

Family Independence First

Family Empowerment First

Family Engagement First

Family Community First

Family Respect First

Family Support First

Family Culture First

Family Success First

Family Choice First

Family Values First

Family Voices First

Family Vision First

Family Driven First

Family Goals First

Family Focus First

VENDOR SEARCH SOFTWARE

FOR FAMILY VOICES
NETWORK OF ERIE COUNTY,
NEW YORK

Connecting Communities... Focused on Quality



Family First Search Software

Objective: To increase family voice and individual choice in Erie County’s Wraparound System of Care, and increase the opportunity for positive engagement by showing youth and families that the system can work collectively to provide for their individual needs. Secondary objective is to provide equal accessibility to all agencies contracted in SOC.

Method: Care Coordinators will be provided a search software system that has all services, vendor agencies, service providers, and independent contractors preloaded. Care Coordinators will help their assigned families enter the demographic information they find most relevant to their needs in the “Family First” software, in order to select their child and family’s service providers.

Steps:

1. A family focus group provided information on what they would like to see in a provider, what they would like to control for, and what characteristics they would most appreciate.
2. Data collected from focus group was used to create Vendor Demographic Data Form (Schedule 3.1).
3. Vendor Demographic Data Forms were disseminated to Vendor Agency Supervisors and Independents to gather their relevant provider profiles.

This data was different than any other collected for service providers in the past. It asked for race/ethnicity, age, gender, educational levels, professional licenses, work-related experiences, and specific areas of clinical expertise.

NEEDS:

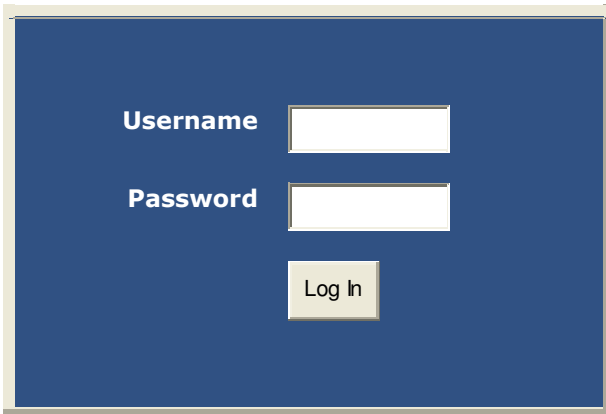
- I. The demographic data collection created Human Resource concerns (race, age, etc) that needed to be addressed.
 - II. Extra codes were listed for providers that were not previously loaded in CareManager.
 - III. According to vendor code list, some providers were not qualified for checked codes.
 - IV. Contracting concerns – Schedule 1.2s did not always match codes that were selected.
 - V. Ongoing data collection needed; multiple concerns created training delays.
4. Vendor Demographic Data Form and Vendor Service Codes were provided to independent software technology firm, to create a search software that will highlight the information provided in the family focus group.
 5. Family First Search Software training has been provided on an ongoing basis.

GETTING STARTED

Once all programs have loaded on the desktop, click on “Family First Local” icon if not using a live internet connection, or click on the “Family First Web” icon to access online.

If an icon is not available, access your notebook computer’s Internet Browser, and go directly to the Family First Website: <https://www.familyfirstny.org>

The Family First Login page should be displayed as follows:



The image shows a login form with a dark blue background. On the left side, the labels 'Username' and 'Password' are written in white. To the right of each label is a white rectangular input field. Below the 'Password' field is a yellow rectangular button with the text 'Log In' in black.

Enter the Login and Password provided to you by CCNY.

NOTE: Only those Care Coordinators who do not have access to wireless air cards need to be concerned about the synchronization function. Working in a wireless environment will always be the fastest and most efficient method to utilize Family First.

AFTER LOGIN

Upon logging in, the following should be the home page displayed on your screen:

Family Focus First



[Home](#) [Clients](#)

[Edit password](#) | [Log out](#)

Welcome

A required update needs to be loaded for all users that are running the local version on their laptops.

Please click the link below, click "Run", "Run" again, then "OK". The update is complete after this step.

[Update now](#)

Welcome to "Family First", a vendor provider search engine created specifically for the Family Voices Network of Erie County, New York.



[Click here to synchronize your local version to the server](#)
(This process will take a few moments)

If you choose, select the 'Edit Password' function, and change your password. You are now ready to use the Family First software.

ENTERING CLIENTS

Upon login, click on your **Clients** tab to begin entering a new client.

Family Vision First

Welcome

Home **Clients**

[View Archived Clients](#) | [Create New Client](#)

Clients

Next, click on the “[Create a New Client](#)” hotlink in the upper right hand corner. This will open up your electronic Universal Referral Form (URF), shown below. The only information needed from CareManager will be the Client Identification #, which is available on every Care Coordinator’s client list in CareManager. This client id will be used for tracking services, response time, and surveys. Complete the URF, and click “Add Information” at the bottom of the screen.

NOTE: Single line text fields have a limit of 200 characters (including spaces), whereas the larger, multiple line text fields have an unlimited capacity. Please provide

Home **Clients**

Add a New Client

CareManager Client Identification #	<input type="text" value="0831-092"/>	CareManager Client Identification #Required!
Client First name	<input type="text" value="John"/>	First name Required!
Client Last name	<input type="text" value="Doe"/>	Last name Required!


Child's nick name	<input type="text" value="Duey"/>
Child's date of birth	<input type="text" value="2/23/82"/>
Child's sex	<input type="text" value="Male"/>
Child's ethnicity	<input type="text" value="Caucasian"/>
Street address	<input type="text" value="123 Cayuga"/>

City	<input type="text" value="Cktw ga"/>
State	<input type="text" value="NY"/>
Zip	<input type="text" value="14225"/>
Nearest cross street	<input type="text"/>
Phone number	<input type="text" value="716-555-1212"/>
Name of parent(s)/ legal guardian(s)	<input type="text" value="Samantha"/>
Relationship	<input type="text" value="MOM"/>
Address (if different from above)	<input type="text"/>


Emergency Contact and Relation to the Child

Emergency Contact	<input type="text"/>
Relation to Child	<input type="text"/>
Phone Number	<input type="text"/>

Other household members (1)

Name	<input type="text"/>
DOB	<input type="text"/>
Relation to child	<input type="text"/>
Living in the home?	<input type="text"/> 

Other household members (2)

Name	<input type="text"/>
DOB	<input type="text"/>
Relation to child	<input type="text"/>
Living in the home?	<input type="text"/> 



[Click here to view /enter more than 2 household members](#)

Months in Care Coordination

What is the current situation or mental health status that led to this referral:

Child/Family Relation Information

Strengths

Child's hobbies/interests

Needs

Medical Concerns (any restrictions and/or allergies)

Diagnosis

Axis I DX Name

Axis I DX Code

Axis II DX Name

Axis II DX Code

Axis III DX Name

Axis III DX Code

Axis IV DX Name

Axis IV DX Code

Axis V: Recent

Axis V: Last Year

Diagnosis comments

Family First will allow families their Voice & Choice to be heard.

Psychiatric History

Medications

Institution Name

Last placement date

Medical Exam Status

Oriented

Affect

Mood

Lethality Assessment (both current and historical)

Self

Others

Drug/Alcohol History (child and/or family)

Exposure to Trauma (domestic violence, abuse, neglect, etc) (past and/or present)

Weapons in the home?

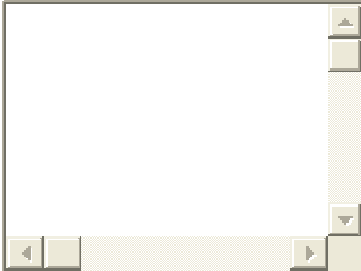
If yes, what weapons are present

Plan regarding weapons

Is safety a factor when transporting child?

Are there safety concerns with other family members/community?

Please explain the area of focus from the most recent Plan of Care for this Service/Support



Add Information

CARE COORDINATOR TIP: Family First stores the same information that is currently documented on the Universal Referral Form. Taking a few minutes to enter all the clients that currently appear on your caseload (with their CareManager Case #), will eliminate the need to fill this form out later, as the information will be available to providers as they determine the terms of a case. Since planning, preparing, and executing Child & Family Team meetings can be very time-consuming, this will make the search process easier. This means you only need to carry the *signature page* with you for obtaining the parent/guardian's consent.

UNDERSTANDING THE SEARCH

Click on your **Clients** tab to view all available clients currently in care (and currently entered). Select the client who will receive services by clicking on their name. Then select the **Find a Provider for this Client** button (located in the upper right corner of the page) to begin entering the preferred characteristics the Child & Family Team is looking for in a service provider.

That function will bring you to the following default page:

Family Engagement First



Welcome

[Edit password](#) | [Log out](#)

Home **Clients**

Search Criteria

Vendor Service Code

4653 - Respite Services - Hourly

Gender

--All Genders--

Age range

21

70

to

Language spoken (other than English)

--All Languages--

Race/Ethnicity

--All Races/Ethnicities--

Check here to show ONLY Medicaid eligible providers

Search

From this default page, Care Coordinators are able to select a specific profile of a worker for your client based on what the Child & Family Team have determined to be the best fit for the child. Each section has a drop-down available for the selection of Vendor Service Code, Gender, Age Range, Language spoken, and Race/Ethnicity. Additionally, if a Care Coordinators are only interested in those providers who are Medicaid reimbursable, they can check that box and see only those providers available.

STARTING THE SEARCH

Below is **EXAMPLE** to follow along:

Family Community First



1. Using the drop down table for “**Vendor Service Code**”, select the service associated with the needs identified by your Child & Family Team.

Enter 5206 DCW Mentoring

5206 - DCW-Mentoring

2. Using the drop down table for “**Gender**”, select the preferred gender of the service provider, as identified by the CFT.

Enter All Genders

--All Genders--

3. Using the drop down table for “**Age Range**”, select the parameters for the preferred age range of the service provider, as identified by the CFT.

Enter 21 to 43

21

to

43

4. Using the drop down table for “**Language Spoken (other than English)**”, select the preferred language ability the service provider should be influent in, as identified by the CFT.

Enter Spanish

Spanish

5. Using the drop down table for “**Race/Ethnicity**”, select the preferred culture of the service provider, as identified by the CFT.

Enter Hispanic or Latino

Hispanic or Latino

6. NOTE: If services for the wraparound client are being funded by Medicaid, place a check mark in the box to see *only those providers* who can be contracted under those regulations.

Leave Blank

Check here to show ONLY Medicaid eligible providers

7. Click on “Search” button.

Search

UNDERSTANDING THE SEARCH RESULTS

The “Results” page will appear very similar to the “Search Criteria” page, but with distinct additional features:

Family Engagement First



Welcome

[Edit password](#) | [Log out](#)

[Home](#) [Clients](#)

Search Criteria

Vendor Service Code 5206 - DCW-Mentoring ▼

Gender --All Genders-- ▼

Age range 21 ▼ to 43 ▼

Language spoken (other than English) Spanish ▼

Race/Ethnicity Hispanic or Latino ▼

Check here to show ONLY Medicaid eligible providers

Choice #3 ▼

Vendor Organization:

Heritage Centers

14214

ph. 716-833-8603 ext 217 fax

rschenk@heritagecenters.org

Provider Details

Juan Attea

Gender: **Male**

Credentials: **AA**

Professional Licenses:

Other Languages Spoken: - **Spanish**

Special Interests: - **Sports**

Medicaid Eligible? : False

Vendor Codes: [4653 - Respite Services - Hourly] [4656 - Skill Building] [5203 - DCW Crisis Respite] [5205 - DCW-Parent Aide] [5206 - DCW-Mentoring] [5207 - DCW-Recreation] [5302 - Crisis Respite/Hourly] [5522 - Parent Aide] [5523 - Tutoring] [5524 - Mentoring] [5525 - Recreation] [5535 - Group Recreation]

Choice #1

Vendor Organization:

Hispanics United of Buffalo

14201

ph. 716-348-4624 fax

hubdv@hotmail.com

Provider Details

Andrea Padilla

Gender: Female

Credentials: HS/GED

Professional Licenses:

Other Languages Spoken: - Spanish

Special Interests:

Medicaid Eligible? : False

Vendor Codes: [5205 - DCW-Parent Aide] [5206 - DCW-Mentoring] [5207 - DCW-Recreation] [5520 - Case Aide Services] [5522 - Parent Aide] [5524 - Mentoring] [5525 - Recreation] [5537 - Professional Interpreter Services] [5538 - Community Interpreter Services:] [5540 - Community Translation Services] [5570 - Vendor Transportation]

Choice #2

Vendor Organization:

Hispanics United of Buffalo

14201

ph. 716-348-4624 fax

hubdv@hotmail.com

Provider Details

Norma Gonzalez

Gender: Female

Credentials: AA

Professional Licenses:

Other Languages Spoken: - Spanish

Special Interests: - Music

Medicaid Eligible? : False

Vendor Codes: [5206 - DCW-Mentoring] [5520 - Case Aide Services] [5522 - Parent Aide] [5524 - Mentoring] [5537 - Translation Services]

Please be aware that the search results will list *all service providers* loaded in Family First. Family First will sort them in order, starting with those service providers that are loaded under the desired service code, then those that *most closely resemble* the preferred characteristics already entered by the Care Coordinator (at the top), continuing through to those service providers who *do not resemble* those characteristics at all (toward the bottom).

NOTE: For training purposes, only three of the selections were listed.

All lists will have the same basic headings, each of which includes:

- Vendor Organization,
- Zip code they operate in,
- Vendor Agency Supervisor phone number, and the
- Vendor Agency Supervisor email address.

Service Provider information listed will include preferred characteristics chosen by the CFT, as well as the following additional profile information:

- credentials (as reported by vendor agency),
- professional licenses (as reported by vendor agency),
- languages spoken (as reported by vendor agency),
- special interests (as reported by vendor agency),
- Medicaid/Waiver eligibility, and their
- Additional Service Code eligibility.

In addition to listing all available providers fitting the Child & Family Team's preferred characteristics, the software will allow families to rank-order their top 5 candidates.

This drop down function, located to the right of the Vendor Organization, will guide the software in the selection process should Choice #1 be unavailable, going immediately to Choice #2, then Choice #3, etc.

Users should scroll down to the bottom of the page, and click on "Continue."

REQUESTING AN APPOINTMENT

The “Request an Appointment” page should look like the following:



[Vendor Search](#) [Vendors](#) [Client Cases](#)

Request an Appointment

Client #	<input type="text" value="007"/>
Client First name	<input type="text" value="Juan"/>
Client Last name	<input type="text" value="Malo"/>
Parent/Guardian(s)	<input type="text" value="Carmen Electra"/>
Address	<input type="text" value="123 Olympic Way"/>
City	<input type="text" value="Olympus"/>
State	<input type="text" value="NY"/>
Zip	<input type="text" value="14201"/>
Phone	<input type="text" value="71-430-3362"/>
Anticipated Length of Service	<input type="text" value="6 months"/>
Safety Issues/Items to be aware of:	<ul style="list-style-type: none"><input checked="" type="checkbox"/> Drug Use in the home - Use in past<input type="checkbox"/> Drug Use in the home - Current use<input type="checkbox"/> History of violent/aggressive behavior<input checked="" type="checkbox"/> Exposure to Trauma (Domestic Violence, Abuse, Neglect, etc.)<input type="checkbox"/> Domestic violence<input type="checkbox"/> Physical abuse

- Neglect
- Weapons in the home
- Current concern of runaway behavior
- Previous (history) concern of runaway behavior
- Are there safety concerns with other family members/community

Other Important Information

Juan is a bilingual male, age 15. He is athletic, gifted in math, and very cool.

Juan's needs are for a caring, strong male role model to mentor him, and to

Care Coordinators will enter their client's case number from CareManager, their name, parent/guardian's name, and home address. From this point forward, the client's data will be stored in the Family First Software.

Care Coordinators will then enter the anticipated length of time the service provider should expect to be involved with the client.

From the Assessment, Crisis Plan, and CFT meetings, the Care Coordinator will identify all relevant Safety Issues/Items to be aware of by selecting each appropriate box.

Care Coordinator will enter any additional information they feel is necessary in the text box provided.

Press

This request for service will be saved on Family First, and emailed to the Vendor Agency Supervisor listed for Choice #1 the next time that laptop is connected to the internet (and synchronized). NOTE: If the request was generated in a wireless environment, it will be sent immediately.

PROCESSING THE REQUEST

Request has been sent

Thank you! Your request has been saved and will be emailed to the Vendor Agency Supervisor once your Care Coordinator has connected to the Internet. You should expect to hear from that agency within the next 16 business hours.

Vendor Agency Supervisors/Independents should expect to receive an email that lets them know their provider was selected by a family for a particular service, and they would then have to “Accept” or “Decline” that contract. That email message looks as follows:

A family has requested your services. The details for this request can be viewed at <https://www.familyfirstny.org>

WHEN REQUEST FOR SERVICE IS ACCEPTED

The VA Supervisor or Independent provider will be allowed to see the details of the case (which were previously found within the Universal Referral Form), including the child’s diagnosis, safety issues/concerns, and any other pertinent information supplied by the Care Coordinator. They must then decide whether they will accept or decline the case.

If they accept the case, it will be up to the VA Supervisor to contact their employee (“provider”), and inform them of the request. That provider would then pursue the request as normal, and arrange a meeting with the client and family in conjunction with their Care Coordinator. In order to ensure that the connection is made, the Care Coordinator will also receive a confirming email with the following message:

Provider Gateway-Longview has chosen to accept the terms of this case. Family First recommends you contact them or their Vendor Agency supervisor to coordinate the introduction to the child and/or family.

WHEN REQUEST FOR SERVICE IS DECLINED

If a request for service is “declined,” that VA Supervisor will check off a reason for declination from the following:

- Provider has scheduling conflict
- Provider has conflict of interest
- Provider’s services on hold
- Outside of provider’s geographical area
- Safety Concerns
- Inappropriate Referral
- Provider decline—reason other than listed

This action will be logged and automatically trigger an email being sent to the next Vendor Agency selected as “Choice # 2”, and the above process will continue until a match is made.

Default Declination: Should a Vendor Agency Supervisor not accept a contract for service within 16 business hours of that email being sent, Family First will automatically decline the contract, and send a new email request to the next Vendor Agency on the family’s list of choices (Choice # 2, 3, 4, or 5), until a match is made.

Care Coordinators will receive emails alerting them whenever a request for service is accepted or declined, as well as a warning email when their client has been declined 1 time less than the total number of selections chosen. This will signal that Care Coordinator to begin planning for a potential CFT meeting to discuss finding another provider or resource.

The process will be completed when that Care Coordinator has logged into Family First, and checked their client and their particular service need as “matched.”

UNDERSTANDING THE CLIENT LIST

The client list below shows all vendors that were selected by a given Care Coordinator, and groups all requests together by client, case #, service code, and all ranked choices. All requests under a given code for each client are linked together, and can be “archived” all at once by clicking on the “Archive” function. To bring the data back, click on “View Archived Cases”, and the data can be seen, and retrieved.

Client Cases for Eric Maldonado [Find a Provider for this Client](#) | [View Archived Cases for this Client](#)

Client	Case #	Client #	Vendor Code	Agency	Provider	Choice #	Accepted	Declined	Survey	Archive
Eric Maldonado	234	007	5100 - Individual Mental Health Therapy	CCNY-FOR TESTING ONLY!!	Brian Pagkos	1	URF False	True	N/A	Archive
Eric Maldonado	234	007	5100 - Individual Mental Health Therapy	CCNY-FOR TESTING ONLY!!	David Monroe	2	URF False	True	N/A	Archive
Eric Maldonado	234	007	5100 - Individual Mental Health Therapy	CCNY-FOR TESTING ONLY!!	Christine Rine	3	URF False	True	N/A	Archive
Eric Maldonado	234	007	5100 - Individual Mental Health Therapy	CCNY-FOR TESTING ONLY!!	Duncan Bethel	4	URF False	True	N/A	Archive
Eric Maldonado	234	007	5100 - Individual Mental Health Therapy	CCNY-FOR TESTING ONLY!!	Christa Bebak	5	URF False	True	N/A	Archive

DATA COLLECTION & EVALUATION

For data collection and evaluation purposes, surveys will be periodically activated through the software, for specific time periods, and seeking only a representative sampling of each service being evaluated. All surveys are voluntary and confidential, and each guardian and child will have the opportunity to accept or decline the survey.

The surveys will be done through a hotlink “Survey” button on the Care Coordinator’s provider list.

Client Cases for Eric Maldonado

Client	Case #	Client #	Vendor Code	Agency	Provider	Choice #	Accepted	Declined	Survey	Archive
<u>Eric Maldonado</u>	61	007	9002 - Transportation	We Care	Rachel Johnson	1	<u>URF</u> True	False	N/A	<u>Archive</u>

If N/A appears is listed, there is no survey to be collected. Surveys include questions related to that provider’s effectiveness with the family, their professionalism towards their responsibility to Care Coordinators, and whether that provider would be recommended by the family to others.

SYNCHRONIZING THE LOCAL APPLICATION TO THE WEB

When using the Family First software in a non-wireless environment (“Local”), the saved requests need to be synchronized to the web-based application at the next available opportunity.

Family Focus First



Welcome

[Edit password](#) | [Log out](#)

[Home](#) [Clients](#)

Welcome

A required update needs to be loaded for all users that are running the local version on their laptops.

Please click the link below, click "Run", "Run" again, then "OK". The update is complete after this step.

[Update now](#)

Welcome to “Family First”, a vendor provider search engine created specifically for the Family Voices Network of Erie County, New York.



[Click here to synchronize your local version to the server](#)

(This process will take a few moments)

Simply follow the instructions on your login page, and your laptop will be synchronized (all data will be transferred from your laptop to the server, and all requests will be processed).

HELP DESK: Contact Eric Maldonado, Vendor Development Specialist, 430-3362 or by email at emaldonado@comconnectionsny.org with any problems encountered while using the Family First software.