Virtual Family Assessment and Planning Team (FAPT) Meetings[1]

What does virtual FAPT mean?

A FAPT meeting is considered virtual when any of the participants are utilizing a web-based platform/application (e.g., Zoom) and/or phone to facilitate or engage in the meeting.

Fully virtual FAPT meetings occur when FAPT members, the family, provider, and any other participants all participate by video or phone.

Hybrid virtual FAPT means any combination of the following:

- The FAPT members may all be meeting in person in the same room and any combination of the caseworker, family, providers, etc. participate via electronic means.
- Any combination of FAPT members, family, or providers participating in an in-person meeting with some members participating virtually.

Benefits to a virtual FAPT:

- Improved participation, attendance, and engagement from families and vendors.
- Elimination of the need for travel by team members, and providers.
- No transportation barrier for families.
- More flexible scheduling options so that FAPT can occur, avoiding and decreasing interruptions in service approval/provision.

Potential barriers to a virtual FAPT:

- Internet/Technology issues.
- Lack of FAPT member engagement.
- Concerns about obtaining signatures.
- Inability to provide an adequate level of confidentiality due to available platform capabilities.
- The virtual platform may not be the best way to engage all families.

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[1] This document was developed for the CSA State and Local Advisory Team by a group of SLAT members and local CSA Coordinators. The document was approved by the SLAT on August 4, 2022.

Best Practices/Guidance for Virtual FAPT Meetings

If a locality is going to utilize a virtual FAPT option, it is recommended that local policy include language regarding the authorization and circumstances of virtual FAPT meetings. Policy language may include content related to some of the best practices identified for virtual FAPT meetings.

Security:

Learn about the security features of the virtual platform and implement the applicable security features to whichever platform you use. Potential options to mitigate security concerns include, but may not be limited to:

- Work with your locality's IT Department to identify the available platforms and security features.
- Locked meetings.
- Obtain a list of expected participants in advance and admit only authorized individuals.
- Use separate meeting links for each FAPT case.
- Utilize a meeting password/passcode.
- Designate a host to admit individuals.
- Ensure staff and families know that using an open (non-secured) Wi-Fi internet access limits the amount of meeting security.
- Make sure your local policy addresses that virtual meetings should not be recorded.

Confidentiality:

Being in a virtual setting for FAPT members is different than being in the controlled environment of the FAPT conference room, so confidentiality looks different. Localities may want to consider updating FAPT member confidentiality forms to include confidentiality for FAPT members working off-site. Some possible options include:

- Annual confidentiality agreement that includes a statement that references protocols when a member is participating in a meeting virtually, such as ensuring that confidential information is protected and not visible or will be able to be overheard by individuals who are not supposed to have access to that information.
- Include statements of confidentiality on the IFSP signature page that acknowledges each participant's pledge to keep information confidential. For example: "By signing this IFSP, I agree not to divulge any information revealed at this meeting to any individual or agency, except as authorized by policy or required by law."

Signatures:

It is recommended that localities meeting virtually have a signature solution, ideally an electronic signature program recommended by your locality's IT Department. Potential options include, but may not be limited to:

• DocuSign

• Adobe Sign

• Faxing/Scanning

If signatures are unable to be obtained through an electronic method, verbal consent should be documented in the Individual Family Service Plan ([FSP) with a notation of who provided the consent, on what date, and who recorded it on the document.

Family Engagement:

• Have a call-in option for people unable or do not have the capacity to participate via a web- based platform.
• If allowable by your locality, consider purchasing calling cards for families who may struggle with keeping cell service.
• Have a language interpreter to engage in the virtual meeting if needed.

• Ensure that enough time is scheduled for the meeting such that the family's voice can be heard in the time allowed.
• Provide as much flexibility in scheduling to ensure that the time scheduled works for the family.

FAPT Member Engagement/Professionalism:

FAPT members should participate in meetings in the same way that they would participate in person, in terms of levels of engagement and professionalism. It is recommended that localities each identify their own requirements and develop their culture of engagement. Some suggestions include:

• Members should use their camera if they have access to one.
• Members should demonstrate engagement by looking at the screen (and/or explaining that they are looking at a second screen for typing).
• Members should provide feedback and participate in the conversation.
• Members should avoid eating, driving, napping, answering the phone, engaging in "outside" conversations, etc. during FAPT meetings.
• Consider designating a specific "technology facilitator" and/or a separate

documenter, so the meeting facilitator is able to fully engage with the family and participants.

- Facilitators may consider an opening statement to families and providers to explain some of the things mentioned above. For example, "please note that our staff will be engaged during your FAPT meeting today, but there may be times when staff will be writing notes or researching policies and services related to your case and therefore they may seem distracted."
- Consider formats where at least some FAPT members are in person in the same room to facilitate communication among members.
- Consider having rules of engagement displayed on the screen if using a virtual platform.
- Localities should have a procedure regarding cancelation of virtual FAPT meetings in the event that a meeting is canceled.