

PerformCARE[®]

Instructional Guide for Substance Abuse Treatment (SAT) Providers' Welcome Page

(Last update: Release 1.25.1, October 2013)

Instructions for Use

Table of Contents

I. Introduction.....	2
II. Accessing CYBER.....	3
III. Standard Welcome Page Components.....	4
IV. Welcome Page Links.....	6
V. Welcome Page Hierarchy.....	8
VI. Using the Provider Tab of the Face sheet.....	9

I. Introduction

CYBER Welcome Pages were initially developed and released for most service lines within the Children's System of Care (CSOC) in 2011. Each page was designed to meet the needs of that specific service line. With the addition of Substance Abuse Treatment (SAT) providers into the System of Care in July 2013, a new Welcome Page has been designed to assist these providers with managing their day-to-day work.

The Welcome Page is similar to a reporting dashboard area that the user first comes to when they log into the system, and can be reached at any time during a logged-in session. It allows users to have quick access to information that is typically used to set priorities in the day such as treatment plans/assessments that are not yet completed or submitted, expiring authorizations for service, and information on youth who are pending admission to a program.

*Please note that, in some instances, the information that populates on the Welcome Page is user specific, not agency specific. In order to ensure that the information is correct, users must be opened on the Provider tab of a youth's Face Sheet; this assigns the youth to the user and the data within the youth's record can then be reported on the Welcome Page (see page 9 for more information). Also, some functionality is dependent upon a user's security set-up; if a user does not have access to the appropriate or necessary information on their Welcome Page, they should contact their System Administrator or the Service Desk (1-877-736-9176/servicedesk@performcarenj.org).

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 links for Home, Youth & Family Guide, Careers, and Contact, along with a search bar. Below this is a blue navigation menu with options for Families, Youth, Providers, About, and CYBER. A red circle highlights the 'Launch Cyber' link in the 'Youth' section, which provides contact information for technical assistance. Below this, there is a 'Help for Youth' section. The main content area features a 'CYBER LOGIN' form with fields for 'Enter Login Name Here' and 'Enter Password Here', and a 'Login' button. Below the form is a consent statement regarding Protected Health Information (PHI) and HIPAA. An arrow points from the 'Launch Cyber' link to the login form.

NJ Children's System of Care
Administered by PerformCare Behavioral Health Solutions | An AmeriHealth Mercy Company

Home • Youth & Family Guide • Careers • Contact Search Web site

Families Youth Providers About CYBER

We develop and manage Behavioral Health Solutions that are Member and Family Focused

Launch Cyber
For technical assistance, with the Cyber System, call 1-877-736-9176 or email service@performcarenj.org.

Help for Youth
If you are between the ages of 5 and 21 and need help with daily life challenges.

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/> "

*If a user has difficulty accessing the system, or needs their ID/security set-up, they should contact their System Administrator or the CYBER Service Desk.

III. Standard Welcome Page Components

Every Welcome Page contains some of the same functionality; these elements do not change across security access levels.

The screenshot displays the PerformCARE System Admin interface. On the left, a blue sidebar contains the following elements: the title 'System Admin', the user name 'Stacy Basara' and contact number '609-989-1625', a list of links in blue text ('FAQ's', 'Cyber Updates', 'Help', 'Service Desk Form', 'Training Information'), and a vertical stack of white buttons with blue text: 'Youth / Child Search', 'Your Caseload', 'Out Of Home', 'Provider Details', 'System Functions', and 'Historical Access'. An arrow points to the top of this sidebar. On the right, a 'Quick Search' section features five input fields for 'ID Number', 'First Name', 'Last Name', 'DOB', and 'SSN'. Below this is a section titled 'Service Plans / Asmts - In Progress' with a table header containing 'Youth/Child ID', 'First Name', and 'Last Name'.

Every Welcome Page includes a Quick Search area, which is located at the top of the screen. Users can enter any combination of information to find a youth's CYBER record; it is recommended that users enter partial names or birthdates in order to find the correct file. *Please keep in mind that users cannot search for youth who are not open to their agency; if a user attempts to do so, they will be unable to locate the record. In addition, substance abuse agencies will only have access to records that were authorized via youth signed consent, which is required under 42-CFR Part 2.

The information in the upper-left hand corner contains the agency's System Administrator and their contact number. This individual can reset passwords, assign and adjust security levels, set-up new accounts, and deactivate the accounts of users who are no longer with the agency. The links below that the System Administrator (which are in blue) will populate information in a new window when clicked.

- FAQ's – will bring up the CYBER FAQ page of the PerformCare website
- CYBER Updates – not currently functional
- Help – will bring up the Service Desk's phone number and email address
- Service Desk Form – will open the Form as it appears on the PerformCare website
- Training Information – will bring the user to the training page of the PerformCare website.

The functions that are associated with the buttons located on the left column of the Welcome Page are as follows;

- Youth/Child Search – will bring the user to the Youth/Child Search area, which remains at the top of the screen when the user accesses a youth's record
- Your Caseload – will open up a new window which lists the youth that the user is opened to on the youth's Face Sheet/Provider Tab. This button will only work if the agency assigns users to youth via the Provider Tab (see page 9 for more information)
- Out of Home – will bring the user to YouthLink
- Provider Details – will bring the user to the Provider Details area of the system
- System Functions – will bring the user to the Manage Access area; the majority of users will only have access to their own information. System Administrators will utilize this button to get to their Manage Access area, which is where they can locate user records, add new users, etc.
- Historical Access – will show the user a list of youth that have been serviced by the agency and have been discharged
- Reports – will be accessible only by users that have a Level 3 designation in their user profile

The information in the lower left-hand corner is information about the user's CYBER ID and security levels; changes can be made to this information by the agency's System Administrator or the Service Desk.

The right-side of the page includes a series of links; each will have a parenthesis after the title that will (initially) be blank. To populate this area with numbers, which will show the user how many items are under that category, the user must click on the Refresh button at the top of the list.

The screenshot shows the top navigation bar with the text "Welcome to CYBER Khayyam Bey, Integrity House, Inc." and a "Refresh Total" button. Below this is a "Select a User" dropdown menu and a "Print" button. A table displays columns for "Child Family Team Date", "Create Date", "Author", and "Status". A sidebar menu on the right includes "Service Plans/Assessment" with sub-items: "In Progress(1)", "Submitted(0)", "Approved(0)", and "Returned(0)", along with "Authorization", "Claims", and "YouthLink View". An arrow points to the "Refresh Total" button.

Child Family Team Date	Create Date	Author	Sta
2013/10/08	2013/10/08	Khayyam Bey	In-

IV. Welcome Page Links

The right-side of the Welcome Page contains list of links; each link has a parenthesis “()” after it which, once the Refresh button is clicked, will display a list of items attached to that link. Once the user clicks on one of the links, the center grid will populate with the associated data. By default, the Service Plans/Assessments In Progress grid will load each time the user arrives at the Welcome Page.

The screenshot shows the 'Service Plans/Assessments - In Progress' section of the PerformCARE interface. At the top, there is a header with 'Integrity House, Inc.' and a 'Refresh Total' button. Below the header, there is a table with the following columns: Youth/Child ID, First Name, Last Name, Child Family Team Date, Create Date, Author, and Status. A single row is visible with the following data: Youth/Child ID 238838, First Name J, Last Name H, Child Family Team Date 2013/10/08, Create Date 2013/10/08, Author Khayyam Bey, and Status In-Progress. To the right of the table, there is a sidebar menu with the following sections: Service Plans/Assessment (In Progress(1), Submitted(0), Approved(0), Returned(0)), Authorization, Claims, and YouthLink View.

The links on the right-side of the page are broken into sections, which can be opened by clicking on each of the headings, and are defined as follows;

- Service Plans/Assessments
 - In Progress – the plans, assessments, and LOCI documents the logged-in user has in draft
 - Users will be able to determine the type of document that is in draft by checking the last column in the grid – Plan Type
 - Submitted – the plans and assessments submitted to PerformCare for youth in the user’s caseload
 - Approved – a list of the plans and assessments that have been approved within the last 7 days for the youth who are on the user’s caseload
 - Returned – a list of the plans and assessments that have been returned for youth on the user’s caseload
 - Each grid will include the following information:
 - Youth/Child ID – acts as a hyperlink; when clicked, the user is brought to the Treatment Plans/Assessments screen in the youth’s record
 - First Name and Last Name of the Youth
 - Child Family Team Date (as entered in the plan/assessment)
 - Create Date
 - Author
 - Status – In Progress, Submitted, Returned
 - Plan Type – Routine, Transition, Discharge Treatment Plan, BPS Assessment, Strength and Needs Assessment (SNA), LOCI (will only appear in the In Progress grid)
- Authorizations
 - Current – will list all authorizations for that agency where the current date falls on or between the start/end dates of the authorization
 - Last 30 Days – will list all authorizations for that agency that have expired in the last 30 calendar days
 - Expiring – will list all authorizations for that agency that will expire in the next 30 calendar days
 - Auth History – will list all authorizations for that agency that have expired between 31 and 365 calendar days from the current date
 - Each grid will include the following information:

PerformCARE[®]

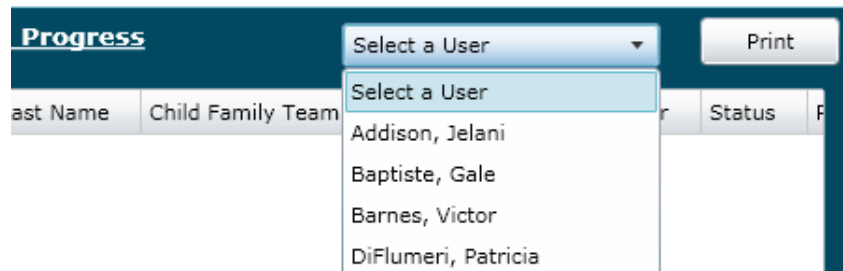
- Authorization # - acts as a hyperlink; when clicked, the user is brought to the Authorization Details screen
 - The Authorization Details screen will house a list of claims that have been submitted against the authorization; this area will not be functional for most SA treatment providers. If your agency is submitting 1500 forms for enhancement services, information will be posted here.
 - CYBER ID
 - Youth Name
 - Amount
 - Amount Remaining
 - Units
 - Units Remaining
 - Service Code and Description
-
- Claims – will list data for the logged in user’s agency; ***this area will only display information for those agencies that submit 1500 forms for enhancement services***
 - Claims – list of all claims
 - In Progress – all claims with a status of “In Progress”
 - Submitted – all claims with a status of “Submitted”
 - Approved – all claims that have been approved by PerformCare/CSOC
 - Sent – claims that have been sent for payment
 - Paid – all claims from the last 365 calendar days that have been paid
 - Returned – all claims with a status of “Returned”
 - Denied – all claims with a status of “Denied”
 - Review – all claims currently in review with PerformCare
 - CSOC Review – all claims currently in review with CSOC
-
- YouthLink View – for Short Term (ST) and Long Term (LT) SAT providers only; will display data for any programs the logged in user is attached to in CYBER
 - New to Provider Queue – a list of referrals added to the program(s)’ queue in the last 3 calendar days
 - Accepted – a list of the referrals in Accepted status
 - Scheduled – a list of the referrals in Scheduled status
 - Recently Admitted – a list of the youth that were admitted into the program(s) in the last 3 business days
 - Each grid will contain the following information:
 - Site Name
 - Youth/Child ID
 - First and Last Name of the youth
 - IOS – as it appears on the youth’s referral
 - Days on YouthLink – number of days the youth’s referral has been posted
 - Post Date – the original date the referral was posted on YouthLink

V. Welcome Page Hierarchy

There are two functions available on the Welcome Page that are driven by the security settings within a user's profile. In order to change the security in a profile, users must contact their System Administrator or the Service Desk.

Users who are designated Director (DIR/CE), Finance (FIN), or Manager (MGR) will have the ability to pull data for users designated as Supervisor (SUP). SUP users will have the ability to look at data from other SUP users, as well as those designated Case Managers (WOR). WOR users will only have access to their own Welcome Page data.

To access this information, the user will utilize the pull-down menu that is above the center-page grid.



Selecting a user from the menu populates the links on the right-side of the page, and the associated grids, with the data from the selected user's Welcome Page; this allows a Manager or Supervisor to monitor the work of staff and identify areas that may need immediate attention such as expiring authorizations, plans, assessments, or LOCI documents that have been sitting in draft (In Progress) status for an extended period of time.

Users with a designation of Supervisor, Manager, or higher (QA, FIN, etc.) will also be able to see a list of outstanding work that is attached to any deactivated users that fall below them in hierarchy; a user's CYBER access can be deactivated by the agency's System Administrator or the Service Desk via Manage Access. A new accordion on the Welcome Page will be available to these users and will allow them to see what documents are still in progress; users can then go to the Plan Approval screen and reassign the plan or assessment; they can also utilize the functionality on the Progress Note screen which allows these levels of users to access all draft progress notes that are associated with a youth's record. This allows the user to edit, delete or commit the progress note to the record.

VI. Using the Provider Tab of the Face sheet

When the user's program has an open Tracking Element in a youth's record, which allows the agency access to the record to complete actions such as add assessments and treatment plans, users will also have the ability to utilize the Provider Tab.

CIMID	FIRSTNAME	LASTNAME	TYPE	FACILITYNAME	STARTDATE	ENDDATE	EMAIL	PHONE	ReadOnlyAccess
-------	-----------	----------	------	--------------	-----------	---------	-------	-------	----------------

Adding users within the agency to this tab allows for the use of the “Your Caseload” button that is on the Welcome Page and can also be accessed from within a youth's record. This button shows the logged-in user a list of the youth that they are assigned, or opened, to; this allows for quick access to a record without having to search through the list of all youth the agency is opened to. Being added to the Provider tab will also assist users in tracking information on their Welcome Page; any treatment plans or assessments that are submitted for a youth that is on a user's caseload will appear on the Welcome Page as Submitted, Approved, Returned, etc.

Clicking the “Add Provider” button will bring up a new window, in which the user can select the appropriate individuals to open the record to.

Existing Provider: [Dropdown Menu]

Effective Date: [Date Picker] 15

End Date: [Date Picker] 15

Accept Cancel

Users must select a name from the drop-down menu; only users from the logged-in user's agency will appear in the list. Users must then enter an effective date; end date is optional. Clicking “Accept” will enter that individual into the Provider tab for the youth's record and the youth will then appear on the user's Caseload.