User Guide: FSP 3M

Version 1.0
[08/08/2022]

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User Guide: FSP 3M

General

Information captured on this form is transmitted to the state of California by each County. Providers will complete the form and, if possible, data is transmitted to the county.

FSP 3M form is completed quarterly after PAF to gather the information that will be updated regularly through 3M and KET documents. The appropriate documentation workflow is validated by the system and is dependent on state defined parameters.

Navigating to and Creating the FSP 3M

From the Client Search or Quick Link

You can create the document from the client tab. In order to do this, you must first search for the client or select the client from your primary list in client search drop down.

Navigate to the 'Search OR Open this Client' dropdown. Click the dropdown and select 'Client Search' or choose the client name in the drop down. If using search functionality, see below:
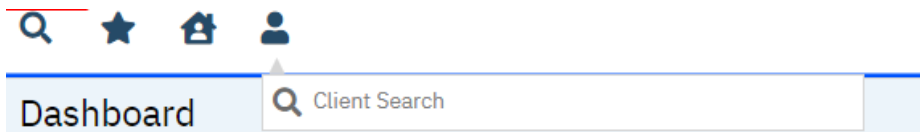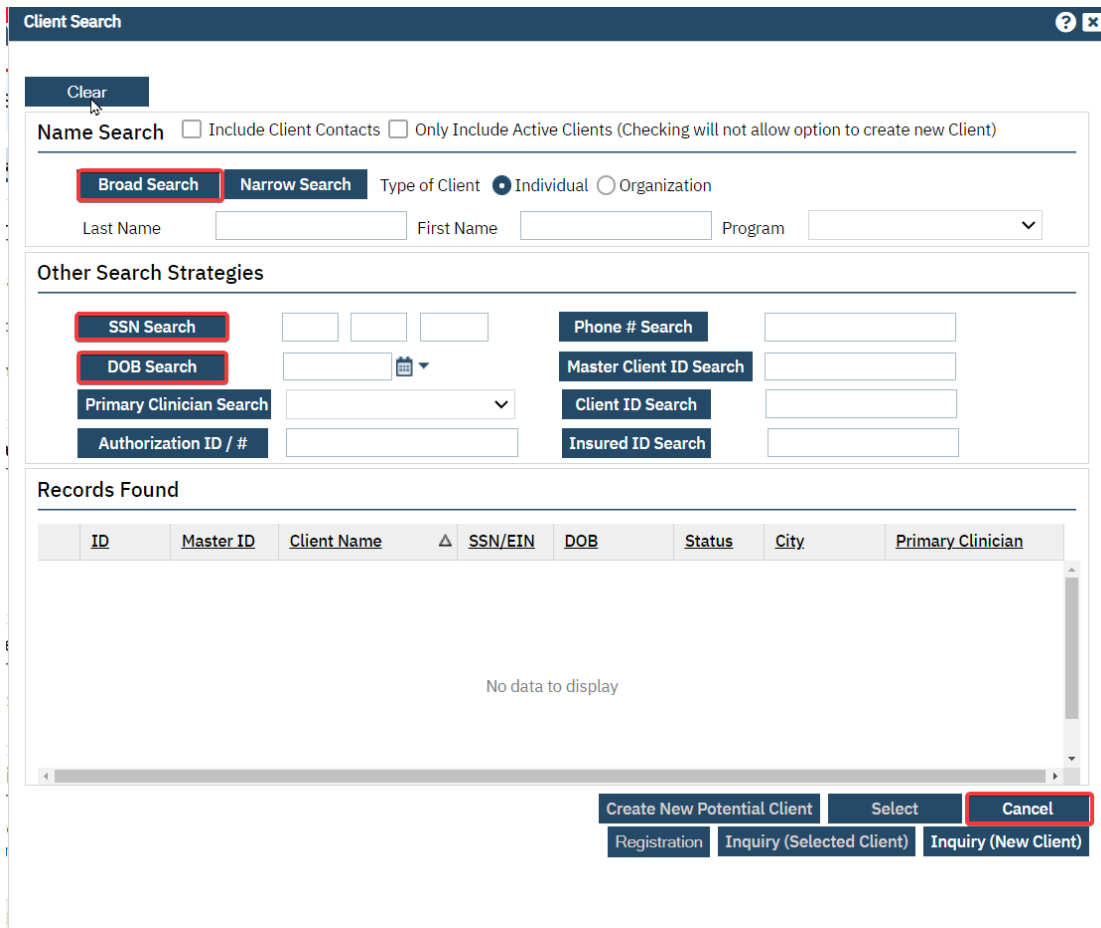

You will be presented with the 'Client Search' screen. On this screen you will be able to search for a client by a number of parameters.

- Broad Search - Allows for the search of a client by name, partial name, sounds like.
- Narrow Search - Returns for search of exact name match
- SSN Search - Social Security Number search
- DOB Search - Date of Birth search
- Primary Clinician Search - Search by assigned primary clinician
- Authorization ID/# - Search by authorization ID or number recorded in SmartCare
- Phone # Search - Client phone number search

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- Master Client ID Search - Used in Care Management; Search by client's Master Record ID. Your organization will not use this button.
- Client ID Search
- Insured ID Search-search by insurance ID.

Upon opening client search you will note that the only button to the bottom right that is actionable is 'Cancel.' Minimally, you must perform a one part search including first and last name, social security number, and date of birth prior to opening a client. Enter information in each of the fields you would like to use for a search parameter and click the corresponding search button for each, as shown outlined in below.

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If the client for whom you are searching already has a record in SmartCare, you will have the ability to both select the existing record.

- Select - This will open the selected client's record

Click the 'Select' button to open the existing client. Once the client has been opened, you will note that there is a new tab open with the client's name and ID displayed.
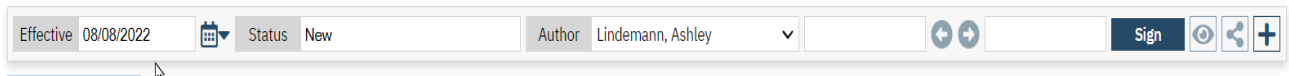
This is the client tab. When a client is selected, the client's name will appear on the toolbar. This is where you will be able to create a FSP 3M document.

By using the magnifying glass to search for the CANS document you can search for the assessment or locate the assessment using a quick link.

FSP 3M
General
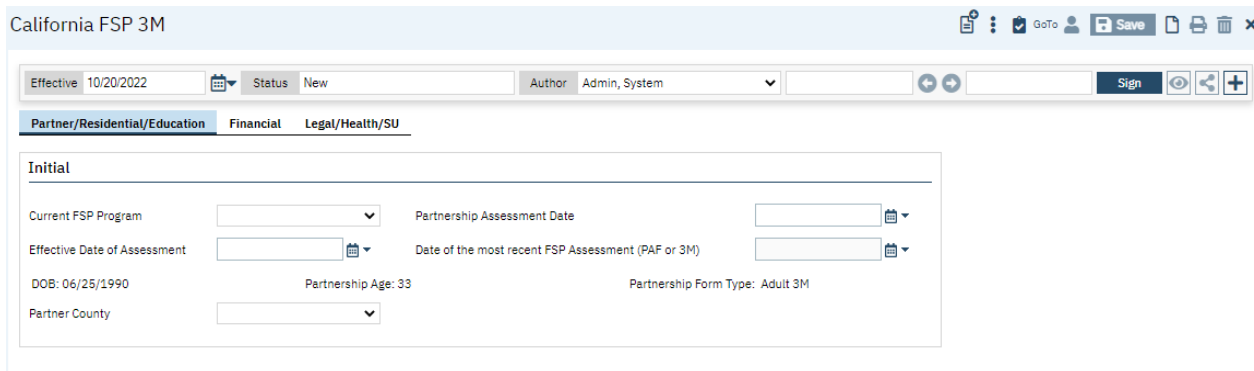Under the screen name, note the information pertaining to the status of the document.

We will explore these fields more thoroughly when completing the FSP 3M. However, note at this time that effective date will be required to complete the document and it is defaulting to today's date. This default is configurable and can be changed, depending on your organization.

Partner/Residential/Education

Initial

Current FSP Program- This is a dropdown list of programs where the FSP ID is associated, and the client is currently and/or has been enrolled in the past. The dropdown will include the program name, enrolled date, and discharge date (if one exists). A PAF must already exist for this program/client. This Document cannot be completed unless the PAF was completed first. This should alert user that this a 3 month review/update. If this document is set up as a service note vs. standalone document AND user selected a program on the Service Details screen for the document, PAF program name will be initialized from the Service details tab. ***This is a required selection.***

Partnership Assessment Date- This section will populate the most recent Assessment date of the previous or most recent completed PAF date where the FSP Program selected matches the FSP Program on the PAF. ***This is a required selection.***

Effective Date of Assessment- Date that the FSP 3M is being completed. ***This is a required field.***

Date of the most recent FSP Assessment (PAF or 3M)- This date will initialize the effective date from the most recently signed PAF or 3M, whichever is most recent.

DOB: This is a read-only field and cannot be edited by the user.

Partnership Age: This is a read-only field and cannot be edited by the user. This field will not show/be calculated until user enters 'Effective Date of Assessment'. The calculated age is the 3M Assessment date less date of birth. For example, the client could be 15 today, but it is their birthday today and I just opened the form today, but actually saw the client yesterday, so 3M Assessment date is yesterday's date, so the Partnership age would actually be 14. This will be used to determine Form Type and fields/tabs that should show/be required.

Partnership Form Type: This is a read-only field and cannot be edited by the user. It will not calculate/initialize a value until the Partnership Age has calculated. This field is dependent on the Partnership Age. If the Partnership Age is 0-15, then 3M Child will show in this field. If the Partnership Age is 16-25, then the 3M TAY will show in this field. If the Partnership Age is 26-59, then 3M Adult will show in this field. If the Partnership Age is 60 and older, then 3M Older Adult will show in this field.

Partner County- User is able to notate the county involved with the client. This is a searchable text box as users are able to start typing the name of the county they are searching for and a generated list will populate. If your organization is the county entity, this field will not likely be

visible for you based on how your administration team has configured it within SmartCare. Configuration key information is located at the bottom of this document in the Set- Up Consideration section. ***This is a required selection.***

Education-Child/Youth/TAY

- User is to make a selection using the radio buttons of 'Yes' or 'No.'
- This section will only show for Child/Youth and TAY, not showing for ages 26 and older.
- ***This is a required selection.***

Education-For Children/Youth who are required by law to attend school

Estimate the child/youth's attendance level CURRENTLY- User is to make a selection using the radio buttons from the selection listed above. User is only able to choose one of the radio buttons. This section will not show for 26 and older. ***This is a required selection.***

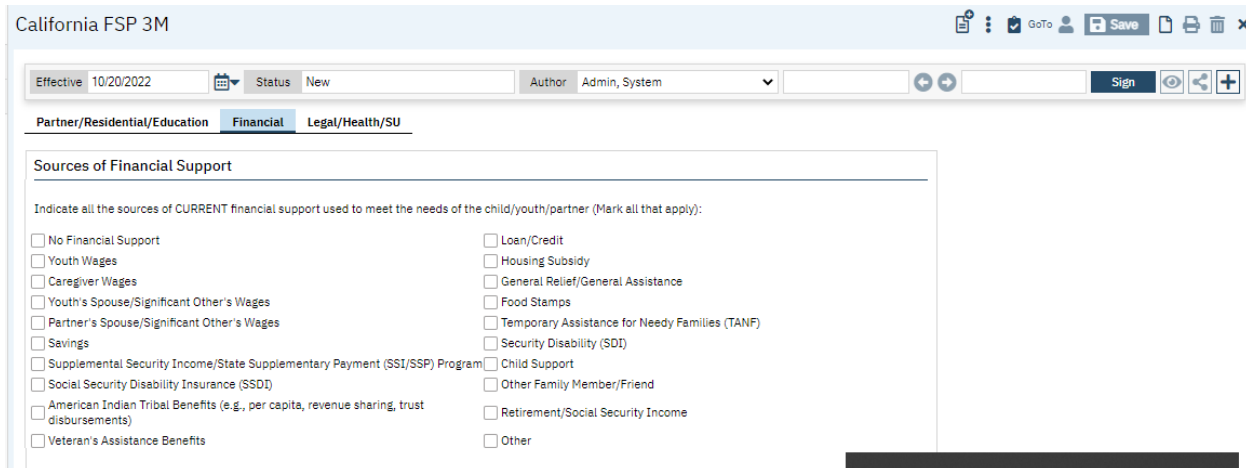**CURRENTLY, the child/youth's grades are-** User is to make a selection using the radio buttons from the selection listed above. User is only able to choose one of the radio buttons. This section will not show for 26 and older. ***This is a required selection.***

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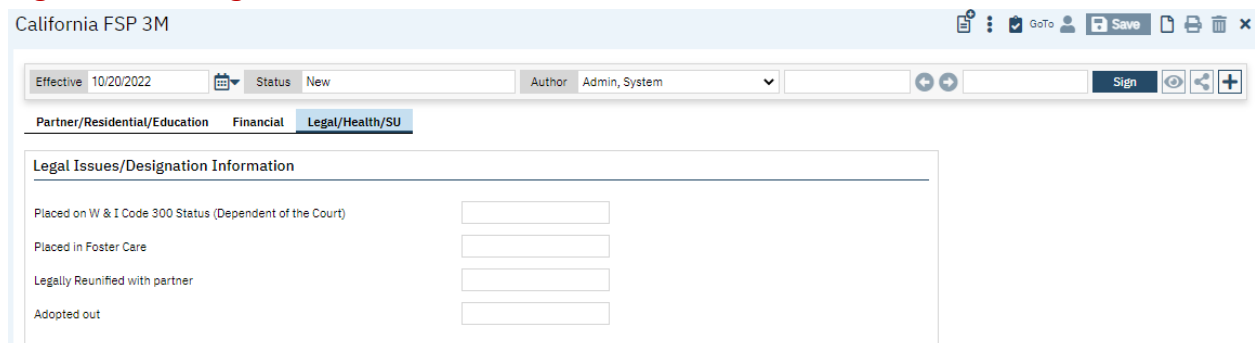
Financial

Sources of Financial Support

Users are asked to indicate all the sources of CURRENT financial support used to meet the needs of the child/youth/partner (Mark all that apply):

- User is to make a selection using the checkboxes choices listed above.
- User is able to select more than one.
- Options for 'Caregiver's Wages' and 'Child Support' will only show for ages 0-25.
- This section shows for all ages.
- ***This is a required selection.***

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Legal Issues/Designation Information

California FSP 3M

Effective 10/20/2022 | Status New | Author Admin, System | Sign

Partner/Residential/Education   Financial   **Legal/Health/SU**

Legal Issues/Designation Information

Placed on W & I Code 300 Status (Dependent of the Court)

Placed in Foster Care

Legally Reunified with partner

Adopted out

- User is to indicate the total number of children the partner has who are CURRENTLY involved with the following selections above.
- This is a numeric only textbox and user is *required* to enter a value for every field above. User is able to enter the value of '0.'
- This will show for all ages.

Health Status

HEALTH STATUS

Does the partner/child/ youth have a primary care physician currently?   ○ Yes   ○ No

- User is to make a selection using the radio buttons of 'Yes' or 'No.'
- This section will only show for all ages.
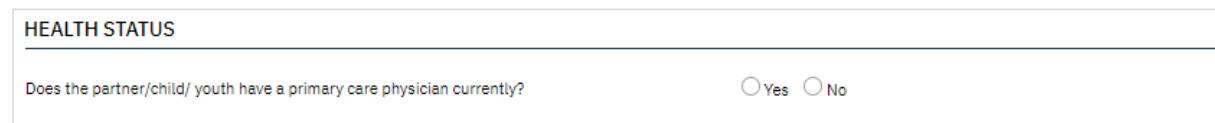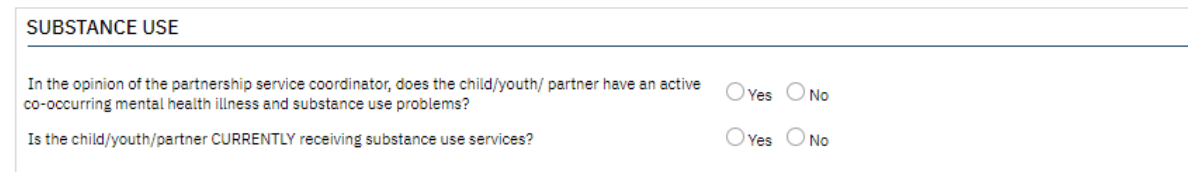- ***This is a required selection.***

Substance Use

SUBSTANCE USE

In the opinion of the partnership service coordinator, does the child/youth/ partner have an active co-occurring mental health illness and substance use problems?   ○ Yes   ○ No

Is the child/youth/partner CURRENTLY receiving substance use services?   ○ Yes   ○ No

- User is to make a selection using the radio buttons of 'Yes' or 'No.'

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- This section will only show for all ages.
- ***The first question is a required selection. If user selects 'Yes' on the first question, then the second question will be required.***

ADL/IADL

Index for Independent Activities of Daily Living (ADL)

California FSP 3M

Effective	09/12/2022		Status	In Progress		Author	Admin, System

Partner/Residential/Education   Financial   Legal/Health/SU   **ADL/IADL**

For each area of functioning listed below, check the description that applies (The word 'assistance' means supervision, direction or personal assistance)

Bathing - either sponge bath, tub bath or shower	○ Receives no assistance (gets in and out of tub by self, if tub is usual means of bathing)
	○ Receives assistance in bathing only one part of the body (such as back or leg)
	○ Receives assistance in bathing more than one part of the body (or not bathed)
Dressing - gets clothes from closets and drawers, including underclothes, outer garments and uses fasteners (including braces, if worn)	○ Gets clothes and gets completely dressed without assistance
	○ Gets clothes and gets dressed without assistance, except for assistance in tying shoes
	○ Receives assistance in getting clothes or in getting dressed, or stays partly or completely undressed
Toileting	○ Goes to 'toilet room', cleans self, and arranges clothes without assistance (may use object for support such as cane, walker, or wheelchair and may manage night bedpan or commode, emptying same in AM)
	○ Receives assistance in going to the 'toilet room' or in cleansing self or in arranging clothes after elimination or in use of night bedpan or commode
	○ Doesn't go to room termed 'toilet' for the elimination process
Transfer	○ Moves in and out of bed as well as in and out of chair without assistance (may be using object for support, such as a cane or walker)
	○ Moves in and out of bed or chair with assistance
	○ Doesn't get out of bed
Continence	○ Controls urination and bowel movement completely by self
	○ Has occasional 'accidents'
	○ Supervision helps keep urine or bowel control; catheter is used, or person is incontinent
Feeding	○ Feeds self without assistance
	○ Feeds self except for getting assistance in cutting meat or buttering bread
	○ Receives assistance in feeding or is fed partly or completely by using tubes or I.V. fluids
Walking	○ Walks on level without assistance
	○ Walks without assistance but uses single, straight cane
	○ Walks without assistance but uses two points for mechanical support such as crutches, a walker or tow canes (wears a brace)
	○ Walks with assistance
	○ Uses wheelchair only
	○ Not walking or using wheelchair
House-Confinement	○ Has been outside of residence on 3 or more days during the past 2 weeks
	○ Has been outside of residence on only 1 or 2 days during the past 2 weeks
	○ Has not been outside of residence in past 2 weeks

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- User is to make a selection based on the radio buttons and field associated to the right. This section only shows for ages 59 and older.
- ***This is a required selection, as a user is required to choose one of the radio buttons associated with each separate field.***

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Instrumental Activities of Daily Living (IADL)

California FSP 3M

| Effective | 09/12/2022 | | Status | In Progress | | Author | Admin, System |

Partner/Residential/Education   **Financial**   **Legal/Health/SU**   **ADL/IADL**

Instrumental Activities of Daily Living (IADL)

For each area of functioning listed below, check the description that applies

Can the client use the telephone?	○ Without Help ○ With Some Help ○ Completely Unable to Do
Can the client get to places out of walking distance?	○ Without Help ○ With Some Help ○ Completely Unable to Do
Can the client go shopping for groceries?	○ Without Help ○ With Some Help ○ Completely Unable to Do
Can the client prepare their own meals?	○ Without Help ○ With Some Help ○ Completely Unable to Do
Can the client do their own housework?	○ Without Help ○ With Some Help ○ Completely Unable to Do
Can the client do their own handyman work?	○ Without Help ○ With Some Help ○ Completely Unable to Do
Can the client do their own laundry?	○ Without Help ○ With Some Help ○ Completely Unable to Do
If the client takes medication (or if the client had to take medication) could they take it on their own?	○ Without Help ○ With Some Help ○ Completely Unable to Do
Can the client manage their own money?	○ Without Help ○ With Some Help ○ Completely Unable to Do

- User is to make a selection based on the radio buttons and field associated to the right. User is able to make the selection of 'Without Help', 'With Some Help', or 'Completely unable to Do.'
- This section shows for ages 59 and older.
- *** This is a required selection, as a user is required to choose one of the radio buttons associated with the separate fields.***

Completing the FSP 3M

When all information that can be gathered has been entered into the FSP 3M, a few final steps are needed to complete the FSP 3M.

You have two options: sign or save. If there is a compelling reason not to complete and sign the document, it can be saved and returned to at a later time by clicking the save button in the toolbar.

However, keep in mind that if the document is not signed information will not initialize into the client record, where applicable. To sign the document, it is not required that you save it first. Signing will both save and sign the document. First, ensure that the document has an effective date, and then click the blue 'Sign' button.
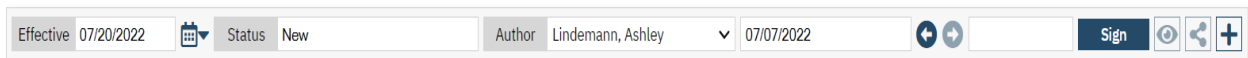
When you click the sign button, if you have fields that are required that you did not enter data into, you will receive a validation message like the one below.

The validation message will tell you exactly where you need to go to complete the requirement. The first part of the message (e.g. Partner/Residential/Education) will tell you on what tab you will find the requirement on. The second part of the message (e.g. Initial) will tell you which section to find the requirement in. The third part of the message (e.g. Current FSP Program is required) will tell you what the requirement itself is.

Once all requirements have been completed, click the sign button again (if validations occurred). You will then be presented with the signature screen. By typing in your password and clicking 'Sign' the document will be signed and applicable information initialized to the client record.
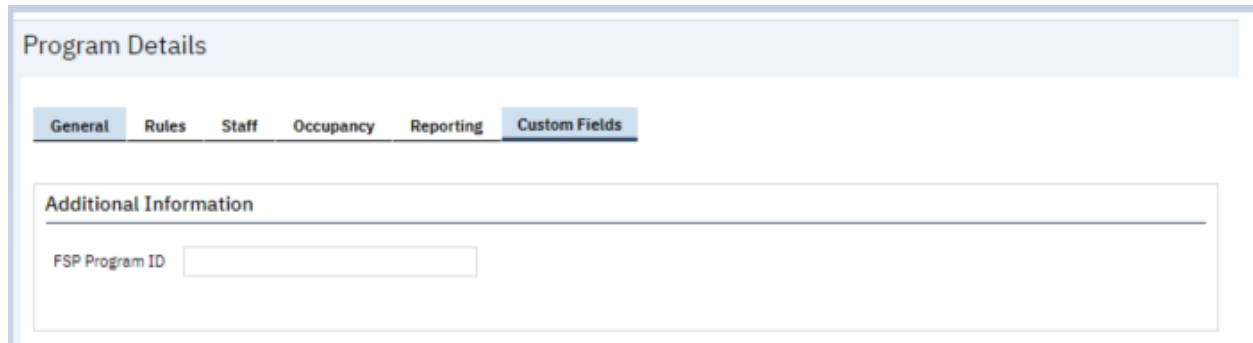
Once the document is signed, you should see a PDF of the document on the screen and status should change to complete.

Set Up Considerations

Program Details Screen

On the program details page, the user is able to indicate the organization's FSP Program ID for each program that is considered an FSP/MHSA Program. This is an administrative function, as it is used to send the FSP Program ID on the file based on the program selected on the 3M document.

Configuration Keys

Field Name	Configuration Key Category Name
Partner County	XSetCountyCodeForCaliforniaStateReporting

If your organization only provides services to clients within ONE county, then you should enter the County Code as defined by your state here. If nothing is entered, then on the form, user will be required to select the County every time. If something is entered here, then user will not see the field and it will prepopulate in the table for this document to be sent for reporting to the accurate county.

If your organization provides services to clients in more than one county and you report to each of those counties, then you should indicate 'None' in this key or leave it blank and users will be required to select the county each time they do the document.

The field this impacts is the 'Partner County' field below that is located on the Partner/Residential/Education tab in the Initial section.

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If there are counties you do not provide services to, you can go to the DACSManagingEntity Global Code category in the Global Codes screen and deactivate any counties you do not want staff to see in the drop down. You should only do this for counties that NONE of your programs are serving. You should keep all counties that at least one program serves as active.

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