

# PerformCARE<sup>®</sup>

## CYBER Release 1.16: Instructional Guide for IIC Users

## Role-Based Security – Instructions for Use for IIC Users

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## **I. Introduction**

Bio/Psycho/Social Needs Assessments have not had a review and submittal process, or a hierarchy, attached to them within CYBER in the past. This new release includes a hierarchy structure for this assessment type that allows for the assessment to be assigned to users other than the author within the same agency prior to submittal to the CSA for review, work or editing. (Assessments will be available for transferring within the user's agency prior to submittal, as well as after the assessment has been returned by the CSA.)

This new structure will include the redesigned Plan Approval screen, which is accessible from the Youth/Child Search screen. Once accessed, the user will have the ability to search for, filter and assign the specific plan and assessment types that are currently In Progress within their agency; any plans or assessments that have been submitted to the CSA will not appear in the window.

Bio/Psycho/Social Needs Assessments that have not been submitted to the CSA and are In Progress will continue to appear on the IIC author's Welcome Page; assessments will appear for whoever currently owns the assessment.

A History button is now available for use on this assessment, as well as all other assessments (which functions the same as the History button on Treatment Plans), which allows the user to review the path that the assessment has taken prior to being approved.

This Instructional Guide will also review the enhancements that have been made to CYBER security and the CYBER Welcome Page for IIC Users.

## 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).

For Assistance - 24 hours a day - 7 days a week : Please Contact Us at 1-877-652-7624 HOME ESPAÑOL

# NJ Children's System of Care

Administered by PerformCare Behavioral Health Solutions | An AmeriHealth Mercy Company

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Welcome To  
**New Jersey Children's System of Care**

PerformCare is the statewide Contracted System Administrator (CSA) for the Division of Child Behavioral Health Services (DCBHS). As the CSA, PerformCare is

**LAUNCH CYBER**

## 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/> "

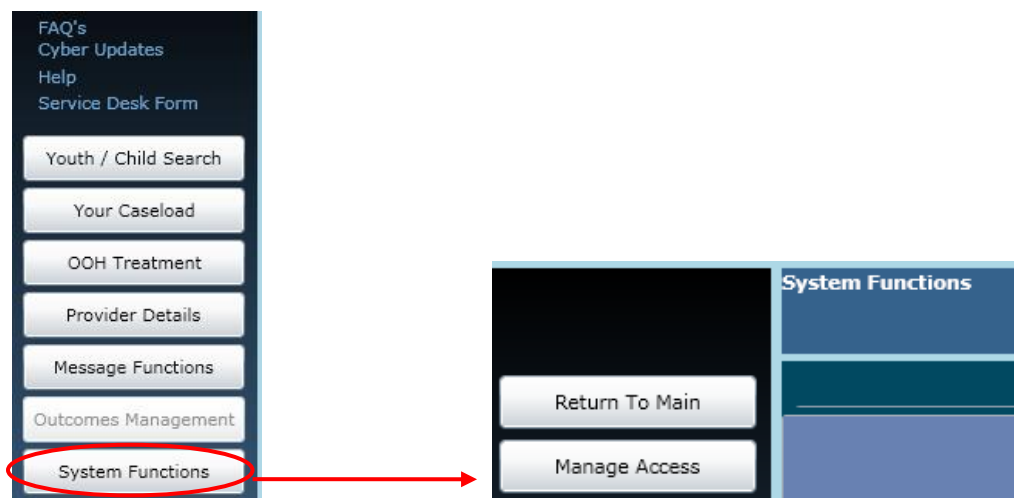
## II. Changes to Security

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; 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 old password, 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 following four requirements 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 the Manage Access 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.

The image shows a screenshot of the 'Edit My Login' form. The form has a light blue background and a white border. It contains several input fields: 'Login Name' with the value 'MOlivieri', 'First, Last Name' with 'Michele' and 'Olivieri', 'Password' with a masked field of dots, 'Email' with an empty field, and 'Phone' with the value '1-6096895400'. At the bottom right of the form are two buttons: 'Save Login Info' and 'Cancel'.

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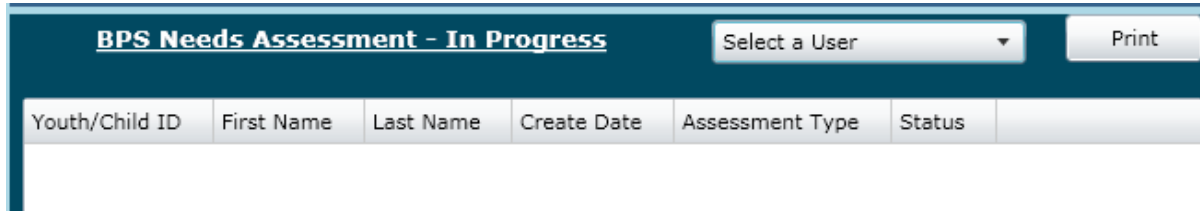
Changing the password here resets the 90-day clock and the user will not receive notification to change their password again for another 90 days. \*Please note – if the user accesses this screen and finds that their email address is either missing or incorrect, it is recommended that the user complete this field. If, at any time, they need their password reset their System Administrator will be able to reset it and have the system send a temporary password to the user via email.

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 their access level to CYBER (for example, if a Supervisor currently does not have access to anomaly management and they now need to gain access, they should contact their System Administrator who can grant them access).

## III. Welcome Page Hierarchy

Users will see a new menu available on their Welcome Page, above the grid area that is labeled “Select a User”.



Many IIC providers/clinicians work independently and are not subject to a supervisor/manager hierarchy. For the purpose of this release, these IIC providers will be designated as IIC Care/Case Managers (IICCM) in CYBER. Users that have this designation will only see their own name in this menu; other IIC users that have a higher-level designation within the system (i.e. Supervisor, Manager) will see the names of all users below them in the new Welcome Page hierarchy. For example, Supervisors will see the IIC workers (or clinicians) assigned to them that work for the agency; these individuals will have the designation of IICCM. By selecting a name from the menu, the links on the Welcome Page will repopulate with the data for that user; this new functionality allows high-level users such as Supervisors to manage the work of their staff. It also allows them to see information such as returned Plans/Assessments, over-due Plans/Assessments and expiring Authorizations for youth that are assigned to the user they've chosen.

\*Please note: Users with a designation of IIC Supervisor will also be able to see the Welcome Pages of other users with the same designation for their agency; the same applies to Managers.

Users should keep in mind that the ability to see a user's work applies to the Welcome Page only; meaning that if the user is not open on the Provider tab of a youth's Face Sheet they will not have access to the record. Also, if the logged in user adds something to a youth's record, it will be logged under the logged-in user's ID and not that of the user that was chosen from the Welcome Page.

\*\*Many agencies have not set-up security for users prior to this release; it should be noted that a number of agencies have not needed to do this set-up due to a limited number of staff at the agency. IIC agencies may want to consider making changes to their current structure so that all of functionality reviewed in this training can be utilized. Also, a user that has a Supervisor, Manager or higher designation will have a new accordion available on their Welcome Page that will show the work that is still assigned to users within the agency whose CYBER access has been deactivated; without a Supervisor or Manager designation attached to their User ID, users will not have this new accordion. For more information on how to set-up the security levels for users, System Administrators should refer to the training titled **CYBER Release 1.16: Instructional Guide for System Administrators**. For more information on the Welcome Page for Supervisors and Managers, please refer to the training titled **CYBER Release 1.16 Welcome Page for High-Level Users**.

## IV. Assessment Hierarchy

This CYBER release includes new functionality that will allow users that are creating Bio/Psycho/Social Needs Assessments to transfer the assessment to another user within their agency prior to submitting to the CSA.

\*Please note that current CYBER functionality has not changed. All IIC users will still have the ability to author an assessment and access their assessments via their Welcome Page. (Also, all IIC users will have the ability to transfer the assessment to other users within their agency, as well as submit directly to the CSA.) The author of the assessment can submit directly to the CSA without transferring it to another user and assessments can be deleted from the system as long as they have not been submitted to the CSA.

In order to transfer an assessment to another user, the assessment must first be saved by the author. Once it is saved, the author will find the new Transfer button at the bottom of the assessment is now active.

The screenshot shows a vertical list of assessment categories, each with a right-pointing chevron icon:

- > SOCIAL AND EDUCATIONAL FUNCTIONING
- > TREATMENT HISTORY
- > YOUTH'S PRESENT CHALLENGES
- > MENTAL STATUS
- > SUMMARY AND RECOMMENDATIONS

Below the list is a row of action buttons:

- Save
- Save & Close
- Submit
- Transfer** (highlighted with a red border)
- Print
- Cancel
- Delete
- Return
- View BPS Review History

Clicking on the Transfer button will bring up a window where the user will select another user within the agency to send the assessment to.

The dialog box has a title bar that reads "Select user for transfer." The main content area is titled "Select User to Review Treatment/ Assessment Plan" and contains the following information:

- User Id:
- Name: Pendergrass, Linda
- Program Description: Apple Counseling
- Level of User: Plan Lvl 3

At the bottom of the dialog are two buttons: "Accept" and "Cancel".

Selecting a user from the User ID menu will populate the other options – Name, Program Description and Level of User.



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\*Note: All IIC users will have the Plan Level 3 security designation; this allows all users within this agency type to submit assessments directly to the CSA without having to submit it for internal approval.

Once the user clicks “Accept”, the assessment will be sent to the new user. IIC users (who have received transferred assessments) will be able to access the assessment on their Welcome Page via the “In Progress” link in both the BPS Needs Assessment and Service Plan accordions, and it will also be accessible on the new Plan Approval window. The assessment will no longer appear on the author’s Welcome Page after it has been transferred; authors and all other users will see the assessment on the new Plan Approval window. The author will also see the Assessment on the youth’s Treatment Plans and Assessments grid; the assessment will be read-only to the author until it is either transferred or returned to them.

There is also a Return button available on the assessment; clicking this button will bring up a window similar to the one that appears after the user clicks on Transfer. When using the Return function, users will only see the User IDs of those users that have worked on the assessment; using Transfer, the user will see all user IDs within their agency.

## V. Plan Approval Window

The Plan Approval window was previously used for Treatment Plans only; this area has been enhanced to include all Treatment Plans and Assessments.

The screenshot shows the 'Plan Approval' window with the following sections:

**Plan Selection Area:**

- Plan:  IIC,  Assessment,  [Empty]
- Plan Type:  BPS-Assmt,  [Empty],  [Empty],  [Empty],  [Empty],  [Empty],  [Empty],  [Empty]

**Filter Options:**

- Doc Type: ALL
- Past Due:
- Due Today:
- Due Tomorrow:
- Program: All - All
- Assigned To: All Users- All
- Buttons: Select All, Clear All, OR, FROM: <M/d/yyyy> 15, TO: <M/d/yyyy> 15, Refresh

**Filtered Plans (8)**

PLAN	PLANTYPE	ASSIGNEDTO	YOUTH/CHILD	REQUESTOR	DUE DATE
Assessment	BPS-Assmt- Transferred	Jennifer Cummings		Warren Wallace	
Assessment	BPS-Assmt- Transferred	Amber Scott (Apple)		Jennifer Cummings	
Assessment	BPS-Assmt- Transferred	Jennifer Cummings		Jennifer Cummings	
Assessment	BPS-Assmt- Returned	Jennifer Cummings		Warren Wallace	2012/02/02
Assessment	BPS-Assmt- In Progress	Warren Wallace		Warren Wallace	2012/02/02

**My Plans (6)** Double click on a treatment plan to review.

PLAN	PLANTYPE	ASSIGNEDTO	YOUTH/CHILD	REQUESTOR	DUE DATE
IIC	IIC- Assigned	Warren Wallace		Warren Wallace	
Assessment	BPS-Assmt- In Progress	Warren Wallace		Warren Wallace	2012/01/29 11:46:2
Assessment	BPS-Assmt- In Progress	Warren Wallace		Warren Wallace	
Assessment	BPS-Assmt- In Progress	Warren Wallace		Warren Wallace	

At the top of the screen, users will find the Plan selection area. By default, this area will only show the plans and assessments that the user has access to and that are currently active in the agency (they 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 an IIC user, options such as IIC and Assessment 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 BPS Assessment (as seen in the above example). The selections made here are what fuel the Filtered Plans and Assessments that appear in the next grid.

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.

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 above.

The user also has the option of choosing to look at the plans and 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 Assigned To 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 (including themselves). (Please note that deactivated users will remain on this list until all work that was assigned to their ID has been assigned to other users.)

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.

Filtered Plans (8)						
PLAN	PLANTYPE	ASSIGNEDTO	YOUTH/CHILD	REQUESTOR	DUEDATE	
Assessment	BPS-Assmt- Transferred	Jennifer Cummings		Warren Wallace		▲
Assessment	BPS-Assmt- Transferred	Amber Scott (Apple)		Jennifer Cummings		
Assessment	BPS-Assmt- Transferred	Jennifer Cummings		Jennifer Cummings		
Assessment	BPS-Assmt- Returned	Jennifer Cummings		Warren Wallace	2012/02/02	
Assessment	BPS-Assmt- In Progress	Warren Wallace		Warren Wallace	2012/02/02	▼

Assign

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. 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. 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 12 for more details.)

Users can assign a plan or assessment to themselves, even if it is currently assigned to another user. 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 (6)** Double click on a treatment plan to review.

PLAN	PLANTYPE	ASSIGNEDTO	YOUTH/CHILD	REQUESTOR	DUE DATE
IIC	IIC- Assigned	Warren Wallace		Warren Wallace	
Assessment	BPS-Assmt- In Progress	Warren Wallace		Warren Wallace	2012/01/29 11:46:2
Assessment	BPS-Assmt- In Progress	Warren Wallace		Warren Wallace	
Assessment	BPS-Assmt- In Progress	Warren Wallace		Warren Wallace	

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. 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 the Treatment Plans and Assessments grid of the youth's record. When the document needs to be transferred to another user, the current owner of the document 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, they can assign it to themselves on the Plan Approval window, from the Filtered Plans grid.

## VI. View Assessment History

If a user needs to determine who currently owns an assessment, or what its current status is (in progress, approved, returned), they can refer to the assessment itself.

> SOCIAL AND EDUCATIONAL FUNCTIONING  
 > TREATMENT HISTORY  
 > YOUTH'S PRESENT CHALLENGES  
 > MENTAL STATUS  
 > SUMMARY AND RECOMMENDATIONS

Going to the Treatment Plans and Assessments grid of a youth's record will assist a user in finding the assessment they are looking for. A new button has been placed at the bottom of all assessments so that users can access the document's history. The "View BPS Review History", when clicked, will show the user a history of who has owned the document, as well as the current status of the assessment. (\*Note: the button can be clicked at any time; the user does not have to wait until the full document has loaded.)

BPS Assessment Review History

Assessment Review History is shown below

FromUser	ToUser	Status	Date	Program
APowell	JCummings	Returned	1/26/2012 2:46:43 PM	0161888-Apple Counseling
APowell	(Self)	Assigned	1/26/2012 2:45:48 PM	CSA
WWallace		Submitted to CSA	1/26/2012 2:45:27 PM	CSA
JCummings	WWallace	Returned	1/12/2012 4:52:32 PM	CSA
WWallace	JCummings	Transferred	1/12/2012 4:51:44 PM	0161888-Apple Counseling

The Review History window will show the originator of the document (FromUser) in the bottom line of the grid. "ToUser" will indicate who the assessment was transferred to; in the case of the assessment being submitted to the CSA, "Submitted to CSA" will be listed in the Status column and the Program name will be "CSA". Status will show the status of the Assessment – Assigned, Transferred, Submitted, Returned, or Approved; the current status will appear in the first row of the grid. The Date column will show the date and time of the status change. The Program column will indicate the name of the program that the "ToUser" is associated with.