

# PerformCARE<sup>®</sup>

CYBER Release 1.16: Welcome Page  
Hierarchy Instructional Guide for Users  
with High-Level Access (“Supervisor”  
designation and up)

# PerformCARE®

## Welcome Page Hierarchy– Instructions for Use

### Table of Contents

I. Introduction .....	3
II. Accessing CYBER .....	4
III. Welcome Page Hierarchy .....	5
IV. New Functionality for Users with Supervisor and Higher Designations .....	6

## I. Introduction

The Welcome Page was initially designed to give users a quick access point to the most frequently used areas of CYBER that they refer to in their day-to-day work; it also was to function much like a reporting service, where a user would have access to data that would show information such as plans that were coming due and authorizations that were going to expire and it would then prompt follow-up work. Up until this CYBER release, a user was capable of seeing only their own work on the Welcome Page.

This release of CYBER includes an enhancement to the Welcome Page for CSA, DCBHS, Case Management, IIC, OOH and MRSS; a new hierarchy structure will be presented on the Welcome Page in the form of a pull-down menu above the grid in the middle of the screen.

This hierarchy structure is based upon the new Role Based Security model within CYBER. If a user has a designation of "CM" (Care Manager) in the system, they will only see their own work on the Welcome Page and will not have the option of choosing another user. Users with a designation of "SUP" (Supervisor) will be able to see the work of the Care Managers below them in the hierarchy structure, as well as the work of other Supervisors, within their agency. (This is also the case for anyone with the designation of "MGR", or Manager.) Users with a higher level designation, such as "QA" (Quality Assurance) or "DIR" (Director) will see all users below them in the hierarchy structure for their agency.

This enhancement was made so that Supervisors and Managers have the ability to track the work of their staff; specifically, it allows them to see the number of plans or assessments that are being returned to the user by the CSA. This also allows them access to the user's individual Aging Reports (where applicable). This enhancement allows users to see the plans and assessments that are "In Progress" and may need to be sent to another user within the organization for submittal to the CSA if a Care Manager is out of the office unexpectedly. Some Supervisors and Managers may already be managing this process by using the Plan Approval screen and reassigning plans and assessments from there; the Plan Approval screen has been changed but the functionality of assigning and reassigning plans remains the same. For more information on the changes made to the Plan Approval screen, please refer to the Instructional Guide specific to your Service Line (Case Management, OOH, MRSS, etc.).

Users with a designation of Supervisor, Manager or higher (QA, FIN, etc.) will also be able to see a list of outstanding work that is attached to any deactivated users that fall below them in hierarchy. A new accordion on the Welcome Page will be available to these users and will allow them to see what documents are still in progress; users can then go to the Plan Approval screen to reassign the Treatment Plan or Assessment, or they can utilize the new functionality on the Progress Note screen which allows these levels of users to access all draft progress notes that are associated with a youth's record. This allows the user to edit, delete or commit the progress note to the record.

## II. Accessing CYBER

Users must first log-into CYBER with their UserID and Password. The log-in screen can be found via the PerformCare website – [www.performcarenj.org](http://www.performcarenj.org).



## CYBER LOGIN

Enter Login Name Here

Enter Password Here

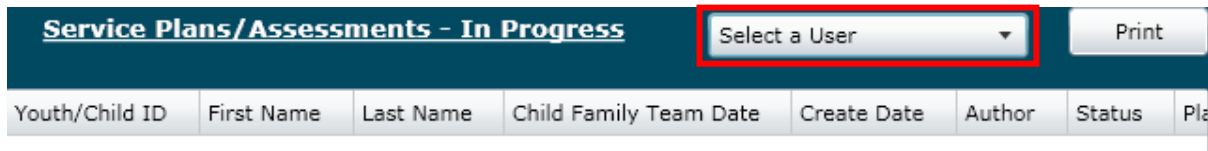
Login

As a CYBER User I understand that my work will involve access to Protected Health Information (PHI) as defined by HIPAA (The Health Insurance Portability and Accountability Act) for the purpose of providing or arranging treatment, payment or other health care operations. I also acknowledge that I am engaged by a covered entity. I further acknowledge my responsibility to protect the privacy of and to guard against inappropriate use or disclosure this PHI by logging in as a CYBER User.

This is in compliance with "The Health Insurance Portability and Accountability Act (HIPAA) of 1996 and its implementation regulations. For more information on HIPAA please go to <http://www.hhs.gov/ocr/hipaa/> "

## III. Welcome Page Hierarchy

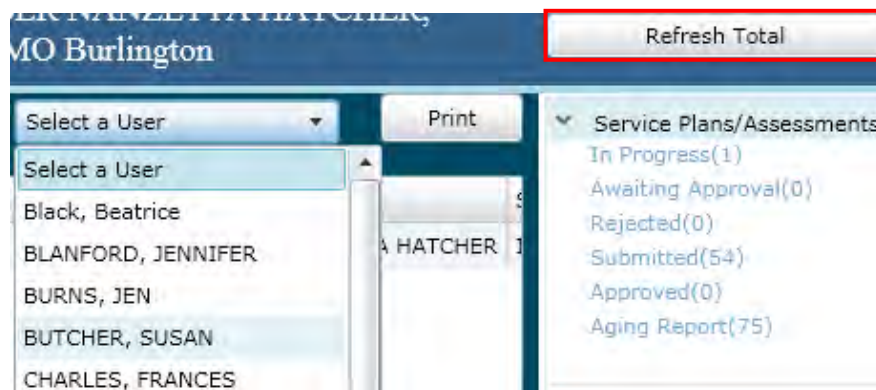
There is a new hierarchy structure available for use on the Welcome Page that users will find above the center grid area.



This pull-down menu will allow users that have a higher than Care Manager designation in CYBER to see the work of others below them in the hierarchy (Care Managers will not have options in this menu; they will only see their own Welcome Page). This was done so that Supervisors and Managers could easily access and track the work of their staff; this was also implemented to assist others in gaining access to work. If a Care Manager is not available and work needs to be completed on a Treatment Plan or Assessment, the Supervisor or Manager can pull up that user's Welcome Page, find the Plan or Assessment, and transfer it to another user who is currently working with the youth. They can also transfer the Plan or Assessment to themselves to submit to the CSA. (Transferring or re-assigning the document is done on the Plan Approval screen.)

\*Please note: Users with a Supervisor designation will also have the ability to see the work of other users with the same Supervisor designation (this is the case for Managers, as well).

Selecting a name from the menu will then populate the links on the Welcome Page with that user's information; the selected user's name will appear at the top of the menu as a reminder to the logged-in user. (Note: to see the numbers next to the links on the right re-populate with the selected user's information, remember to click on the Refresh Totals button that is located above the links on the right-side of the screen.)

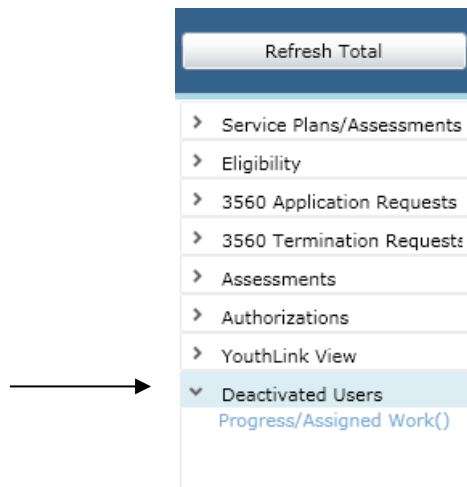


Keep in mind that the User ID that is logged into the system is the ID that will be attached to any work that is done; the system will not maintain the ID that is chosen from the Welcome Page hierarchy. For example, if the Supervisor chooses to review the work of a Care Manager, and then goes to a youth's record and commits a progress note, that note will have the ID of the Supervisor attached to it.

The grids on the Welcome Page will continue to function as they have since their initial release; this hierarchy structure does not change the functionality of the grids, or the information that is housed in each.

## IV. New Functionality for Users with Supervisor and Higher Designations

Users with the designation of Supervisor or higher within an agency will have access to a new accordion on the Welcome Page titled “Deactivated Users”; it will be the last accordion on the right-side of the page.



Users will find one link here, “In Progress/Assigned Work”. Clicking this link will populate the center grid with a list of all work that is currently assigned to a user that has been deactivated in the agency.

The screenshot shows a table titled 'Deactivated Users' with a 'Select a User' dropdown and a 'Print' button. The table contains the following data:

Youth/Child ID	Doc Type	User ID	Status	Treatment ID
<a href="#">121317</a>	Treatment - CMO	NJIDAVIS	In-progress	551077
<a href="#">2869</a>	Assessment		In-progress	3
<a href="#">46554</a>	Assessment		In-progress	61054
<a href="#">123</a>	Assessment		In-progress	61078
<a href="#">278</a>	Assessment		In-progress	61264
<a href="#">108302</a>	Assessment		In-progress	61286
<a href="#">6030</a>	Assessment		In-progress	61368
<a href="#">428</a>	Assessment		In-progress	62728
<a href="#">80900</a>	OOH-Assessment	NJIDAVIS	In-progress	49410
<a href="#">5342</a>	Strengths Needs Assessment	NJBPREST	Assigned	175557

If there are Treatment Plans or Assessments that have not been submitted to the CSA, the user can find them on the Plan Approval screen; keep in mind that Treatment Plans and Assessments that are still in-progress can only be accessed on the youth’s Treatment Plans and Assessments screen by the author. The documents can be reassigned to another user within the agency for work, review, deletion or submission on the Plan Approval screen. (To easily locate a Treatment Plan or Assessment on the newly redesigned Plan Approval Screen, please refer to the Instructional Guide for your Service Line.) If there are draft Progress Notes in the system, the user will need to go to the youth’s record and click on the new “Select All Draft Progress Notes” option; if the agency is still open in Tracking, the user will be able to navigate to the record from this grid, by clicking on the Youth/Child ID hyperlink. If the agency is closed in Tracking, the user will not see the draft progress notes on this grid; they will not be accessible.

# PerformCARE®

**Progress Notes**  Show All Draft Progress Notes  Truncate Notes  Show My Draft Progress Notes  Show Committed and Signed Progress Notes

NoteDate	NoteType	Created BY	Note
----------	----------	------------	------

Only users with a designation of Supervisor or higher will have access to this new function; no other users will see it. Please keep in mind that this new functionality allows these users to see all draft progress notes that are associated with an individual youth's record. Users should take care that they are only editing, deleting or committing those progress notes that were attached to a user who is now deactivated. Users that are still active in the system should be completing a clean-up of their own draft notes on a regular basis. There is a new column in this grid – Created By – that will indicate the user ID of the user that authored the note; this information should be referred to as to ensure the correct note is being accessed.