

# PerformCARE<sup>®</sup>

## Instruction Guide for Ad Hoc Data Extract : Authorizations

## Ad-Hoc Extracts – Authorizations – Instructions for Use and Exporting

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## **I. Introduction**

The extract contains all the fields from the Authorizations table that pertain to the Authorization data (such as the start date of the authorization, the service code associated with the authorization). The extract will show data for the children that have an authorization created for the agency the user is associated with, within a specific time frame. (Definitions of each field are available on page 9.)

**\*\*For the purpose of these instructions, the report is defined as a data extraction\*\***

## II. Accessing the Extract

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

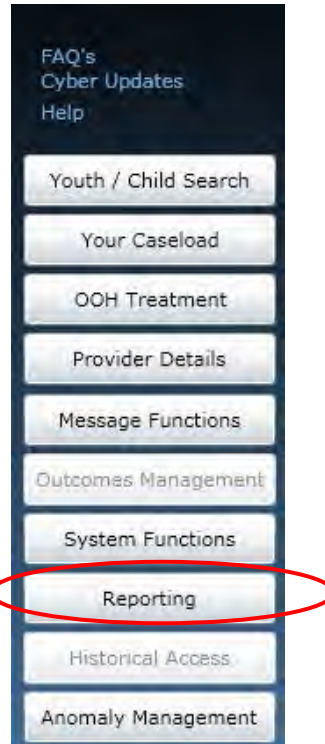
Login

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/> "

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To access the Ad Hoc Extracts, users will click on the “Reporting” button on the left-side of their Welcome Page.

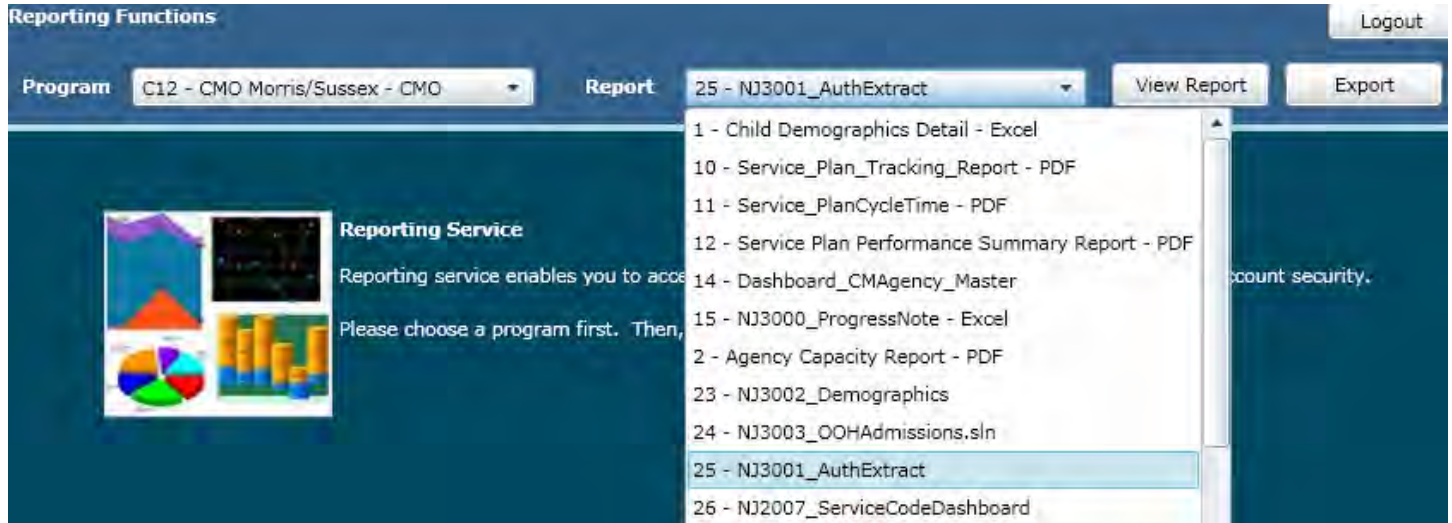


\*If a user does not have a functional Reporting button on their Welcome Page, they should contact their Systems Administrator or the Service Desk for assistance with their security access. Only users with Level 3 security may access functionality from the Reporting button.

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Users will choose their Program Name from the first menu and the extract from the second menu (see below).

\*The Authorizations Ad Hoc Extract is titled – “25 – NJ3001\_AuthExtract”.



**Reporting Functions** Logout

Program: C12 - CMO Morris/Sussex - CMO    Report: 25 - NJ3001\_AuthExtract    View Report    Export

**Reporting Service**  
Reporting service enables you to access...  
Please choose a program first. Then, ... account security.

- 1 - Child Demographics Detail - Excel
- 10 - Service\_Plan\_Tracking\_Report - PDF
- 11 - Service\_PlanCycleTime - PDF
- 12 - Service Plan Performance Summary Report - PDF
- 14 - Dashboard\_CMAgency\_Master
- 15 - NJ3000\_ProgressNote - Excel
- 2 - Agency Capacity Report - PDF
- 23 - NJ3002\_Demographics
- 24 - NJ3003\_OOHAdmissions.sln
- 25 - NJ3001\_AuthExtract**
- 26 - NJ2007\_ServiceCodeDashboard

## III. How to Customize the Extract

Users should click on the “**Export**” button to view the extract within CYBER; this will allow users to change the parameters and customize the extract to be exported. (Choosing “View Report” will not create an extract unless the user has their PC set-up to automatically open the file from the download and pop-ups are disabled in the browser.)

The screenshot displays the 'Reporting Functions' section of the PerformCARE interface. At the top right, there is a 'Logout' button. Below it, the 'Program' dropdown is set to 'C12 - CMO Morris/Sussex - CMO' and the 'Report' dropdown is set to '25 - NJ3001\_AuthExtract'. To the right of these dropdowns are two buttons: 'View Report' and 'Export'. The 'Export' button is highlighted with a red rectangular border. Below this section, there is a navigation bar with 'View Report' and 'Back to Report Selection' buttons. The main form area contains several input fields: 'Authorization create date from:' with the value '11/30/2011' and a calendar icon; 'Authorization create date to:' with the value '12/30/2011' and a calendar icon; 'Last name starts with:' and 'First name starts with:' both with empty text boxes; and 'Show Only Active Youth:' with radio buttons for 'True' (selected) and 'False'. On the right side of this form, the 'View Report' button is circled in red.

Users will need to enter the parameters to generate the data extract that fits their needs; the information shown in the screenshot above is the default setting for the extract parameters. Clicking on the calendar button will give the user the ability to choose the date parameters. The parameters are as follows;

- Authorization Create Date From/To: The time frame that the user wants to look for Authorizations, based upon the start date of the authorization in the youth’s record
- Last Name Starts With: Users may chose to put only the first letter(s) of the youth’s last name; the user can run the extract without including this information
- First Name Starts With: Users may chose to put only the first letter(s) of the youth’s first name; the user can run the extract without including this information
- Select Only Active Youth: Select “True” to see only the youth that currently have an open Tracking Element for the agency; select “False” to see all youth that have had (and currently have) an open Tracking Element for the agency

Clicking the View Report button will create the extract.

## IV. Exporting the Extract into Excel

Once the extract loads, the user will have the option to export the data to another format, such as Excel.

The screenshot shows the PerformCARE interface with search filters and an export menu. The filters include "Authorization create date from:" (9/5/2011), "Authorization create date to:" (12/30/2011), "Last name starts with:", "First name starts with:", and "Show Only Active Youth:" (True). The export menu is open, showing options: "Select a format", "XML file with report data", "CSV (comma delimited)", "Acrobat (PDF) file", "MHTML (web archive)", "Excel", "TIFF file", and "Word". The "Excel" option is highlighted.

| Authorization Number | Child ID | Last Name | First Name | Start | End | Molina Accepted | Service |
|----------------------|----------|-----------|------------|-------|-----|-----------------|---------|
|                      |          |           |            |       |     |                 |         |

This close-up screenshot shows the "Select a format" dropdown menu with the following options: "Select a format", "XML file with report data", "CSV (comma delimited)", "Acrobat (PDF) file", "MHTML (web archive)", "Excel", "TIFF file", and "Word". The "Excel" option is highlighted.

| Last Name | First Name | Start | Molina Accepted | Service |
|-----------|------------|-------|-----------------|---------|
|           |            | 10/   | unavailable     |         |

Choosing Excel from the menu, and then clicking on "Export", will export the data to an Excel worksheet.



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Once the data is exported into Excel, the user can choose to filter or sort it as needed.

|    | A                    | B        | C         | D          | E               | F            | G                        | H         | I          |
|----|----------------------|----------|-----------|------------|-----------------|--------------|--------------------------|-----------|------------|
|    | Authorization Number | Child ID | Start     | End        | Molina Accepted | Service Code | Service Code Description | Unit Cost | Appr Units |
| 1  | 1536193976           |          | 8/7/2011  | 8/12/2011  | unavailable     | CSA26        | Camp                     | 0         | 1          |
| 2  |                      |          |           |            |                 |              |                          |           |            |
| 3  | 1536217081           |          | 9/1/2011  | 9/30/2011  | unavailable     | Z5008        | Care Management          | 0         | 1          |
| 4  | 1536223581           |          | 9/1/2011  | 9/30/2011  | 07/19/2011      | Z5008        | Care Management          | 0         | 1          |
| 5  | 1536224377           |          | 10/1/2011 | 10/31/2011 | unavailable     | Z5008        | Care Management          | 0         | 0          |
| 6  | 1536226285           |          | 9/1/2011  | 10/31/2011 | 06/28/2011      | Z5008        | Care Management          | 0         | 1          |
| 7  | 1536226364           |          | 9/1/2011  | 9/30/2011  | 06/28/2011      | Z5008        | Care Management          | 0         | 1          |
| 8  | 1536227201           |          | 9/1/2011  | 9/30/2011  | 06/28/2011      | Z5008        | Care Management          | 0         | 1          |
| 9  | 1536227648           |          | 9/1/2011  | 9/30/2011  | 06/28/2011      | Z5008        | Care Management          | 0         | 1          |
| 10 | 1536228124           |          | 9/1/2011  | 9/30/2011  | 06/28/2011      | Z5008        | Care Management          | 0         | 1          |

## V. Ad Hoc Data Extract Dictionary

### Authorizations

*The definitions below explain the various data field in the data extract*

| Field Name                      | Definition   |
|---------------------------------|--|
| <b>Appr Units</b>               | The number of units that were approved for the service that was authorized.  |
| <b>Authorization Number</b>     | The Authorization Number that is assigned to each individual Authorization in the youth/child's CYBER record.                        |
| <b>Child ID</b>                 | The Child ID is the unique identifier number for a child/ youth or young adult associated with the Authorization in CYBER            |
| <b>Create Date</b>              | The date on which the authorization was entered into the youth/child's CYBER record.   |
| <b>Create User</b>              | CYBER username of the individual that created the authorization in CYBER.  |
| <b>End</b>                      | The End Date of the Authorization.   |
| <b>First Name</b>               | First Name of the youth as its entered on the Face Sheet   |
| <b>Last Name</b>                | Last Name of the youth as its entered on the Face Sheet  |
| <b>Molina Accepted</b>          | The date that the Authorization was accepted by Molina (Medicaid).   |
| <b>Provider Name</b>            | Name of the provider agency that the authorization was created for.  |
| <b>Provider Number</b>          | Unique numerical identifier within CYBER that is associated with the provider that the service was authorized for.                   |
| <b>Service Code</b>             | The code that is associated with the service that is authorized and housed in the youth/child's CYBER record.                        |
| <b>Service Code Description</b> | A short description of the service that the Authorization was created for.   |
| <b>Start</b>                    | The Start Date of the Authorization.   |
| <b>Unit Cost</b>                | The cost per unit for the service that was authorized; may be blank if there is no billable amount associated with the service code. |