

PerformCARE[®]

Instruction Guide for Ad Hoc Data Extract : Progress Notes

Ad-Hoc Extracts – Progress Notes – Instructions for Use and Exporting

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I. Introduction

The extract contains all of the fields from the Progress Note table that pertain to the Progress Note data (including the youth's CYBER ID, the type of Progress Note, and the date of the note). The extract will show data for the children that were open to the user's agency and have progress notes created within a specific time frame chosen by the user. (Definitions of each field are available on page 9.)

*Please note that this extract was updated on January 31, 2012. Users will see a change in the search parameters that appear at the top of the report window. The new extract will be consistent with the current extract report structure and the data returned may be more comprehensive. Also, this change will result in a consistent selection methodology for all the extract reports.

****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.



CYBER LOGIN

Enter Login Name Here

Enter Password Here

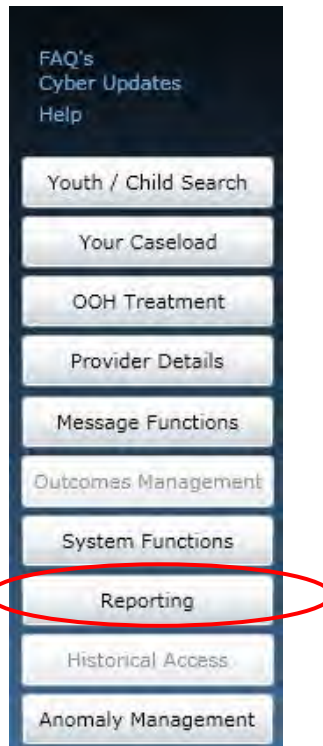
Login

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 – “NJ3000_ProgressNotes”.

Reporting Functions Logout

Program: C12 - CMO Morris/Sussex - CMO Report: [Dropdown]

View Report Export

Reporting Service
Reporting service enables you to access...
Please choose a program first. Then...

- 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

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 shows the PerformCARE interface. At the top, there are two dropdown menus: "Program" set to "C12 - CMO Morris/Sussex - CMO" and "Report" set to "25 - NJ3000_ProgressNoteV2". 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 the value "12/25/2011" and a calendar icon; "Child Agency entry date to:" with the value "1/24/2012" and a calendar icon; "Last name starts with:" and "First name starts with:" text boxes; "Show Only Active Youth:" with radio buttons for "True" (selected) and "False"; and "Note Type:" with a dropdown menu. 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 date parameters. The parameters are as follows;

- Child Agency Entry Date To/From: The start date of when the youth’s CYBER record was open in Tracking Elements to the user’s agency.
- Last Name Starts With: Users may choose 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 the user is associated with who had open Tracking Elements during the time frame selected; select “False” to see all youth that have had an open Tracking Element for the agency during the time frame selected but may not be currently active with the agency.
- Note Type: A selection menu which allows the user to filter out certain note types; for example, the user may choose to only see IIC notes by selecting just that note type from the menu.

This is a close-up of the "Note Type" dropdown menu. The "Child Agency entry date to:" field is set to "1/24/2012". The "First name starts with:" field is empty. The "Note Type" dropdown is open, showing a list of options with checkboxes: "(Select All)", "BHA - Behavioral Assistan", "C/F - Child/Family Team U", "C/F2 - Billable C/F Team t", "CBHPU - DCBHS Placeme", "CC - Collateral Contacts", and "CC2 - Billable CC".

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.

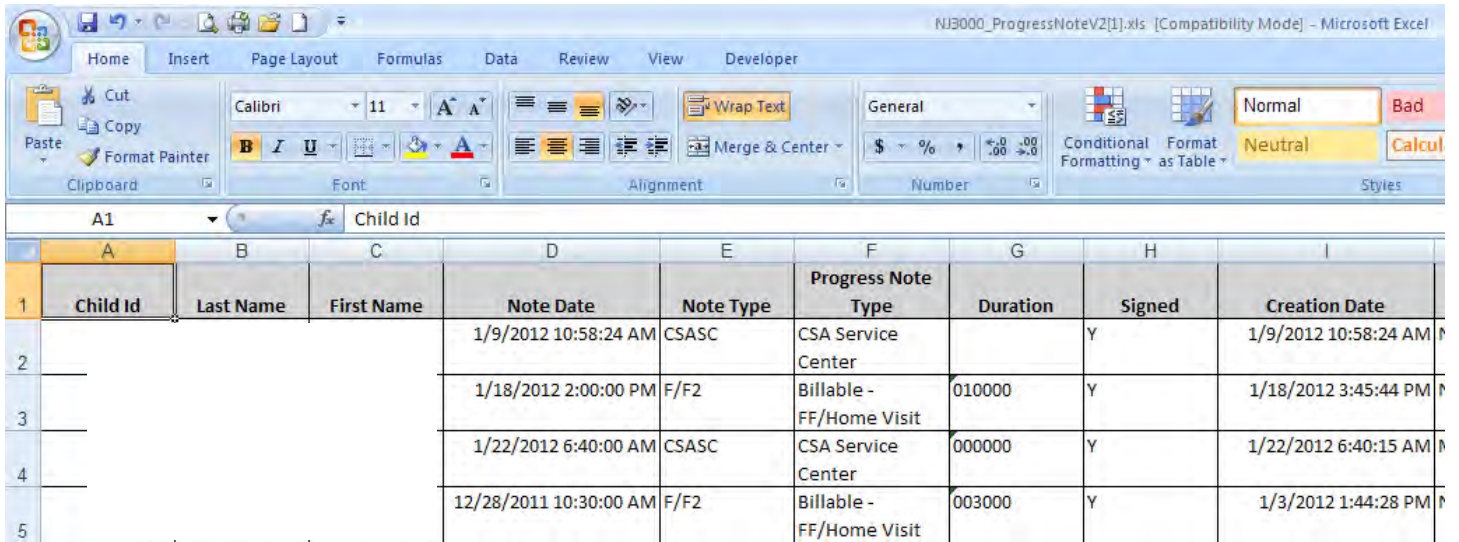
The screenshot shows the PerformCARE search interface. It includes fields for 'Child Agency entry date From:' (12/25/2011) and 'Child Agency entry date to:' (1/24/2012). There are also fields for 'Last name starts with:', 'First name starts with:', 'Show Only Active Youth:' (True/False), and 'Note Type' (BHA - Behavioral Assistance, C). A 'View Report' button is visible. Below the filters is a navigation bar with '1 of 21', '100%', and a 'Select a format' dropdown menu highlighted with a red box. An 'Export' button is also present. Below the navigation bar is a table header with columns: Child Id, Last Name, First Name, Note Date, Note Type, Progress Note Type, Duration, and Signed.

This close-up shows the 'Select a format' dropdown menu open. The options listed are: 'Select a format', 'XML file with report data', 'CSV (comma delimited)', 'Acrobat (PDF) file', 'MHTML (web archive)', 'Excel' (highlighted in blue), 'TIFF file', and 'Word'. The background shows the same search filters as the previous screenshot, with 'Child Agency entry date to:' set to 1/24/2012 and 'Note Type' set to BHA - Behavioral Assistance, C.

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 the Microsoft Excel interface with the following data table:

	A	B	C	D	E	F	G	H	I
1	Child Id	Last Name	First Name	Note Date	Note Type	Progress Note Type	Duration	Signed	Creation Date
2				1/9/2012 10:58:24 AM	CSASC	CSA Service Center		Y	1/9/2012 10:58:24 AM
3				1/18/2012 2:00:00 PM	F/F2	Billable - FF/Home Visit	010000	Y	1/18/2012 3:45:44 PM
4				1/22/2012 6:40:00 AM	CSASC	CSA Service Center	000000	Y	1/22/2012 6:40:15 AM
5				12/28/2011 10:30:00 AM	F/F2	Billable - FF/Home Visit	003000	Y	1/3/2012 1:44:28 PM

V. Ad Hoc Data Extract Dictionary

Authorizations

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

Field Name	Definition
Child ID	Unique identifier for the youth's record in CYBER
Creation Date	The date the Progress Note was created in the system
Creation User	The User ID of the individual that authored the progress note
Duration	The length of time entered into the note by the user; usually represents the length of time for a meeting or service
First Name	First Name of the youth
Last Name	Last Name of the youth
Note Date	A date will display when entered by the author of the progress note; typically the date of service
Note Type	The code associated with the type of progress note
Progress Note Type	The type of progress note (IIC, CSA Service Center, Billable CC, etc)
Signed	Indicates that the progress note is committed to the youth's record
Submitted Date	The date the progress note was committed to the youth's record