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CYBER Release 1.16: Instructional Guide to Role- Based Security for OOH Users

Role-Based Security for OOH Users – Instructions for Use

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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 will have the ability to add/edit the access rights for users within their agency. Also, the security of the CYBER system has been improved so that it is more in-line with industry standards.

This release includes updates to the Plan Approval screen. Users will now find assessments on the Plan Approval screen so that they are easier to locate and can be reassigned to other users if the assessment needs to be submitted to the CSA or Case Management Entity (CME) but the Care Manager is out of the office; changes have also been made so that it is easier for a user to locate specific plan types or assessments from this screen. Users will also see that the Review History button that is available on all Treatment Plans is now available on Assessments, as well.

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 that is assigned to user's level of security within CYBER. This was done so that Supervisors, Managers, and other users that have a high-level designation attached to their IDs have the ability to better manage the work of their staff and track trends. Users with high-level designations 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.

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.

The screenshot shows the homepage of the NJ Children's System of Care. At the top, there is a navigation bar with the text "For Assistance - 24 hours a day - 7 days a week : Please Contact Us at 1-877-652-7624" and links for "HOME" and "ESPAÑOL". Below this is a banner with the logo "NJ Children's System of Care" and the text "Administered by PerformCare Behavioral Health Solutions | An AmeriHealth Mercy Company". A blue navigation bar contains links: "ABOUT", "FOR FAMILIES", "FOR YOUTH", "FOR PROVIDERS", "FREQUENTLY ASKED QUESTIONS", and "CONTACT".

Below the navigation bar, there is a "Welcome To New Jersey Children's System of Care" section. To the right of this text is a button labeled "LAUNCH CYBER" which is circled in red. An arrow points from this button to the "CYBER LOGIN" form below.

The "CYBER LOGIN" form is on a light green background and contains two input fields: "Enter Login Name Here" and "Enter Password Here", followed by a "Login" button.

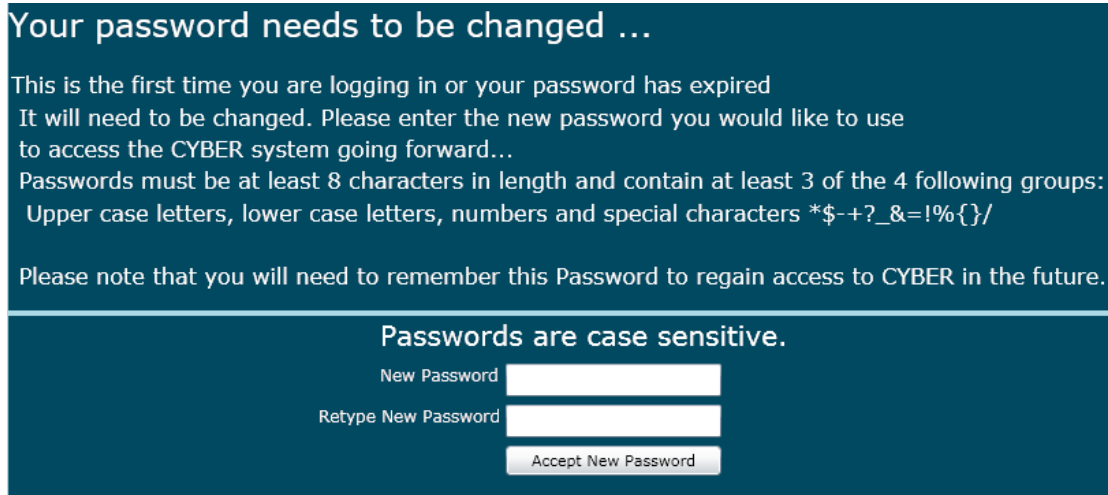
Below the form is a text box containing a HIPAA acknowledgment statement:

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/> "

III. Changing an Expired Password

Individual users will be notified that their CYBER password has expired, first by a notification on the log-in page that states their password will expire in 10 days. Once the 10th day has passed/on the 10th day, the user will be brought to the following screen after they attempt to log-into the system with their expired password (this is the same screen that will appear to a user after their password has been reset by their System Administrator).



The screenshot shows a dark blue background with white text. At the top, it says "Your password needs to be changed ...". Below that, it explains that the password has expired and needs to be changed. It lists requirements: at least 8 characters, and at least 3 of the following: upper case letters, lower case letters, numbers, and special characters (*\$-+?_&=!%{}/). A note says "Please note that you will need to remember this Password to regain access to CYBER in the future." Below this is a section titled "Passwords are case sensitive." with two input fields: "New Password" and "Retype New Password". At the bottom of this section is a button labeled "Accept New Password".

Users will need to enter a new, strong password and then click Accept (users may re-use passwords after 4 new passwords have been entered into the system). This will prompt the system to check the password against the new requirements;

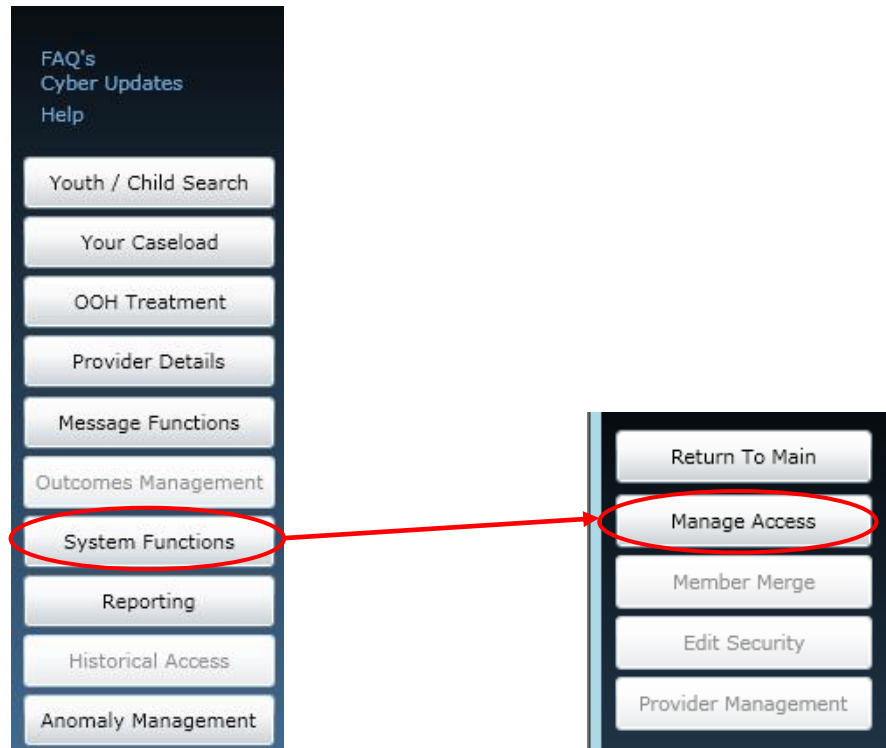
- Minimum of 8 characters in length
- Three of the following four parameters must be met;
 - Upper case letter
 - Lower case letter
 - Number
 - Special character (*, \$, -, +)

If there is an issue with the new password, the system will alert the user to the issue, and the user will need to enter another password. If the system accepts the new password, the user will be logged into the system.

IV. Changing an Existing Password

Users have the ability to change their own passwords at any time. Doing so will reset the system so that the user has another 90 days until they are asked to change their password again.

Clicking on the System Functions button on the left-side of the Welcome Page will bring the user to the Manage Access area.



Clicking the Manage Access button in the top left-hand corner of the window will bring the user to the Edit window for their log-in information.

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Edit My Login

Login Name

First, Last Name

Password

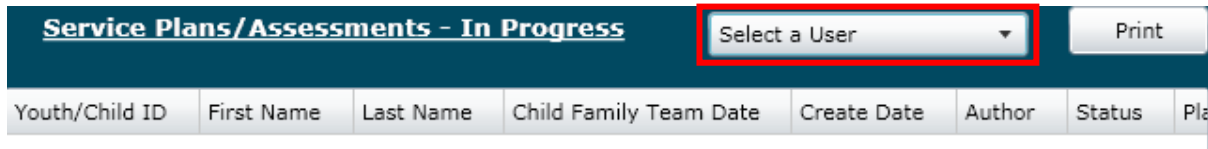
Email

Phone

The user can delete the password and enter a new one in the Password field; this new password must also meet the same requirements as that which is entered on the new password screen (see page 4). It is recommended that if the Email Address field is blank that the user enters their current, valid Email Address so that it is logged into the system; if the user forgets their password at any time, they can contact their System Administrator, who can prompt the system to send a new, temporary password to their email account.

V. Welcome Page Hierarchy

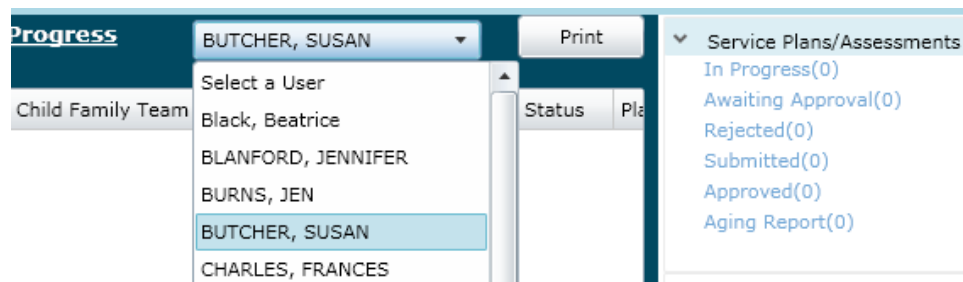
There is a new hierarchy structure available for use on the Welcome Page that users will find above the center grid area.



This pull-down menu will allow users that have a higher than Care Manager designation in CYBER 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 pull up that user's Welcome Page to see the document; 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 **CYBER Release 1.16 Welcome Page Hierarchy for High-Level Users** for more information.

Selecting a name from the 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.

VI. View Assessment History

Strength and Needs Assessments, as well as all other assessments in CYBER, now have the View Review History button available for use.

> CAREGIVER NEEDS

> CHILD BEHAVIORAL/EMOTIONAL NEEDS

> CHILD RISK BEHAVIOR

> PSYCHOTROPIC MEDICATION MODULE

Save Save & Close Submit

Print Cancel Delete

View S&N Review History

Clicking on the View S&N Review History button will bring up a window that will contain the status of the Assessment, including a history of who has owned the assessment.

Strength and Needs Assessment Review History

Assessment Review History is shown below

FromUser	ToUser	Status	Date	Program
njpronollo	(Self)	Assigned	2/22/2012 10:18:51 AM	R8884803-MENTOR NJ LEVEL 1 CSOCI
njpronollo	njcwhite	Assigned	2/22/2012 10:17:56 AM	R8884803-MENTOR NJ LEVEL 1 CSOCI
njpronollo	kellis	Assigned	2/22/2012 10:17:40 AM	R8884803-MENTOR NJ LEVEL 1 CSOCI

VII. 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.

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

- Plan Selection Grid:** A grid with columns 'Plan' and 'Plan Type'. Under 'Plan', CMO, OOH, and UCM are checked. Under 'Plan Type', CR90D, DJCR, JCR, NOCSA, and TJCR are checked.
- Filters:**
 - Doc Type: ALL
 - Past Due, Due Today, Due Tomorrow: all checked
 - Program: All - All
 - Assigned To: All Users - All
 - Date Range: FROM: <M/d/yyyy> 15, TO: <M/d/yyyy> 15
 - Buttons: Select All, Clear All, Refresh
- Filtered Plans (126):** A table with columns PLAN, PLANTYPE, ASSIGNEDTO, YOUTH/CHILD, and REQUESTOR.

PLAN	PLANTYPE	ASSIGNEDTO	YOUTH/CHILD	REQUESTOR
CMO	CR90D	SANDRA PRUSINOWSKI		SANDRA PRUSINOV
OOH	DJCR	ZZZJESSICA CAMPBELL (The Mentor Network)		JESSICA CAMPBELL
OOH	DJCR- In Progress	DOTTIE ROESLY		DOTTIE ROSLEY
OOH	DJCR- In Progress	JULIE MOYER		JULIE MOYER
OOH	DJCR- In Progress	Michael Hessler		Michael Hessler
- My Plans (0):** A section with a sub-header 'Double click on a treatment plan to review.' and a table with columns PLAN, PLANTYPE, ASSIGNEDTO, YOUTH/CHILD, REQUESTOR, DUE DATE, AGENCY, TREATMENTPLANID, and CurrP. The table is currently empty.
- Buttons:** Clear All, Select All, Assign, Unassign.

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; 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 OOH user, options such as CMO and OOH will appear here (if there are 90-day plans in the system for this user's agency). 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 90-day plans and JCRs. 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.

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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).

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 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.

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 (126)

PLAN	PLANTYPE	ASSIGNEDTO	YOUTH/CHILD	REQUESTOR
CMO	CR90D	SANDRA PRUSINOWSKI		SANDRA PRUSINOV
OOH	DJCR	ZZZJESSICA CAMPBELL (The Mentor Network)		JESSICA CAMPBELL
OOH	DJCR- In Progress	DOTTIE ROESLY		DOTTIE ROSLEY
OOH	DJCR- In Progress	JULIE MOYER		JULIE MOYER
OOH	DJCR- In Progress	Michael Hessler		Michael Hessler

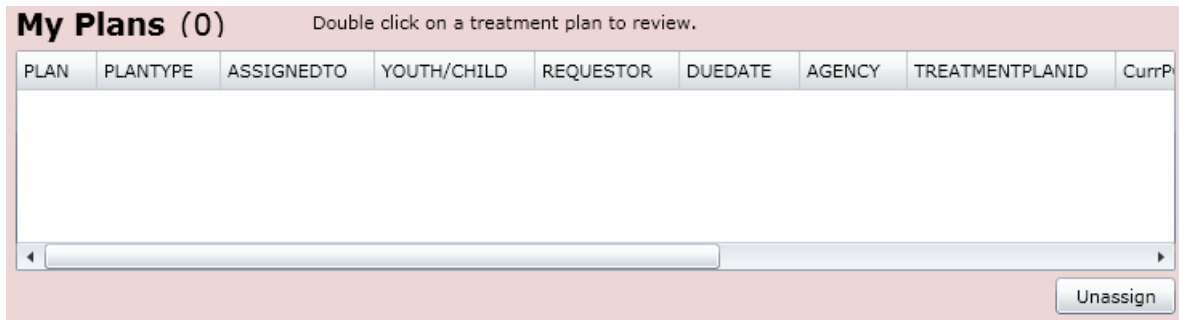
Assign

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 for approval. The grid will show the 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

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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. 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. (Clicking on this button will allow the user to choose another user within the agency to assign the document to; it does not have to be assigned to the logged-in user.) 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.)



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 and submit it 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).