Form fields for Primary Caregiver and Legal Guardian will be inactive.

Next, enter information about the Referring Agency or Referring Individual, a brief history of the youth, desired outcomes of care, and current and past services/ agencies that serve and have served the Youth and family.

Reasons for referral:

- ☐ Abandonment
- ☐ Death of Parent(s)
- ☐ Drug Abuse
- ☐ Housing
- ☐ Neglect
- ☐ Prostitution
- ☐ Suicidal

- ☐ Aggression/Assault
- ☐ Delinquency
- ☐ Emotional Disability
- ☐ Learning Disability
- ☐ Other
- ☐ Runaway

- ☐ Alcohol Abuse
- ☐ Developmental Disability
- ☐ Family Conflict
- ☐ Legal Issues/Incarceration
- ☐ Physical Abuse
- ☐ School Problems

- ☐ Behavior Problems
- ☐ Diagnosed Mental Illness
- ☐ Financial
- ☐ Medical
- ☐ Promiscuity
- ☐ Sexual Abuse

If Other Please Specify: [_____]

Explain checked indicators: [_____]

Referring Agency: [_____]

Referring Individual: [_____]

Phone 1: (___) ___-____ [Select ▾]

Phone 2: (___) ___-____ [Select ▾]

Referral Date: __/__/____

Brief History:

[   ]

Desired Outcome from Participation in this program:

[   ]

Current mental health and community services (list agencies that served this family):

Service Type	Provider Name and Contact Information	Frequency
[_____]	[_____]	[_____]
[_____]	[_____]	[_____]
[_____]	[_____]	[_____]
[_____]	[_____]	[_____]
[_____]	[_____]	[_____]

Previous mental health services (List agencies that have served this family):

Service Type	Provider Name and Contact Information	Frequency
[_____]	[_____]	[_____]
[_____]	[_____]	[_____]
[_____]	[_____]	[_____]

List details about the person involved in conducting the assessment.

Person Who Conducted Assessment: [_____]

Contact Information: [_____]

Clinical Evaluator Name:

First: [_____]

MI: [____]

Last: [_____]

Clinical Evaluator Phone:

Phone Number: (___) ___-____

Phone Type: [Select ▾]

Finally, if enrolled in school and information is available, check the appropriate boxes and enter the required school details.

| School Placements: | Enrolled in School?: ☐ | School Information Available?: ☐ |

* Start Date:	__/__/____
* School Name:	
* Current Grade:	Select ▾
School Placement: Is an IEP in place?:	☐ General Education ☐ Special Education ☐ Yes ☐ No
School Placement Type:	Select ▾
* School Year:	FY16-17 ▾

Save **Cancel**

Once all information has been entered on the Referral Form, click the **Save** button. Information entered on the Referral Form will auto-populate throughout the Youth Record, where applicable.

Youth record added successfully! Would you like to fill in other details for the youth record?

- Click 'Yes' to fill in other details (or)
- Click 'No' to add new youth record

Yes **No**

Next there is a pop up asking if you would like to enter more information for the Youth Record, including Diagnosis information. Click Yes to proceed to the Youth Record. Click No to add another Youth Record.

Once the Youth has been established in the system through the above steps, visit the Referral Form tab to enter all Diagnosis and Medication information. If Diagnosis and Medication information is not entered via the Referral Form, this information can be entered in the Plan of Care for the Youth, if that feature is used.

ENROLLING A YOUTH

For a New Youth Record, the initial Enrollment Status is automatically set to Pending, using the current date.

A Youth Enrollment cycle always begins with a Pending Status record. This record cannot be deleted, but you can modify the Pending status start date in the Enrollment section of the Youth Record.
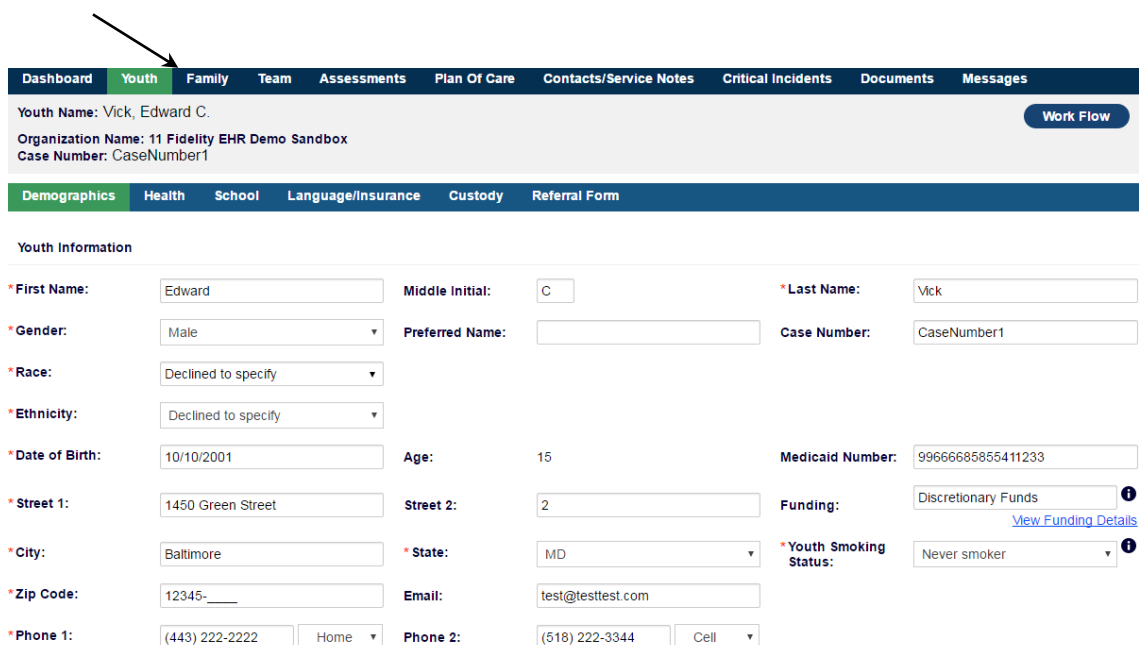
Time from the Pending Status start date to the Enrolled Status start date is calculated as the *Weeks In Pending*. Time from the Enrolled Status start date until the Discharged Date is the *Weeks In Care.* In the Youth Record Dashboards, *Duration,* or *Weeks in Care* are calculated from the Enrolled Status Start Date.

While in Pending Status, the following information *can* be added to the Youth Record: Youth Tab (Demographics, School, Language/Insurance, and Custody), Family Members, Team Members, Assessments, Services, Documents, and Contacts/Notes. You can also schedule Team Meetings and send Messages.

Many features use the *Pending Date* and *Enrollment Date* for calculations, so it is important to set these dates accurately and as soon as possible.

ADDING A NEW ENROLLMENT STATUS

To add a new Enrollment Status, including Enrolling the youth, select the Youth Tab within the Youth Record, and then click on the Enrollment button:

Education Placement: FY16-17, Westminster High School, Grade: 11, Special Education
Legal Guardian: Janine Vick, Birth Mother
Primary Caregiver: Janine Vick(Birth Mother)
Custody Status --
Enrollment Status: Enrolled, 04/01/2016, 31 Weeks 0 days
Facilitator: Hyde, Mark, 11 Fidelity EHR Demo Sandbox
Preferred Language

Client Portal Logins   Client Portal   Enrollment   Save   Cancel

The opens the Enrollment screen which lists all Enrollment statuses for a Youth Record.

Click the Add Enrollment Status button to reach the window below where you add the new enrollment.

YOUTH ENROLLMENT

Name: Vick, Edward C.
Case Number: CaseNumber1

Add Enrollment Status

Status	Start Date	Organization	Duration	Edit	Delete
Enrolled	04/01/2016	11 Fidelity EHR Demo Sandbox	30 Weeks, 6 days	Edit	Delete
Pending	02/27/2016		4 Weeks, 6 days	Edit	--

Close

Select the appropriate Start Date and Enrollment Status. Depending on the Enrollment Status selected, the Reason and Youth Organization fields may become available. When the Youth Organization field is available, it is required; selecting a Reason field is always optional. Click Save after you have completed the

ADD ENROLLMENT STATUS

Name: Vick, Edward C.
Case Number: CaseNumber1

* Start Date: __/__/____
* Enrollment Status: Select
Reason:
Youth Organization: Select

Save   Cancel

information.

MODIFYING AN ENROLLMENT STATUS

To change an Enrollment Status for a youth, including the Pending Status Start Date,

select the Youth Tab within the Youth Record, and then click on the Enrollment button. (This is the same process as adding a new Enrollment Status)

Once Enrollment screen opens the list of all Enrollment Statuses for a Youth Record. Locate the Enrollment Status record you would like to change, and click on the Edit hyperlink:

The Start Date, Organization, and Reason in the Enrollment Status record can be changed. However, the Enrollment Status cannot be changed. If an Enrollment Status is incorrect, it must be deleted using the Delete hyperlink to the right of the Edit hyperlink, and a new Enrollment Status must be created.

COMPLETING A YOUTH RECORD

Within the Youth Record, all information, including school, language, insurance, custody, and referral source can be entered/edited in the **Youth** tab.

FUNDING DETAILS

Funding Details are entered on the Demographics Sub-Tab of the Youth Tab by clicking on the View Funding Details hyperlink.

This opens the Funding Details window where the Funding Source and State Date for this Funding Source can be entered. Once that information is complete click the Add button. This will add the Funding Source to the Youth Record.

SCHOOL PLACEMENT

To add school placement, select the School Sub-Tab and click the Add button.

This opens the School Details window, where required fields are indicated with a red asterisk. Enter the start date for the current school placement, school name, grade, placement type, and school year then click on Save. The school placement will now display in the Youth Record.

LANGUAGE, INSURANCE, AND JURISDICTION INFORMATION

To add Language/Insurance information, select the Language/Insurance Sub-Tab of the Youth Tab within the Youth Record.

Answer each of the questions and then click Save at the bottom. The Language/Insurance information will now display in the Youth Record.

CUSTODY STATUS

To add Custody details for the Youth, select the Custody Sub-Tab of the Youth tab within the Youth Record and click the Add button. This data will populate the Residential Outcomes Dashboard on the **Youth Record** Dashboard Page, starting with the date of Enrollment.

Enter the information for each of the questions. In the Custody Details window is where Adoption Status, Dependency Status, as well as Court Order (if not Custody of biological/adoptive parent) is indicated.

CUSTODY DETAILS

Youth Name: Vick, Edward C.

*Current Custody Start Date:	__/__/____
*Custody Status:	Select ▾
*Current Living Environment:	select ▾
Current Housing Start Date:	__/__/____
Residential Arrangement:	Select ▾
Household Size:	Select ▾
Household Income:	Select ▾
*Adoption Status:	Select ▾
*Dependency Status:	Select ▾
Court Order, if Not Custody of Biological/Adoptive Parent?	☐ Yes ☐ No
Name of Caretaker/Facility:	
Notes about Current Living Environment:	
Do the caregivers speak English?	☑ Yes ☐ No
If no, what language is spoken?	

After all information has been entered, click the Save button.

REFERRAL FORM

The Referral Form is used to add basic information that may be taken and used elsewhere in the Youth Record. With the exception of the Diagnosis and Medication

information, the Referral Form sub-tab is identical to the Referral Form available when adding a new Youth Record. For detailed instructions on completing a Referral Form, refer to the section Add a New Youth Record using the Referral Form.

YOUTH DIAGNOSES

Near the bottom of the Referral Form is the Youth Diagnoses information. Diagnoses Options are set in the Configuration Settings by an Administrator. Users will be able to select from the DSM IV Axis pick lists or the DSM V pick list, depending on which the Configuration Administrator has selected. The Configuration Administrator may also enable a feature to link the DSM and ICD diagnosis boxes so that when you select the DSM diagnosis code the ICD code is automatically populated.

A Youth with no Diagnoses will display a "No Diagnosis Found" message for each DSM category, as shown below. To enter Diagnosis information, click the Add/Edit hyperlink.

The Diagnosis entry page will display, where all information related to Diagnosis can be entered. To add a new Diagnosis, click the Add New Diagnosis button in the lower left corner. To edit an existing Diagnosis, click the Edit hyperlink in the Diagnosis row.

ADD/EDIT YOUTH DIAGNOSIS

Youth Name: Edward C. Vick   Case Number: CaseNumber1
Date of Birth: 10/10/2001
Clinical Evaluator: N/A   Phone Number: N/A

DIAGNOSIS DETAILS

*Start Date of Diagnosis:	__/__/____
End Date of Diagnosis:	__/__/____
Diagnosis Priority (1-35):	Select ▾
Current GAF:	
Highest GAF in Last Year:	
* Axis I:	Select ▾
* Axis II:	Select ▾
Axis III:	Select ▾
Axis IV:	Select ▾
DSM 5 Diagnosis:	Please begin typing here
ICD-9 Diagnosis:	Select ▾
ICD-10 Diagnosis:	Please begin typing here and select

[Add New Diagnosis] [Add/Edit Notes] [Undo Changes] [Save Changes] [Close] [Cancel/Close]

When adding a Diagnosis, select the Start Date, Diagnosis Priority, and select values from the available picklists. The Start Date must be *after* the Youth DOB, but not after Today's Date (cannot be set in the future). A Diagnosis Priority can only be designated to one Diagnosis record at a time. Once a Diagnosis is edited and saved to include an End Date, and the End Date has been passed, the Priority will be removed.

The Undo Changes button will remove all data entered since the diagnosis was previously saved, or if the diagnosis has never been saved, as is the case with adding a new diagnosis, then all data entered will be removed. Once all desired fields have been filled, click the Save Changes button. Then, click the Close button to exit the Add/Edit Diagnosis Details mode. This will bring the user back to the Youth Diagnosis screen, where the saved Diagnosis record will appear under the appropriate DSM heading.

Once back at the Youth Diagnosis screen, click the Cancel/Close button to exit the Youth Diagnosis portion of the Referral Form. This will return the user to the add/edit section for Youth information via the Referral Form.

YOUTH MEDICATION
Below the Diagnosis portion of the Referral Form, is the Medication section. (Use the scroll bar to scroll below Diagnosis.)

To add new a Medication, or Edit existing Medication(s), use the Add/Edit hyperlink. This opens the Medication editing form. Click on the Add New Medication button to add a new Medication, or click on the Edit hyperlink to edit an existing Medication record.

ADD/EDIT YOUTH MEDICATIONS   X

Youth Name: Doug Arnold
Case Number: N/A
Date of Birth: 11/19/2002
Clinical Evaluator: N/A
Phone Number: N/A

Start Date	Name of Medication	Dosage	Frequency	End Date	Comments/Instruction		
08/28/2016	Xanax	1 Capsule				Edit	Delete

Medication Details

* Name of Medication: [_____]   * Start Date: [__/__/____]
Dosage: [_____] [Select ▼]   End Date: [__/__/____]
Frequency: [_____] [Select ▼]
Comments/Instructions: [_____]

[Add New Medication]   [Undo Changes] [Save Changes] [Close]   [Cancel/Close]

When adding a new medication, the Name, Start Date, End Date, Dosage and Frequency fields will now become available for you to enter the new Medication details (as will the Undo Changes, Save Changes, and Close buttons). Once Medication details have been entered, click Save Changes. Multiple Medications can be added in the same way. When finished entering Medications, click the Cancel/Close button to exit the Medication editing form.

ADD/EDIT YOUTH MEDICATIONS   X

Youth Name: Doug Arnold
Case Number: N/A
Date of Birth: 11/19/2002
Clinical Evaluator: N/A
Phone Number: N/A

Start Date	Name of Medication	Dosage	Frequency	End Date	Comments/Instruction		
08/28/2016	Xanax	1 Capsule				Edit	Delete

Medication Details

* Name of Medication: [_____]   * Start Date: [__/__/____]
Dosage: [_____] [Select ▼]   End Date: [__/__/____]
Frequency: [_____] [Select ▼]
Comments/Instructions: [_____]

[Add New Medication]   [Undo Changes] [Save Changes] [Close]   [Cancel/Close]

If editing an existing Medication, make any edits in the fields needed, and click the Save Changes button. To exit the Medication editing form click the Cancel/Close button.

All Medication in the Youth history is listed in the Referral Form, even if the Medication has an End Date in the past.

. Once back at the Youth Medication screen, click the Cancel/Close button to exit the Youth Medication portion of the Referral Form. This will return the user to the add/edit section for Youth information via the Referral Form.

To exit the Referral Form, simply navigate to any Tab or sub Tab.

THE WORK FLOW

The Work Flow is a Task List that tracks the completion of necessary steps and tasks to complete a **Youth Record**, as identified by the Configuration Administrator. The Work Flow is accessible from any page in the **Youth Record.**

Clicking the **Work Flow** button will bring up a moveable window, listing the Tasks and necessary information. This window will always stay on top, but allows the user to work with the screen below. By using the Work Flow, the user can check, view, and complete the tasks required for the Youth Record.

Each Task has a hyperlink to the location within FidelityEHR where the Task can be completed. For Team, Youth Needs, and Youth Services, the Work Flow identifies the total number of each completed instead of a check mark. The status bar at the bottom shows the percentage of Work Flow Tasks that have been completed for the Youth Record. To exit the Work Flow window, click the

"x" in the upper right corner.

LOCATING A YOUTH RECORD

The Home page will display Quick Links and the Youth Record Clipboard. To access the Home page (within a Configuration):

- Click the **Menu** button, and click **HOME**
  OR
- Click on the **Fidelity**EHR logo in the upper left corner of the screen.
  Tip: *Use this logo to return to the Home Page from anywhere in the* FidelityEHR *system.*

Once on the Home Page, the Youth Records Clipboard shows the names of all Youth Records that are accessible:

- For users with assigned Youth, those Youth records will be shown.
- For users without assigned Youth, but the ability to see ALL youth, all Youth will be shown.
- The records are listed by the **Last Edited On** column starting with the oldest date and moving to most recent.
Optional (these can be enabled in the Configuration Settings)

- For users who are on a Youth's team those Youth records will be shown.
- For users who entered a Youth into the configuration those Youth records will be shown.
If your Administrator has enabled the Configuration Setting *View Last Edited On Columns, when* a Youth Name is red,this indicates the record has not been updated in the past 30 days. If it has been updated in the past 30 days, the text will be green. The date of last edit is listed in the column to the right. To work with one of these Youth, click on the hyperlinked name. This action will open the Youth Record.

To aide in finding Youth Records, users have the ability to (Sort) and filter (🔽) the Youth Records list on the Clipboard.   The applied sort and/or filter will be retained until the user either changes the filter or logs out of the system.

SORTING THE YOUTH RECORDS LIST

1. Access the Youth Records list in the Clipboard on the Home page.
2. Click (Sort)
3. In the Select Option(s) window, choose column to sort in the **Sort By** field
4. In the Order field, Choose to sort the column in either Descending (A to Z, First to Last) or Ascending (Z to A, Last to First) Order

5. To add a second sort to a different column, choose the column to sort in the **Then by** field.
6. In the Order field, choose to sort the column in either Descending (A to Z, First to Last) or Ascending

SELECT OPTION(S)   X

	Column		Order	
Sort by	LastEditOn	▼	First to Last	▼
Then by	Name	▼	A to Z	▼

                                                              Ok   Cancel

(Z to A, Last to First) Order.

EXAMPLE: THIS SORT WOULD FIRST PUT THE FACILITATOR COLUMN IN ALPHABETICAL ORDER BY LAST NAME AND THEN PUT EACH OF THEIR ASSOCIATED YOUTH IN ALPHABETIC ORDER BY LAST NAME.

7. To close the Select Option(s) window:
   a. Click **Ok** to apply the sorting options selected.
      OR

Name ▼	Facilitator ▼	Organization Name ▼	Last Edited On ▼	Status ▼
Beaches, Bethany	Bell, Paul	11 Fidelity E..	11/02/2016	Enrolled
Lee, Brandon	Bell, Paul		10/27/2016	Pending
Lewis, Gerald	Bell, Paul	11 Fidelity E..	10/21/2016	Enrolled
Arnold, Claire	Facilitator, ..		11/02/2016	Pending
Austen, Kate	Facilitator, ..	11 Fidelity E..	11/01/2016	Enrolled
Bonds, Bobby	Facilitator, ..	11 Fidelity E..	10/31/2016	Enrolled

   b. Click **Cancel** or **X** to discard the sorting options selected.

CLEARING THE SORT

The applied sort will be retained until the sort is manually cleared or until a log out occurs.

To manually clear the sort:

1. Access the Youth Records list in the Clipboard on the Home page
2. Click **Clear Sort**.

FILTERING THE YOUTH RECORDS LIST

The Youth Records list on the Home Page Clipboard can be filtered to show only specific Name(s), Date(s) and Status(es). To filter the Youth Records list:

1. Access the Youth Records list in the Clipboard on the Home page.
2. Click ▼ next to the column heading to filter *(Name, Facilitator, Organization Name, Last Edited On or Status)*.
3. Check the box next to each Name or Date that should be visible when the filter is applied.

    Tip 1: *Use the* ↓Sort A to Z   ↑Sort Z to A *to sort the list for easier browsing while*

SELECT ORGANIZATION(S)   **X**

↓ Sort A to Z   ↑ Sort Z to A

Select	Facilitator Name
☐	Bell, Paul
☐	Facilitator, Amanda
☐	Hyde, Mark
☐	Hyde, Mary
☐	Test, User
☐	Vedder, Edward
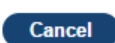
Select All   **Clear Selected**   **Filter**   **Cancel**

making the selection(s).
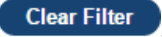
    Tip 2: *Use the select all button to choose all items in the list and clear selected button to undo any selection(s).*

4. Once the desired selections have been made, click **Filter** to apply the filter and return to the Home Page. Click **Cancel** only to discard the selections and prevent the filter from being applied.

5. Repeat steps 2-4 to apply additional filters.

CLEARING THE FILTER(S)

The applied filter(s) will be retained until the sort is manually cleared or until a log

out occurs. To manually clear the filter(s):

1. Access the Youth Records list in the Clipboard on the Home page
2. Click **Clear Filter** .

FINDING A YOUTH RECORD USING QUICK LINKS

A Youth Record can also be found by clicking on the **Find a Youth Record** hyperlink in the Clipboard Quick Links options. This search will include Youth assigned to the user, as well all, All Youth where the user is on the Team page and All Youth (if the user has permissions to view all):
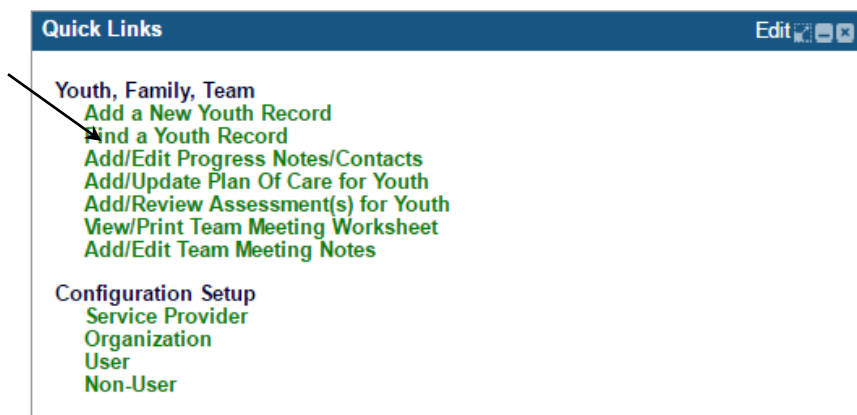
ADDING FAMILY OR TEAM MEMBERS TO THE YOUTH RECORD

While in a specific Youth Record, **Family** or **Team Tabs** can be selected to add members. Once added to the system, the Youth, Family Members and Facilitator are automatically added to the Team.

Team Members may have access to confidential information. Once added as a Team Member, the Family Member can be sent Messages and be identified wherever Team Members are listed. Family members can also be sent reminders about scheduled Team Meetings.

ADDING FAMILY MEMBERS

To add a Family Member, select the Family Tab in the Youth Record and click the Add button.

This opens the Family Member Details screen. Enter the required information for the

Family Member.

Select whether this family member is the **Primary Caregiver** and/or **Legal Guardian** for the Youth. Up to *two* Primary Caregivers and *two* Legal Guardians can be added to a Youth Record.

- A Primary Caregiver is someone who accepts and takes responsibility for the Youth.
- The Legal Guardian has power to make *legal* decisions of financial, health

care, estate, and person in nature. If the family member is a Legal Guardian, the Medical Consent fields will become available.

If the Family Member lives with the Youth, the address from the **Youth Record** can be copied by using the radio buttons "Same as youth address?" This will overwrite any existing data in this field. All email addresses entered need to be unique to the Family Member. Two family members cannot have the same email address. Once all data is entered, click the Save button.

CREATING A YOUTH/FAMILY LOGIN

As mentioned, the Youth and Family Members can be sent Messages and reminders within Fidelity_EHR. To activate this feature, create a Login for the Family.

While in the Youth tab of the Youth Record, select the Demographics tab and look

to the bottom left for the **Client Portal Login** button.

Click the Family Login button on the lower left corner of the Demographics sub-tab to set up a Family Login for the Youth and any Family Members. This opens the Add/Edit Client Portal Login screen. Here enter any required data for the Youth for Login activation.

ADD/EDIT CLIENT PORTAL LOGIN

Client / Team Member:	select ▾	Street 1:	
* First Name / MI:		Street 2:	
* Last Name:		City:	
Highest Degree Achieved:	select ▾	State / Zip Code:	select ▾ ____-____
* Email:		Status:	⦿ Enable ◯ Disable ❶
Phone 1:	(__) ___-____	Select ▾	
Phone 2:	(__) ___-____	Select ▾	
* User Name:	Check Availability		
* Password:	❶		
* Re-Type Password:			
* Role:	select ▾		

[Save] [Save and Return] [Back to Youth Record] [Cancel]

Remember, for the Youth to receive email notifications from Fidelity$_{EHR}$, a valid email will need to be entered. If using the placeholder email, be sure to note the password and username to provide to the Youth for login.

YOUTH LOGIN

When the Youth then logs into their Family Page, they will receive a notification of any unread messages:

You have 1 unread message(s)!

[Ok]
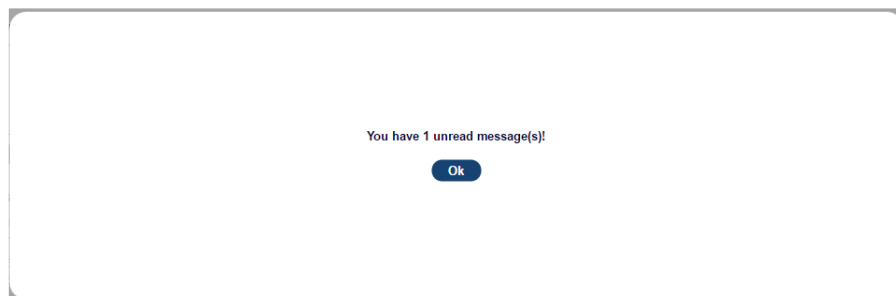
From the Messages tab, they will see a listing of any Messages sent to them by Fidelity$_{EHR}$ as well as have the ability to send Messages to their Facilitator:

Client Information	Messages	Health Information	Plan of Care	Inbox

Arnold, Doug	Age:13	Male	5 Weeks 4 days

ENTER MESSAGE:

[text entry box]

Send **Clear**

MESSAGES   TOTAL MESSAGES: 1 UNREAD MESSAGES: 0
Green - Read messages.   Blue - Unread messages.

[11/8/2016 12:51:03 PM] - [Other --> Arnold, Doug] - We will be having a small cel...

Back to Youth Record

To reply to the message, enter text in the "Enter Message" field up top and click on the Send button. The reply will appear in the listing below.

MESSAGES   TOTAL MESSAGES: 2 UNREAD MESSAGES: 1
Green - Read messages.   Blue - Unread messages.

[11/8/2016 12:51:03 PM] - [Other --> Arnold, Doug] - We will be having a small cel...
[11/9/2016 8:19:40 PM] - [Other --> Other] - Ok, we will be there, thank y...

ADDING TEAM MEMBERS

To add a Team Member, select the Team Tab in the Youth Record and click the Add button.

Dashboard	Youth	Family	Team	Assessments	Plan Of Care	Contacts/Service Notes	Critical Incidents	Documents	Messages

Youth Name: Vick, Edward C.   **Work Flow**
Case Number: CaseNumber1
Organization Name: 11 Fidelity EHR Demo Sandbox

Team Members   **Team Meetings**

Add

Name ⓘ	Organization	Team Role	Start Date	End Date		
Vick, Edward C.	11 Fidelity EHR Demo Sandbox	*Youth	02/27/2016			
Vick, Janine		Birth Mother	02/27/2016		Edit	Delete
Hyde, Mark	11 Fidelity EHR Demo Sandbox	*Facilitator	10/09/2016		Edit	Delete

This opens the Add Team Member screen. Enter the required information for the Team Member. In order to add a Team Member, that person must be either a User (with Login credentials) or a Non-User (without Login credentials.) If adding a Non-

User who has not been added to the system yet, they can be entered from this screen if you have permission.

ADD TEAM MEMBER
Youth Name: Vick, Edward C.

* Team Member Name:	Select ▾
* Team Member Group:	● User ○ Non-User ○ Family Member ❶
* Start Date:	__/__/____
End Date:	__/__/____
Organization:	
* Team Member Role:	Select ▾ Add Role
* Team Member Type:	● Formal ○ Informal
Team Member Status:	

Save   Cancel

NOTE: THE ABILITY TO ADD A TEAM MEMBER ROLE TO THE PICKLIST IS BASED ON USER ROLE PERMISSIONS. THE ADD ROLE HYPERLINK WILL ONLY APPEAR IF PERMISSIONS WERE GRANTED TO THE USER ROLE LOGGED IN.

CREATING AND ADDING A NON-USER TEAM MEMBER

To Create a Non-User record and add them to the Team select the Non-User radio button in this window, which will generate an Add Non-User hyperlink.

ADD TEAM MEMBER
Youth Name: Vick, Edward C.

* Team Member Name:	Select ▾
* Team Member Group:	○ User ● Non-User ○ Family Member ❶ Add Non-User
* Start Date:	__/__/____
End Date:	__/__/____
Organization:	
* Team Member Role:	Select ▾ Add Role
* Team Member Type:	● Formal ○ Informal
Team Member Status:	

Save   Cancel

Clicking the Add Non-User hyperlink will bring up the window below, where the

First Name, Last Name and Email Address for the Non-User needs to be entered. Once that infomation has been added, click the Save button.

ADD NON-USER

* First Name: [   ]
* Last Name: [   ]
Email: [   ]
Unknown@fidelityehr.com can be used as a placeholder.

[Save] [Cancel]

All Non-Users must have a unique email address and cannot share an email address. You can use Unknown@fidelityehr.org as a placeholder, but as a result that Team Member will not receive emails about the Youth until their unique email address is added to their Non-user record. Unknown@fidelityehr.org *must* utilize an upper-case "U" in "Unknown".
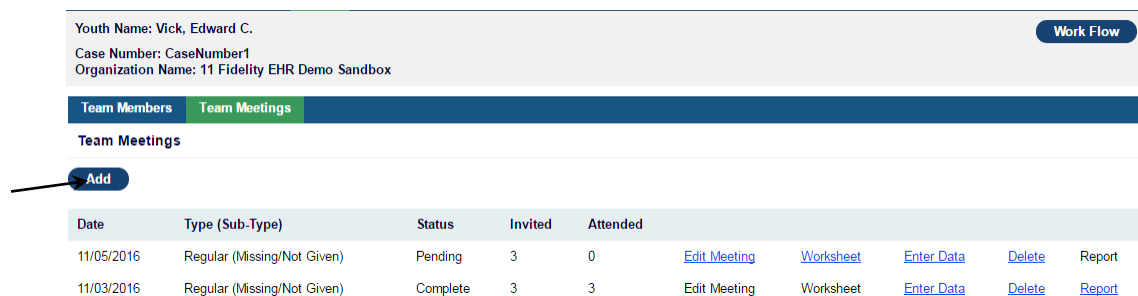
TEAM MEETINGS

Three different types of Team Meetings: An Initial Team Meeting, A Regular Team Meeting, or a Crisis Team Meeting can be scheduled. There can only be one Regular Team Meeting scheduled at a time, while multiple Crisis Team Meetings can be scheduled. This first Regular Team Meeting you schedule is called the Initial Team Meeting.

The Team Meeting Sub-Tab provides summary details about scheduled meetings. New meetings can be added by clicking the Add button. An existing Team Meeting can be edited by clicking on the Edit hyperlink. Review and Print a Worksheet by clicking on the Worksheet hyperlink.

ADDING A TEAM MEETING

Meetings are scheduled on the **Team Tab** of the **Youth Record**, on the Team Meetings Sub-Tab. To add a new Team Meeting click the Add button.

In the Team Meeting window, enter the Date, Time, Type, and Location for the Team Meeting, and then select which Team Members will be invited to the meeting. A Team Meeting can only be scheduled for a future time and date. You can choose to send an Email Reminder to the invited Team Members as long as you are adding the meeting at least 48 hours before it is scheduled to occur. After the required information has been entered click the **Save** button.

ADD TEAM MEETING

Youth Name: Vick, Edward C.

* Meeting Date:	__/__/____	
* Meeting Time:	Select ▼	Select ▼
* Meeting Type:	Select ▼	
Meeting Sub Type:	Select ▼	
* Meeting Location:	Select ▼	
Meeting Address:		
Street 1:		
Street 2:		
City:		
State/Zip Code:	Select ▼	____-____

* Invite Members:

☐ Vick, Edward C. (Youth)
☐ Vick, Janine (Birth Mother)
☐ Hyde, Mark (*Facilitator)

☐ Send Email Reminder 48 hours prior to the Meeting

Select All   **Clear Selected**

Save

After the new Team Meeting Another Team Meeting cannot be added until this meeting is completed with data entered, or deleted.

Youth Name: Vick, Edward C.
Case Number: CaseNumber1
Organization Name: 11 Fidelity EHR Demo Sandbox

Work Flow

Team Members	Team Meetings

Team Meetings

Add

Date	Type (Sub-Type)	Status	Invited	Attended					
11/05/2016	Regular (Missing/Not Given)	Pending	3	0	Edit Meeting	Worksheet	Enter Data	Delete	Report
11/03/2016	Regular (Missing/Not Given)	Complete	3	3	Edit Meeting	Worksheet	Enter Data	Delete	Report

EDITING A TEAM MEETING

To edit a Team Meeting, click on the Edit hyperlink on the meeting record row. This will open an editing window, where edits can be made to the existing Meeting.

Youth Name: Vick, Edward C.								
Case Number: CaseNumber1								Work Flow
Organization Name: 11 Fidelity EHR Demo Sandbox								

Team Members   **Team Meetings**

Team Meetings

Add

Date	Type (Sub-Type)	Status	Invited	Attended					
11/05/2016	Regular (Missing/Not Given)	Pending	3	0	Edit Meeting	Worksheet	Enter Data	Delete	Report
11/03/2016	Regular (Missing/Not Given)	Complete	3	3	Edit Meeting	Worksheet	Enter Data	Delete	Report

Click on the Update button when finished editing the Team Meeting.

EDIT TEAM MEETING   **X**

Youth Name: Vick, Edward C.

*Meeting Date:	11/05/2016
*Meeting Time:	04:00 ▾ PM ▾
*Meeting Type:	Regular ▾
Meeting Sub Type:	Select ▾
*Meeting Location:	In the Office ▾
Meeting Address:	
Street 1:	
Street 2:	
City:	
State/Zip Code:	Select ▾ ___-___

*Invite Members:
- ☑ Vick, Edward C. (Youth)
- ☑ Vick, Janine (Birth Mother)
- ☑ Hyde, Mark (*Facilitator)
- ☑ Send Email Reminder 48 hours prior to the Meeting

Select All   **Clear Selected**

Update   **Cancel**

DELETING A TEAM MEETING

Initial Team Meetings cannot be deleted, but Regular and Crisis can be deleted by clicking on the Delete hyperlink on the Meeting record row.

TEAM MEETING WORKSHEET

The Team Meeting Worksheet is a convenient tool used to print out a worksheet to

use during the meeting to record updates/changes for the Youth/family, including Core Assessments. This data can then be used to update the Youth Record. The Team Meeting Worksheet is available through the Worksheet hyperlink on the Meeting record row. Once selected, a window will open where the printing and output options will appear.

An example of a Team Meeting Worksheet is located in Appendix A of this Manual.

ENTERING DATA FROM A TEAM MEETING

Once a scheduled team meeting is in progress, data from the meeting will be captured on the Team Meetings Sub-Tab. This information includes:

- Date and duration of the meeting
- Attendance for the meeting
- Assessment reviews *(5 Core Assessment and Team Process Assessment)*
- Attendee signatures

A Team Meeting has two statuses that control the actions and items related to the meeting:

	Pending The required information has not been saved.	**Complete** The required information has been saved.
Update Dates, Duration and Attendance	✓	✗
Review Core Assessments	✓	✓
Capture Attendee Signatures	✓	✗

Schedule Future Regular Meetings	✗	✓
Schedule Crisis Meetings	✓	✓
Worksheet printed/saved		✗
Team Meeting Report	✗	✓
Team Meeting Signature Report	✗	✓
Delete Meeting	✓	✓

There are 3 ways in which a Team Meeting status can be changed to "Complete":

- Entering the Date, Duration and Attendance and saving the information
- Using the Signature Pad
- Reviewing All Assessments and choosing to indicate that the meeting is Complete
    - o *Note: This will also provide the option for the next regular meeting to be scheduled, attendees to be invited and reminders to be sent.*

Therefore, when entering Team Meeting Data, the following workflow is recommended:

1. Add the Date, Duration and Attendance and All Signatures
2. Add any missing Assessments
3. Review All Core Assessments

To Enter the Data for a Team Meeting:

1. In the Youth Record, Click on the Team Tab
2. Click on the Team Meetings Sub-Tab
3. Click on the Enter Data hyperlink for the appropriate team meeting.

MEETING DATE, DURATION AND ATTENDANCE INFORMATION:

Once the Enter Data for a Team Meeting window has been opened *(see section above)*, the entry of information about that specific meeting can begin with the required elements.

Required fields are indicated by an (*) next to the description. The Data from the Team Meeting cannot be saved without all required fields being completed. They are:

- **<u>Meeting Date</u>** – the date of the Team Meeting. This will default from the date that was selected when the team meeting was originally created, but can be changed
- **<u>Meeting Duration</u>** – indicate the total length of the meeting in minutes.
- **<u>Attendance</u>** – this list defaults to the list invited team members when the team meeting was created.

| ENTER DATA FROM TEAM MEETING | X |

*Meeting Date: 11/03/2016

*Meeting Duration: 60 ▾ **Time (in minutes)**

Select All None

*Attendance:
☑ Vick, Edward C. (Youth)
☑ Vick, Janine (Birth Mother)
☑ Hyde, Mark (*Facilitator)

Meeting Notes:

Save Notes

Non-Team Members

First Name:

Last Name:

Add

No Data Found!

Signature Pad

Review All Core Assessments   **Save and Close**   **Cancel**

TIP: *USE THE ALL HYPERLINK IN THE* Select All None *TO MAKE ATTENDEE SELECTION MORE EFFICIENT.*

ADDING TEAM MEMBER SIGNATURES

The **Signature Pad** button allows for Team Members in attendance to sign the Attendance document electronically to verify they were present at the meeting. In order to use this button, the permission for Add Electronic Signatures must be enabled in the Administration Tool permissions.

Important Note: Using the **Signature Pad** button also changes the status of the Team Meeting to Complete. **Therefore, it is recommended that all signatures be captured at the time that **Signature Pad** is clicked. If this is not possible, then additional signatures can be captured on the Plan of Care.**

To add Team Member Signatures:

1. Access the Enter Data from a Team Meeting window by clicking on the Enter Data hyperlink for the appropriate meeting.
2. Complete all required information, indicated by a (*):
   a. **Meeting Date** – the date of the Team Meeting. This will default from the date that was selected when the team meeting was originally created, but can be changed.
   b. **Meeting Duration** – indicate the total length of the meeting in minutes.
   c. **Attendance** – this list defaults to the list invited team members when the team meeting was created but can be modified if invited people did not attend.

3. Click **Signature Pad**.
4. Click the Unsigned hyperlink in the **Signature Status** column next to the name of the first Team Member who will provide a signature

TEAM MEETING SIGNATURE PAD   (X)

Date of Meeting: 11/5/2016
Type: Regular
Youth: Vick, Edward C.

Name	Role	Signature Status
Vick, Edward C.	Youth	Unsigned
Vick, Janine	Birth Mother	Unsigned
Hyde, Mark	Facilitator	Unsigned

Non-Team Members

No Data Available!

(Preview Report)   (Save Report to Document Tab)   (Close)

5. Type the Team Member name in the "Enter your name:" field in the Signature Pad window.

SIGNATURE PAD   (X)

Enter your name:

[   ]

Click and drag to draw your signature in the box below.

(Submit Signature)   (Clear Signature)

6. Click (Clear Signature) to erase the signature and sign again.

7. Click (Submit Signature) to accept the signature

8. On the Signature Pad Preview:
   a. Click [Create New] to return to the previous Signature Pad screen and re-enter the signature
      OR
   b. Click [Continue] to submit the signature to the Meeting Report Document.
9. The **Signature Status** column for the team member with a submitted signature will now appear with a status of Signed.

TEAM MEETING SIGNATURE PAD   [X]
Date of Meeting: 11/5/2016
Type: Regular
Youth: Vick, Edward C.

Name	Role	Signature Status
Vick, Edward C.	Youth	Signed
Vick, Janine	Birth Mother	Unsigned
Hyde, Mark	Facilitator	Unsigned

Non-Team Members

No Data Available!

[Preview Report]   [Save Report to Document Tab]   [Close]

10. Repeat steps 5-10 for all other Team Members with a status of Unsigned in the **Signature Status** column.

11. Once all signatures are complete, use the following options:
    a. Click [Preview Report] to preview the attendance report document that contains all of the signatures.
    b. Click [Save Report to Document Tab] to save a copy of the Team Meeting Attendance Report to the Documents Tab on the Youth Record *(to make the report available for future printing/viewing and emailing).*

12. Click [Close] to close out of the Team Meeting Signature Pad and return to the Enter Data From Team Meeting Window. The [Signature Pad] and

Save and Close will now be greyed out because the Team Meeting status has been changed to **Complete.**

13. Click **Cancel** to return to the Team Tab in the Youth Record. The Status of the meeting will now be Complete.

CORE ASSESSMENTS AND TEAM PROCESS REVIEW

ADDING ASSESSMENTS

The next step in entering information from the Team Meeting is to make sure that all Core Assessment have been reviewed. There are five Core Assessments housed in the Assessments Tab: *Community Outcomes, Family Satisfaction, Family Support, School Outcomes* and *Youth Support.* The information captured in these assessments is updated on the POC and the dashboard of the Youth Record.

If any Assessments have not yet been added to the Youth Record in the Assessments Tab, an alert will appear when entering information from the Team Meeting. Below the alert is a list of each missing Assessment.

To add the missing assessment(s):

1. Click the "Add All Core Assessments" button. This will move to the Assessments Tab in the Youth Record

NOTE: FOR MORE INFORMATION ABOUT ADDING ASSESSMENTS TO THE YOUTH RECORD, SEE THE ASSESSMENTS SECTION.

2. Click on the [Add All Core Assessments] button.
3. Click on the name of a Core Assessment that is missing from the Youth Record.

4. Complete the Assessment
5. Click [Save and Close].
6. Continue across the tabs to until each assessment has been completed.
7. Once all 5 Core Assessments have been added, click the Team Tab to continue entering Team Meeting Information.
8. Click on the Team Meetings Sub-Tab.
9. Click on the Enter Data hyperlink for the appropriate team meeting to Review All Core Assessments.

REVIEWING ASSESSMENTS

Once all the assessments have been added to the Youth Record, the
[Review All Core Assessments] button on the Enter Data from Team Meeting window allows entry of the meeting assessment data for all active core assessments in the Youth Record. This is also the only place in the system where the Team Process Assessment can be entered.

To Review all active Core Assessment for a Team Meeting:

1. From the Enter Data From Team Meeting window, Click [Review All Core Assessments]. This goes to the Review All Assessment Page.

NOTE: *IF THERE ARE STILL OUSTANDING CORE ASSESSMENT LISTED ABOVE THE REVIEW ALL CORE BUTTON, PLEASE VISIT THE* ADDING ASSESSMENTS *SECTION ABOVE.*

2. Each of the 5 Core Assessments, and the Team Process Assessment have a separate tab. The view defaults to the Community Tab. To start with a different Assessment, click on the desired tab.

3. Complete the information for the chosen Assessment. All fields with an (*) are required and must be completed in order to save information.
   - **Last Review Date** – Populates with date that the Assessment was last reviewed.
   - **Date Reviewed** – The date of this review.
   - **Next Review Date** - This field will automatically schedule the next Team Meeting. It is pre-populated with a date 30 days from the previous Review Date, but can be edited.
4. Use **"Check box if Not Reviewed"** check box if the Assessment was not reviewed as part of this Team Meeting.

5. Use the Review hyperlink to view all previous review ratings for the each individual Core Assessment.

6. Once all of the Assessments have been reviewed or indicated as Not Reviewed, Click

Note: If you have not completed one of the required assessments, the system will not allow you to continue without completing it. Proceed to the missing assessment and either complete the assessment, or mark the checkbox stating "Check box if not Reviewed" for that assessment.

ASSESSMENTS

There are six Core Assessments housed in the Assessments Tab: *Community Outcomes, Family Satisfaction, Family Support, School Outcomes, Team Process*, and *Youth Support*. Each Core Assessment has a corresponding *Dashboard* that displays the data in an easy-to-understand graph on the **Youth Record.** (To enter data for the CAFAS or TSCC Assessments, see Assessments in the Plan Of Care section).

Your Configuration can also request access to add-on Licensed Assessments, or create Custom Assessments. The Family Timeline Interview is also housed under the Assessments tab..

The ability to *Add*, *Edit*, *View*, and *Delete* Assessments are independent, assignable *Permissions* and may not all be available to all Users. When adding assessments in Fidelity_{EHR}, it is important that your pop-up blocker is set to allow pop ups from Fidelity_{EHR}.

GENERAL NOTES ABOUT ASSESSMENTS

For information about entering the CAFAS or TSCC Assessment data, please refer to the Assessments in the Plan Of Care section.

When a new assessment is added, by default Fidelity_{EHR} will enter a Next Review Date 30 days after the current Review Date. This date can be modified at any time.

Entering an End Date Closes an Assessment, effective on the End Date. An End Date cannot be earlier than the Start Date or the most recent Review Date of an Assessment. The most recent Review Date may also be the End Date, however, in which case the Next Review Date will be deleted.

  a. An Assessment End Date will be displayed on the associated Youth Dashboard as a vertical bar with a roll-over text box indicating it was "Closed on [Date]".

  b. Closed Assessments will not be included in Home Page Dashboards that summarize Assessment Data, or be included as "Missing" where appropriate.

  c. No Reviews can be added after the End Date. (However, a Last Review may be added on the End Date.)

d. Once the End Date has passed (in real time), the Assessment can no longer be Edited, Deleted or Reviewed. Users with the appropriate permissions can Edit or Delete a Closed Assessment.

e. A Closed Assessment (Assessment with an End Date earlier than the Current Date) can still be Viewed or Printed, if the User Role has that Permission.

f. If a User has Permission to Edit a Closed Assessment, they cannot remove the End Date if there is an existing second Assessment, nor change the End Date to the Start Date (or greater) of the existing Active Assessment, unless they first delete the second Active Assessment. This only applies to Assessments limited to One per Youth Record.

g. A Closed Assessment will not prevent another Assessment of the same type from being added to the Youth Record.

h. Once an Assessment is Closed, there will be no more Reminders scheduled for the Facilitator.

2. Except for **Youth Needs**, Core Assessments are added *once* to a Youth Record, and then periodically reviewed. Multiple **Youth Needs** can be added.

3. After an **Assessment** has been added to a **Youth Record**, Summary Information about the Assessment will be available directly from the screen. This includes the Start Date, the next scheduled Review Date, and the Date the Assessment was Last Reviewed. (For static, or point-in-time Assessments, the Last Reviewed and Review Date columns will be empty.) Available Actions will also be displayed as blue-text hyperlinks to the right of each Assessment.

Basic Actions for an Assessment are:

a. **Edit**: Allows a User to modify any content of an existing Assessment, including any Review data that may have already been entered.

b. **Delete**: Allows a User to completely and permanently delete an existing Assessment. Once an Assessment has been Deleted, it cannot be recovered.

c. **Review**: *Only available to change-over-time Assessments*. This allows a

User to add an additional data-point to an existing Assessment. Adding a Review data-point to an Assessment under the Core Assessments Sub-Tab will also update the associated Youth Dashboard linked to that Assessment.

4. If there are any additional Actions available for an Assessment, they will display as blue-text hyperlinks next to the Basic Actions.

CORE ASSESSMENTS

There are six Core Assessments: *Community Outcomes, Family Satisfaction, Family Support, School Outcomes, Team Process*, and *Youth Support*. Each Core Assessment has a corresponding *Dashboard* that displays the data in an easy-to-understand graph on the **Youth Record.** These Assessments record *change-over-time* information for different aspects of Youth and family well-being.

ADDING A CORE ASSESSMENT TO A YOUTH RECORD

From within the Youth Record, click on the Assessments Tab. From the Core Assessments Sub-Tab, click the Add button. Select the Core Assessment you'd like to add to this Youth Record. Once selected, fill in the Assessment details on screen. Remember all required information is indicated with a red asterisk.
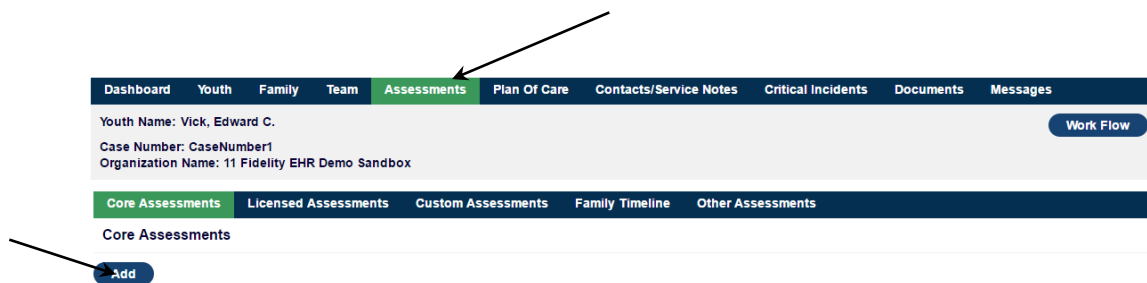
CORE ASSESSMENT SUMMARIES

On the following pages, you will find summaries of each of the six Core Assessments you can add to the Youth Record.

Community Outcomes: This Core Assessment addresses overall community functioning.

Dashboard view:
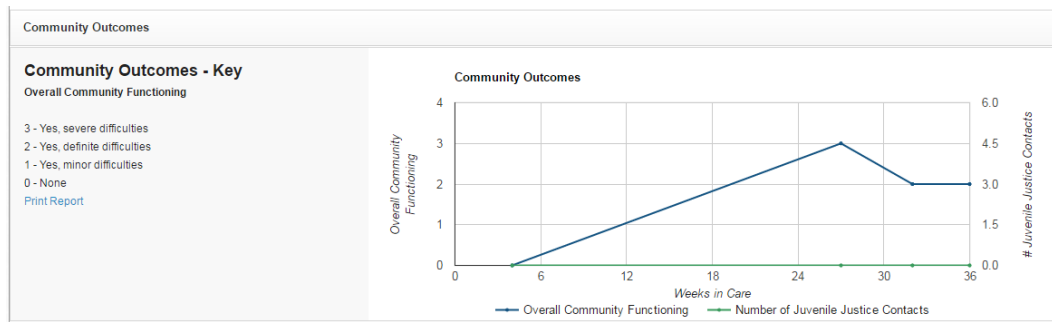
Assessment Tab Details view:

EDIT COMMUNITY OUTCOMES   **X**

Youth Name: Vick, Edward C.

ASSESSMENT DETAILS:

* **Start Date:**	02/27/2016
* **Date Reviewed:**	10/06/2016
* **Next Review Date:**	11/05/2016
End Date:	11/02/2016
Number of days in current assessment period:	222

Overall community functioning: 3 - Yes, severe difficulties

* Do the difficulties interfere with the youth's home life?	3 - A great deal
* Do the difficulties interfere with the youth's classroom learning?	3 - A great deal
* Do the difficulties interfere with the youth's friendships?	3 - A great deal
* Do the difficulties interfere with the youth's leisure time or things she or he does for fun?	3 - A great deal

Family Satisfaction: This Core Assessment addresses the satisfaction of the family with the services the Youth and family are receiving, as well as the progress of the family.

Dashboard view:

Assessment Tab Details view:

Youth Connections: This Core Assessment addresses the connectedness to the School, Family, Service and Community.

Dashboard view:
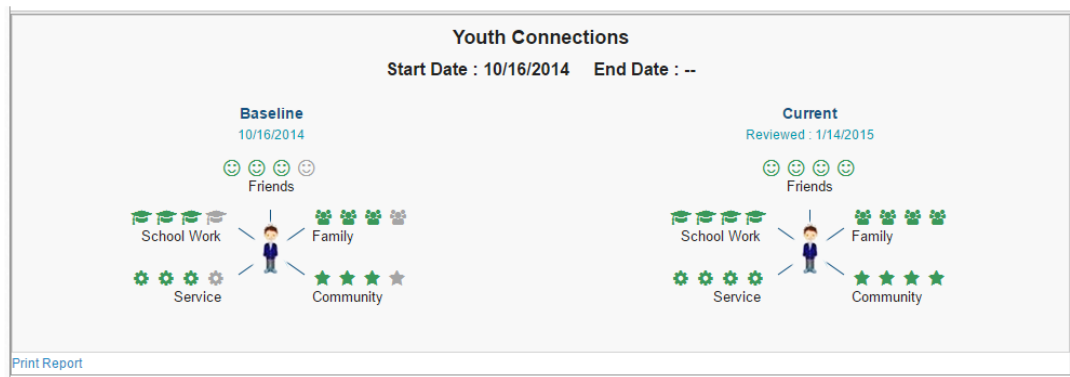
Assessment Tab Details view:

EDIT YOUTH SUPPORT

Youth Name: Hernandez, Esther (Sota)

Assessment Details:

* Start Date:	02/14/2014	ⓘ
* Date Reviewed:	10/16/2014	ⓘ
* Next Review Date:	11/15/2014	ⓘ
End Date:	__/__/____	ⓘ
* Family:	2 - Strength ▾	
* Friends:	2 - Strength ▾	
* School or work:	2 - Strength ▾	
* Community:	2 - Strength ▾	
* Service:	2 - Strength ▾	

ADDITIONAL NOTES: (Add/Edit)

'Pending' Status Start Date: 02/14/2014

Family Connections: This Core Assessment addresses the Family's connectedness to others in the community.

Dashboard view:

Family Connections
Start Date : 3/20/2014   End Date : --

Baseline	Current
3/20/2014	Reviewed : 1/14/2015

Print Report
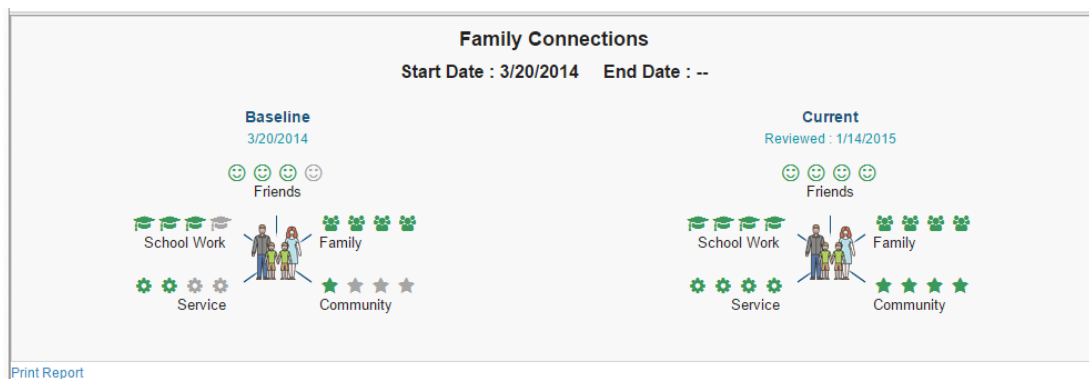
Assessment Tab Details view:

EDIT FAMILY SUPPORT

Youth Name: Hernandez, Esther (Sota)

ASSESSMENT DETAILS:

* **Start Date:**	02/14/2014
* **Date Reviewed:**	03/20/2014
* **Next Review Date:**	04/19/2014
End Date:	__/__/____
* **Family:**	3 - Significant Strength ▼
* **Friends:**	2 - Strength ▼
* **School or work:**	2 - Strength ▼
* **Community:**	0 - Significant Need for Mor ▼
* **Service:**	1 - Need for Support ▼

ADDITIONAL NOTES: (Add/Edit)

School Outcomes: This Core Assessment captures the school days, Youth attendance, and Youth success.

Dashboard view:

School Outcomes

School Outcomes - Key
Current Success in School

3 - Significant Success
2 - Some Success
1 - Some problems
0 - Significant problems
Print Report
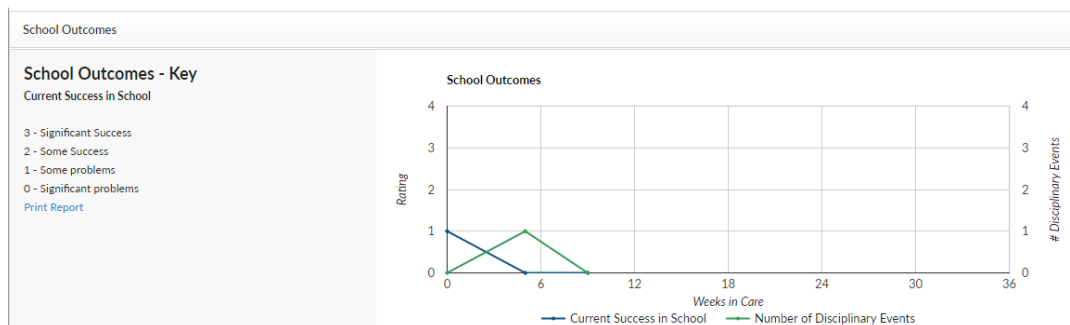
School Outcomes

Assessment Tab Details view:

REVIEW SCHOOL OUTCOMES   X

Youth Name: Austen, Kate

ASSESSMENT DETAILS:

* Last Review Date: 02/20/2016   ⓘ
* Date Reviewed: 03/21/2016   ⓘ
* Next Review Date: 04/20/2016   ⓘ
  End Date: __/__/____   ⓘ
  Number of days in current assessment   30
  period:
* Number of Active School days: [   ]
* Number of days Youth attended: [   ]
  Attendance: 0 %
* Current Success in School: [Select   ▼]

ADDITIONAL NOTES: (Add/Edit)

[   ]

DISCIPLINARY EVENTS:

* School Date: [__/__/____   ]   * Event: [Select   ▼]   Add ▾

Youth Needs: The *Youth Needs Assessment* is the only *Core Assessment* that can be added multiple times in a **Youth Record**. This Assessment records a specific **Need** of a Youth and a detailed *Plan to Address* that Need, shares it with the Team, and allows the Facilitator to monitor progress.

The Plan of Care (POC) addresses Youth Needs and the Youth dashboard is updated via information in the POC. For more information about the POC, including entering Youth Needs, see Plan of Care (POC).

Dashboard View:

Needs, Outcomes, Strategies Details view:

CUSTOM ASSESSMENTS

Assessments created using the *Assessment Creator Tool* are available for use in the Youth Record Custom Assessments Tab. Custom Assessments are created by the Configuration Administrator. For specific instructions on adding the Custom Assessment to a Youth Record in your Configuration, consult your Configuration

Administrator.

In general, when a User adds and saves a Custom Assessment to the Youth Record, the system will notify you of the data saved. If the User attempts to save a Custom Assessment with empty fields, the system will prompt with a notification of the empty fields and if the User would like to save with blank information.

FAMILY STORY

To enter a Family Story for a Youth Record, within a Youth Record click on the Assessments Tab. Choose the Custom Assessments Sub-Tab and click the Add button under the Custom Assessments heading.
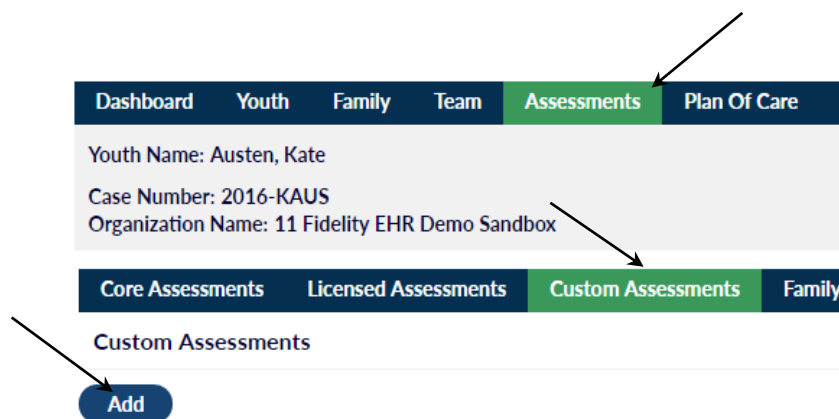
When the Add New Custom Assessment window opens, click on the Family Story hyperlink.

ADD NEW CUSTOM ASSESSMENT

HCBS (Ver.1, One-Time, Single)

Leisure Time (Ver.1, One-Time, Single)

RD Test (Ver.1, One-Time, Single)

Test Assessment (Ver.1, One-Time, Single)

Cancel

LICENSED ASSESSMENTS

Currently there several Licensed Assessments:

CAFAS

Child and Adolescent Needs and Strengths (CANS)

Child and Adolescent Service Intensity Instrument (CASII)

Wraparound Fidelity Index Short Form (WFI-EZ)

TSCC

To access Licensed Assessments, within the Youth Record click on the Assessments Tab. Then choose the Custom Assessments subtab, locate Licensed Assessments, and click the **Add** button.

| Dashboard | Youth | Family | Team | Assessments | Plan Of Care |

Youth Name: Austen, Kate

Case Number: 2016-KAUS
Organization Name: 11 Fidelity EHR Demo Sandbox

| Core Assessments | Licensed Assessments | Custom Assessments | Fa |

Licensed Assessments

Add
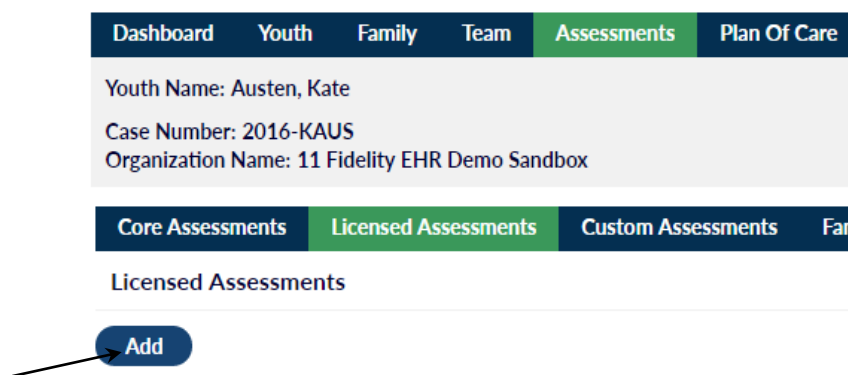
This will open a window where the Licensed Assessments can be selected by

clicking on the name of the Assessment.

LICENSED ASSESSMENTS: X

CAFAS
Child and Adolescent Needs and Strengths (CANS)
Child and Adolescent Service Intensity Instrument (CASII)
Wraparound Fidelity Index Short Form (WFI-EZ)
TSCC
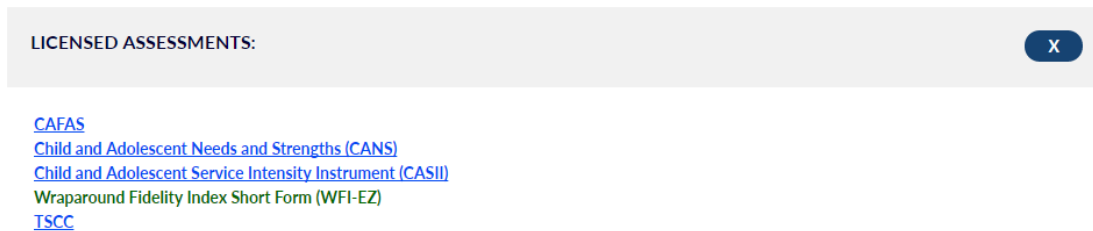
Once a Licensed Assessment is added, it will appear in the Licensed Assessments section of the screen. The assessment will then be included in any reporting. (For more information about permission-based Data Reports and Exports from the Navigation Menu, see the Quick Query section).

FAMILY TIMELINE INTERVIEW ASSESSMENT

When the Family Interview Assessment is completed, Fidelity~EHR~ will generate a graphical, chronological Timeline for the family.
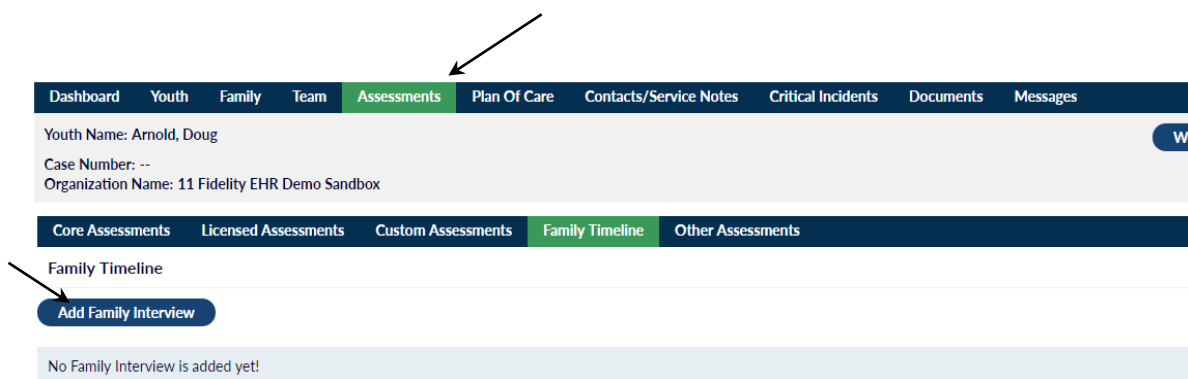
Each sub-tab of the Family Interview Assessment addresses unique concerns, and by navigating from one sub-tab to the next you can enter information for the Youth:

ADD FAMILY INTERVIEW   X

Youth Name: Arnold, Doug

Summary	Family Interview	Developmental History	Medical History	Family Medical History	Educational Background

Psychological Background   Family Timeline

Family Interview Questionnaire:

Today's Date:	11/07/2016					
Child's Name:	Arnold, Doug	D.O.B:	11/19/2002	Age:	13	
Parent(s):						
Guardian:	Maxwell, Marvin					
Address:	45 South Main ,Ally,AK	Telephone: (W)	(605) 558-9956			
		Telephone: (C)	--			

Is your child right or left handed?   ☐ Right ☐ Left

If left handed, is there a history

Once information has been added to the Family Timeline and saved, it will display in the Youth Record Assessment Tab under Family Timeline Sub-Tab.

Core Assessments	Licensed Assessments	Custom Assessments	Family Timeline	Other Assessments

Family Timeline

Add Family Interview

Assessments	Date Added	Last Updated				
Family Interview	06/17/2016	06/17/2016	Summary	Report	Edit	Delete

The Report hyperlink provides the Family Timeline data in graphical form, with the ability to print from the screen, save as a file, and email the report.

(08/03/2002) Kate Austen (Youth) was born

View/Print Report	Save Report to File	Save Report to Youth Record	Email Report	Close
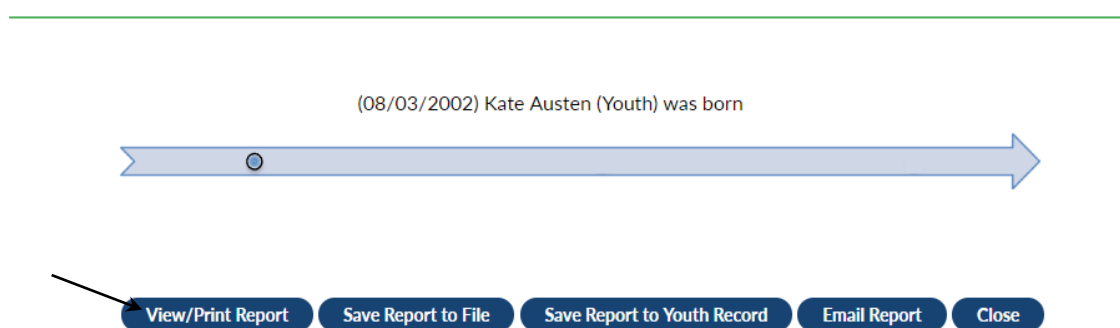
To email the Family Timeline Report as a .pdf, click the Email Report button and fill in the email address(es), subject, and message.

Click the Send Email button. All Recipients will receive an email with the file attached.

REVIEWING ASSESSMENTS

Data from assessment reviews can be entered using the Team Meeting function (see Entering Data from a Team Meeting) or from the Assessment tab in the Youth Record. There are two ways to enter review data from the Assessment tab by reviewing an individual assessment, or by Reviewing All Core Assessments.

REVIEWING INDIVIDUAL ASSESSMENTS

Click on the Review hyperlink next to the assessment to enter review data on (hover the mouse over the assessment name to get a Tool Tip with details about the assessment). This will open a window where the user can enter the review data for that single assessment. At the bottom of the screen the user will be able to view data for all previous reviews for the assessment. An example is provided on the following page, using the Community Outcomes Assessment.

REVIEWING ALL CORE ASSESSMENTS

The Review All Core Assessments button can be used to enter data for all active Core Assessments and will open a screen which allows the user to enter data for all active Core Assessments.

Enter data for the Assessments identified with tabs across the top. The Date

Reviewed and Next Review Date data will be used for all reviews entered. If a particular Assessment was not reviewed, the user can check the box in the window to indicate no review, and no new data will be saved for that Assessment. If there is no baseline Assessment entered for the Youth, it cannot be reviewed, and the system will display the message below.

Review All Assessments:

Name: Arnold, Doug
Case Number: --

| Community Outcomes | Family Satisfaction | Family Support | School Outcomes | Team Process | Youth Support |

There is no existing family support assessment for this youth yet. You must add the assessment to the Youth Record first before you can review it!

Save All   Cancel

REVIEWING NEEDS ASSESSMENTS

Multiple Youth Needs are reviewed in the POC. For more information about Needs, Outcomes, and Strategies in the POC, see the Needs, Outcomes, Strategies section.

PLAN OF CARE (POC)

ADDING A POC

To add a POC, while in a Youth Record, select the Plan of Care tab and click on the Add button to create a POC.

| Dashboard | Youth | Family | Team | Assessments | Plan Of Care | Contacts/Service Notes | Critical Incidents | Documents | Messages |

Youth Name: Arnold, Claire   Case Number: --
Organization Name: --   Work Flow

Plan Of Care (POC)
Add

When prompted, enter the Start date for the POC. Note that the start date of the pending enrollment status is shown on this screen.

PLAN OF CARE START DATE

Please enter the **Start Date** for this **Plan Of Care.**

Start Date: __/__/____

The **Start Date** of this **Plan Of Care** must be on or after the Youth's Pending Status **Start Date**, cannot overlap a previous **Plan Of Care** (if any), or be set in the future.

Pending Status Start Date: 2/11/2014

For data consistency, once selected, the **Start Date** cannot be changed, so be sure it is accurate. If the **Start Date** is incorrect, the **Plan Of Care** must be Deleted, and a new **Plan Of Care** added, in order to change it. Any data added to the initial **Plan Of Care** will also need to be re-added to the new POC.

Save and Continue   Cancel and Exit

COMPLETING THE PLAN OF CARE (POC)

Now that a POC for the Youth Record has been opened, the user can enter data in each category by navigating the tabs on the right side of the screen.

There are currently up to eight tabs in the POC: Family Vision and Team Strengths; Crisis Plan; Team Mission; Assessments; Needs, Outcomes, Strategies; Other

Summary and Team Details; Admin Info Sheet; and Care Coordinating Organization.

The following sections will provide instructions for entering data into each of the eight POC categories.

1. FAMILY VISION AND TEAM STRENGTHS

This section includes the youth details, youth contact details, family vision and team strengths for each member. The family and team members auto populate from the Youth Record. Click on the Add/Edit hyperlink next to items such as "Family Vision" and "Team Strengths" to enter those data.

When finished entering Family Vision and Team Strengths information, click the Save button, and then navigate to additional categories using the Next Page button or the POC tabs on the right.

Plan Of Care

Youth Name: Lynch, Jane L.
Medicaid ID: N1000000000000000

Version: Current (11/07/2016) ▼ (Only the Current Version can be Edited.)

1	**Family Vision and Team Strengths**
2	Crisis Plan
3	Team Mission
4	Assessments
5	Needs, Outcomes, Strategies
6	Other Summary and Team Details
7	Admin Info Sheet
8	Care Coordinating Organization

About this Plan Of Care:

Start Date: 11/07/2016   **Last Updated:** 11/07/2016   **Closed Date:**

About this Version of the Plan Of Care:

Type: ◉ Initial CFT ○ CFT Review ○ Transition CFT ○ Discharge   **CFT Meeting Leading to POC:** 11/07/2016

---

1. Family Vision and Team Strengths

YOUTH DETAILS: (Edit)

Jane L. Lynch
1234 Silver Street
Suite 204
Tigard, 97223
(503) 555-5555 (Cell)

DOB: 08/01/2001
Enrolled:
Email: Unknown@fidelityehr.com

YOUTH CONTACT DETAILS (PRIMARY CAREGIVER): (Edit)

Cannot find a Primary Caregiver under this Youth.

FAMILY VISION: (Add) (Edit)

[Exit]   [View/Print]   [Save]

2. CRISIS PLAN

Click on the Add/Edit hyperlink to create or modify the Crisis Plan details.

Plan Of Care

Youth Name: Lynch, Jane L.
Medicaid ID: N1000000000000000

Version: Current (11/07/2016) ▼ (Only the Current Version can be Edited.)

1	Family Vision and Team Strengths
2	**Crisis Plan**
3	Team Mission
4	Assessments
5	Needs, Outcomes, Strategies
6	Other Summary and Team Details
7	Admin Info Sheet
8	Care Coordinating Organization

2. Crisis Plan (Add/Edit)

CLINICAL EVALUATOR:

EMERGENCY CONTACT:

PRIMARY CARE PHYSICIAN:

PREFERRED HOSPITAL:

YOUTH DIAGNOSES: (Add/Edit)

DSM IV

No DSM IV Diagnoses Found!

The Crisis Plan Details Tab includes Clinical Evaluator and Clinical Summary details.

There is also a hyperlink "Copy from Referral Form" which, when clicked, will pull in any Clinical Evaluator information you've already entered in the Referral Form. When you have finished entering the Crisis Plan Details, click on the Save button. Then click on the Clinical Summary tab at the top of the screen. Complete each of the sections of Clinical Summary with the information you have. Note that under Responsible People and Phone Numbers for Crisis Plan Action Steps you can select Team Member names from the pick list and insert their name and phone number into the field. When you have completed your entry, click on Save and Close.

YOUTH DIAGNOSIS

Use the Add/Edit hyperlink next to Youth Diagnosis heading, to include DSM and ICD diagnosis.

You will be able to select from the DSM IV Axis pick lists or the DSM V pick list, depending on which your Configuration Administrator has selected. The DSM and ICD diagnosis boxes may be linked so that when you select the DSM diagnosis code the ICD code is automatically populated, if that feature has been enabled.

The Diagnosis entry page will display, where you can enter all information related to Diagnosis. To add a new Diagnosis, click the Add New Diagnosis button in the lower left corner. To edit an existing Diagnosis, click the Edit hyperlink in the Diagnosis row.

Plan Of Care

Youth Name: Lynch, Jane L. **Medicaid ID:** N1000000000000000

Version: Current (11/07/2016) ▼ (Only the Current Version can be Edited.)

1	Family Vision and Team Strengths
2	Crisis Plan
3	Team Mission
4	Assessments
5	Needs, Outcomes, Strategies
6	Other Summary and Team Details
7	Admin Info Sheet
8	Care Coordinating Organization

2. Crisis Plan (Add/Edit)

CLINICAL EVALUATOR:

EMERGENCY CONTACT:

PRIMARY CARE PHYSICIAN:

PREFERRED HOSPITAL:

YOUTH DIAGNOSES: (Add/Edit)

DSM IV

No DSM IV Diagnoses Found!

DSM 5

ADD/EDIT YOUTH DIAGNOSIS   X

Youth Name: Jane L. Lynch **Case Number:** D200
Date of Birth: 8/1/2001
Clinical Evaluator: N/A **Phone Number:** N/A

DIAGNOSIS DETAILS

*Start Date of Diagnosis:	__/__/____
End Date of Diagnosis:	__/__/____
Diagnosis Priority (1-35):	Select ▼
Current GAF:	
Highest GAF in Last Year:	
* Axis I:	Select ▼ 🛈
* Axis II:	Select ▼ 🛈
Axis III:	Select ▼ 🛈
Axis IV:	Select ▼
DSM 5 Diagnosis:	Please begin typing here 🛈
ICD-9 Diagnosis:	Select ▼
ICD-10 Diagnosis:	Please begin typing here and select 🛈

DSM IV

No DSM IV Diagnoses Found!

When adding a Diagnosis, select the Start Date, Diagnosis Priority, and select values from the available picklists. Start Date must be after the Youth DOB, but not after Today's Date (cannot be set in the future). A Diagnosis Priority can only be designated to one Diagnosis record at a time. Once a Diagnosis is edited to have an End Date, the Priority will be removed.

The Undo Changes button will remove all entered data, and not save any entered data. Once all fields have been entered, click the Save Changes button. Then, click the Close button to exit the Add/Edit Diagnosis Details mode. You will be brought back to the POC Crisis Plan screen, where your saved Diagnosis record will appear under the approriate DSM heading.

CURRENT MEDICATIONS

Below the Diagnosis information of the Crisis Plan, you will find the Current Medication listing. To enter medications for the youth click on Add/Edit next to Medications next to the Current Medications heading.

Plan Of Care

Youth Name: Lynch, Jane L.   Medicaid ID: N1000000000000000

Version: Current (11/07/2016) ▼ (Only the Current Version can be Edited.)

2. Crisis Plan (Add/Edit)

CLINICAL EVALUATOR:

EMERGENCY CONTACT:

PRIMARY CARE PHYSICIAN:

PREFERRED HOSPITAL:

YOUTH DIAGNOSES: (Add/Edit)

DSM IV
  No DSM IV Diagnoses Found!

DSM 5
  No DSM 5 Diagnoses Found!

ICD 10
  No ICD 10 Diagnoses Found!

CURRENT MEDICATIONS (Add/Edit) (View)

BRIEF HISTORY:

[Exit]   [View/Print]   [Save]

1	Family Vision and Team Strengths
2	Crisis Plan
3	Team Mission
4	Assessments
5	Needs, Outcomes, Strategies
6	Other Summary and Team Details
7	Admin Info Sheet
8	Care Coordinating Organization

To add new Medication, or Edit existing Medication, use the Add/Edit hyperlink. You will be brought to the Medication editing form. Click on the Add New Medication button to add a new Medication, or click on the Edit hyperlink to edit an existing Medication record.

When adding a new medication, the Name, Date, Dosage and Frequency fields will now become available for you to enter the new Medication details (as will the Undo

Changes, Save Changes, and Close buttons). Once Medication details have been entered, click Save Changes. If you need to continue adding Medications, proceed in the same way. Otherwise, click the Cancel/Close button to exit the Medication editing form.

If editing a current Medication, make your edits in the fields needed, and click the Save Changes button. Then, click the Cancel/Close button to exit the Medication editing form.

Only Current Medications are listed in the POC Crisis Plan. If a Medication has an end date that is in the past, the Medication will no longer be listed in the Crisis Plan, nor will it print in the current version of the POC. However, all Medication for the Youth will be listed in the Referral Form Medication listing. (If you enter the medication with an end date in the past via the POC Crisis Plan- it will not generate in the POC listing, but it will generate in the Medication history in the Referral Form).

You will return to the Referral Form, where you can add or edit any other Youth information.

POTENTIAL CRISIS, ACTION STEPS, AND ACTION STEP TASKS
After entering Brief History, Triggers, and Responsible Persons, you will have the opportunity to enter Potential Crisis and Action Steps. With Permission, you can use the Add/Edit hyperlink to add a Potential Crisis.

YOUTH DIAGNOSES: (Add/Edit)

DSM IV

No DSM IV Diagnoses Found!

DSM 5

No DSM 5 Diagnoses Found!

ICD 10

No ICD 10 Diagnoses Found!

CURRENT MEDICATIONS (Add/Edit) (View)

11/01/2016 - Zoloft (1 Tablet 2*Daily)

BRIEF HISTORY:

TRIGGERS:

RESPONSIBLE PERSONS:

Potential Crises & Action Steps ⊕ ADD NEW   ≣ EXPAND ALL

2	Crisis Plan
3	Team Mission
4	Assessments
5	Needs, Outcomes, Strategies
6	Other Summary and Team Details
7	Admin Info Sheet
8	Care Coordinating Organization

Once the Potential Crisis has been added, it will appear in the listing. From that listing you can use the Review hyperlink to review the Potential Crisis, as well as add Action Steps (both formal and informal). Use the respective hyperlinks to add each:

No DSM IV Diagnoses Found!

DSM 5

No DSM 5 Diagnoses Found!

ICD 10

No ICD 10 Diagnoses Found!

CURRENT MEDICATIONS (Add/Edit) (View)

11/01/2016 - Zoloft (1 Tablet 2*Daily)

BRIEF HISTORY:

TRIGGERS:

RESPONSIBLE PERSONS:

1	Family Vision and Team Strengths
2	Crisis Plan
3	Team Mission
4	Assessments
5	Needs, Outcomes, Strategies
6	Other Summary and Team Details
7	Admin Info Sheet
8	Care Coordinating Organization

Potential Crises & Action Steps ⊕ ADD NEW   ≣ CLOSE ALL

⊖ Jane is having touble adjusting t...   _Start Date_ - _Desired Complete Date_   👁   ⊗
                                             10/31/2016 - 12/30/2016   REVIEW   DELETE

No Action Steps exist yet for this Potential Crisis.   ⊕
                                                          ADD / EDIT

Exit   View/Print   Save

Once a Potential Crisis is reviewed, the Review History will generate below the Progress section.

Once Action Steps are added, they will generate in a listing below the Potential Crisis:

When adding an Action Step, you can indicate if it is a formal Action step:

If the Action Step is a Formal Service, you will then fill out the Billing information:

Once you have entered all required information and calculated the total number of Units for this Action Step, click the Save button. At that point, the Service Delivery,

Service Costs, and Customer Report buttons will become available. You can find more information about these buttons in Needs, Outcomes, Strategies, as these buttons function here in the Crisis Plan similarly to Service Delivery, Service Costs, and Customer Reports for Youth Needs.

From this Action Step listing you can then assign Tasks to Team Members in FidelityEHR, if you have proper permission. Expand the Action Step Details, and use the Add/Edit hyperlink next to the Task heading:

You can then select the Team Member to assign the Strategy Task to, including a Due Date, a description of the Task, and if it is Formal. If the Team Member is a User of FidelityEHR, you can also send a Reminder via the system.

ADD/EDIT CRISIS PLAN TASKS TO ACTION STEP FOR POTENTIAL CRISIS ⊗

Youth Name: Lynch, Jane L.
Medicaid ID: N1000000000000000

Potential Crisis Description: Jane is having touble adjusting to the new school
Start Date: 10/31/2016
Desired Completion Date: 12/30/2016
Action Step Description: Meet Jane twice a week at the school

Reorder

TASK FOR THIS ACTION STEP FOR POTENTIAL CRISIS:

Task Assignment	Description	Formal?	Due Date

* Select Team Member: [Select ▾]
* Task Due Date: __/__/____
* Task Description: [   ]
Estimated time: [   ]
Actual time: [   ]
Create Reminder ? ☐ ⓘ
* Is this a Formal Task? ○ Yes   ⦿ No

If the Action Step Task is Formal, indicate Yes, and once you click Add Task you will be brought to the Formal Task editing page. This Formal Task page functions the same as Action Step Formal Service as described in Potential Crisis, Action Steps, and Action Step Tasks.

The Crisis Plan Potential Crisis, Action Steps, and Crisis Plan Tasks will also generate in a Print version of the POC.

When finished entering Crisis Plan information, click the Save button, and then navigate to additional categories using the Next Page button or the POC tabs on the right.

3. TEAM MISSION

On the Team Mission tab, click on the Add/Edit hyperlink to create or modify the Team Mission.

Plan Of Care

Youth Name: Lynch, Jane L.

Medicaid ID: N1000000000000000

Version: Current (11/07/2016) ▾ (Only the Current Version can be Edited.)

3. Team Mission

TEAM MISSION: (Add) (Edit)

To guide Jane back on a path of success in and outside of school. Her talent in the arts is a great place to focus our efforts. Her parents want her to peruse her artistic talents and gain more education. The school is opening doors for her to receive some guidance from local musician. (11/7/2016 1:48:13 PM by Admin, Admin)

1	Family Vision and Team Strengths
2	Crisis Plan
3	Team Mission
4	Assessments
5	Needs, Outcomes, Strategies
6	Other Summary and Team Details
7	Admin Info Sheet
8	Care Coordinating Organization

Enter the Team Mission and then click on the Save and Close button.

ADD/EDIT TEAM MISSION (POC FORM)   X

Youth Name: Lynch, Jane L.
Medicaid ID: N1000000000000000

TEAM MISSION   Check Spelling

Attend the local Community College arts program for High School Students.

Add   Cancel

TEAM MISSION

To guide Jane back on a path of success in and outside of school. Her talent in the arts is a great place to focus our efforts. Her parents want her to peruse her artistic talents and gain more education. The school is opening doors for her to receive some guidance from local musician. (11/7/2016 1:48:13 PM by Admin, Admin)

4. ASSESSMENTS

In this section, you can enter data for CAFAS, CANS, CASII, WFI-EZ and TSCC assessments. With permission, you are able to add, edit, or delete these assessments as well.

Dashboard	Youth	Family	Team	Assessments	Plan Of Care	Contacts/Service Notes	Critical Incidents	Documents	Messages

Youth Name: Case, Penny (Pen)   **Work Flow**

Case Number: 12345

Organization Name: --

Core Assessments	**Licensed Assessments**	Custom Assessments	Family Timeline	Other Assessments

Licensed Assessments

Add

No Licensed Assessments are added yet!

LICENSED ASSESSMENTS: **X**

CAFAS
Child and Adolescent Needs and Strengths (CANS)
Child and Adolescent Service Intensity Instrument (CASII)
Wraparound Fidelity Index Short Form (WFI-EZ)
TSCC

CHILD AND ADOLESCENT FUNCTIONAL SCALE (CAFAS)

There are a maximum of 8 entries for CAFAS. "Baseline" is the initial set of scores entered into the system (consider this Time 1). The "Most Recent" record are the subscores entered most recently into the system. All other entries between "Baseline" and "Most Recent", are named as "Time 2" through "Time 7".

ADD CAFAS ASSESSMENT

Youth Name: Case, Penny (Pen)

Youth Name: Case, Penny (Pen)
Medicaid ID: 5555555   [X]

[Add New] ←

BASELINE CAFAS:
* Date of Assessment: [__/__/____]

SUBSCALE SCORES:

School/Work Role Performance	Home Role Performance	Community Role Performance	Behavior Toward Others	Moods and Emotions	Self-Harmful Behavior	Substance Use	Thinking
0	0	0	0	0	0	0	0

Total Score: 0

*Note: Only 8 CAFAS Assessments can be added.

[Save and Close]   [Save]   [Cancel]

To add a CAFAS subscore, click on the "Add New" hyperlink, as shown above. (Note that once a record has an entry, this link will change to "Add/Edit". Once a record has the maximum number of entries, this link will change to "Edit" only.)

You will then able to fill in the assessment, as shown below.

ADD CAFAS ASSESSMENT

Youth Name: Case, Penny (Pen)

Youth Name: Case, Penny (Pen)
Medicaid ID: 5555555

(X)

Add New

BASELINE CAFAS:
* Date of Assessment: 11/10/2016

SUBSCALE SCORES:

School/Work Role Performance	Home Role Performance	Community Role Performance	Behavior Toward Others	Moods and Emotions	Self-Harmful Behavior	Substance Use	Thinking
4	4	5	4	8	4	2	5

Total Score: 36

Note: Only 8 CAFAS Assessments can be added.

(Save and Close) (Save) (Cancel)

Enter the subscores for each category, and the Total Score will calculate in the field. Total Score is calculated by adding all of the subscale scores. Click the Save and Close button, or the Save button.

If you Edit a CAFAS entry, remember to save the changes before exiting the Editing screen.

Users are not allowed to delete a "Baseline" entry, but are allowed to edit scores. If a User deletes a CAFAS entry after "Baseline", the system will prompt questions about re-entering that Time's data. If you choose to not re-enter that data, the CAFAS record will be without that Time's data. When you attempt to enter a new CAFAS, the system will first ask if you would like to re-enter the previously deleted Time's data.

CHILD AND ADOLESCENT NEEDS AND STRENGTHS (CANS)

To complete a CANS assessment, begin with category of the assessment, whether it is the initial, a reassessment or transition. Then enter the date of the assessment.

Complete the questions. IF there is a (?) next to a question, this will open a help text box with more information about that question. Simply click on the question mark to open the text box. Be sure to Save at the end of the assessment to avoid losing work.

When completed, you will receive a confirmation message that it is complete and saved successfully. It will also show up in the list of Licensed Assessments.

Licensed Assessments

Add

Assessments	Version	Instances	Date Added	Last Updated	Status	Actions Available
CANS	CFS	Initial 1	12/02/2016	12/02/2016	Completed	Edit Delete View/Print

CHILD AND ADOLESCENT SERVICE INTENSITY INSTRUMENT (CASII)

Enter all of the information for the CASII, starting with the Rater's Name and the Date. Note that there is more than one page to this assessment and that at the bottom of the page you must use the "Next Page" button to continue.

EDIT CASII ASSESSMENT

Youth Name: Arnold, Claire

CASII Worksheet	CASII Scoring Sheet

Rater Name: April Smith   **Date:** 09/22/2016

Please check the applicable ratings within each dimension and record the score in the lower right hand corner. Total your score and determine the recommended level of service intensity using either the Placement Grid or the Decision Tree.

I. Risk of Harm
- ☐ 1. Low Potential for Risk of Harm
- ☑ 2. Some Potential for Risk of Harm
- ☐ 3. Significant Potential for Risk of Harm
- ☐ 4. Serious Potential for Risk of Harm
- ☐ 5. Extreme Potential for Risk of Harm

Score: 2

II. Functional Status
- ☐ 1. Minimal Functional Impairment
- ☐ 2. Mild Functional Impairment
- ☐ 3. Moderate Functional Impairment
- ☑ 4. Serious Functional Impairment
- ☐ 5. Severe Functional Impairment

Score: 4

III. Co-Occurrence: Developmental, Medical, Substance Use, and Psychiatric
- ☐ 1. No Occurrence
- ☑ 2. Minor Occurrence
- ☐ 3. Significant Occurrence
- ☐ 4. Major Occurrence

IV. A. Recovery Environment - Environmental Stress
- ☐ 1. Absent Stressful Environment
- ☑ 2. Mild Stressful Environment
- ☐ 3. Moderate Stressful Environment
- ☐ 4. Serious Stressful Environment

[Save Page] [Save All Pages] [Cancel] [Close] [Next Page]
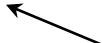
TRAUMA SYMPTOM CHECKLIST FOR CHILDREN (TSCC)

There are two possible TSCC T-Scores to enter: "Baseline" and "Most Recent". The initial scores entered into the system are "Baseline", and those entered most recently are the "Most Recent" record.

To add a TSCC T-Score, click on the "Add New" hyperlink beneath the TSCC heading. (Note that once a record has an entry, this link will change to "Add/Edit". Note that once a record has two TSCC entries, the link will change to "Edit" only).

LICENSED ASSESSMENTS: X

CAFAS
Child and Adolescent Needs and Strengths (CANS)
Child and Adolescent Service Intensity Instrument (CASII)
Wraparound Fidelity Index Short Form (WFI-EZ)
TSCC

You will then be brought to the data entry page to enter your TSCC T-Scores.

ADD TSCC ASSESSMENT   X
Youth Name: Case, Penny (Pen)

Medicaid ID: 5555555

Add New

Baseline T-Scores:
* Date of Assessment: __/__/____

Underresponse (UND)	Hyperresponse (HYP)	Anxiety (ANX)	Depression (DEP)	Anger (ANG)	Posttraumatic Stress (PTS)
0	0	0	0	0	0

Dissociation (DIS)	Overt Dissociation (DIS-O)	Fantasy (DIS-F)	Sexual Concerns (SC)	Sexual Preoccupation (SC-P)	Sexual Distress (SC-D)
0	0	0	0	0	0

*Note: Only 2 TSCC Assessments can be added.

Save and Close   Save   Cancel

If you Edit a TSCC T-Score, remember to save the changes before exiting the Editing screen.

Users are not allowed to delete a "Baseline" entry, but are allowed to edit subsequent scores.

WRAPAROUND FIDELITY INDEX-SHORT FORM (WFI-EZ)

Like the CASII, the WFI-EZ is multiple pages long, so as you complete the pages, you must advance to the next page to complete. You also must Save All Pages at

the end of the assessment. It is advised to save each page as you progress, to avoid losing work in case of interruption.

5. NEEDS, OUTCOMES, STRATEGIES

Users add Youth Needs Assessments in the POC. It is not located under the Assessments tab with the other Assessments.

ADDING A YOUTH NEED

In order to Add a new Youth Needs Assessment, collect the following information:

1. A Description of the Need
2. A Start Date for the Need. The Youth Need Start Date cannot be earlier than the Youth Pending Status Start Date, or Date the Youth Record was added to the Configuration.
3. The Desired Outcome of the Plan to Address the Youth Need.
4. The Desired Completion Date of the Plan to Address the Youth Need.
5. The Life Domain(s) the Youth Need affects or concerns. One or more of the following Life Domains: Behavior, Family, Legal, Place to Live, School, Spiritual, Cultural, Finances, Medical, Safety, Social/Relationships, Work and Emotional. You also have space to indicate "Other" life domains not covered by those categories.
6. The first Date to Review the Plan. By default, the Next Review Date will be set for 30 Days after the Start Date of the Assessment. The User can modify this date, however, if they wish.

7. Information about Billing, if the Need's Strategy is Formal.

Once you have collected this information you can begin to enter the Youth Need in the POC. You can add a single Need by clicking on the Add New hyperlink. Or, you can click on the Add Multi hyperlink if you have more than one Need to enter.

Remember that required data is marked with a red asterisk. Once all information has been entered, click Save and Close.

The Need will now generate in the Need/Outcome listing in the POC:

To add new Needs and Outcomes, enter the information required in all fields. Click the Save and Close button when you have finished.

REVIEWING A NEED
To review a Youth Need, click the Review hyperlink next to the Need Statement:
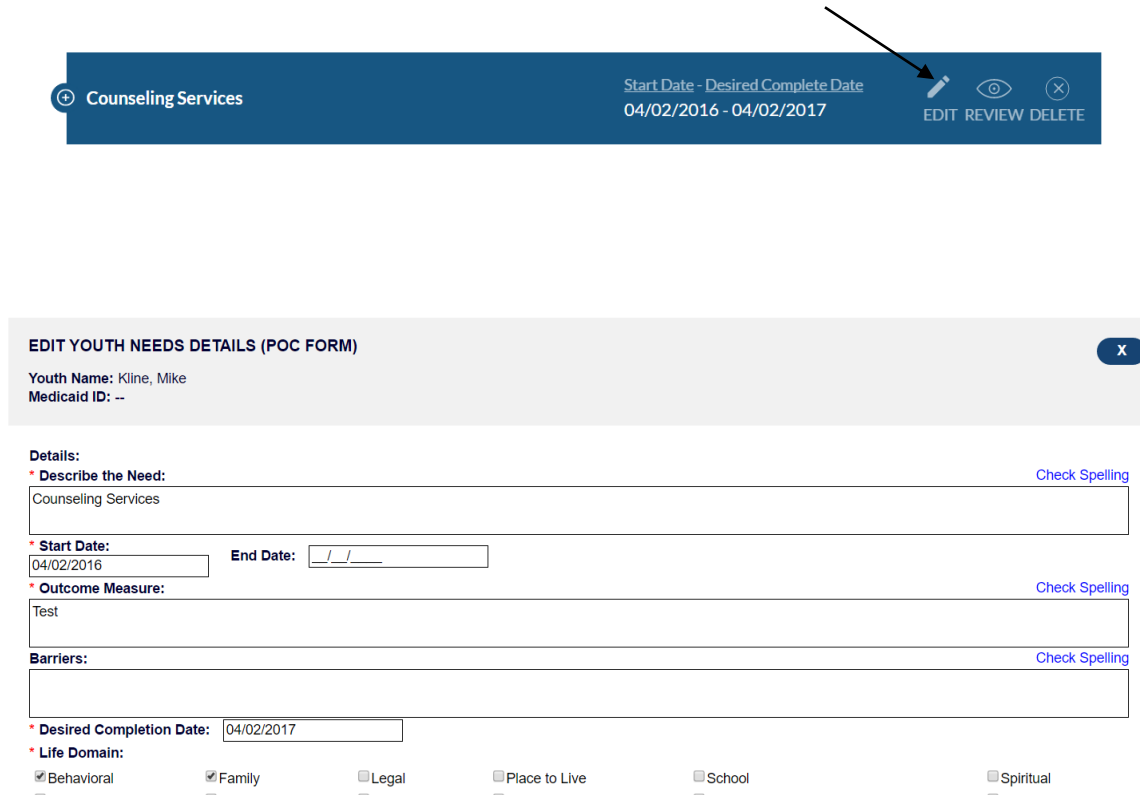
EDITING A NEED

Click on the Edit icon for the Need you wish to edit. This will open the need in Edit mode and you are able to make edits as needed.

REVIEWING A NEED (FOR PROGRESS)

The Review Youth Needs form will appear on screen, with the dates pre-populated. The Date of Review is the current date; Next Review Date is 30 days from the current date.

REVIEW YOUTH NEEDS DETAILS (POC FORM)

Youth Name: Lynch, Jane L.
Medicaid ID: N1000000000000000

Details:
* Describe the Need:
After school activities

* Start Date:
10/31/2016   End Date: __/__/____
* Outcome Measure:
Have Jane involved in 2 after school activities

Barriers:
Jane's low self-esteem

* Desired Completion Date: 12/15/2016
* Life Domain:
☑ Behavioral   ☐ Family   ☐ Place to Live   ☐ Safety   ☑ School   ☑ Social/Relationships
☐ Culture   ☐ Medical
If Others Please Specify:

* Date Reviewed: 11/30/2016
* Next Review Date: 12/07/2016
* Progress Toward Need Met: Select   ▾
Progress Toward Need Comments: Check Spelling

* Progress Toward Outcome Comments: Check Spelling

'Pending' Status Start Date:
8/10/2016

Review History		
Date Reviewed	Progress	Progress Toward Outcome Comments
	0 - Baseline	

Save and Close   Save   Cancel

Once you have entered the Progress Toward Need rating from the picklist, and any comments about the Progress toward the Need or the Outcome, click Save and Close or Save.

Progress Toward Outcome Comments are considered the key measure for Wrap teams to use, and those comments are then viewable at the bottom of the Youth

Need screen. The outcomes are viewed as the most important indicator of progress for the Youth.

Once the Review has been saved, you will be back at the Needs, Outcomes, Strategies page of the Youth POC.   Now, when copies of the Plan of Care are made, these Reviews of Need will be displayed. If there are multiple reviews, the First (Baseline) and Last review will be shown, followed by the Review History that shows all reviews.

TO DELETE A NEED, CLICK ON THE "DELETE" BUTTON NEXT TO THE CORRESPONDING NEED.

Then the editing Need window will appear. Near the bottom where Progress History is listed, you'll see "review" and "delete" hyperlinks next to each row of Progress data. Click on the appropriate row's "Review" hyperlink to edit or delete Progress

Comments or Edit the Date Reviewed or "Delete" hyperlink to delete the review entirely.

Click the Save and Close button, or the Save button (depending on what you need to do next). This save will remove any text in the Progress Toward Need Comments field. You will be notified of a successful save, and when you view the Review History for that record the Progress Toward Need Comment field will be empty.

ADDING/EDITING A STRATEGY

After a Need has been added, Strategies for that Youth Need can be added by clicking on the Add/Edit hyperlink under the Need.

Plan Of Care

Youth Name: Kline, Mike   **Medicaid ID:** --

Version: Current (05/23/2016) ▼ (Only the Current Version can be Edited.)

| 5. Needs, Outcomes, Strategies ⊕ ADD NEW ⊕ ADD MULTIPLE | ☰ EXPAND ALL |

| tutoring | Start Date - Desired Complete Date 04/10/2016 - 06/05/2016 | ✎ 👁 ⊗ EDIT REVIEW DELETE |

No Strategies exist yet for this Need.

⊕
ADD / EDIT

Enter the Strategy Description, and indicate if it is a Formal Service. If it is not a Formal Service click the Add Strategy button and it will now show up below the Youth Need on the screen.

ADD/EDIT STRATEGY FOR YOUTH NEED

Youth Name: Lynch, Jane L.
Medicaid ID: N1000000000000000

Desired Completion Date: 12/15/2016

No Strategies for Youth Need!

ADD/EDIT STRATEGY:
*Strategy Description:

Check Spelling

Co-ordinate with school counselor for a list of after school activities/clubs.

ESTIMATED TIME:

15

ACTUAL TIME:

10

IS THIS A FORMAL SERVICE?

○ Yes   ● No

Add Strategy   Close Form

If it is a Formal Service, the following screen will appear on top of your Strategy where you will enter the Service and Service Provider information.

ADD SERVICE FOR A FORMAL STRATEGY

Youth Name: Lynch, Jane L.
Medicaid ID: N1000000000000000

Need Description: After school activities
Outcome Measure: Have Jane involved in 2 after school activities
Start Date: 10/31/2016
Desired Completion Date: 12/15/2016
Strategy Description: Set up after school classes with Community College in arts.

* Please select a Funding Source for this Strategy:
● Medicaid   ○ Other
Select ▼

*Please select a Service Cost Schema for this Strategy:
● Standard Rates   ○ Provider Rates

* Select Service: Select ▼   * Select Provider: Select ▼
Direct Worker (if applicable)   Services are expected to be provided between;
First Name / MI: _____ / ____   * Service Start Date: __/__/____   Days
Last Name: _____   * Service End Date: __/__/____
                                          Termination Date: __/__/____ ⓘ

Select the Funding Source. Then, select the Service, Modifier and Provider. If applicable, provide the Direct Worker name. Enter Service Start Date and End Date.

Near the bottom, enter the total number of Service Units and the Units per Interval from the picklist.

Click on the **Calculate/Recalculate** button to update the information.

When you have finished entering information click on the Save and Close button located under the Formal Strategy screen, on the Strategy page.

After Saving and Closing the Formal Strategy information, the system will notify you of a successful save, and the Strategy will be noted a Formal Service in the Strategy listing:

Version: Current (05/23/2016) ▾ (Only the Current Version can be Edited.)

5. Needs, Outcomes, Strategies ⊕ ADD NEW   ⊕ ADD MULTIPLE   ☰ EXPAND ALL

| ⊖ **Counseling Services** | | Start Date - Desired Complete Date 04/02/2016 - 04/02/2017 | ✎ EDIT 👁 REVIEW ⊗ DELETE |

| Strategy test | | Formal Yes | ⊕ ADD/EDIT   ⊗ DELETE |

Tasks ⊕ ADD/EDIT	**Formal**	**Assigned To**	**Due Date**		
Begin Foster Care	Yes	Phillip, M...	6/24/2016	☐	⊗

If the Strategy has a Formal Service, in the Formal Column there will be a hyperlink. If you need to edit, or delete, the strategy record, you can access the Formal Strategy form again by clicking this hyperlink. If you need to add Service Delivery, or print a Service Cost Report or Customer Report, you can also access those areas from this hyperlink.

ASSIGNING TASKS FOR A STRATEGY

From this Strategy listing you can then assign Tasks to Team Members in FidelityEHR, if you have proper permission. Expand the Strategy Details, and use the Add/Edit hyperlink next to the Task heading:

Youth Name: Lynch, Jane L.   Medicaid ID: N1000000000000000

Version: Current (11/07/2016) ▾ (Only the Current Version can be Edited.)

5. Needs, Outcomes, Strategies	⊕ ADD NEW	⊕ ADD MULTIPLE		⊟ CLOSE ALL

After school activities — Start Date - Desired Complete Date 10/31/2016 - 12/15/2016 — REVIEW — DELETE

Strategy
Co-ordinate with school counselor for a list of after school activities/clubs.
Formal No — ⊕ ADD / EDIT — ⊗ DELETE

Tasks ⊕ ADD / EDIT   Formal   Assigned To   Due Date
No Tasks exist yet for this Strategy.

Strategy
Set up after school classes with Community College in arts.
Formal Yes — ⊕ ADD / EDIT — ⊗ DELETE

Tasks ⊕ ADD / EDIT   Formal   Assigned To   Due Date
No Tasks exist yet for this Strategy.

Outlet for Jane's creative side — Start Date - Desired Complete Date 11/01/2016 - 11/30/2016 — REVIEW — DELETE

Exit   View/Print   Save

Right navigation:
1 Family Vision and Team Strengths
2 Crisis Plan
3 Team Mission
4 Assessments
5 Needs, Outcomes, Strategies
6 Other Summary and Team Details
7 Admin Info Sheet
8 Care Coordinating Organization

You can then select the Team Member to assign the Strategy Task to, including a Due Date, a description of the Task, and if it is Formal or not. If the Team Member is a User of Fidelity$_{EHR}$, you can also set the system to send a Reminder automatically.

ADD/EDIT TASKS FOR STRATEGY IN YOUTH NEED

Youth Name: Lynch, Jane L.
Medicaid ID: N1000000000000000

Need Description: After school activities
Outcome Measure: Have Jane involved in 2 after school activities
Start Date: 10/31/2016
Desired Completion Date: 12/15/2016
Strategy Description: Co-ordinate with school counselor for a list of after school activities/clubs.

TASK FOR THIS STRATEGY IN THE YOUTH NEED:

Completed	Task Assignment	Description	Formal?	Due Date

* Select Team Member: [Select ▼]
* Task Due Date: [__/__/____]
* Task Description: [   ]
  Estimated time: [   ]
  Actual time: [   ]
  Create Reminder ? ☐ ⓘ
* Is this a Formal Task?   ○ Yes   ◉ No

[Add Task] [Cancel] [Close Form]

Add all of the required details, and indicate if the Task is Formal, and click Add Task
If it is a Formal Task, the Add Service for a Formal Task window will appear:

ADD SERVICE FOR A FORMAL TASK

Youth Name: Lynch, Jane L.
Medicaid ID: N1000000000000000

Need Description: After school activities
Outcome Measure: Have Jane involved in 2 after school activities
Start Date: 10/31/2016
Desired Completion Date: 12/15/2016
Strategy Description: Set up after school classes with Community College in arts.
Task Description: Sing up for one of the two activites

* Please select a Funding Source for this Task:
  ◉ Medicaid   ○ Other
  [Select ▼]

* Please select a Service Cost Schema for this Task:
  ◉ Standard Rates   ○ Provider Rates

* Select Service: [Select ▼]
  Direct Worker (if applicable)
  First Name / MI: [   ] / [   ]
  Last Name: [   ]

* Select Provider: [Select ▼]
  Services are expected to be provided between;
  * Service Start Date: [__/__/____]   Days
  * Service End Date: [__/__/____]
  Termination Date: [__/__/____] ⓘ

Service Unit: --   **Unit Rate:** --
Modifier: --

Address: --

Fill in all Formal Task details, as specified with the red asterisk, and click Save or Save and Close. This Formal Task form is set up very similarly to the Formal Strategy form.

Service Delivery, Service Costs, and Customer Report all become available once the Formal Task information is Saved.

SERVICE DELIVERY AND PAYMENT FOR A FORMAL TASK

Once Formal Strategies or Tasks have been Saved, the Service Delivery button on the Formal Strategy or Tasks form will become available for you to add information about delivery of a Service. Click the Service Delivery button:

EDIT SERVICE FOR A FORMAL STRATEGY

Youth Name: Lynch, Jane L.
Medicaid ID: N1000000000000000

Last Name: [   ]

Service End Date: |11/21/2016 | 13
Termination Date: [/ /] ⓘ

Service Unit: .25 Hours   Unit Rate: $50.00
Modifier: HO - Masters Degree
Procedure Code: FSOYS
Notes: --

Limitations: 10 Hours (40 Units)/ Week

Address: 123 Charles Street
City: Baltimore   State: MD   ZipCode: 12345-____
Provider Type: --
NPI Number: --
Primary Contact: Shelly Winters
Phone 1: (410) 555-5555   Phone 2: (410) 555-5555

* Calculate Total Number of Units for this Strategy: [1]   Units per Interval: [Period ▾]

[Calculate / Recalculate]   There are [1] Intervals in Time Period and [1] Total Units of Service.

| x170060 | $50.00 | 0 | 1 | $0.0 | $50.00 |

[Service Delivery] [Service Costs] [Customer Report]

[Edit Strategy Record] [Delete Strategy Record] [Save and Close] [Save] [Cancel]

Then, click the Add Record button.

SERVICE DELIVERY AND PAYMENT

Youth Name: Lynch, Jane L.
Medicaid ID: N1000000000000000

Describe The Need: After school activities
Outcome Measure: Have Jane involved in 2 after school activities
Service Code - Name: FSOYS- Youth Support
Current Service Provider: Judy Campbell   **Provider Worker Name:**
Service Start Date: 11/09/2016   **Service End Date:** 11/21/2016

Requisition No.	Total No.of Units	Unit Rate	Estimated Cost	Units Used	Remaining	Payments	Balance
x170060	1	$50.00	$50.00	0	1	$0.00	$50.00

[Add Record]

Requisition No.	Service Date	Amount Paid	Date Paid

No Records Found!

[Close]

Service Delivery fields will appear for you to enter details for the Service Date,

==including Amount Paid and Date Paid. Click the Add button when finished, then click the Close button.==

SERVICE DELIVERY AND PAYMENT   [X]
Youth Name: Kline, Mike
Medicaid ID: --

Describe The Need: Counseling Services
Outcome Measure: Test
Service Code - Name: 5201- Camp
Current Service Provider: Johns Hopkins   Provider Worker Name:
Service Start Date: 08/30/2016   Service End Date: 09/14/2016

Requisition No.	Total No.of Units	Unit Rate	Estimated Cost	Units Used	Remaining	Payments	Balance
x170065	32	$88.46	$2830.72	0.6	31.4	$50.00	$2780.72

[Add Record]

Requisition No.	Service Date	Amount Paid	Date Paid			
x170065	09/14/2016	$50.00	11/28/2016	Edit	Delete	

SERVICE COSTS REPORT

To view costs associated with the Youth Record/Plan of Care, select the Service Costs button from the Formal Strategy or Task page.

EDIT SERVICE FOR A FORMAL TASK   [X]
Youth Name: Arnold, Doug
Medicaid ID: --

Last Name: [   ]   * Service End Date: 09/28/2016   8
                                              Termination Date: / /   🛈

Service Unit: .25 Hours   Unit Rate: $50.00   Address: 123 Charles Street
Modifier: HO - Masters Degree   City: Baltimore   State: MD   ZipCode: 12345-____
Procedure Code: INDCOUN   Provider Type: --
Notes: --   NPI Number: --
                                                   Primary Contact: Shelly Winters
Limitations: --   Phone 1: (410) 555-5555   Phone 2: (410) 555-5555

* Calculate Total Number of Units for this Task: [1]   Units per Interval: [Period   ▾]
[Calculate / Recalculate]   There are [1] Intervals in Time Period and [1] Total Units of Service.

Requisition Number	Estimated Cost	Units Used	Remaining	Payments	Balance
x170030	$50.00	1.0	0.0	$50.00	$0.00

[Service Delivery] [Service Costs] [Customer Report] [Non-Medicaid Report]

[Edit Task Record] [Delete Task Record] [Save and Close] [Save] [Cancel]

You will have options to include the specific Youth Need, Service Provider, and Service Name, or option to include all contained within the Plan Of Care. Carefully review your selection(s) before clicking Refresh Form:

SERVICE COSTS AND REPORTS

Youth Name : Arnold, Doug
Medicaid ID: --

Use this Form to View Costs associated with this Youth Record/Plan Of Care. Make selections in the options below and then use Refresh to see the results in the box, below. Select the Print Report Button to generate a Report of the Results.

1. Describe the need: sdafasdf
⦿ Use this Youth Need   ◯ Include All Youth Needs

OR
◯ Use All Youth Needs and Potential Crises

2. Service Provider: Judy Campbell
⦿ Use this Service Provider   ◯ Include All Service Providers

3. Service Name: Individual Counseling
⦿ Use this Service Code   ◯ Include All Service Codes

The results will appear on screen, and you have the option to print the Cost Report using the Print Icon in the upper right hand corner, or download the report to your computer as a pdf report and save.

SERVICE DELIVERY COSTS REPORT

Youth Name: Arnold, Doug

ServiceProvider_SCCOCServiceDeliveryCostsReport	1 / 1	↻ ↓ 🖨

Service Delivery Costs Report   **Printed:** 11/15/2016

Youth Name: Arnold, Doug   **Case No:** DA454545

Youth Name: Doug Arnold   **Assigned Facilitator:** Paul Bell
DOB: 11/19/2002   **Supervisor:** --
Parent/Legal Guardian: --
Current Enrollment Status: Pending   **Plan Of Care Start Date:** 09/29/2016
Current Enrollment Status Start Date: 03/22/2016

CUSTOMER REPORT

To generate a Customer Report, click the Customer Report from the Formal Strategy or Task page.

The Customer Report provides a summary of the Need, Strategy for the Need, as well as Service Provider information. Below is an example of the Customer Report:

A copy of this Customer Information Report will be printed with the POC Report.

6. OTHER SUMMARY AND TEAM DETAILS

TEAM MEMBER DETAILS
In this section, you can edit Team Member Details by clicking on the Edit hyperlink.

Plan Of Care

							Family Vision and Team Strengths
Youth Name: Arnold, Doug				**Medicaid ID:** 454545			

Version: Current (08/26/2016) ▼ (Only the Current Version can be Edited.)

6. Other Summary and Team Details

TEAM MEMBER DETAILS: (Edit) (Strengths)

Name	Team Role	Team Type	Start Date	Phone 1 (Type)	Email
Arnold, Doug	*Youth	Formal	03/22/2016	(605) 558-9956 (Home)	unknown@fidelityehr.com

Side navigation:
1 Family Vision and Team Strengths
2 Crisis Plan
3 Team Mission
4 Assessments
5 Needs, Outcomes, Strategies

This will generate a list of current Team Members. Update the list on this screen from the Edit Team List button and add, edit, or delete Team Members from there. To update the Plan of Care after a Team Member is edited or deleted, the Team Member Details are required to be updated when a red exclamation point (!) is displayed. This is a requirement even if the Configuration Settings indicate to "Automatically Update Plan of Care".

TEAM MEMBER STRENGTHS
In this section you can also add and edit the Team Member Strengths by clicking on the Strengths hyperlink.

6. Other Summary and Team Details

TEAM MEMBER DETAILS: (Edit) (Strengths)

Name	Team Role	Team Type	Start Date	Phone 1 (Type)	Email
Arnold, Doug	*Youth	Formal	03/22/2016	(605) 558-9956 (Home)	unknown@fidelityehr.com
Maxwell, Marvin	Adoptive Parent	Informal	10/07/2016	(605) 558-9956 (Home)	

From the Team Strengths window, select the name to add or edit strengths for. Once the strength details are added or updated, click the Save and Close button.

DISCHARGE SUMMARY DETAILS
The Discharge Summary can be edited from this POC category, by clicking on the Add/Edit hyperlink next to the Discharge Summary heading.

Name	Team Role	Team Type	Start Date	Phone 1 (Type)	Email
Arnold, Doug	*Youth	Formal	03/22/2016	(605) 558-9956 (Home)	unknown@fidelityehr.com
Maxwell, Marvin	Adoptive Parent	Informal	10/07/2016	(605) 558-9956 (Home)	
Maxwell, Shirley	Adoptive Parent	Informal	11/03/2016		Unknown@fidelityehr.com
Test, User	*Facilitator	Formal	10/26/2016		Unknown@fideltiyehr.com
Hyde, Mary	Sponsor	Formal	03/31/2016		unknown@wrap-tms.org
Tim, Tiny	Mentor	Informal	03/31/2016		unknown@fidelityehr.com
Vedder, Edward	Teacher	Formal	03/31/2016	(516) 628-1542 (Home)	uunnknown@fidelityehr.com

5	Needs, Outcomes, Strategies
6	Other Summary and Team Details
7	Admin Info Sheet
8	Care Coordinating Organization

SUMMARY OF SERVICES:

☐ Include Summary of Services Report in Plan of Care

DISCHARGE SUMMARY: (Add/Edit)

Discharge Date: N/A
Reason for Discharge
Discharge Notes/Needs: N/A
Linked to Adult Service and Programs?

FAMILY VOICE AND CHOICE: (Edit)

[Exit]   [View/Print]   [Save]

Enter the Discharge Date, Reason, and any Notes, and whether they were linked to Adult Services and Programs, then click the Save and Close button.

DISCHARGE SUMMARY DETAILS (POC)   [X]

Youth Name: Beaches, Bethany B. (Beth)
Medicaid ID: 00890000000000000

Start Date:	11/10/2016
	Discharge ▼
Reason:	Youth moved out of service area ▼
	Delete Check Spelling
Notes/Needs:	Youth moved to Texas
Linked to Adult Service and Programs?	Yes ▼

[Save and Close] [Cancel]

FAMILY VOICE AND CHOICE SIGNATURES

The Family Voice and Choice Signatures can be edited from this POC category, by clicking on the Edit hyperlink next to the Family Voice and Choice heading. Check applicable boxes for received Initials, and enter the Date Received, then click on the Save and Close button.

Plan Of Care

Youth Name: Arnold, Doug   **Medicaid ID:** 454545

Version: Current (08/26/2016) ▾ (Only the Current Version can be Edited.)

1	Family Vision and Team Strengths
2	Crisis Plan
3	Team Mission
4	Assessments
5	Needs, Outcomes, Strategies
6	Other Summary and Team Details
7	Admin Info Sheet
8	Care Coordinating Organization

6. Other Summary and Team Details

TEAM MEMBER DETAILS: (Edit) (Strengths)

Name	Team Role	Team Type	Start Date	Phone 1 (Type)	Email
Arnold, Doug	*Youth	Formal	03/22/2016	(605) 558-9956 (Home)	unknown@fidelityehr.com
Maxwell, Marvin	Adoptive Parent	Informal	10/07/2016	(605) 558-9956 (Home)	
Maxwell, Shirley	Adoptive Parent	Informal	11/03/2016		Unknown@fidelityehr.com
Test, User	*Facilitator	Formal	10/26/2016		Unknown@fideltiyehr.com
Hyde, Mary	Sponsor	Formal	03/31/2016		unknown@wrap-tms.org
Tim, Tiny	Mentor	Informal	03/31/2016		unknown@fidelityehr.com
Vedder, Edward	Teacher	Formal	03/31/2016	(516) 628-1542 (Home)	uunknown@fidelityehr.com

SUMMARY OF SERVICES:

☐ Include Summary of Services Report in Plan of Care

DISCHARGE SUMMARY: (Add/Edit)

Discharge Date: N/A
Reason for Discharge
Discharge Notes/Needs: N/A
Linked to Adult Service and Programs?

FAMILY VOICE AND CHOICE: (Edit)

[Exit]   [View/Print]   [Save]

FAMILY VOICE AND CHOICE SIGNATURES   [X]

Youth Name: Beaches, Bethany B. (Beth)
Medicaid ID: 00890000000000000

My family had Voice and Choice in the selection of services, providers, and interventions when possible in the Wraparound process building my family's Plan Of Care.

Parent/Guardian Initials:	☐
Date Received:	__/__/____
Youth Initials:	☐
Date Received:	__/__/____

[Save and Close]   [Save]   [Cancel]

---

7. ADMIN INFO SHEET

In this category of the POC, add and edit any information included in the Admin Info Sheet. This sheet includes Youth Details; Custody, Jurisdiction, Living Environment

information; and Language and Insurance details all populated from data in the Youth Record. To edit any of these details, click on the Update or the Go To hyperlinks. When you have finished click the Save or Save and Close button.

8. Care Coordinating Organization (CCO)

From this POC category, you can add or update the Agency, the Organization's strengths, the Facilitator's information, and the Supervisor's information. Click on the Edit hyperlink next to any of the headings to make edits.

Plan Of Care

Youth Name: Arnold, Doug

Medicaid ID: 454545

Version: Current (08/26/2016) ▾ (Only the Current Version can be Edited.)

1	Family Vision and Team Strengths
2	Crisis Plan
3	Team Mission
4	Assessments
5	Needs, Outcomes, Strategies
6	Other Summary and Team Details
7	Admin Info Sheet
8	**Care Coordinating Organization**

8. Care Coordinating Organization (CCO)

CARE COORDINATING ORGANIZATION: (Edit)

11 Fidelity EHR Demo Sandbox
3400 N. Charles Street
Baltimore , MD 21218

Primary Contact: Danielle Phillips
MA Number: --
Funding Source: --

ORGANIZATION STRENGTHS (Add/Edit)

No Strengths Found!

CARE COORDINATOR (FACILITATOR): (Edit)

Mary Schultz
3800 Medical Dr
Colorado Springs, CO 80907
(805) 556-2436 (Cell)
(805) 556-2436 (Home)

Email: Unknown@fideltiyehr.com
Assigned Date: 10/26/2016

CARE COORDINATOR (SUPERVISOR): (Edit)

Beracah Tester

Email: anbalagan@beracahsoft.com

For Care Coordinating Agency, Care Coordinator (Facilitator), and Care Coordinator (Supervisor) you have the option of editing on screen while in the POC, or clicking Go To User Record to make your edits. Once edits are completed, click on the Save and Close button.

EDIT CARE COORDINATING ORGANIZATION DETAILS (POC FORM)   (X)

Youth Name: Arnold, Doug
Medicaid ID: 454545

[Update from Organization]   [Go to Organization Record]

Organization Name:	11 Fidelity EHR Demo Sandb
Primary Contact:	Danielle Phillips
Email:	unknown@fidelityehr.com
Street 1:	3400 N. Charles Street
Street 2:	
City:	Baltimore
State / Zip Code:	MD ▾ / 21218-___
Phone 1:	(___) ___-____ Select ▾
Phone 2::	(___) ___-____ Select ▾
MA Number:	
Funding Source:	Select ▾

[Save and Close] [Save] [Cancel]

SYNCING DATA BETWEEN THE POC AND YOUTH RECORD

If your Administrator has enable the Configuration Setting *Prompt User to Update Plan of Care,* once a POC has been added to a Youth Record, any changes to data made in the Youth Record or in the POC will generate a message asking if you would like to update the POC or Youth Record with the changes you've just made. If you click on Yes, the data (excluding team member updates) will be synced between the POC and Youth Record. If a team member was edited or removed, a manual update is required via the Other Summary and Team Details tab.
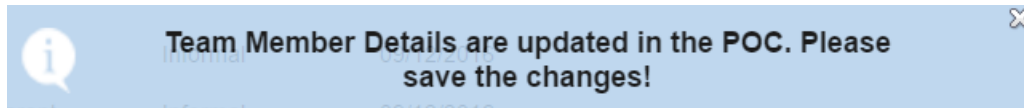
If you click on No, while in the POC you will see a red exclamation point next to any data that has been changed in the Youth Record but not in the POC.
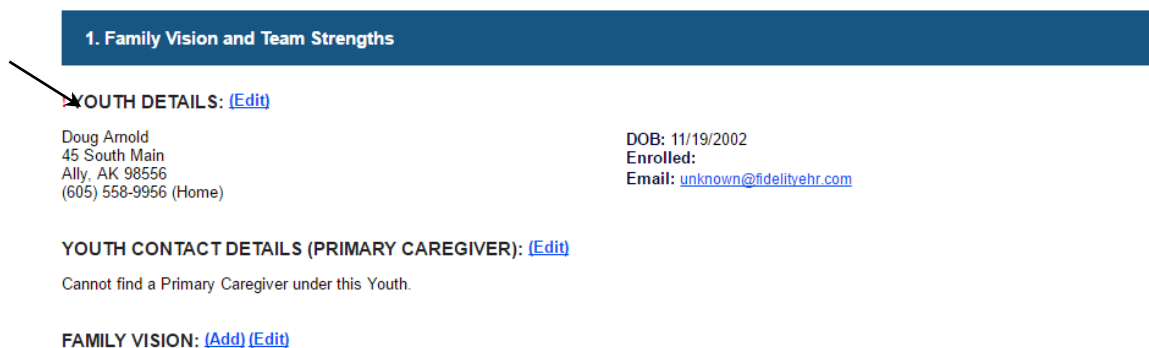
To sync the information from within the POC, click on the Edit hyperlink next to the information with the red exclamation point (**!**). You can then click on the Update from Demographics (or Update from appropriate field within Youth Record). This will sync the data from the Youth Record to the POC. The other option is Export to Demographics, which will sync the POC data to the Youth Record changing whatever is currently in the Youth Record.

EDITING/UPDATING AN EXISTING POC

While in a Youth Record, select the Plan Of Care Tab. Find the Active POC and click on the Update hyperlink.

The Plan of Care update page will open and display a list of all versions of the current POC. To edit, click on the Update hyperlink for the Current Version of the POC. Note the Status key for information about which POCs can be edited.

Plan Of Care Update Page

Start Date of this POC: 12/20/2015				Last Updated: 11/01/2016		Closed Date:		

Is this the first Plan Of Care since enrolling in CME? Yes

Version	CFT Date	Start/Create	Type	Last Updated	Status*	Report	Signature Actions		
Current	12/20/2015	12/20/2015	Initial CFT	11/01/2016	Active	View/Print	Signature Pad Email Manual	Edit	
Copy 1	12/20/2015	07/18/2016	Initial CFT	08/11/2016	Emailed	View/Print	Signature Pad Email Manual	Edit	Delete

Create New Copy

Creating a new copy will create a duplicate of the current Plan Of Care document and include it in the list above. The POC is identified by the next available copy number. The create date will be today's date. Additional edits made in the Current version will not be reflected in any prior copy. Each copy can be viewed or printed, and signatures can be collected.

*Status Key:
  Active: Current open Plan Of Care.
  Duplicate: Static, point-in-time copy of Plan of Care.
  Closed: Plan of Care has ended and can no longer be edited.
  E.Sign x/x: Plan Of Care is being signed. #Received/#needed. Cannot be edited during this process.
  Signed: All signatures received for Plan Of Care. Plan Of Care can no longer be edited.
  Backup: Current version is being signed. Restore to continue making edits in Plan Of Care.

Close-Out Plan Of Care   **Exit Page**

The POC will open on screen, and you can navigate to edit each category by selecting it from the POC Menu on the right. Click the Save button on each screen as you make edits.

Plan Of Care

Youth Name: Austen, Kate   Medicaid ID: N000000000

Version: Current (12/20/2015) ▼ (Only the Current Version can be Edited.)

About this Plan Of Care:
Start Date: 12/20/2015   Last Updated: 11/01/2016   Closed Date:

About this Version of the Plan Of Care:
Type: ● Initial CFT ○ CFT Review ○ Transition CFT ○ Discharge   CFT Meeting Leading to POC: 12/20/2015

1. Family Vision and Team Strengths

YOUTH DETAILS: (Edit)

Kate Austen
6986 Broad Private
Portland, OR 97223
(503) 140-1017 (Cell)

DOB: 08/03/2002
Enrolled: 02/26/2016
Email: unknown@wrap-tms.org

YOUTH CONTACT DETAILS (PRIMARY CAREGIVER): (Edit)

Jackie Austen
6986 Broad Private
Portland, OR 97223
(503) 777-8899 (Cell)

Relationship: Sibling
Email:

FAMILY VISION: (Add) (Edit)

Kate and Jackie want to live together without conflict as they establish their "new" family. (2/25/2016 5:36:29 PM by Phillips, Danielle)

TEAM STRENGTHS: (Add/Edit)

Austen, Kate

Exit   **View/Print**   **Save**

POC Menu:
1 Family Vision and Team Strengths
2 Crisis Plan
3 Team Mission
4 Assessments
5 Needs, Outcomes, Strategies
6 Other Summary and Team Details
7 Admin Info Sheet
8 Care Coordinating Organization

VIEW/PRINT POC

The View/Print option allows the Plan of Care to be viewed in a Print Preview

format. From this view, the Plan of Care can then be printed or saved to a specified location a computer as desired. The Plan of Care can be printed from multiple places in the system including: The Plan of Care tab, the Plan of Care Update Page and from within the Plan of Care itself. Each place offers the same options:

- **<u>Generate Full POC</u>** - includes all (current and past) information on the POC and all (current and past) Customer Reports.
- **<u>Generate Brief POC –</u>** Only includes current information for POC elements and the Customer Report Service Information (ones that have no previous end dates). In addition, it also excludes that Admin Info Sheet
- **<u>Ability to Attach an Addendum</u>** – attach a document from the Document Tab of the same Youth Record to print or save with the POC.

PRINTING FROM THE PLAN OF CARE TAB

1. Access the Plan of Care tab in the Youth Record
2. Find the POC you would like to view on screen or print.
3. Click on the View/Print hyperlink in the Report column on the same line as the POC to view or print.

Plan Of Care Update Page

						Report	Signature Actions		

Start Date of this POC: 12/20/2015   Last Updated: 11/01/2016   Closed Date:

Is this the first Plan Of Care since enrolling in CME? Yes

Version	CFT Date	Start/Create	Type	Last Updated	Status*	Report	Signature Actions		
Current	12/20/2015	12/20/2015	Initial CFT	11/01/2016	Active	View/Print	Signature Pad Email Manual	Edit	
Copy 1	12/20/2015	07/18/2016	Initial CFT	08/11/2016	Emailed	View/Print	Signature Pad Email Manual	Edit	Delete

Create New Copy

Creating a new copy will create a duplicate of the current Plan Of Care document and include it in the list above. The POC is identified by the next available copy number. The create date will be today's date. Additional edits made in the Current version will not be reflected in any prior copy. Each copy can be viewed or printed, and signatures can be collected.

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   Backup: Current version is being signed. Restore to continue making edits in Plan Of Care.

Close-Out Plan Of Care   **Exit Page**

4. From the print option window, select which option of the POC to print: Full or Brief.

Plan Of Care Report

Would you like to view and then print a copy of the POC Report?
Select an option below, then the 'View/Print' button to preview.
☑ **Full POC** (All information including all Customer Reports)

☐ **Brief POC** (Includes Customer Reports for active Services;
    Active Needs, Strategies, Tasks, And Action Steps. Does
        not include Assessments or Admin info Sheet.)

To attach an addendum to the POC:
Choose File
    No file chosen

View/Print the POC   Cancel

5. Click View/Print the POC to generate the Full or Brief POC.
6. The Plan of Care Report window will show the POC information.

7. To save the document, Click the ⬇ in the upper right corner of the window, below the Youth Name.

8. To print the document. Click the 🖨 in the upper right corner of the window, below the Youth Name.

9. Click the X to return to the Plan of Care Tab.

PRINTING FROM THE PLAN OF CARE UPDATE PAGE

1. Access the Plan of Care Update Page by clicking the Update hyperlink for the desired POC to update or by clicking Exit if the desired POC is currently open.

2. Find the POC you would like to view on screen or print.

3. Click on the View/Print hyperlink in the Report column on the same line as the POC to view or print.

Plan Of Care Update Page

Start Date of this POC: 11/01/2016   Last Updated: 11/11/2016   Closed Date:

Is this the first Plan Of Care since enrolling in CME? Yes

Version	CFT Date	Start/Create	Type	Last Updated	Status*	Report	Signature Actions	Edit
Current	11/11/2016	11/01/2016	Initial CFT	11/11/2016	Active	View/Print	Signature Pad Email Manual	Edit

Create New Copy

Creating a new copy will create a duplicate of the current Plan Of Care document and include it in the list above. The POC is identified by the next available copy number. The create date will be today's date. Additional edits made in the Current version will not be reflected in any prior copy. Each copy can be viewed or printed, and signatures can be collected.

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  Backup: Current version is being signed. Restore to continue making edits in Plan Of Care.

Close-Out Plan Of Care   **Exit Page**

4. From the print option window, select which option of the POC to print: Full or Brief.

5. Click [View/Print the POC] to generate the Full or Brief POC.
6. The Plan of Care Report window will show the POC information.
7. To save the document, Click the [↓] in the upper right corner of the window, below the Youth Name.
8. To print the document. Click the [🖨] in the upper right corner of the window, below the Youth Name.
9. Click the [X] to return to the Plan of Care Update Page.

PRINTING FROM THE PLAN OF CARE

1. From a Plan of Care that is already open and being edited, Click **View/Print** .

2. From the print option window, select which option of the POC to print: Full or Brief.

Plan Of Care Report

Would you like to view and then print a copy of the POC Report? Select an option below, then the 'View/Print' button to preview.

☑ **Full POC** (All information including all Customer Reports)

☐ **Brief POC** (Includes Customer Reports for active Services;
   Active Needs, Strategies, Tasks, And Action Steps. Does
   not include Assessments or Admin info Sheet.)

To attach an addendum to the POC:
[Choose File]
No file chosen

[View/Print the POC] [Cancel]

3. Click [View/Print the POC] to generate the Full or Brief POC.
4. The Plan of Care Report window will show the POC information.
5. To save the document, Click the ⬇ in the upper right corner of the window, below the Youth Name.
6. To print the document. Click the 🖶 in the upper right corner of the window, below the Youth Name.
7. Click the [x] to return to the Plan of Care Report Window.
8. To Close the Plan of Care Report Window:
   a. Click [Return to POC] to close and return to the POC
   b. Click [Exit the POC] to close, exit the POC, and return to the Plan of Care Tab in the Youth Record.

CLOSE-OUT A POC

Users with appropriate permissions can close the POC by clicking the Close-Out Plan of Care button (access from the Update hyperlink).

Plan Of Care Update Page

Start Date of this POC: 11/01/2016   Last Updated: 11/11/2016   Closed Date:

Is this the first Plan Of Care since enrolling in CME? Yes

Version	CFT Date	Start/Create	Type	Last Updated	Status*	Report	Signature Actions		
Current	11/11/2016	11/01/2016	Initial CFT	11/11/2016	Active	View/Print	Signature Pad Email Manual	Edit	

Create New Copy

Creating a new copy will create a duplicate of the current Plan Of Care document and include it in the list above. The POC is identified by the next available copy number. The create date will be today's date. Additional edits made in the Current version will not be reflected in any prior copy. Each copy can be viewed or printed, and signatures can be collected.

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   Closed: Plan of Care has ended and can no longer be edited.
   E.Sign x/x: Plan Of Care is being signed. #Received/#needed. Cannot be edited during this process.
   Signed: All signatures received for Plan Of Care. Plan Of Care can no longer be edited.
   Backup: Current version is being signed. Restore to continue making edits in Plan Of Care.

Close-Out Plan Of Care   **Exit Page**

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A message will generate, asking if you are sure you would like to close the selected POC.

Are you sure about closing this POC?
If you proceed with closing, the POC
cannot be recovered or reopened.

Yes   **No**

DELETE POC

Users with appropriate permissions can delete the existing POC by clicking on the Delete hyperlink. A message will be generated asking if you are sure you would like to delete the POC selected. Deleting a POC will delete all information entered specific to the POC within the Youth Record.

Plan Of Care Update Page

Start Date of this POC: 12/20/2015   Last Updated: 11/01/2016   Closed Date:

Is this the first Plan Of Care since enrolling in CME? Yes

Version	CFT Date	Start/Create	Type	Last Updated	Status*	Report	Signature Actions			
Current	12/20/2015	12/20/2015	Initial CFT	11/01/2016	Active	View/Print	Signature Pad Email Manual	Edit		
Copy 1	12/20/2015	07/18/2016	Initial CFT	08/11/2016	Emailed	View/Print	Signature Pad Email Manual	Edit	Delete	

Create New Copy

Creating a new copy will create a duplicate of the current Plan Of Care document and include it in the list above. The POC is identified by the next available copy number. The create date will be today's date. Additional edits made in the Current version will not be reflected in any prior copy. Each copy can be viewed or printed, and signatures can be collected.

*Status Key:
   Active: Current open Plan Of Care.
   Duplicate: Static, point-in-time copy of Plan of Care.
   Closed: Plan of Care has ended and can no longer be edited.
   E.Sign x/x: Plan Of Care is being signed. #Received/#needed. Cannot be edited during this process.
   Signed: All signatures received for Plan Of Care. Plan Of Care can no longer be edited.
   Backup: Current version is being signed. Restore to continue making edits in Plan Of Care.

Close-Out Plan Of Care   **Exit Page**

SIGNATURE STATUS FOR A POC

EMAIL POC FOR SIGNATURES

While in a Youth Record, select the Plan Of Care Tab. Find the POC that needs to be emailed for signature, and click on the Email hyperlink.

From the Plan of Care Update Page, click on Create New Copy. This will create a new copy of the Current POC to email out for signatures, while still allowing you to edit the Current POC. A Copy is a locked duplicate of the current POC which is not editable, but can be printed or emailed.

Click on the Email hyperlink for the new POC Copy you've just created. The Signature Status window will open, where you can see the Signature information for each Team Member involved.

Plan Of Care Signature Emails

X

	POC: Current (06/02/2016)	Type: Initial CFT	Youth: Arnold, Claire		

signature pad

Name	Role	Signature Status	Email Status	Date Sent	Email Actions
Arnold, Claire	*Youth	Unsigned	Not Sent		
Facilitator, Amanda	*Facilitator	Unsigned	Not Sent		

Close

To send an email for an electronic Signature, click on the Not Sent hyperlink next to the Team Member Role. This will prepare the system to send an email.

Preparing to Create Email for Electronic Signature...

POC: Current (06/02/2016) **Type:** Initial CFT **Youth:** Arnold, Claire
Target: Facilitator **Name:** Facilitator, Amanda **Email:** unknown@fidelityehr.com

Include a Copy of the POC as an Attachment? ○ Yes ● No

Create Email Cancel

After selecting **Yes** or **No** to include the attachment, click Create Email. From the Compose Email screen, you can enter additional email addresses, edit the Subject, and enter a personalized message. Click the Send Email button to generate the email.

Compose Email   **X**

From: Admin Admin (no-reply@fidelityehr.com)
To: unknown@fidelityehr.com
CC:
Subject: Signature Needed for Plan of Care
Attached: Arnold, Claire11/4/2016 6:48:20 PM.pdf
Enter your message below:

Send Email   **Cancel**

EMAIL RECIPIENT FOR POC SIGNATURE

When a team member receives an email requesting an electronic signature (for the POC, for example), they are provided a link in the email that takes them directly to the item for review. The email will also contain a passcode that the recipient will enter once at that URL provided. Below is an example of what that portion of the email may look like:

This is a system-generated email triggered by an Event or Activity in the system where this email address is associated with a email by mistake, please contact the System Administrator at unknown@fidelityehr.com immediately, and destroy this ema information contained herein is protected under Federal Confidentiality Laws and the possession of it, without proper Conse Criminal Penalties.

11 Fidelity EHR Demo Sandbox

3400 N. Charles Street
Baltimore, MD, 21218

Dear Amanda Facilitator,

You are receiving this email in regards to a meeting to be held next Thursday.

Thank you,

To Review, Comment on, or Sign the POC, please use the following URL and Passcode:

URL : https://my.fidelityehr.com/SignatureHome.aspx?T=POCPremium&TId=52411&P=POC&Y=55228&S=5

PASSCODE : 3bu8otgv

If you have a FidelityEHR User ID, you can also log into the client portal to Review, Comment on, or Sign the POC.

Regards,

FidelityEHR

The recipient clicks on the link, and is brought to the Fidelity_{EHR} passcode page where they enter the passcode provided in the email:

Please Enter the Passcode!

Please enter the passcode present in your email here to view the document!

Enter Code Here:

Submit

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Terms of Use
Privacy Notice
HIPAA Security Policy
FidelityEHR.com

(The recipient can copy and paste the passcode from the email into the passcode field).

Once the passcode has been submitted, the recipient is brought to the POC for review. Along the bottom, there are a few choices:

Plan Of Care Report   Printed: 11/04/2016
Youth Name: Arnold, Claire   Case No: --

About the Plan Of Care

Start Date: 06/02/2016   Last Date Updated: 11/04/2016

Version: Current   Status: Emailed   Type: Initial CFT   Date of CFT: 10/06/2016

About the Youth

Address: 1818 North Lewis River   Details: DOB: 10/15/2003
           Fields, AK, 98865   Enrolled: 03/22/2016
           (701) 552-6655 (Home)   Email: --

About the Parent/Guardian

Name: Details:
                                                       Email: --
Address:

Team Strengths
No Team Member records were found!

Team Abilities
No Team Member records were found!

Choose Option: ☑ Accept & Sign Document ☐ Post Comment ☐ Reject Document   [Submit] [Close]

To sign the POC, check the box "Accept & Sign Document", then click the Submit button. You will be brought to the "signature pad" option, which will look like this:
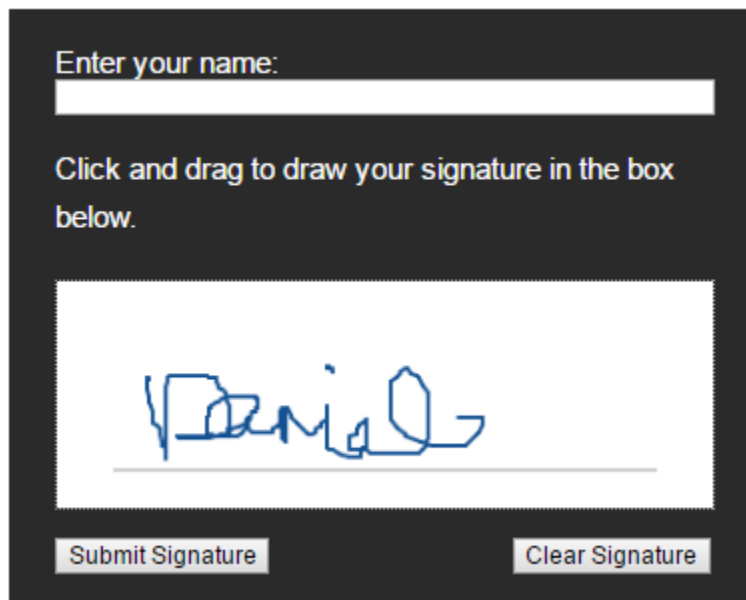
Enter your name:

Click and drag to draw your signature in the box below.

[Submit Signature]   [Clear Signature]

Type your name. Then, using your mouse, click and drag to draw your signature in

the large white box. (The signature box is touch-screen-friendly so you can use your fingertip to "sign" your name in the larger white box if on a mobile device or touch screen system). If you do not like how it turns out, click on the "Clear Signature" button and it will erase what you have already drawn, and you can re-sign. If you do like what you've drawn, click the "Submit Signature" button. After clicking the "Submit Signature" button, the system will show you a Preview, and you'll have one more chance to review the drawn signature. If you like it, you will click the "Continue" button.

Once submitted, Fidelity_{EHR} will provide a message on screen stating the signature has been submitted successfully. The recipient will also receive a confirmation email, stating that the POC was signed.

MANUAL POC SIGNATURE

From the Signature Status window, find the Role of the Team Member you would like to record a Manual signature for, and click on the Sign hyperlink.

Plan Of Care Update Page

Start Date of this POC: 12/20/2015   Last Updated: 11/01/2016   Closed Date:

Is this the first Plan Of Care since enrolling in CME? Yes

Version	CFT Date	Start/Create	Type	Last Updated	Status*	Report	Signature Actions			
Current	12/20/2015	12/20/2015	Initial CFT	11/01/2016	Active	View/Print	Signature Pad Email Manual		Edit	
Copy 1	12/20/2015	07/18/2016	Initial CFT	08/11/2016	Emailed	View/Print	Signature Pad Email Manual		Edit	Delete

Create New Copy

Creating a new copy will create a duplicate of the current Plan Of Care document and include it in the list above. The POC is identified by the next available copy number. The create date will be today's date. Additional edits made in the Current version will not be reflected in any prior copy. Each copy can be viewed or printed, and signatures can be collected.

*Status Key:
  Active: Current open Plan Of Care.
  Duplicate: Static, point-in-time copy of Plan of Care.
  Closed: Plan of Care has ended and can no longer be edited.
  E.Sign x/x: Plan Of Care is being signed. #Received/#needed. Cannot be edited during this process.
  Signed: All signatures received for Plan Of Care. Plan Of Care can no longer be edited.
  Backup: Current version is being signed. Restore to continue making edits in Plan Of Care.

Close-Out Plan Of Care   **Exit Page**

Plan Of Care Manual Signature

X

POC: Current (06/02/2016)   Type: Initial CFT   Youth: Arnold, Claire

signature pad

Name	Role	Signature Status	Manual	Manual Signature Date	Manual Signature Action
Arnold, Claire	*Youth	Unsigned	Sign		
Facilitator, Amanda	*Facilitator	Unsigned			

Close

Enter the date of the Manual signature, and click the Save button.

Manual Signature for POC

Date Signature Received:

__/__/____

Save   **Cancel**

CRITICAL INCIDENTS

The Critical Incidents tab allows for the documentation of any events or situations that jeopardize the health or safety of the youth, family and/or team members. Some examples include: runaway events, medical events and school events. The Critical Incidents tab is accessed within the Youth Record on the Critical Incidents Tab. The ability to view, add, edit or delete Critical Incidents can be added or altered by an Administrator in the Administrative Tool Youth Record permissions. Reports can also be generated for Critical Incident data fields in Report Builder.

When adding an incident, there are required fields that must be completed in order to save the information:

- **Date of Incident** – Date that the event or situation occurred
- **Critical Incident Code/Description** – This describes the overall type of event or situation. *For a customized list, items can be added by an Administrator in the Administration Tool Picklist Editor (CriticalIncidentCodeDescription).*
- **Is this the Initial Incident?** - Indicates if this is the first occurrence of this situation or event.

ADD A NEW CRITICAL INCIDENT

1. Access the appropriate Youth Record and click on the Critical Incidents Tab.
2. Click [Add] .
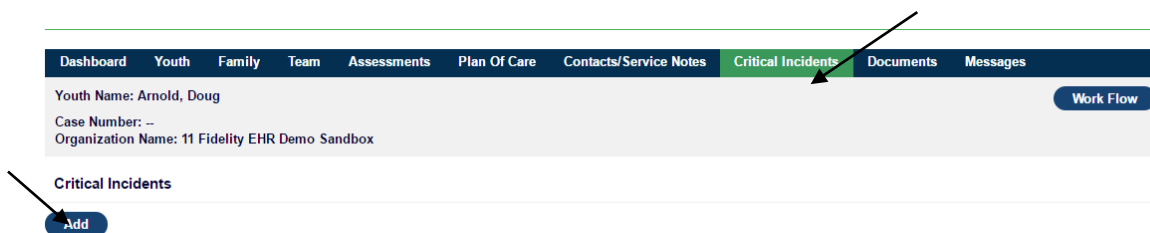
3. Complete the required fields that have an (*) next to the description.
4. The Date Entered field will default to today's date.
5. Click (Add/Edit) for the Critical Incident Details to add detailed information about the event or situation.

ADD CRITICAL INCIDENT   X

Youth Name: Arnold, Doug
Case Number: --
Medicaid ID: 454545

* Date of Incident: __/__/____

Date Entered: 11/04/2016

* Critical Incident Code/Description: Select ▼

* Is this the Initial Incident?   Select ▼

Critical Incident Details: (Add/Edit)

[   ]

Save   Save and Close   Cancel

Critical Incident Details:

Sam was involved in another incident in school. He believed that the other student was stealing items from his gym locker.
No medical attention was required and Sam is receiving In-School Suspension for 2 days.

Add   Cancel

6. Once the details have been typed in the Critical Incident Details, click **Add** . The information will now be displayed in the Critical Incident Details area on the Add Critical Incident window. It will also contain the date and time entered as well as the name of the user who entered the information.

7. To save the information that has been entered without closing the Add Critical Incident window, click **Save** or skip to step 8.

8. To close the Add Clinical Incident Window:

   a. Click **Save and Close** to save the information that has been entered and close the Add Critical Incident window

OR

b. Click or to discard the information that has been entered and close the Add Critical Incident window *without* saving any information.

Once the information is saved and the Add Critical Incident window is closed, the incident will now appear on the Critical Incidents tab. Any additional incidents will appear in the list in ascending order by Critical Incident Date. To view the list in reverse order, click on the **Critical Incident Date** column heading. To view the list by Initial Incident/Code Description order, click on the **Initial Incident/Code Description** column heading.
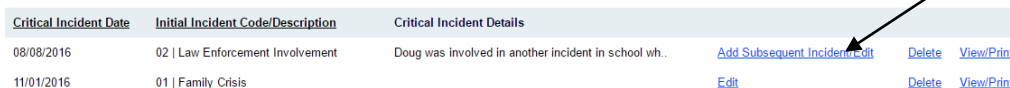
Critical Incident Date	Initial Incident Code/Description	Critical Incident Details			
08/08/2016	02	Law Enforcement Involvement	Doug was involved in another incident in school wh..	Add Subsequent Incident/Edit	Delete	View/Print
11/01/2016	01	Family Crisis		Edit	Delete	View/Print

EDIT A CRITICAL INCIDENT

Existing incidents may be edited to add or change information (i.e. to add details gathered by another team member about the incident). To edit an existing Critical Incident:

1. Access the appropriate Youth Record and click on the Critical Incidents Tab
2. Click Add Subsequent Incident/Edit that is located on the same line as the incident to edit.

Critical Incident Date	Initial Incident Code/Description	Critical Incident Details			
08/08/2016	02	Law Enforcement Involvement	Doug was involved in another incident in school wh..	Add Subsequent Incident/Edit	Delete	View/Print
11/01/2016	01	Family Crisis		Edit	Delete	View/Print

3. Click Edit on the same line as the incident to edit in the Add Subsequent Incident/Edit Critical Incident window. This moves the information to the fields at the bottom of the window to allow them to be changed or added.

4. Add or change information in those fields. *All required fields are indicated by a (*) next to the description and need to completed in order to save the incident.*
5. Click (Add/Edit) in Critical Incident Details to add or edit detailed information about the event or situation.
    c. **Add New Details**
        i.   Type the information into the Critical Incident Details window
        ii. Click Add . The information will now be displayed in the Critical Incident Details area on the Add Subsequent Incident/Edit Critical Incident window.   It will also contain the date and time entered as well as the name of the user who entered the information.
    d. **Edit Existing Details**
        i.   Click Edit on the same line as the Note to be edited on the Critical Incident Details window.

ADD SUBSEQUENT INCIDENT/EDIT CRITICAL INCIDENT

Youth Name: Arnold, Doug
Case Number: --
Medicaid ID: 454545

Critical Incident Date	Initial Incident Code/Description	Critical Incident Details	
Critical Incident Date 08/08/2016	Initial Incident Code/Description 02 | Law Enforcement Involvement	Critical Incident Details Doug was involved in another incident in school wh..	Edit

*Date of Incident: 08/08/2016

Date Entered: 11/04/2016

*Critical Incident Code/Description: 02 | Law Enforcement Involver ▾

*Is this the Initial Incident? Yes ▾

Critical Incident Details: (Add/Edit)

> Doug was involved in another incident in school where he thought a student was stealing from his locker. He assaulted the student in the hallway and the police were called. No medical attention was required.(11/4/2016 12:35:45 PM) by Admin, Admin;

[Save] [Save and Close] [Cancel]

ii. Edit the information as necessary and then click [Save and Close]. The information will now be displayed in the Critical Incident Details area on the Add Subsequent Incident/Edit Critical Incident window. It will also contain the date and time of the edit as well as the name of the user who edited the information.

Critical Incident Date	Initial Incident Code/Description	Critical Incident Details			
08/08/2016	02 | Law Enforcement Involvement	Doug was involved in another incident in school wh..	Add Subsequent Incident/Edit	Delete	View/Print
11/01/2016	01 | Family Crisis		Edit	Delete	View/Print

e. Delete Existing Details

i. Click Delete in the same line as the Note to be deleted on the Critical Incident Details window.

ii. Click [Yes] to delete the Critical Incident Details.

Are you sure about deleting this Critical Incident Record? Initial Incident and all Subsequent Incidents will be removed permanently!

[Yes] [No]

9. To save the information that has been entered without closing the Add Subsequent

Incident/Edit Critical Incident window, click [Save] or skip to step 10.

10. To close the Add Subsequent Incident/Edit Critical Incident window:

   a. Click [Save and Close] to save the information that has been entered and close the Add Subsequent Incident/Edit Critical Incident window
   OR
   b. Click [Cancel] or [X] to discard the information that has been entered and close the Add Subsequent Incident/Edit Critical Incident window *without* saving any information.

ADD A SUBSEQUENT INCIDENT TO A CRITICAL INCIDENT

Existing incidents may require additional related incidents to be added. To add a subsequent incident to an existing Critical Incident:

1. Access the appropriate Youth Record and click on the Critical Incidents Tab
2. Click Add Subsequent Incident/Edit on the same line as the incident that requires the subsequent incident to be added.

Critical Incident Date	Initial Incident Code/Description	Critical Incident Details			
08/08/2016	02	Law Enforcement Involvement	Doug was involved in another incident in school wh..	Add Subsequent Incident/Edit	Delete	View/Print
11/01/2016	01	Family Crisis		Edit	Delete	View/Print

3. At the bottom of the Add Subsequent Incident/Edit Critical Incident window, are fields available for entering information about the subsequent incident.

ADD SUBSEQUENT INCIDENT/EDIT CRITICAL INCIDENT			X

Youth Name: Arnold, Doug
Case Number: --
Medicaid ID: 454545

Critical Incident Date	Initial Incident Code/Description	Critical Incident Details	
Critical Incident Date 08/08/2016	Initial Incident Code/Description 02 | Law Enforcement Involvement	Critical Incident Details Doug was involved in another incident in school wh..	Edit

*Date of Incident:	__/__/____
Date Entered:	11/08/2016
*Critical Incident Code/Description:	Select ▾
*Is this the Initial Incident?	No ▾
Critical Incident Details: (Add/Edit)	

[Save] [Save and Close] [Cancel]

4. Complete the required fields that have an (*) next to the description. *The **Is this the Initial Incident** field will default to "No" and cannot be changed since it is a subsequent incident.*

5. The **Date Entered** field will default to today's date.

6. Click (Add/Edit) in Critical Incident Details to add detailed information about the event or situation.

7. Once the details have been typed in the Critical Incident Details, click [Save] . The information will now be displayed in the Critical Incident Details area on the Add Subsequent Incident/Edit Critical Incident window and will contain the date and time entered as well as the name of the user who entered the information.

8. To save the information that has been entered without closing the Add Subsequent Incident/Edit Critical Incident window, click [Save] or [Save and Close] , or skip to step 9.

9. To close the Add Subsequent Incident/Edit Critical Incident window:

    a. Click [Save and Close] to save the information that has been entered and close the Add Subsequent Incident/Edit Critical Incident window
       OR
    b. Click [Cancel] or [X] to discard the information that has been entered and
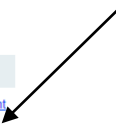
close the Add Subsequent Incident/Edit Critical Incident window *without* saving any information.

DELETE A CRITICAL INCIDENT

With the appropriate user permissions, a Critical Incident can be deleted from the Critical Incidents Tab. To delete the entire record (including subsequent records) for a Critical Incident:

1. Access the appropriate Youth Record and click on the Critical Incidents Tab
2. Click Delete located on the same line as the incident to delete.

Critical Incident Date	Initial Incident Code/Description	Critical Incident Details			
08/08/2016	02	Law Enforcement Involvement	Doug was involved in another incident in school wh..	Add Subsequent Incident/Edit	Delete	View/Print
11/01/2016	01	Family Crisis		Edit	Delete	View/Print

3. Click yes to *permanently* delete the subsequent Critical Incident. This cannot be undone.

Are you sure about deleting this Critical Incident Record? Initial Incident and all Subsequent Incidents will be removed permanently!
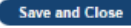
Yes No

DELETE A SUBSEQUENT INCIDENT

With the appropriate user permissions, a subsequent incident can be deleted from the record of the initial Critical Incident. To delete the record of a subsequent incident:

1. Access the appropriate Youth Record and click on the Critical Incidents Tab
2. Click Add Subsequent Incident/Edit on the same line as the Initial incident that has the subsequent incident to delete.

3. Click Delete on the same line as the subsequent incident to be deleted in the Add Subsequent Incident/Edit Critical Incident window. *The initial Critical Incident does not have a delete option on this window.*

Critical Incident Date	Initial Incident Code/Description	Critical Incident Details			
08/08/2016	02	Law Enforcement Involvement	Doug was involved in another incident in school wh..	Add Subsequent Incident/Edit	Delete	View/Print
11/01/2016	01	Family Crisis		Edit	Delete	View/Print

4. Click Yes to *permanently* delete the subsequent Critical Incident Details. This cannot be undone.

5. To save the information that has been entered without closing the Add Subsequent Incident/Edit Critical Incident window, click **Save** or skip to step 6.

6. To close the Add Subsequent Incident/Edit Critical Incident window:

   a. Click **Save and Close** to save the information that has been entered and close the Add Subsequent Incident/Edit Critical Incident window
      OR
   b. Click **Cancel** or **X** to discard the information that has been entered and close the Add Subsequent Incident/Edit Critical Incident window *without* saving any information.

VIEW OR PRINT A CRITICAL INCIDENT

With the appropriate user permissions, a Critical Incident can be viewed or printed from the Critical Incidents Tab. To view/print the entire record (including subsequent records) for a Critical Incident:

1. Access the appropriate Youth Record and click on the Critical Incidents Tab
2. Click View/Print on the same line as the incident to view and /or print.

Critical Incident Date	Initial Incident Code/Description	Critical Incident Details			
08/08/2016	02	Law Enforcement Involvement	Doug was involved in another incident in school wh..	Add Subsequent Incident/Edit	Delete	View/Print
11/01/2016	01	Family Crisis		Edit	Delete	View/Print

3. The View Critical Incident Report window will show information for the Initial Incident as well as any Subsequent Incidents.

4. To save the document, Click the ⬇ in the upper right corner of the window, below the Youth Name.

5. To print the document. Click the ⬛ in the upper right corner of the window, below the Youth Name.

6. Click the ⬛ to return to the Critical Incidents Tab.

CONTACTS/SERVICE NOTES/NOTES

The Contacts tab is where any communication with or services for the Youth, Family or other Team Members between team meetings is documented. Based on the configuration setup, the tab in the Youth Record will show one of two options:

- **Contacts/Notes** – indicates that only non-billable progress notes will be entered.
- **Contacts/Service Notes** – indicates that non-billable progress notes or billable service notes can be entered.

board	Youth	Family	Team	Assessments	Plan Of Care	Contacts/Service Notes	Critical Incidents	Documents

Select the Contact/Service Notes tab, and fill in all required data as marked with a red asterisk—including if it is a Billable Contact. The question "Is this a Billable Contact?" determines whether service data is included in the record. Service Note Date of Contact first allowable Date is either the Youth Date of Birth, or the Youth Pending Status Date, whichever is earlier. This date cannot be a date in the future.

ADD/EDIT CONTACT/SERVICE NOTE   X

Youth Name: Arnold, Doug
Case Number: --
Medicaid ID: 454545

Service Note Id:	[ ]
*Date of Contact:	__/__/____
*Person making contact:	Select ▼

Team Members: Select All None

*Person(s) contacted:
- ☐ Hyde, Mary (Sponsor)
- ☐ Vedder, Edward (Teacher)
- ☐ Tim, Tiny (Mentor)
- ☐ Maxwell, Marvin (Adoptive Parent)
- ☐ Schultz, Mary (*Facilitator)
- ☐ Maxwell, Shirley (Adoptive Parent)
- ☐ Arnold, Doug (Youth)
- ☐ Other

Others:
[   ]

*Is this a Formal Contact?	○ Yes ◉ No
Start Time	Select ▼ Select ▼
*Type of contact	Select ▼
*Setting for Contact	Select ▼
*Length of Contact	Select ▼ **Minutes**
Travel Time	Select ▼ **Minutes**

Click Save and Close once you have entered all required data. In the Add/Edit Service for Billable Contact form, select MTCM. Then select values from the Select Service and Select Purpose pick lists and click Save and Close. These values will determine which data will be populated in the shaded area of the Contact Record.

ADD/EDIT SERVICE FOR BILLABLE CONTACT   X

Youth Name: Arnold, Doug

                              ◉ MTCM   ○ RBHS
* Select Service: Select   ▼
* Select Purpose: Select   ▼

Service Unit: --
Unit Rate: --
Procedure Code: --
Notes: --
Limitations: --

Save and Close   Save   Cancel

Once Billable Contact information has been entered for a Contact/Service Note, it can be edited by using the Edit Billable button at the bottom of the Contact/Service Note screen.

Reason for Denial:

Name: _____   Title: _____   Date Denied:
                                                    _____
                                                    Date will be populated upon denial of amendment
                                                    Save Denial   Delete Denial

Amendment Status: _____

There are no contact/Notes details present!

Edit Billable   Save   Save and Close   Cancel

Once a Contact/Service Note has been added to the Youth Record, the details will appear in a listing on the Contact/Service Note tab. From here, the note can be edited, deleted, or viewed/printed by clicking on the appropriate hyperlink. When

the Date Contact for a Contact /Service Note is greater than 7 days from the current date, the Contact /Service Note will no longer be editable. For example, if the Date Created is 7/23/16, the Contact/Service Note should stop being editable on 7/31/16. Only users with permissions to Edit Locked Contact Records or Edit Locked Billable Contact (Service Note) will be able to make edits after the Contact/Service Note is locked.

The Contacts/Service Notes tab also enables users to search the notes by a number, word or phrase by using the Search Service Note field. The search will look for data contained in the following fields of the Contact/Service Notes: Contact Type, Contact Details, Date Created, Billable Service Name, Service Note ID, Person making Contact, Persons contacted and Others (when applicable), Follow up Steps, and Setting for Contact.

Selecting the Print hyperlink generates a Report on screen that details all information you entered for the Contact/Service Note.

A Summary Contact Report in short form generates a report with information about who made the contact, number of contacts made, and duration. A long form of Summary Contact Report generates information about the person contacted, number of times met, total time met, and type of contact.

DOCUMENTS

Certain documents may be important to a Youth and family. Fidelity_{EHR} allows Users with permission to upload documents to, and download documents from, a **Youth Record**. These documents are then available to other authorized Users with Permission. These documents can even be emailed from this tab as needed.

ADD DOCUMENTS

To add a document to the Youth Record select the Documents Tab. Click on the Choose File button and then browse your computer for the document you would like to upload. Once you've found it, select the document category from the Label pick list. Click upload and the file will be saved to the Youth Record.

EMAIL DOCUMENTS

Check the box next to the Document Name and then click the Email Document button.

This will open the Compose Email window where you will enter the email address(es), subject line, and a personalized message. Once you have entered that

information click on the Send Email button.

COMPOSE EMAIL   (X)

From: Admin Admin(no-reply@fidelityehr.com)

To:

CC:

Subject:

Attached: ContactSer...y.pdf

Enter your message below:

MESSAGES

From the Messages Tab, Users can send messages to Team Members assigned to the Youth Record, including the Youth and Family Members.

To send a message, select the Messages Tab within the Youth Record. Select the name of the person you are sending the message to from the pick list. Type your message into the Enter Message field and then click the Send button.

Past Messages sent and received are shown in the Messages section at the bottom of the screen. Messages which have been read are in green text, and unread messages are in blue text.

The message will display in the Team Members Messages. Once displayed, Users with permission can click on the message line to Reply, Edit, or Delete the message.

REPLY/EDIT/DELETE MESSAGE   x

◉ Reply ○ Edit Message ○ Delete Message

Enter Message:

Kate please give me a call today, thanks.

Enter Reply:

|

Send   Cancel

COMPOSE EMAIL   x

From: Admin Admin(no-reply@fidelityehr.com)

To:

CC:

Subject:

Attached: ▫ Event Report.doc

Enter your message below:

YOUTH RECORD REMINDERS

From the Message Tab you can also add or edit Youth Record Reminders by clicking the Youth Record Reminders button.

This will open the Add/Edit Youth Record Reminder screen, where you can see all Pending and Completed Reminders.

To Add a New Reminder, click the Add New Reminder button from the Add/Edit Youth Record Reminder screen.

Enter the text to display in the Reminder, select a Reminder Date, and select a Reminder Leading which indicates the time delay from the Reminder Date to when the Reminder is created. Then select the Users Affected by this Reminder which means which users will receive this Youth Record Reminder. Click on Save and Close to finalize the Reminder.

Youth Record Reminders are listed on the Users' Home Dashboard, on the Reminders Tab. Reminders can be filtered by category:

PERMISSION BASED FEATURES

ASSIGNING A FACILITATOR TO A YOUTH RECORD

Not all Users have permission to assign a facilitator to a Youth Record. If you believe you need this permission, contact your Configuration Administrator.

Only one Facilitator can be assigned at a time to a Youth Record.

To assign a Facilitator to a Youth Record, from the Menu Navigation Bar select Enrollment   -> Assign Facilitator.

You will be directed to the Assign Facilitator screen with all Youth in the configuration. Select the Youth Record by using the check boxes along the right side, then choose the Facilitator information at the bottom of the screen and click the Assign button.

Simon, Sara	Admin, Admin	10/18/2016	--	☐
Smith, Matthew C.	Admin, Admin	08/17/2016	--	☐
Tanks, Thomas	Vedder, Edward	11/03/2016	--	☐
Test, Beracahtest	Admin, Admin	07/22/2016	--	☐
Test, Responsive	Admin, Admin	10/05/2016	Facilitator, Amanda	☐
Tjhgjgj, Admin	Admin, Admin	10/10/2016	--	☐
Turner, Roosevelt	Bergerson, Kara	03/10/2016	Bell, Paul	☐
Urioste, Domonique	Admin, Admin	03/10/2016	Hyde, Mary	☐
Vick, Edward C.	Admin, Admin	02/27/2016	Hyde, Mark	☐

Assign To Facilitator:

* **Select Role:** [Select ⬍]
* **Select User:** [⬍]
* **Enter Start Date:** [__/__/____]

Assign

The Youth Status and Facilitator filters can help narrow the Youth and Facilitator list before making Assignments. You can work with All Youth, those with Pending status, or those with Enrolled status. The Facilitator filter will list all Facilitators for your configuration.

CHANGING A FACILITATOR FOR A YOUTH RECORD

If a Youth Record needs to be reassigned follow the same steps outlined above to select the Youth Record. After the box has been checked for the appropriate Youth Record, choose the Facilitator information at the bottom of the screen and enter the Start Date for the new Facilitator. You will get a message saying the Facilitator has been added to the Youth Record.

QUICK QUERY

YOUTH RECORDS

With the appropriate permissions, the **Quick Query Youth Records** page can be used for exporting Youth Record data. To access this page from the Menu Navigation Bar select Quick Query, then select Youth Records from the sub-menu.
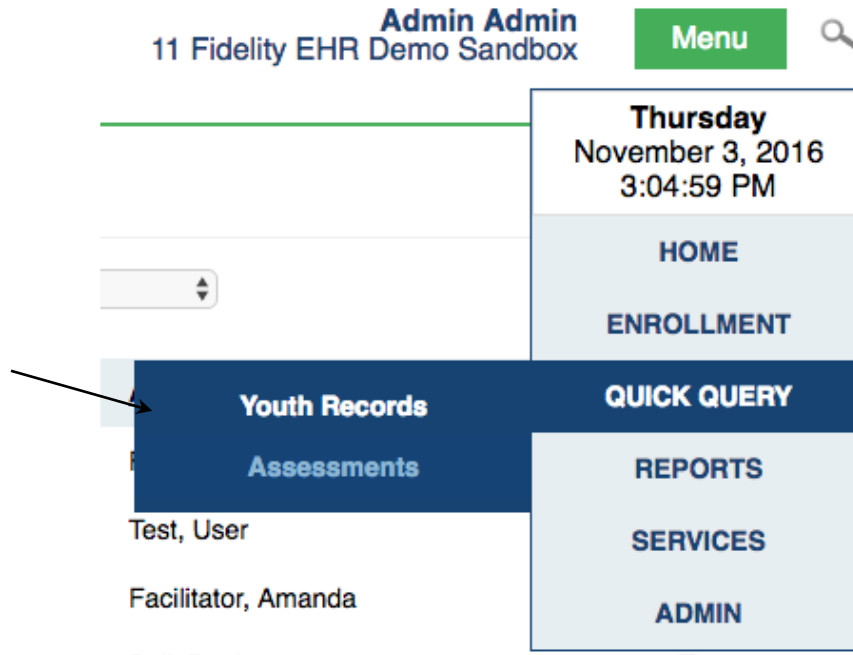
EXPORT INDIVIDUAL YOUTH RECORD DATA

To export Youth Record data for an *individual* Youth, select Work with Individual Youth Record and click next.
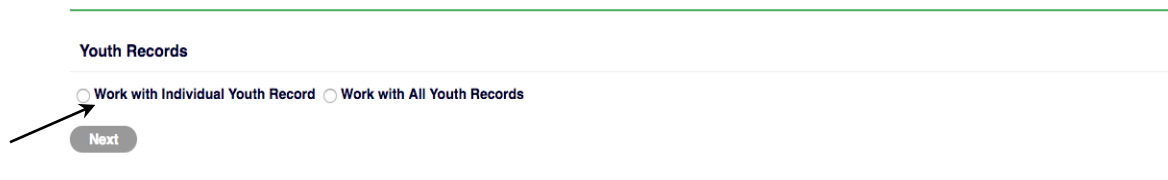
Enter the name of the Youth to generate Youth Record data for into the Name text field, in the format 'Last Name, First Name,' then click search to bring up a list of matching Youth. Note that the full name of the Youth does not have to be entered, provided the entered characters match with one or more Youth Records in the format 'Last Name, First Name.' Check the box to the left of the Youth to create Youth Record data for, then click 'Available Datasets' to bring up the different kinds of Youth Record data available for the selected Youth.

Select which Dataset to create a Youth Record export of for the selected Youth from the Dataset picklist, then use the Content field to select whether to include numerical fields, text fields, or both kinds of fields in the output. Note that selecting different contents only affect some of the displayed fields, such as Gender. Others, such as First Name or Youth ID, will appear the same regardless of the Content field.

Click Preview Output to create a spreadsheet of the selected Youth Record data. The complete spreadsheet can be viewed here within the page. The Youth Record data can be downloaded to the local computer as an Excel file by clicking Save Output to File. The data can also be saved directly to the Youth Record by clicking Save Output to Youth Record. The Youth Record data can be found in the Documents tab of the Youth Record. Finally, the data can be emailed to any valid email address by clicking Email Report.

To email Youth Record data, enter a valid email to send the Youth Record data to into the 'To:' text field. Be sure that the email address is correct as the Youth Record data is sensitive. Email address can also be entered into the 'CC:' field. Enter a subject for the email and a message into the large lower text box so that the

recipient can understand what they've been sent. When all the fields have been filled, click Send Email and the addresses entered will receive the created email with the Youth Record data attached.

EXPORT MULTIPLE YOUTH RECORD DATA
To export Youth Record data for *multiple* Youth, select Work with All Youth Records and click next.

Youth Record - Work with All Youth Records

Select Dataset: Include:
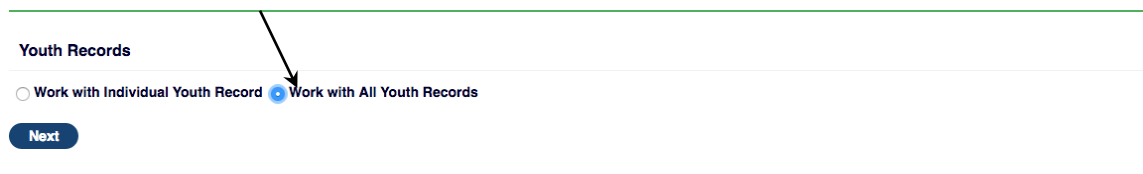
Youth Demographics (one record per youth):   ☐ School   ☐ Language and Insurance
● Basic   ○ Complete   ☐ Custody   ☐ Referral Data
                                                          ☐ Health Data

Youth Details (multiple records per youth):
○ Family Members   ○ Team Members

○ Diagnoses   ○ Immunizations

Filter Dataset: ❶

Gender: | All   ▲▼ | Select Youth: All None

Race: | All   ▲▼ | ☑ Arnold, Claire
                                                                                    ☑ Arnold, Doug
Age: From: [   ] To: [   ]   ☑ Austen, Kate
                                                                                    ☑ Beaches, Bethany B.
Enrollment Status: ☐ Discharge   ☐ Not Enrolled   ☐ Pending   ☑ Bell, Paul J.
                           ☐ Enrolled   ☑ Beracah, Test
                                                                                    ☑ Bonds, Bobby
Organization: | All   ▲▼ | ☑ Camden, Dorothy F.
                                                                                    ☑ Case, Penny
Assigned Facilitator: | All   ▲▼ | ☑ Clark, Kiley
                                                                                    ☑ Fields, Harv E.
Date Range: From: __/__/____   To: __/__/____   ☑ Lee, Brandon
                                                                                    ☐ Lewis, Gerald
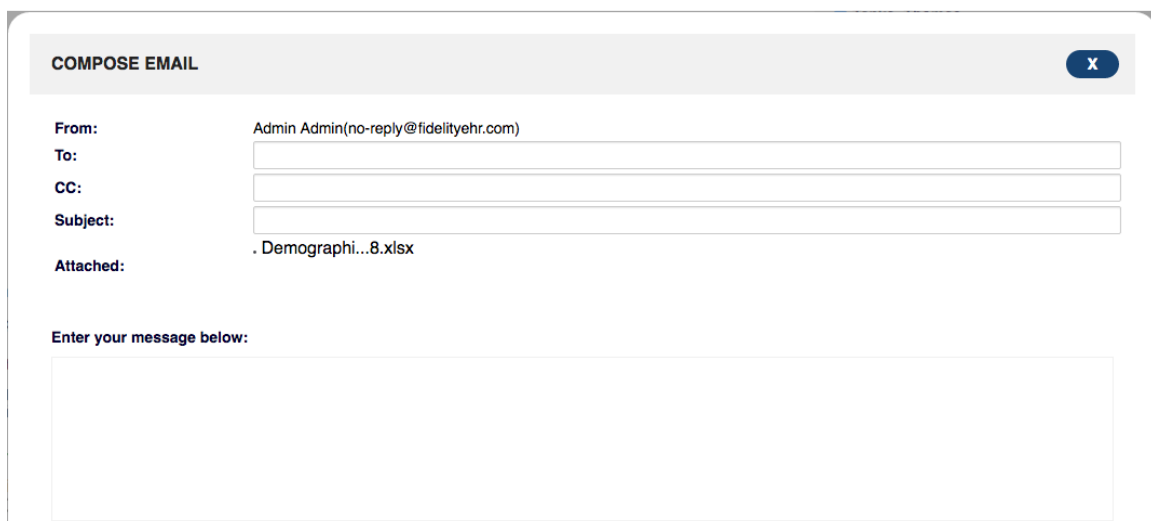
The Dataset can be filtered to only show the Youth Record data for specific Youth. Use Gender to filter for Youth who identify as male, female, or transgender, and Race to filter for the reported race of the Youth. To filter by age, enter the lower age into the 'From:' field and the upper age into the 'To:' field. This will filter the dataset for all the Youth whose ages that are between the upper and lower bounds, including the two entered ages. The Enrollment Status box filters the dataset for Youth whose Enrollment Status match those checked. Note that if no boxes are checked, then Youth with any Enrollment Status are included. Date Range filters for Youth with their Current Enrollment Status Start Date within the chosen range. Inactive Youth Records can be included or excluded from the Dataset by selecting either Yes or No in the Include Inactive Youth Records field. The default for Include Inactive Youth Records is No. Youth can also be selected or deselected individually from the filtered Dataset.

Once the Dataset has been filtered as desired, the Output Options can be set. Use the Scope field to choose whether to use the most current Youth Records in the output, or to select past dates to draw Youth Records from. Use the Content field to select whether to use numerical fields, text fields, or both kinds of fields in the output. Note that selecting different contents only affect some of the displayed fields, such as Gender. Others, such as First Name or Youth ID, will appear the same regardless of the Content field.

Click Preview Output to create the spreadsheet of the filtered Dataset. The output can be viewed within the browser and can also be downloaded to the local

computer through the Save Output to File button. The spreadsheet can also be sent to any valid email address using Email Report. The recipient of the email can download and view the file on their local computer.

Enter a valid email to send the Youth Record data to into the 'To:' text field. Be sure that the email address is correct as the Youth Record data is sensitive. Email addresses can also be entered into the 'CC:' field. Enter a subject for the email and a message into the large lower text box so that the recipient can understand what they've been sent. When all the fields have been filled, click Send Email and the addresses entered will receive the created email with the Youth Record data attached.
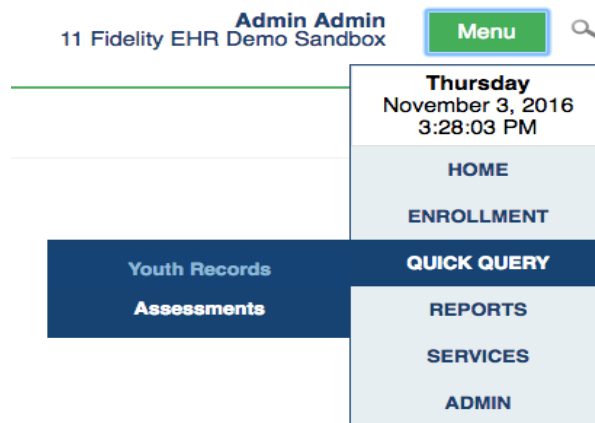
COMPOSE EMAIL   X

From: Admin Admin(no-reply@fidelityehr.com)
To:
CC:
Subject:
               . Demographi...8.xlsx
Attached:

Enter your message below:

YOUTH ASSESSMENT DATA

The **Quick Query Assessments** page can be used for exporting any Youth Assessment data. To access this page from the Menu Navigation Bar select Quick Query, then click Assessments from the sub-menu.

EXPORT INDIVIDUAL YOUTH ASSESSMENT DATA

To export Assessment data for an *individual* Youth, select Work with Individual Youth Record and click Next.

Enter the name of the Youth to generate Youth Assessment data of into the Name text field, in the format 'Last Name, First Name,' then click search to bring up a list of matching Youth. Note that the full name of the Youth does not have to be entered, provided the entered characters match with one or more Youth Records in the format 'Last Name, First Name.' Check the box to the left of the Youth to create Youth Assessment data of, then click Available Datasets to bring up the different kinds of Youth Assessment data available for the selected Youth.

Assessments - Work with an Individual Youth Record

1. Search for and Select Youth Vick 🔍

	Last Name	First Name	Configuration	Case Number	Date of Birth	Gender	Enrolled Status
☐	Franco	Vicky	02 Umatilla County Human Services		07/24/2006	Female	Enrolled
☑	Vick	Edward	11 Fidelity EHR Demo Sandbox	CaseNumber1	10/10/2001	Male	Enrolled

2. Select Youth and then Available Assessments

Available Assessments

* **Assessment:**	Community Outcomes ▼			
* **Format:**	Graphical Report (.pdf) ▼	**Include Facilitator Assigned** ☑	**Include Enrollment Status** ☐	
* **Scope:**	All ▼	**From:** __/__/____	**To:** __/__/____	
* **Content:**	Numeric and Text Values ▼	**Remove Identifying Information?** ☑ ⓘ		

3. Select Assessment, Scope, Format and Content and then Preview Output
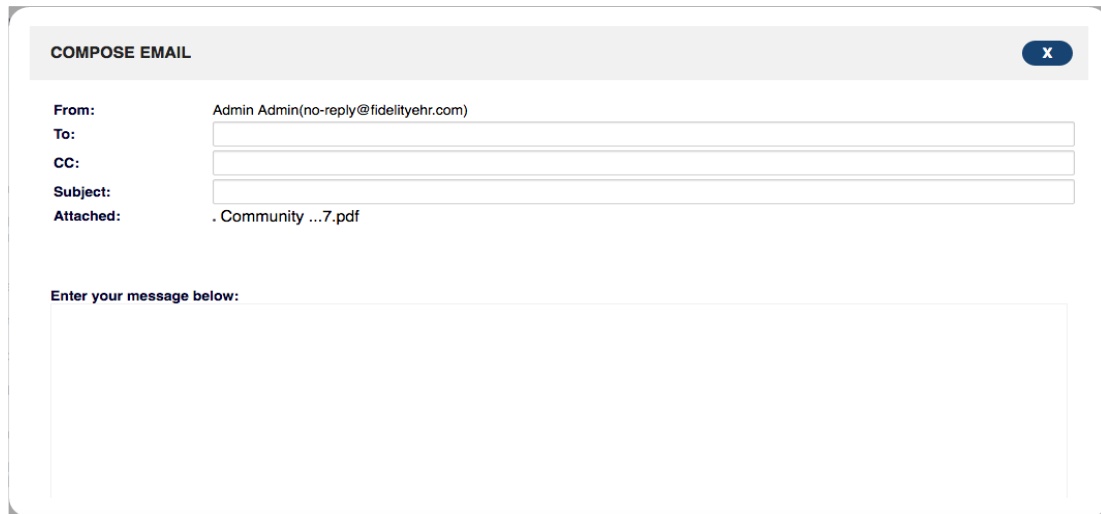
Preview Output

Select which Dataset to create an Assessment export of for the selected Youth from the Dataset picklist. Use the Scope field to filter which Assessments of the selected type are included in the output, using scopes such as All, Specific Dates, or First and Last. Select from the Format picklist whether to use a spreadsheet or a graphical report to present the selected Assessment data. Spreadsheet lists each Assessment as a row with each field as a column. Graphical report plots the Youth Assessment data onto an appropriate graph. If Graphical Report is chosen, the options Include Facilitator Assigned and Include Enrollment Status to append Facilitator or Enrollment Status data onto the graphical report output become available. Check Remove Identifying Information to take out Youth names and replace them with the Youth ID assigned to that Youth. Use the Content field to select whether to include numerical fields, text fields, or both kinds of fields in the spreadsheet format. Note that selecting different contents only affect some of the displayed fields, such as Gender. Others, such as First Name or Youth ID, will appear the same regardless of the Content field.

Click 'Preview Output' to create a spreadsheet of the selected Youth Data. The output can be viewed within the browser and can also be downloaded to the local computer through the Save Output to File button, or saved to the Documents tab of the Youth Record with Save Output to Youth Record. The spreadsheet can also be sent to any valid email address using Email Report. The recipient of the email can download and view the file on their local computer.

Enter a valid email to send the Youth Assessment data to into the 'To:' text field. Be sure that the email address is correct as the Youth Assessment data is sensitive.

Email address can also be entered into the 'CC:' field. Enter subject for the email and a message into the large lower text box so that the recipient can understand what they've been sent. When all the fields have been filled, click Send Email and the addresses entered will receive the created email with the Youth Assessment data attached.

COMPOSE EMAIL   **X**

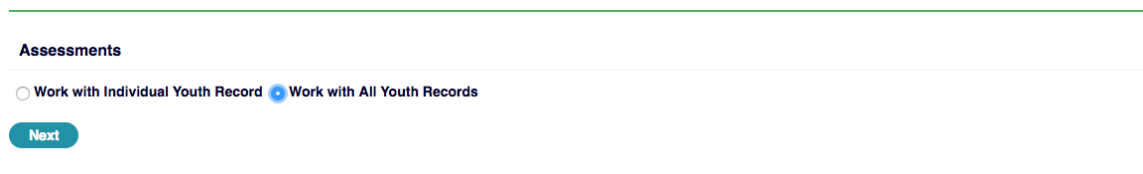| From: | Admin Admin(no-reply@fidelityehr.com) |
To:	
CC:	
Subject:	
Attached:	. Community …7.pdf

Enter your message below:

EXPORT MULTIPLE YOUTH ASSESSMENT DATA

To export Youth Assessment data for *multiple* Youth, select Work with All Youth Records and click Next.

Assessments

○ Work with Individual Youth Record ● Work with All Youth Records

Next

Select which Assessment you would like to export Youth Assessment data for by first choosing the Type of assessment, such as Core or Licensed, then selecting the specific assessment of that type in the Assessment field.

Assessments - Work with All Youth Records

Select Assessment:

* **Type:** Core   * **Assessment:** Youth Support

Filter Dataset: Select Youth: All None

Gender: All   ☑ Austen, Kate
                                                                 ☑ Bell, Paul J.
Race: All   ☑ Bonds, Bobby
                                                                 ☑ Camden, Dorothy F.
Age: From: ____ To: ____   ☑ Lewis, Gerald

Enrollment Status: ☐ Discharge   ☐ Not Enrolled   ☐ Pending
                         ☑ Enrolled   **Number of Youth in Dataset: 7**

Funding: All
                                                                 Refresh
Include Inactive Youth Records: ○ Yes ● No

Output Options:

* **Format:**   Spreadsheet (.xlsx)

* **Scope:**   All   From: __/__/____   To: __/__/____

* **Content:**   Text Values   Remove Identifying Information? ☑ ⓘ

Preview Output
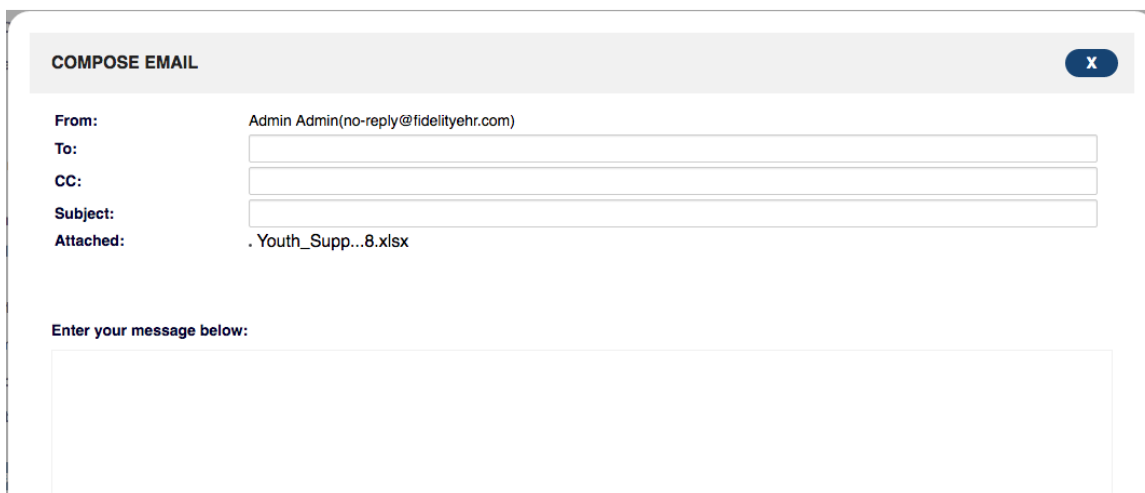
The Dataset can be filtered to only show the Youth Assessment data for specific Youth. Use Gender to filter for Youth who identify as male, female, or transgender, and Race to filter for the reported race of the Youth. To filter by age, enter the lower age into the 'From:' field and the upper age into the 'To:' field. This will filter the Dataset for all Youth whose ages are between the upper and lower bounds, including the two entered ages. The Enrollment Status box filters the Dataset for Youth whose Enrollment Status match those checked. Note that if no boxes are checked, then Youth with any Enrollment Status are included. Use the Funding picklist to filter the dataset for a specific funding type, such as discretionary funds. Inactive Youth Records can be included or excluded from the Dataset by selecting either Yes or No in the Include Inactive Youth Records field. The default for Include Inactive Youth Records is No. Finally, Youth in the Dataset can be manually excluded by clicking the box next to their name.

Once the Dataset has been filtered as desired, the Output Options can be set. Select from the Format picklist whether to use a Spreadsheet or a Graphical Report to present the selected Youth Assessment data. Spreadsheet lists each Assessment as a row with each field as a column. Graphical Report plots the Youth Assessment data onto an appropriate graph. Set Scope to determine which Assessments are used from the Dataset. Select All to include all Assessments, and select Specific Dates to use only the Assessments created from an entered date range, including the dates entered. Use the Content field to select whether to include numerical fields, text fields, or both kinds of fields in the output. Note that selecting different

contents only affect some of the displayed fields, such as Gender. Others, such as First Name or Youth ID, will appear the same regardless of the Content field. With the Graphical Report format, the Content field is automatically set to Numeric and Text Values. Check Remove Identifying Information to replace all the Youth names in the output with their assigned Youth ID.

Click Preview Output to create the output of the filtered Dataset. The output can be viewed within the browser and can also be downloaded to the local computer through the Save Output to File button. The spreadsheet can also be sent to any valid email address using Email Report. The recipient of the email can download and view the file on their local computer.

Enter a valid email to send the Youth Assessment data to into the 'To:' text field. Be sure that the email address is correct as the Youth Assessment data is sensitive. Email address can also be entered into the 'CC:' field. Enter subject for the email and a message into the large lower text box so that the recipient can understand what they've been sent. When all the fields have been filled, click Send Email and the addresses entered will receive the created email with the Youth Assessment data attached.

ADDING OR EDITING A SERVICE AND SERVICE PROVIDER IN THE CONFIGURATION

With the appropriate permissions, the **Services** and **Service Providers** pages can be used for adding and editing information on services received by youth.

ADD NEW SERVICES

To access the Add/Edit Services page from the Menu Navigation Bar select Services-> Add/Edit Services.

You will be directed to a page showing all the Services that already exist in your configuration.
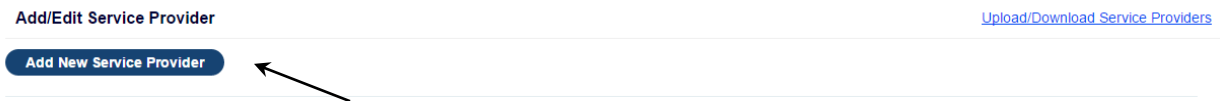
To add a new Service Provider, use the "Add Service Provider" button.

Add/Edit Service Provider   Upload/Download Service Providers

[Add New Service Provider]   ⬋

The first step to adding a new service provider is assigning a Provider Code. This must be a unique code. You may enter a code or choose to have the system randomly assign one for you.

ADD NEW SERVICE PROVIDER CODE: [X]

* Please Enter a unique Service Provider Code: [   ]   Verify Code

A **Service Provider Code** can be any combination of letters and/or numbers, between 6 and 10 characters long. It must be unique for each **Service Provider**. All locations for this **Service Provider** will also use this **Service Provider Code**, and are added from the **Main Service Provider Page**. Different locations are identified using the **Order No**. If you are unsure of what to enter, you can use the button below to create a unique **Service Provider Code** automatically.

[Generate Random Code]   [Save and Continue]   [Cancel]

Next you will fill in all of the information regarding the new service provider in the form.

Add New Service Provider: (VQS864-01)

* Service Provider Name:

* Street 1:

Street 2:

* City:

* State: Select

* Zip Code:

Phone 1: (___) ___-____ Select

Phone 2: (___) ___-____ Select

Contact First Name / MI:

Contact Last Name:

Contact Email:

Accepts Email Referrals?: ☐ Yes (email address required)

Medical Assistance ID:

National Provider ID:

Capacity:

Locations:

Add New Location ⓘ

Website URL:

Service Area:
(How is it defined?)

Keywords:

Process Notes:
(How do you connect families with Provider?)

Notes:

Be sure to "Save" your work before exiting the page.

Service Categories   Save and Exit   Save   Exit

The new Service will now display in the top section of the page.

EDIT SERVICES

To edit an existing Service in your configuration, open the Menu Navigation Bar and select Services -> Add/Edit Services.

You will be directed to a page showing all the Services that already exist in your configuration. Click on the blue Edit hyperlink next to the Service that you would like to edit.


The information for the Service you have chosen to edit will now be shown at the bottom of the screen. Please note that you will not be able to edit the Service Code, but you can edit all the other fields. After you have finished making your edits, click Update and your changes will be saved.

You will be directed to a page showing all the Service Providers that already exist in your configuration. Click on the Add New Service Provider button.

EDIT SERVICE PROVIDERS

To edit an existing Service Provider in your configuration, open the Menu Navigation Bar and select Services -> Add/Edit Service Providers.
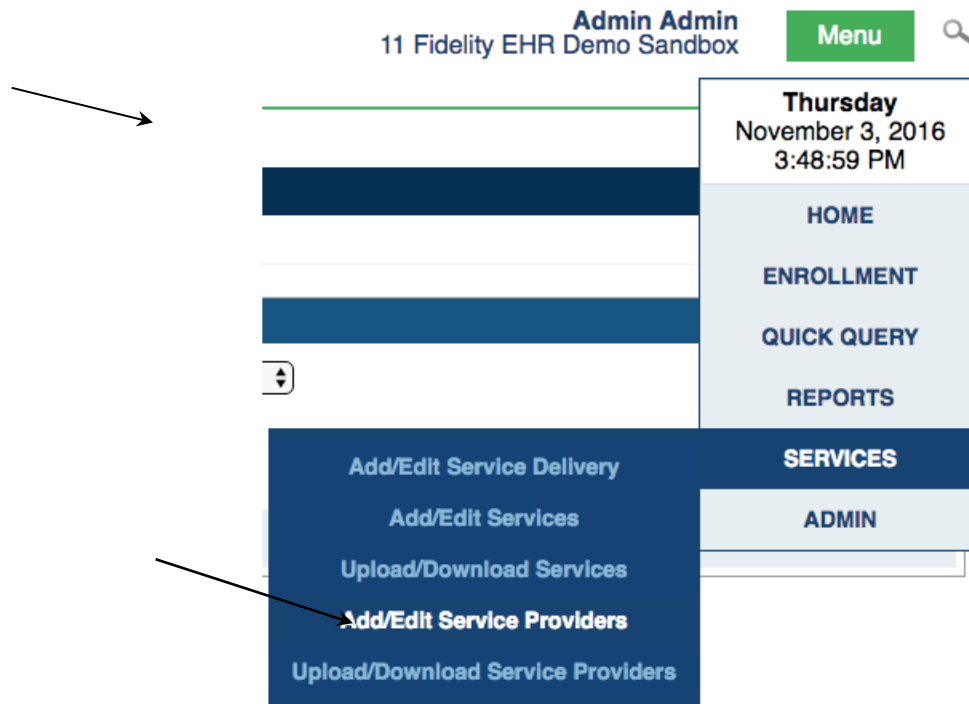
You will be directed to a page showing all the Service Providers that already exist in your configuration. Click on the Service Provider name of the provider you would like to edit.

Add/Edit Service Provider

Add New Service Provider

Code-Order	Provider Name	Street1	City	State	Zip Code	WebSite URL	Status
112558-01	Test2	111	333	AL	00001		Enabled
AAA555-01	Boys and Girls Club o...	9952 S Ashland	Chicago	IL	00006		Enabled
AGE419-01	Leonard Center	865 W North Avenue	Chicago	IL	60642		Enabled
AT72015-01	Amy Trainor	135 Union Street	Baltimore	MD	12345		Enabled
C72015-01	Judy Campbell	123 Charles Street	Baltimore	MD	12345		Enabled
DBC236-01	Test	123 Morgan St	Westmi...	MD	21157		Enabled
GLW930-01	Dr Nathan Drake	2115 W Chicago Ave	Chicago	IL	60622		Enabled
HSD708-01	Safe Space	166 N Ashland	Chicago	IL	60652		Enabled
o12232-01	Test2	111	333	AL	00001		Enabled
PNC215-01	Dr Lorraine Hunt	713 E 89th St	Chicago	IL	60619		Enabled

1 2 3

The Service Provider record will show on the screen and you can edit any of the fields. When you have finished making your edits click on Save and Exit.

ADDITIONAL PROVIDER LOCATIONS

When adding a new Service Provider or when editing an existing one, you have the capability to enter Additional Locations. The first location entered will always be the main Service Provider location in the system. To add an additional location from within the Service Provider record, click on the blue Add New Location hyperlink.

Enter all the required information for this location for the Service Provider. The only field that you cannot edit is Service Provider Name. If this location has the same National Provider Identifier (NPI), the system will display a message upon saving, indicating another Provider was found with the same NPI. This is just a notification; you are allowed to save the Providers additional location(s), even though this notification appears.

No. Address/Location:

Order #	Address		
01	456 Texas St, Rubio TX 78956	Edit	Delete

Service Categories   **Save and Exit** **Save** **Exit**

When you are finished click on Save and Exit and you will return to the record for the main location of the provider. The additional location will now be shown at the bottom right of the Service Provider record.

Add/Edit Service Provider Location: (DXS581-02)

* Service Provider Name:	Testing 348 🛈	Website URL:
* Street 1:		Service Area: (How is it defined?)
Street 2:		
* City:		Keywords:
* State:	Select ▼	
* Zip Code:	____-____	Process Notes: (How do you connect families with Provider?)
Phone 1:	(__) ___-____ Select ▼	
Phone 2:	(__) ___-____ Select ▼	Notes:
Contact First Name / MI:		
Contact Last Name:		
Contact Email:	amnr2004@yahoo.com	
Accepts Email Referrals?:	☑ Yes (email address required)	
Medical Assistance ID:		
National Provider ID:		
Capacity:	0	

Locations:

No. Address/Location:

Order #	Address		
01	456 Texas St, Rubio TX 78956	Edit	Delete

APPENDIX A: TEAM WORKSHEET EXAMPLE

Team Meeting Date: 11/08/2016

Next Team Meeting:

Youth Name(Last, First, M.I.) : Vick, Edward, C	
DOB : 10/10/2001	**Enrollment date :** 04/01/2016

Contact Information

Address:

Street1/Street2:	1450 Green Street, 2	City/State/Zip Code:	Baltimore, MD 12345
Phone Number(s):	(443) 222-2222		

Parent/Guardian(s):

Name(s):	Vick, Janine	Relationship:	Birth Mother

Contact Information (if different from youth): Yes

Summary of Team Members

Name	Phone Number	Role	Invited	Attended
Bell, Paul	(___) ___-____	Facilitator	☐	☐
Hyde, Mark	(___) ___-____	Facilitator	✓	☐
Vedder, Edward	(516) 628-1542	Facilitator	☐	☐
Vick, Edward	(443) 222-2222	Youth	✓	☐
Vick, Janine	(443) 222-2222	Birth Mother	✓	☐

Strategies (Services)

Funding	Category	Sub-Category	Outcome

Family Support and Connections

(0=Significant need for improvement; 1=Need for improvement; 2=Strength; 3=Significant strength; 999=Missing or Not Given; x=Not Rated)

Family connections	**Previous Rating:**	Strength	**New Rating:**	
Friend connections	**Previous Rating:**	Strength	**New Rating:**	
School/work connections	**Previous Rating:**	Strength	**New Rating:**	

Community connections	Previous Rating:	Strength	New Rating:	
Service connections	Previous Rating:	Strength	New Rating:	
Case Notes				

Youth Support and Connections

(0=Significant need for improvement; 1=Need for improvement; 2=Strength; 3=Significant strength; 999=Missing or Not Given; x=Not Rated)

Family connections	Previous Rating:	Strength	New Rating:	
Friend connections	Previous Rating:	Strength	New Rating:	
School/work connections	Previous Rating:	Strength	New Rating:	
Community connections	Previous Rating:	Strength	New Rating:	
Service connections	Previous Rating:	Strength	New Rating:	
Case Notes				

Meeting Notes

| Meeting Notes | |

School Outcomes

Number of days in current assessment period:	30		
Number of Active School days:	25		
Number of days Youth attended:	25		

(0=Significant problems: Failing all classes or making no progress; 1=Some problems: Failing some classes or making little progress; 2=Some success: Passing all classes or making expected progress; 3=Significant success: Doing well in all classes or exceeding expectations for progress; 999=Missing or Not Given; x=Not Rated)

| Current Success in School | **Previous Rating:** | Some success | **New Rating:** | |

Disciplinary Events

(0=Suspension; 1=Expulsion; 2=Other ; 999=Missing or Not Given)

| Case Notes | |

| **Community Outcomes** | | | | |
| Number of days in current assessment period: | 0 | | | |

(Considering this time period, overall, does the youth have difficulties in emotions, concentration, behavior, or getting along with others? 0=No; 1=Yes, minor difficulties; 2=Yes, definite difficulties; 3=Yes, severe difficulties; 999=Missing or Not Given; x=Not Rated)

| Overall community functioning | **Previous Rating:** | Yes, definite difficulties | **New Rating:** | |

For the following questions, please use this scale: (0=Not at all; 1=A little; 2=A medium amount; 3=A great deal; 999=Missing or Not Given; x=Not Rated)

Do the difficulties interfere with the youth's home life?	**Previous Rating:**	A medium amount	**New Rating:**	
Do the difficulties interfere with the youth's classroom learning?	**Previous Rating:**	A medium amount	**New Rating:**	
Do the difficulties interfere with the youth's friendships?	**Previous Rating:**	A medium amount	**New Rating:**	
Do the difficulties interfere with the youth's leisure time or things she or he does for fun?	**Previous Rating:**	A medium amount	**New Rating:**	

Juvenile Justice Contact

(0=Arrest; 1=Detention; 2=Other ; 999=Missing or Not Given)

| Case Notes | |

Family Satisfaction

(0=Very dissatisfied; 1=Dissatisfied; 2=Satisfied; 3=Very satisfied; 999=Missing or Not Given; x=Not Rated)

Overall, how satisfied are you with the services you have received?	**Previous Rating:**	Neither Satisfied nor Dissatisfied	**New Rating:**	
Overall, how satisfied are you with the progress you have been making?	**Previous Rating:**	Neither Satisfied nor Dissatisfied	**New Rating:**	
Case Notes				

Team Process

(0=Significant need for improvement; 1=Need for improvement; 2=Strength; 3=Significant strength; 999=Missing or Not Given; x=Not Rated)

Our team includes the right people	**Previous Rating:**	Strength	**New Rating:**	
Our team has a shared understanding of the family's story and vision for the future?	**Previous Rating:**	Strength	**New Rating:**	
Our team agrees about what we are working on together	**Previous Rating:**	Strength	**New Rating:**	
Our team checks to make sure our actions are producing results	**Previous Rating:**	Strength	**New Rating:**	
Our team recognizes the youth and family as key decision-makers	**Previous Rating:**	Strength	**New Rating:**	
Our team works to connect the youth and family to people, resources and places they may find helpful in the future	**Previous Rating:**	Strength	**New Rating:**	
Our team continually changes what we are doing if it's not working	**Previous Rating:**	Strength	**New Rating:**	
Case Notes				