

The Document Upload: Phase I (OOH Referral Request Process for CMO's)

OVERVIEW: Document upload functionality allows certain CYBER users to electronically upload documents directly to a youth's CYBER record. Document type and subtype categories were developed which enables all documents to be uploaded in an organized and easily accessible fashion.

Effective **June 1, 2015**, Phase I of the document upload process will be implemented. For Phase I of implementation, only CMO users will solely use this functionality to upload specific documents to a youth's CYBER record in support of the Out-of-Home Referral Request and Transitional Joint Care Review (TJCR) processes. Therefore, all IOS determinations completed on 6/1/15 onward will require CMO to upload required documentation into a youth's record at the time of the OOH Referral Request or TJCR submission. Intensity of Service (IOS) determinations will not be made with incomplete documents. **Additional service lines (including OOH providers) will be phased in at a later date.**

PLEASE TAKE NOTE that in order for Level 2 and Level 3 CMO CYBER Users to have the ability to review and upload documents, your System Administrator must add the following Security Groups to the Level 2 and 3 Users:

UCMDOCATTACH

UCMDOCATTACHRead

GOALS OF DOCUMENT UPLOAD:

- ✓ **To improve the quality of out-of-home IOS determinations**
- ✓ **To decrease OOH Referral Request and TJCR returns**
- ✓ **To eliminate paper referral packets for SRTU consultation**
- ✓ **To streamline existing processes**

NEW FEATURES:

- In order to allow for sufficient time for review of all documentation, the review time for OOH Referral Requests has been increased to two (2) business days.
- Two comprehensive checklists have been created which will assist CMO's in gathering all required documents. Document requirements for substance use and IDD are included. These checklists must be uploaded at the time of the OOH request and are available on the PerformCare website:

Out-of-Home Referral Request Checklist Transitional Joint Care Review (TJCR) Checklist

- A new standardized cover letter has been developed for SRTU consultation. This document is available on the PerformCare website.
- Care Managers now have the ability to view the name, effective date, and contact information of their assigned SRTU consultant via the Provider tab of a youth's face sheet:

USER	FIRSTNAME	LASTNAME	TYPE	AGENCYTYPE	FACILITYNAME	STARTDATE	ENDD
NJBAK	Jennifer	Bak	EXEEXE	CSOC	CSOC/SRTU	2015/04/06	
nwatson	Nicole	Watson	SABWOR	SAB	SODAT of New Jersey, Inc.	2015/03/25	

PROCESS: OOH REFERRAL REQUESTS

1. Care Manager will gather all required documents (per checklist requirements) and complete OOH Referral Request based on the information within the documents. Care manager will complete the checklist in order to ensure that all required documents are available.
2. Care Manager will save the document using a standard naming convention for all documents that need to be uploaded - *Cyber ID, document type, date received*. Optional fields such as *County* can be added to the end of the filename.
3. Care Manager will proceed to upload all documents (including the checklist) to CYBER via the following steps:
 - a. Document upload functionality can be found on the Doc tab of the youth's Face Sheet. Clicking on the *Add New Document* button will open a new window where the user will select the Document Type, Sub-Type, and enter a description before uploading the document to the record (please take note that a crosswalk of documents, document types, and sub-types can be found on the 2nd page of both checklists. This will assist you in making the correct choices when deciding where to place documents in the record):

Type	Description	Create Date	File Name

- b. Upon entering the document type/subtype and description, click the *Browse* button, and select the area where the document is located.
 - c. Click the *Upload* button, which will upload the document to the youth's record**.
4. All required documents (including the completed checklist) must be in CYBER at the time of the OOH Referral Request submission. An OOH Referral Request that is received without the necessary supporting documentation will be returned. For example, if you are pending the outcome of a Psychosexual Evaluation, please do not submit the OOH Referral Request as this document is critical to the IOS decision-making process.

5. Upon upload of documents and submission of the OOH Referral Request, the Care Manager will enter an *Out-of-Home Referral* progress note which verifies that all required documents were uploaded and are ready for review.
6. PerformCare will review the OOH Referral Request and supporting documents and will render an IOS determination (or return incomplete submissions) within two (2) business days.

****If a document is uploaded to CYBER in error, the Care Manager must submit a request to the CYBER Service Desk at servicedesk@performcarenj.org or (877) 736-9176 in order to have the document deleted from the youth's record. Only PerformCare has the ability to delete uploaded documents.**

PROCESS: TRANSITIONAL JOINT CARE REVIEWS (TJCR)

1. Immediately following the Child Family Team (CFT) meeting which confirms the plan for OOH transition, the Care Manager will gather all required documents and complete the TJCR checklist to ensure that all required documents are present.
2. Care Manager will proceed to upload all documents (including the checklist) to CYBER via the steps provided above.
3. Upon upload of documents, the Care Manager will enter a *CFT Update* progress note which both verifies CMO's agreement with transition and confirms that all required documents were uploaded to file.
4. Upon completion of above tasks, the OOH provider may proceed to submit the TJCR for review. The TJCR should not be submitted until all documents are uploaded. CMO should be coordinating this process with the OOH provider.
5. PerformCare will review the TJCR and supporting documents and will render an IOS determination (or return incomplete submissions) within five (5) business days.

SRTU CONSULTATION

1. If the Intensity of Service (IOS) meets criteria for SRTU consultation, PerformCare will instruct the Care Manager to send an e-mail with attached SRTU Cover Letter to the following e-mail address:
SRTUconsultation@dcf.state.nj.us

The email should contain the following information:

Subject Line: "Cyber ID#"/IOS Determination

Body of Email: Sender's contact information

Attachment: SRTU Cover Letter (posted on the PerformCare website – Providers/Forms)

2. SRTU will check this e-mail daily. SRTU referral will be assigned within one (1) business day of receipt. Please take note that SRTU will not send a return e-mail verifying e-mail receipt. To verify e-mail receipt, the Care Manager may request an e-mail delivery receipt via their e-mail settings.
3. As mentioned above, Care Manager has the ability to obtain the name, effective date, and contact information of their assigned SRTU consultant via the Provider tab of the youth's face sheet.

4. The assigned SRTU consultant will contact the Care Manager with recommendations within three (3) business days of assignment.

IMPORTANT TIPS TO REMEMBER:

- ✓ If a document is uploaded to CYBER in error, the Care Manager must submit a request to the CYBER Service Desk at servicedesk@performcarenj.org or (877) 736-9176 in order to have the document deleted from the youth's record. Only PerformCare has the ability to delete uploaded documents.
- ✓ IOS determination timeframe for OOH Referral Requests has been increased to two (2) business days. TJCR review time will remain five (5) business days. The TJCR should not be submitted until all documents are uploaded. CMO should be coordinating this process with the OOH provider!
- ✓ The OOH Referral Request Checklist, Transitional Joint Care Review (TJCR) Checklist, and the SRTU Cover Letter are all posted on the PerformCare website under *Provider/Forms*.
- ✓ If the youth is educationally classified, the Care Manager does NOT need to upload the entire IEP. Rather, only upload the cover sheet which verifies the youth's educational classification.
- ✓ Due to disclosure protection under 42-CFR Part II, do NOT upload any documents pertaining to substance use. Instead, please fax substance use evaluative materials to PerformCare at (877) 949-6590 along with the required Substance Use Consent Form which is located on the PerformCare website at <http://www.performcarenj.org/provider/substance/forms.aspx>. Please check box if assessment was faxed.
- ✓ Do NOT upload court related documents. If the youth is involved with court, please clearly document the status of court involvement, including, but not limited to, court hearings, legal charges, probation information, court orders, subpoenas, etc. within the Legal Involvement accordion of the OOH Referral Request (or directly within the TJCR).
- ✓ Please use the following crosswalk guide (included within both checklists) in order to ensure that documents are uploaded within the correct category:

DOCUMENT UPLOAD CROSSWALK		
DOCUMENT	CYBER DOC TYPE	CYBER DOC SUBTYPE
OOH Referral Document Checklist	Clinical	Other Applicable Reports/Evaluation
BPS (if not in CYBER)	Clinical	Bio Psychosocial Assessment
Psychological Evaluation	Clinical	Psychological Eval/Assessment
Psychiatric Evaluation	Clinical	Psychiatric Evaluation
*Psychiatric Update	Clinical	Other Applicable Reports/Updates
Specialty Evaluations	Clinical	Specialty Assessment/Evaluation
Substance Use Assessment	N/A	N/A
IEP Cover Sheet/Evaluation	Clinical	IEP/Educational Info
Medical Reports	Clinical	Medical Information
Other applicable evaluations/reports	Clinical	Other Applicable Reports/Documents