PerformCARE®

CYBER Release 1.16:
Instructional Guide for
Case Management Entities

PerformCare®

Role-Based Security – Instructions for Use for CME Users

Table of Contents

I. Introduction

Role-Based Security is new functionality that is a part of the CYBER 1.16 release. Prior to this release, security access to CYBER was managed by a log-in affiliation and was often set-up with assistance from Service Desk. With this new functionality, a System Administrator (a.k.a. Security Administrator) will have the ability to add/edit the access rights for users within their agency. Also, the security of the CYBER system has been increased so that it meets industry standards.

This release also includes the addition of a hierarchy for Out of Home (OOH) Referrals; this structure mimics that which is currently attached to Treatment Plans and allows the author to transfer the referral within their agency for work, and also includes a built-in structure for internal review of the referral prior to submission to the CSA.

A new option is available for many users on the Welcome Page that will allow them to see the work that belongs to others within the agency that fall below them in the hierarchical structure which is assigned to user's level of security within CYBER. This was done so that Supervisors and Managers have the ability to better manage the work of their staff and track trends. Supervisors, and those above them in the security hierarchy, will also have a new accordion on their Welcome Page that will allow them to see the work that is still outstanding (or in progress) and is attached to any deactivated users in their agency that fall below them in the hierarchy.

PerformCARE®

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.

III. Changes to Security

Starting 90 days after the release of 1.16, users will begin to receive a notice on the log-in page that asks them to change their password. This will be done on a rolling basis; meaning the notifications will be done slowly throughout the system starting 90 days after the release (users will get a notification message 10 days prior to the date their password needs to be changed).

Once the user receives notification, they will be brought to a new screen where they will enter their new password, and then confirm the new password. The new password, which must be at least 8 characters in length, must meet three of the four requirements that follow, in order to be accepted by the system:

- Upper-case letter
- Lower-case letter
- Number
- Special character (@, !, $, etc.)

Please note: A user may change their password at any time. Once on the Welcome Page, the user clicks on the System Functions button on the left-side of the screen. This will bring them to the Manage Access area, which is accessible via the button on the upper-left side of the screen.
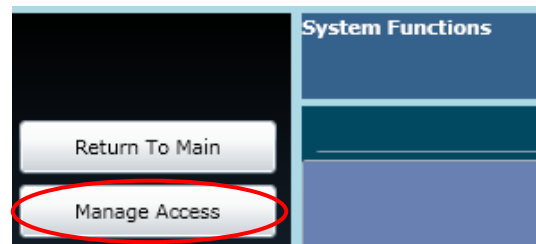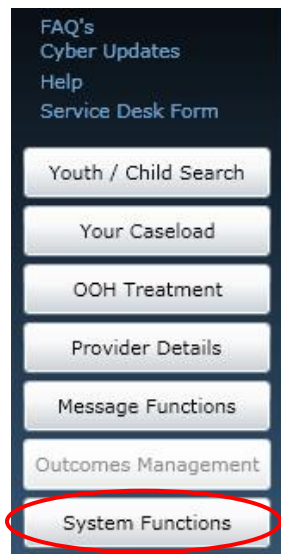
Clicking on this button will bring up the user's detail window, where the user can change their password, as well as their phone number and email address.

Changing the password here resets the 90-day clock and the user will not receive notification to change their password again for another 90 days. If the user sees that the Email field is blank, it is recommended that they enter their address; this can be used by the System Administrator if the user needs their password reset at any time.

The functions that are available to your agency's System Administrator have also changed in order to increase their ability to assist the users within their organization.

If a user locks their account (by entering an incorrect ID or password 3 times) or forgets their password, they should contact their Systems Administrator who can now unlock accounts and reset passwords. Users should also contact their System Administrator if they need access to a new program, or need an adjustment made to in their access level to CYBER (for example, if a Supervisor currently does not have access to reporting and they now need to gain access, they should contact their System Administrator who can grant them access).

PerformCARE®

IV. 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.
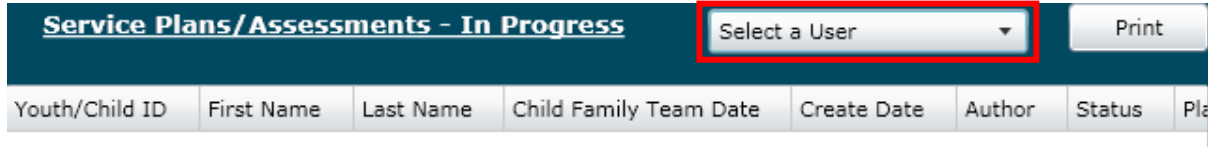
This pull-down menu will allow users to see the work of others below them in the hierarchy. This was done so that Supervisors and Managers could easily access and track the work of their staff; this was also implemented to assist others in gaining access to work. If a Care Manager is not available and work needs to be completed on a treatment plan or assessment, the Supervisor or Manager can find the document on the user's Welcome Page; they can then easily locate it on the Plan Approval screen 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.

*Please note: Supervisors will also have the ability to see the work of other Supervisors (this is the case for Managers, as well). Supervisors and Managers will also have new functionality available to them on the Welcome Page that allows them to see the in progress work that is still assigned to any deactivated users from their agency; please refer to the training titled **Welcome Page Hierarchy Instructional Guide for Supervisors and Managers** for more information.

Selecting a name from the drop-down 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 on the top of the right-hand side of the screen.)
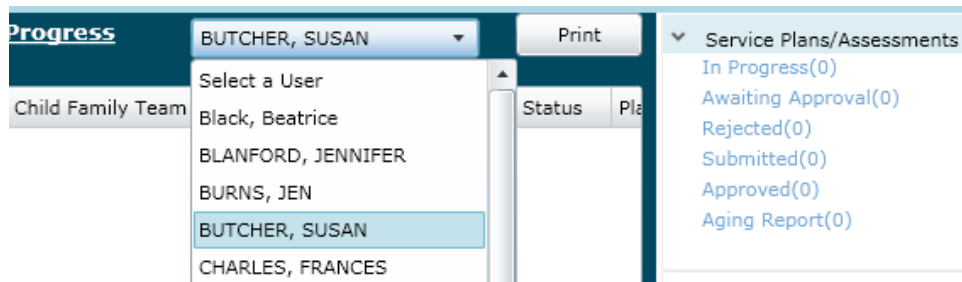

Keep in mind that the User ID that is logged into the system is the ID that will be attached to any work that is done; the system will not maintain the ID that is chosen from the Welcome Page hierarchy. For example, if the Supervisor chooses to review the work of a Care Manager, and then goes to a youth's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

*Please note: all users will see a change to the first accordion on their Welcome Page. The Service Plans accordion now includes Assessments; this was done to accommodate the changes made to the OOH Referral, which includes a hierarchy structure that is similar to that of Service Plans. For the time being, assessments will continue to also appear in their own accordion, further down on the right-hand side of the Welcome Page.

V. OOH Referral Hierarchy

A new hierarchy structure has been put in place for the transfer, review, submittal and return of OOH Referrals. (For those familiar with Treatment Plan hierarchy, this structure mimics that of the Treatment Plan.)

This new functionality was added to the system so that the author of the OOH Referral can submit it to a Supervisor, or someone else above them in the hierarchy, for review prior to sending it to the CSA; the Referral can also be transferred to another user within the organization for review, editing or additional work and then returned to the author.
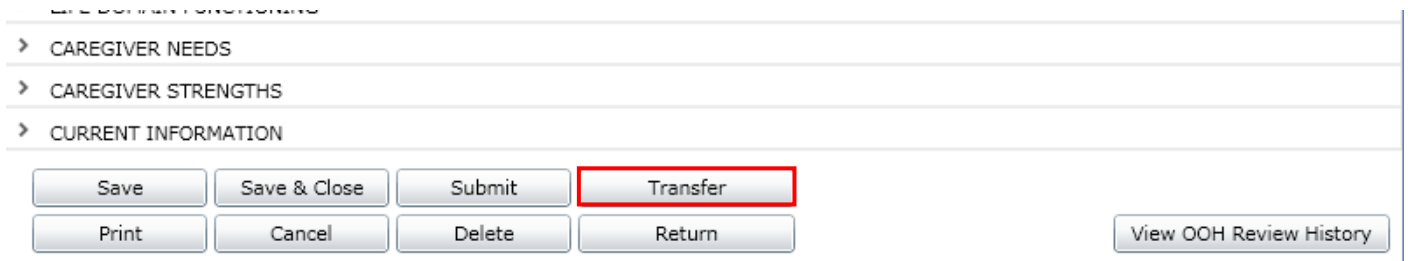
At the bottom of the OOH Referral, the author will find a number of new buttons, including a Transfer button; it will be active once the Referral has been saved by the author. Clicking this button will bring up a window which will allow the user to choose anyone within their organization to transfer the Referral to.
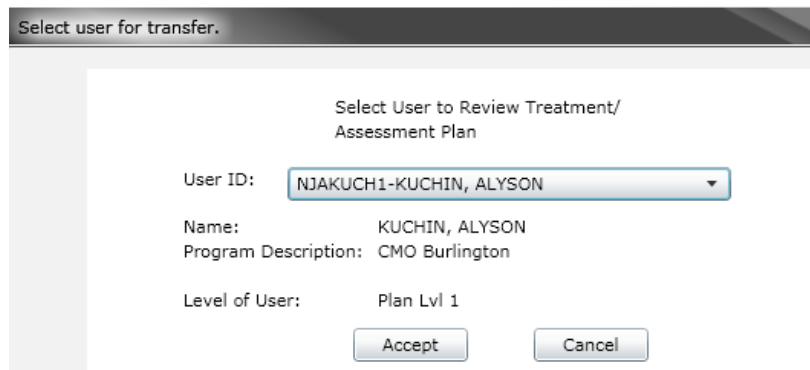
Selecting a User ID from the menu will also populate the user's name, name of the program they are associated with and their level of security as related to Treatment Plans, Assessments and the review/submittal process. (Plan Level 1 users can only transfer to another user, return to a previous user who worked on the document or submit to a Supervisor or higher user for submittal to the CSA; Plan Level 2 users can transfer, return and submit above in the hierarchy (within their agency) and to the CSA; Plan Level 3 users can transfer, return and submit directly to the CSA.) Clicking Accept will transfer the plan to the selected user; clicking Cancel will bring the user back to the Assessment.

Once the Referral is transferred to another user, it will be visible on the author's Welcome Page under the Submitted link in the Service Plans/Assessment accordion; the Referral will now be read-only for the author. Assessments will also continue to appear in the Assessments accordion when they are still In Progress with the author or once they are returned to the author by the CSA. It will also be visible on the user's Welcome Page it was transferred to under the Awaiting Approval link.

The user who is now the owner of the Referral (after the transfer) has the ability to return the Referral back to the author or they can transfer it to another user within the agency; the current owner may also chose to submit the

Referral to a Supervisor for review and submittal to the CSA. (If the current owner has a Plan Level 2 or 3 associated with their ID, they can submit the Referral directly to the CSA.)
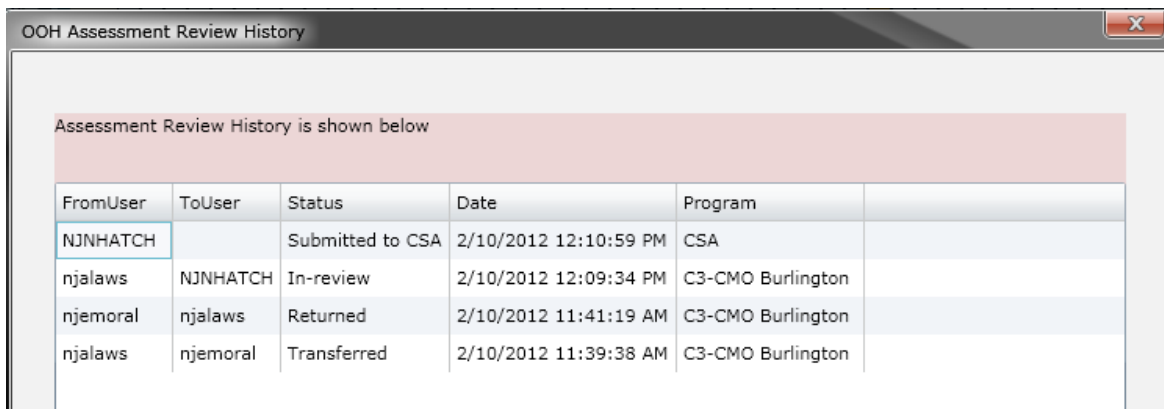
Once Submit is chosen, the user will see a window that is similar to that which is used for transferring. The only users that will appear in the Submit window are those that are Supervisors or higher (they will have the ability to transfer the Referral, as well as the option to Submit to CSA). Keep in mind that the Referral needs to be complete prior to submitting; if there are required fields left blank, the user will get an error message that indicates which fields are not completed. The user will be unable to submit until all required data has been entered.

There is also a new Review History button available on the OOH Referral, as well as all other Assessments in CYBER, that will show the user where in the system the Referral currently is. (The functionality of this button mimics that of the Review History button that users may be familiar with from Treatment Plans.)

When the user clicks on this button, a grid appears that shows the review history of the document both within the agency and the CSA. The most recent status of the Referral will appear in the top line of the grid; the bottom line of the grid will show the author of the Referral in the FromUser column.

VI. Plan Approval Screen

Those users that are familiar with the Treatment Plan Approval screen will see a number of changes have been made to this area.

Users will now find both Treatment Plans and Assessments on the Plan Approval screen. Changes have been made to the screen to make it easier for a user to locate a specific plan or assessment type.

At the top of the screen, users will find the Plan Selection Grid. By default, this area will only show the plans and assessments that the user has access to that are currently in the system for the agency and have not been submitted to the CSA; this area fuels the types of plans and assessments that the user will see and will have access to in the next area of the screen. For example, as a CMO user, options such as CMO and OOH will appear here. Once a selection is made, the Plan Type area will populate with options for plans and assessments for the user to choose from such as an Initial ISP and OOH Assessment. The selections made from here are what fuel the filtered plans and assessments that appear in the next grid – Filtered Plans.

This top area also contains a number of filter options for this screen.

The Doc Type menu gives the user the option to look at Treatment Plans only, Assessments only, or All. If the user makes a selection here, it will cause the Plan grid (to the left of the menu) to show only what is applicable and available to the user. For example, if the user were to select ASMT, or Assessments, the Plan grid would only show those Assessment types that are available for the user to select (in the example above, the grid would only display OOH and Assessment).

Next to this area are the check-boxes for time-frames. These time-frames are associated with when the plan or assessment is due. If the user enters a time frame into the boxes here, they will be unable to select any of the other options listed.

The user also has the option of choosing to look at the plans or assessments for a specific program; this menu will only have more than one program available if the user's CYBER ID is associated with more than one program.

The AssignedTo menu allows the logged in user to look for plans and assessments that are assigned to a specific user in their agency; Supervisors and Managers may use this menu to look for the plans and assessments that are currently "In Progress" and are assigned to a user that is no longer with the agency (and has been deactivated). Using this function allows the Supervisor or Manager to locate the documents and reassign them to other users within the agency.

If the user is in this screen for an extended period of time, there is a possibility that new plans and assessments have been entered into the system but are not appearing on this screen (the grids will not automatically refresh). To see if new documents have been entered, clicking on the Refresh button will refresh the filter parameters, which will refresh the Filtered Plans grid.

The Filtered Plans grid will show all plans and assessments (based upon the filters chosen above) that are still within the agency and have not been submitted to the CSA for approval. The grid will show the type of Plan and Plan Type, the status of the document (In Progress indicates that it is still with the author), who currently owns the document (Assigned To), the name and ID of the youth, who the requestor or author of the document is, and the due date (when applicable). Users will also find a new column here – Return History – by scrolling to the right in the grid. If the document has been returned by the CSA, the name of the CSA Reviewer that returned the document will appear here. (This will be the most

recent return; in order to see a full history, the user will need to open the document and click on the History button. See page 8 for more details.)

Users can assign a plan or assessment to themselves, even if it is currently assigned to another user; keep in mind that Plan Level 1 users can only assign documents to themselves here. Plan Level 2 and 3 users can assign plans and assessments to any users within the agency. In order to assign a document to the logged-in user, the document must be selected in the grid (by single-clicking on it) and then the user will click on the Assign button, below the grid. Once the plan or assessment has been assigned to the user, it will appear in the My Plans grid at the bottom of the window. (Plans and assessments that have been submitted to the CSA will not appear on this screen.)

My Plans (2)   Double click on a treatment plan to review.

PLAN	PLANTYPE	ASSIGNEDTO	YOUTH/CHILD	REQUESTOR	DUEDATE
Assessment	OOH-Assmt- In Review	NANZETTA HATCHER		IVY DAVIS	
Assessment	OOH-Assmt- Transferred	NANZETTA HATCHER		NANZETTA HATCHER	

Unassign

Double-clicking on an entry in this grid will open the document up to the user, who will be able to work on the document, transfer it to another user within the agency (if need be) or submit it directly to the CSA.

Users have the option of Unassigning a plan or assessment from their own ID; doing this will allow another user to see it in the Filtered Plans grid as being Unassigned. Clicking on the Unassign button below the My Plans grid will send the selected plan or assessment back to the Filtered Plans grid. This does not transfer the document to another user; if the logged in user is the author, the document will remain available to them on this screen as well as the Treatment Plans and Assessments grid of the youth's record (and the author's Welcome Page, as well). When the document needs to be transferred to another user, the current owner should go into the assessment or plan and, using the Transfer button, send it to another user within their agency for work or review.

Keep in mind that the assessment will be in read-only status to the author after it has been transferred to another user or submitted to the CSA; if the author needs to make revisions to the document prior to it being submitted to the CSA, they can assign it to themselves on the Plan Approval window, from the Filtered Plans grid.