

# PerformCARE<sup>®</sup>

## Instruction Guide for Ad Hoc Data Extract : Demographics

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

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## **I. Introduction**

The extract contains all the fields from the Demographics table that pertain to the Demographic data (such as the Child's Address, Parent Address and Phone Number). The extract will show data for the children that have been linked to the agency the user is associated with via an open Tracking Element, within a specific time frame; please note that if the youth currently has an open Tracking Element for what is defined as a "special population" in CYBER (CCIS, FFT, PHP, etc), they will also appear in the extract. (Definitions of each field are available beginning 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

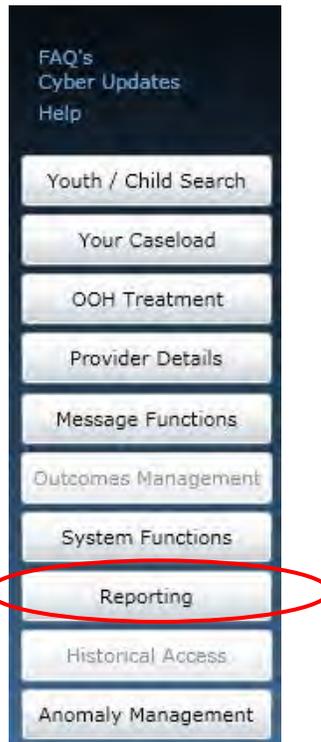
Enter Password Here

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/> "

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

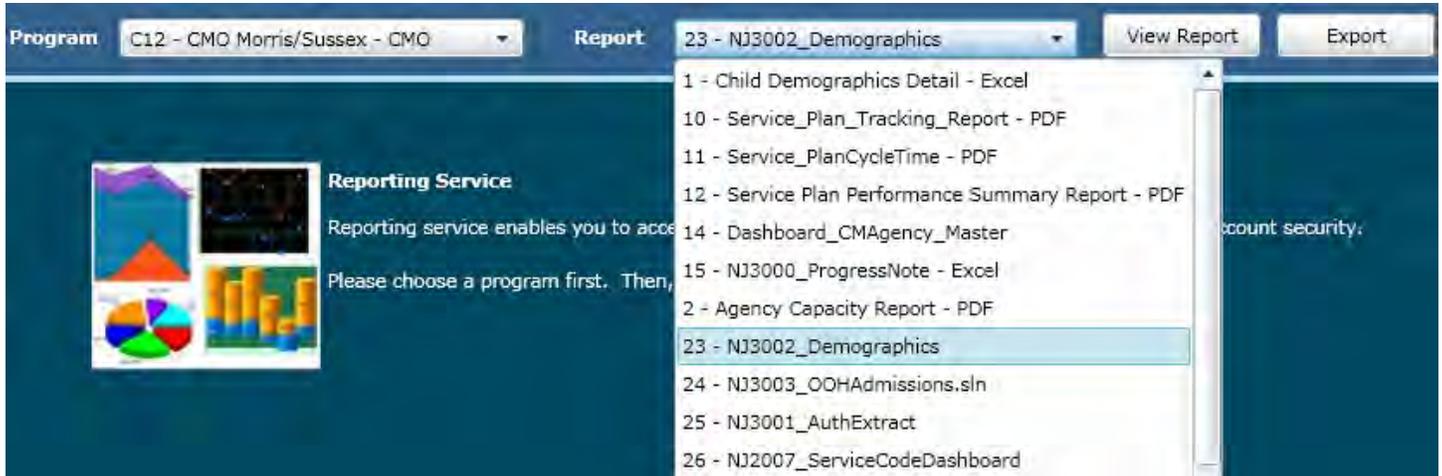


\*If a user does not have a functional Reporting button on their Welcome Page, they should contact their Systems Administrator or the Service Desk for assistance with their security access. Only users with Level 3 security may access functionality from the Reporting button.

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

\*The Demographics Ad Hoc Extract is titled – “23 – NJ3002\_Demographics”.



## 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 PerformCARE interface. At the top, there are two dropdown menus: 'Program' set to 'C12 - CMO Morris/Sussex - CMO' and 'Report' set to '23 - NJ3002\_Demographics'. To the right of these are two buttons: 'View Report' and 'Export', with the 'Export' button highlighted by a red rectangle. Below this is a navigation bar with 'View Report' and 'Back to Report Selection' links. The main area contains several input fields: 'Child Agency entry date From:' with a date of '11/30/2011' and a calendar icon; 'Child Agency entry date to:' with a date of '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'. A 'View Report' button is circled in red on the right side of the form.

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 parameters for the time frames the extract will be created for. The parameters are as follows;

- Child Agency Entry Date From/To: This refers to the start date of the Tracking Element for the agency 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 open Tracking Elements 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.

Child Agency entry date From: 10/3/2011 Child Agency entry date to: 12/30/2011 View Report

Last name starts with: First name starts with:

Show Only Active Youth:  True  False

1 of 2 100% Find | Next Select a format Export

| Child ID | Child Last Name | Child First Name | Child Middle Name | Child DOB | Child Age | Child Gender | Child Race | Child Primary Language | Ch |
|----------|-----------------|------------------|-------------------|-----------|-----------|--------------|------------|------------------------|----|
|----------|-----------------|------------------|-------------------|-----------|-----------|--------------|------------|------------------------|----|

Last name starts with: First name starts with:

Show Only Active Youth:  True  False

1 of 2 100% Find | Next Select a format Export

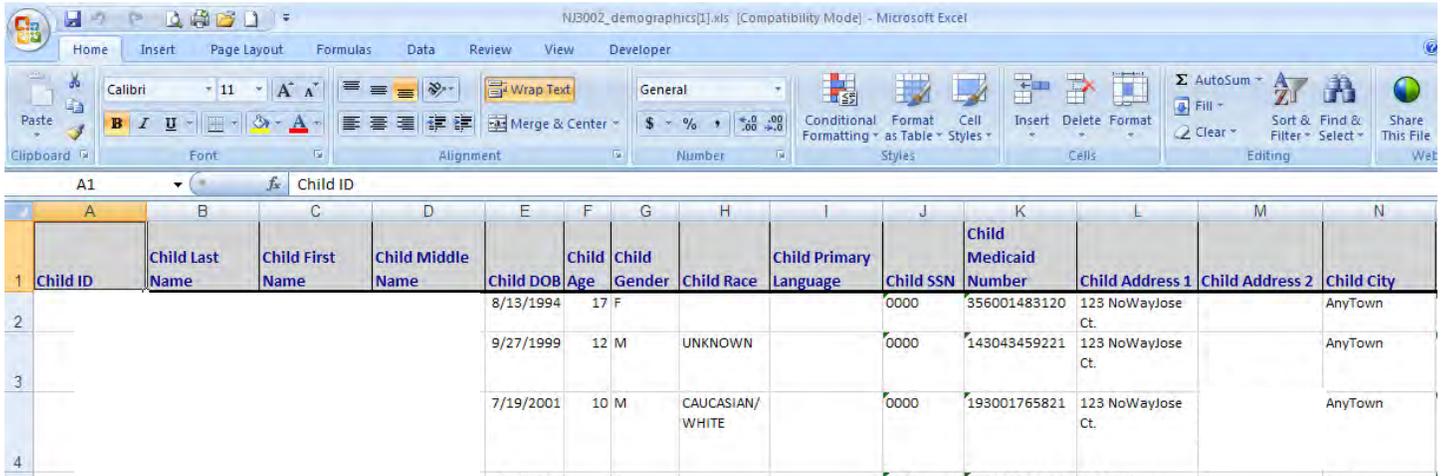
- Select a format
- XML file with report data
- CSV (comma delimited)
- Acrobat (PDF) file
- MHTML (web archive)
- Excel
- TIFF file
- Word

Export Formats

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.



The screenshot shows a Microsoft Excel spreadsheet with the following data:

| Child ID | Child Last Name | Child First Name | Child Middle Name | Child DOB | Child Age | Child Gender | Child Race          | Child Primary Language | Child SSN | Child Medicaid Number | Child Address 1   | Child Address 2 | Child City |
|----------|-----------------|------------------|-------------------|-----------|-----------|--------------|---------------------|------------------------|-----------|-----------------------|-------------------|-----------------|------------|
| 1        |                 |                  |                   | 8/13/1994 | 17        | F            |                     |                        | 0000      | 356001483120          | 123 NoWayJose Ct. |                 | AnyTown    |
| 2        |                 |                  |                   | 9/27/1999 | 12        | M            | UNKNOWN             |                        | 0000      | 143043459221          | 123 NoWayJose Ct. |                 | AnyTown    |
| 3        |                 |                  |                   | 7/19/2001 | 10        | M            | CAUCASIAN/<br>WHITE |                        | 0000      | 193001765821          | 123 NoWayJose Ct. |                 | AnyTown    |
| 4        |                 |                  |                   |           |           |              |                     |                        |           |                       |                   |                 |            |

## V. Ad Hoc Data Extract Dictionary

### Demographics

*The definitions below explain the various data fields in the data extract.*

| Field Name                      | Definition  |
|---------------------------------|---|
| <b>Care Manager</b>             | Name of Care Manager (from Provider tab of youth's Face Sheet)                                  |
| <b>Care Manager Email</b>       | Care Manager's email address, if in the system (from Provider tab of youth's Face Sheet)        |
| <b>Child Address 1</b>          | Address 1 from Demographics tab of youth's Face Sheet   |
| <b>Child Address 2</b>          | Address 2 from Demographics tab of youth's Face Sheet   |
| <b>Child Age</b>                | Current age of the youth  |
| <b>Child City</b>               | City from Demographics tab of youth's Face Sheet  |
| <b>Child County</b>             | County from Demographics tab of youth's Face Sheet  |
| <b>Child DOB</b>                | Date of Birth from Demographics tab of youth's Face Sheet                                       |
| <b>Child Enrollment Age</b>     | Age of the youth at time of enrollment with CM Agency   |
| <b>Child First Name</b>         | First Name of youth from Demographics tab of the Face Sheet                                     |
| <b>Child Gender</b>             | Gender of youth from Demographics tab of the Face Sheet   |
| <b>Child ID</b>                 | Youth's unique CYBER ID number  |
| <b>Child Last Name</b>          | Last Name of the youth from the Demographics tab of the Face Sheet                              |
| <b>Child Medicaid Number</b>    | Medicaid Number assigned to the youth on the Eligibility tab of the Face Sheet                  |
| <b>Child Middle Name</b>        | Middle Name of the youth from the Demographics tab of the Face Sheet                            |
| <b>Child Primary Language</b>   | Primary Language of the youth as entered on the Demographics tab of the Face Sheet              |
| <b>Child Race</b>               | Race of the youth as entered on the Demographics tab of the Face Sheet                          |
| <b>Child SSN</b>                | Social Security Number of the youth; from Demographics tab of the youth's Face Sheet            |
| <b>Child State</b>              | State the youth currently resides in; from the Demographics tab of the youth's Face Sheet       |
| <b>Child Zip</b>                | Zip Code of the city the youth resides in, as entered on the Demographics tab of the Face Sheet |
| <b>CM Agency Code</b>           | Code associated with the Case Management Entity within CYBER                                    |
| <b>CM Agency Effective Date</b> | Effective/Start date of the Tracking Element for the agency                                     |

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|  |   |
|--|---|
| <b>CM Agency Termination Date</b>      | If entered into CYBER, the Termination Date of the Tracking Element for the agency; the date the agency was closed to the youth   |
| <b>CM Enrollment Date</b>              | Date the youth was assigned to a Case Management Entity   |
| <b>Living Situation Description</b>    | Currently active Living Situation for the youth from the Demographics tab of the youth's Face Sheet   |
| <b>Living Situation End Date</b>       | The end date that is entered for the currently active Living Situation (if entered)   |
| <b>Living Situation Start Date</b>     | The start date for the currently active Living Situation  |
| <b>Medicaid Number</b>                 | Youth's most recent, valid Medicaid number; from the Eligibility tab of the youth's Face Sheet  |
| <b>Area Code</b>                       | Area code for the Parent/Legal Guardian phone number  |
| <b>Parent/Legal Guardian Phone</b>     | Phone number for the youth's Parent/Legal Guardian  |
| <b>Parent/Legal Guardian Address 1</b> | Address 1 from the Additional Address information area, for Parent/Legal Guardian address, on the youth's Face Sheet  |
| <b>Parent/Legal Guardian Address 2</b> | Address 2 from the Additional Address information area, for Parent/Legal Guardian address, on the youth's Face Sheet  |
| <b>Parent/Legal Guardian City</b>      | City from the Additional Address information area, for Parent/Legal Guardian address, on the youth's Face Sheet   |
| <b>Parent/Legal Guardian Name</b>      | Name of Parent/Legal Guardian as entered on the Demographics tab of the youth's Face Sheet  |
| <b>Parent/Legal Guardian State</b>     | State from the Additional Address information area, for Parent/Legal Guardian address, on the youth's Face Sheet  |
| <b>Primary Language</b>                | Language of the youth/family, as entered under Languages on the Demographics tab of the youth's Face Sheet  |
| <b>Residence Case Manager</b>          | The name of the current Case Manager for the Residential Placement that the youth is currently enrolled with (if applicable); based upon open Tracking Element on the youth's Face Sheet    |
| <b>Residence Case Supervisor</b>       | The name of the current Case Supervisor for the Residential Placement that the youth is currently enrolled with (if applicable); based upon open Tracking Element on the youth's Face Sheet |
| <b>Residence Effective Date</b>        | Date the youth was admitted into a residential program  |
| <b>Residence Name</b>                  | Name of the residential program that the youth is currently enrolled in (if applicable)   |
| <b>Residence Code</b>                  | Code associated with Residential Program within CYBER   |
| <b>Residence Termination Date</b>      | Discharge date of residential admission; from the Admissions tab on the youth's Face Sheet (if applicable)  |
| <b>Supervisor Current</b>              | Name of current Case Supervisor (of youth's Case Manager) based upon open Tracking Element on youth's Face Sheet  |