# PerformCare®

# Instructional Guide to Document Upload

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**Instructions Guide to Document Upload**

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# I. Introduction

Document Upload is CYBER functionality that allows users with specific security to upload*, or view uploaded documents in a youth's record.  These documents are stored on the Doc tab of the youth's Face Sheet.  Users with the ability to upload and view documents have specific security groups assigned to their CYBER username.   In some instances, the document upload/view functionality will be automatically assigned, or bundled into a user's security settings; in other instances, it will need to be manually added by the user's Security Administrator. The training document, 'CYBER Security System Administrator Instructional Guide' describes the doc upload security (see References).

**Goals of the Document Upload:**

- ✓ To <u>assist</u> in determining the need for clinically appropriate services and <u>improve</u> the clinical decision making process
- ✓ To <u>improve</u> the accessibility of documentation in a youth's record
- ✓ To <u>decrease</u> the amount of phone time for telephonic reviews (for DCP&P)
- ✓ To <u>decrease</u> Out-of-Home (OOH) Referral Request and Transition Joint Care Review (TJCR) returns
- ✓ To <u>eliminate</u> paper submission and referral packets
- ✓ To <u>decrease</u> wait time for consultation from the Office of Residential Services (ORS) formerly the Specialized Residential Treatment Unit (SRTU)

This document will describe the general Document Upload functionality that is available to CYBER users who have the appropriate security access.  In addition, each provider type that has access to the Doc tab within a youth's Face Sheet will find an Appendix here dedicated to their provider-specific details, including the types of documents they can upload and view.

> Due to disclosure restrictions pursuant to 42 CFR Part 2, any documents related to substance use treatment are only visible to PerformCare and CSOC staff. Therefore, <u>submit all substance use assessments and other related substance use treatment documents via secure fax to 1-877-949-6590</u>.  Substance use related information should **not** be uploaded into a youth's record by any user outside of PerformCare until otherwise communicated.

PerformCare, and CSOC, as necessary, review uploaded documents; <u>some uploaded documents may not be reviewed</u>. Therefore, it is **imperative** that users ensure they are uploading the appropriate information into the correct youth's record.  Not doing so could result in a HIPAA violation. Also, because documents are not being reviewed unless necessary, users **must ensure** that they are uploading information under the correct type and sub-type.

If a document intended for one youth is uploaded into a different youth's record in error, PerformCare must be notified to correct the error. The user should submit a request using the Customer Service Request Form (see Amending a Youth Record) in order to have the document removed from the youth's record.

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## II. Accessing CYBER

CYBER can be accessed via the PerformCare website – www.performcarenj.org . The link is available under the CYBER menu at the top of the home page or the button at the bottom of the page. Users must log into CYBER with their Username and Password.
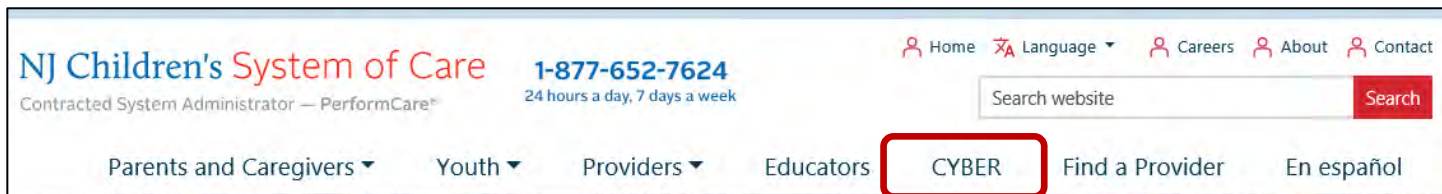


Each provider organization has at least two CYBER Security Administrators, and your agency's CYBER Security Administrators can set up a login and temporary password. Access will be based upon login type and security levels.

**Before logging in, keep in mind…**

- Every time CYBER is launched, the **Username and Password is required, then click the LOGIN button to continue**.
- Users are required to **change their password every 90 days.**

Above the login area is a statement that, CYBER users acknowledge their responsibility to protect the privacy of and to guard against the inappropriate use or disclosure the Protected Health Information (PHI) contained within the system.

This statement will appear during each log in.

Please also check the link: **CYBER Access Requirements** page on the PerformCare website for the most up-to-date technical requirements (such as browser compatibility and operating systems) needed to access CYBER.

**At the bottom of the login page is the version of CYBER. The server number is the last 2 digits at the end (-XX). This is helpful to note when requesting assistance.**
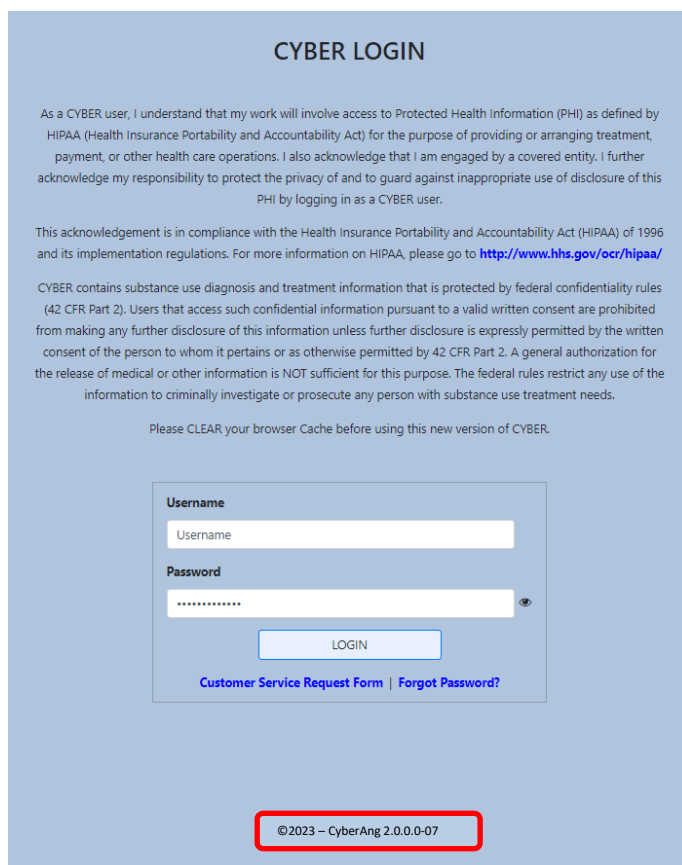
For technical support, please use the **Customer Service Request Form** link under the login.

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## III. Accessing the Document Tab and Upload Functionality

Once a user is given the correct document upload security, the user must locate the correct record prior to uploading any documents. Users can utilize any of the following options to locate a youth's record:

- The Quick Search function on the top of the Welcome Page
- A Youth/Child ID hyperlink from a grid within the system (i.e., on the Welcome Page grids)
- The Face Sheet link on the Provider Queue and Census tabs within Youth Link
- The My Active Youth link on the left-side button bar
- The Youth/Child Search link from the Welcome Page, leads to the Active Agency Youth or the search function above the record screen.

Once the correct record is found, the user can click on the Doc tab within the youth's Face Sheet (highlighted in the example below). An asterisk on the Doc tab means there are new documents uploaded into the Doc tab.



Users will find the following information in the DOC tab grid:

- Doc Status – identifies the status of a document (Status 'New Doc Uploaded' appears for 30 days)
- Document Type – chosen by the user that uploaded the document; the main category that the document falls under
- Document Sub-type – chosen by the user that uploaded the document; the sub-category that the document falls under, more specific than the Type
- Description – open text that is entered by the user uploading the document; this short description should include the specific name of document, author of the document (if applicable) and date of document.  For example: Psychiatric Evaluation, Dr. Smith, 3/1/19
- Date Uploaded – the date the document was actually uploaded, and the record was created
- File Name – Name given to the file that was uploaded. Recommended naming convention is *CYBER ID  Document Type  Date Received* (see Naming Convention)
- Uploaded By – Username of the individual that uploaded the document
- Program Name – The code for the program to which the uploading user is assigned

# IV. Uploading Documents

Once the user has clicked on the Add New Document button, the Upload Files window will appear.

The user must select from the Type of Document menu before selecting a Sub-type. *Please review your provider type Appendix at the end of this document for details on what you can and cannot upload.

All supporting clinical documentation must be uploaded (or faxed if related to substance use) **prior** to submittal of other information such as a Treatment Plan or Assessment. Without supporting documentation, the submitted document will be returned and the review will be deemed incomplete.

Users with access to the CYBER CMS 1500 form for billing purposes require document upload functionality to provide appropriate documentation in order to bill. Training for billing is available on PerformCare's website covering the upload functionality within the CMS 1500 Form. Training materials can be found on the Training page, under Billing and Claims, titled 'Entering Claims'.

**File Upload...**

Select Type of Document

Select Subtype of Document

Enter a comment for the file

Upload a document

Choose File   No file chosen

NOTE: File cannot exceed 20 MB in size.

Upload      Cancel

Once selections are made in both the Document type and Sub-Type menus, the user must enter a comment into the comment text box. Information entered within the comment box may include, but is not limited to, date of assessment, the specific type of specialty assessment/evaluation, applicable dates for a court order, or IEP effective date.

The user can then select the files to upload. Two important facts to remember:

1. Uploaded files **cannot exceed 20 MB in size;** if they are larger than this, the user will receive an error message and will be unable to complete the upload. Users may need to split a large document into two separate files; this may include re-scanning documentation into two (or more) separate files in order to upload the information into the record.

2. The only documents that can be uploaded into a youth record are files with file extensions: .PDF, .BMP, .GIF, .JPEG, .JPG, .PNG, .TIF, .TIFF. Any other formats will not be accepted and the user will need to either convert their document into one of the accepted formats or choose another document. Clicking on the Browse button will open up the user's local files either on their computer or on their network.

| **Acceptable file formats:** |
| --- |
| .PDF – Portable Document Format |
| .BMP – Bitmap Image File |
| .GIF – Graphic Interchange Format |
| .JPEG or .JPG – Joint Photographic (Experts) Group |
| .PNG – Portable Network Graphics |
| .TIF or .TIFF – Tagged Image Format (File) |

## Naming Convention

All file names must follow this naming convention – **CYBER ID Document Type Date Received**. For example, a user uploading the IEP Cover Letter for Youth ID 23456, which was received by their agency on November 25, 2016 should name the file '23456 IEP Cover Letter 11252016'. Once a file is selected, the user will see it appear in the Selected Files area.

Users will not see that the size of the file once it is uploaded;

To remove the file, select "Choose File", and you will be able to select a different document to upload.

Users can only upload **1** document at a time.

Clicking the Upload button will run the upload;

**File Upload...**

**Select Type of Document**

Clinical

**Select Subtype of Document**

IEP/Educational Info

**Enter a comment for the file**

IEP Cover Letter from August 2023 Meeting

**Upload a document**

Choose File    1234 IEP Co...XX2023.docx

NOTE: File cannot exceed 20 MB in size.

Upload    Cancel

If the upload is successful, the screen will return to the youth's Doc tab, where the file will be listed by Date Uploaded.

| Doc Status | Document Type | Document Sub Type | Description | Date Uploaded | File Name |
|---|---|---|---|---|---|
| New Doc Uploaded | Clinical | IEP/Educational Info | IEP Cover Letter from ... | 10/04/2023 | 1234 IEP Cover Letter ... |

If the document is too large or is not the correct file type , users will receive a validation indicating the reason the file cannot be uploaded.

**Upload a document**

Choose File    1234 IEP Co...XX2023.docx ←

NOTE: File cannot exceed 20 MB in size.

This is Docx file which is not an accepted file type.

**Validation Failed**

The File Type you are attemptting to upload is not accepted.please convert the file to one of the following file types before uploading:

.bmp

.gif

Upload    Cancel

**OPEN the Document** – To view documents, users must double-click on the document they would like to open. Next, the user must download the document to view it. Downloaded views vary based on the user's browser type and version. Once a document is uploaded, the user will be able to view it outside of CYBER.

Using Chrome, double click and file is downloaded

a4f16469-fa39-4a3....pdf

Some browsers may automatically download a file to the Download Folder.

Using Edge, double click and file is downloaded

What do you want to do with (1) (400 KB)?
From: apps.performcarenj.org

Open     Save     ∧     Cancel     ×
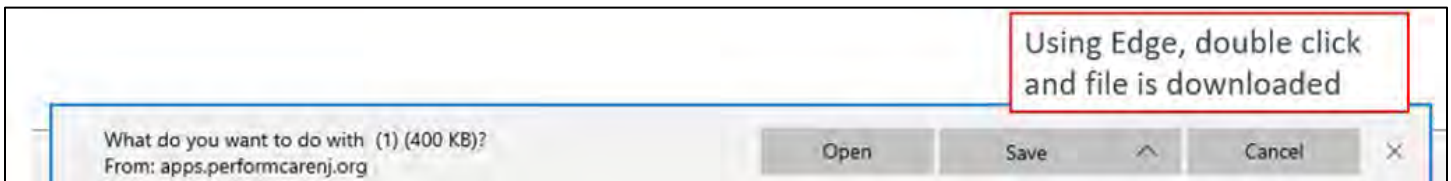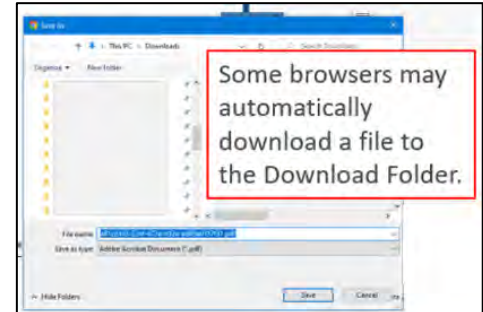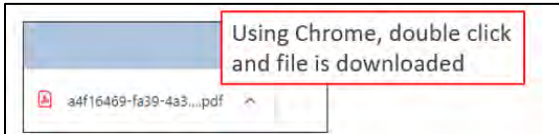
Once the file has been downloaded, users can zoom and rotate the image within the document reader.

## Documents that should not be uploaded

Users are required to ensure that they are uploading only those documents that are appropriate; users are also required to check that the document they are uploading is correct and should be filed under the Document Type and Sub-Type selected.  For example:

- **Any billing-related documentation that is in support of the agency's claim against an authorization** should not be uploaded into the record via the Doc tab of the Face Sheet.
- **Any documents that are in support of a family's DD Eligibility application** should not be uploaded into the youth's record.  PerformCare and CSOC do not check the Document tab of the youth's record for supporting documentation; if documents are uploaded, they will not be reviewed. The family should either mail the documents or upload them using the Family Portal.
- **Due to disclosure protection under 42 CFR Part II, do NOT upload any documents pertaining to substance use.** Instead, please fax substance use evaluative materials to PerformCare at (877) 949-6590, along with the required *Substance Use Treatment Consent Form* which is located on the PerformCare website.
- **All Social Security Numbers must be redacted in uploaded documentation.**

## Amending a Youth Record

If a user enters or uploads documentation into a youth's record that requires modification, the user or the user's supervisor must enter an *amended* progress note indicating:

- Uploaded Document Type, Document Sub-type, Description, Date Uploaded and Filename
- Information that is not correct or entered in error, and that it should not be further disclosed

If uploaded documents with youth specific information is entered into the wrong youth's record, the user should submit a request using the Customer Service Request Form (see References) in order to have the document removed from the youth's record.  Only PerformCare has the ability to remove uploaded documents.

*Note: Documentation is never completely eliminated from the CYBER record. It can be removed from view through a request using the Customer Service Request Form using the Type of Issue: Record Modification Request. Please add the CYBER ID and note specifically what needs to be removed.*

## Revocation of SAMHSA Consent

If the caregiver or youth revokes consent at any time, then indicate that on the particular SAMHSA survey, and their participation is complete. CMO must still complete required sections of reporting documents in provided timeframes.

# V. Security

Users within CMO and MRSS with the designation of CM or SUP in their profile will automatically receive the ability to view <u>and</u> upload documents into the records of the youth currently open to the agency; this security will be bundled in with their CM or SUP designation and will not appear separately. **Users within other service lines will need the doc upload security groups added onto their profiles by their System Administrator**.

The security part of the security group is described below:

- Document Upload – (*provider type designation*)**DOCATTACH**   (e.g. CMODOCATTACH)
- Document View – (*provider type designation*)**DOCATTACHRead**  (e.g. CMODOCATTACHRead)

It is recommended that both security groups DOCATTACH and DOCATTACHRead be added to a user's profile to allow both uploading and viewing documents functions in a youth's record.

These security groups can be found in the Available Groups list on the individual's user profile.  (This information is also included in the updated System/Security Administrator training document on the Training page of the PerformCare website.)

*Please note: If the CMO or MRSS **needs to remove the ability to upload and/or view documents** from a user's profile who has a CM or SUP designation, their **security designation must be changed.** The DOCATTACH and DOCATTACHRead security groups cannot be removed from the CM or SUP security designations because they are a part of the bundled security for those designations.  The System Administrator will have to give the individual a new security designation that does not have the Document Upload-specific codes bundled in with it, such as CMOQA, MRSSQA, etc.*

# VI. Appendices

## Appendix A: Document Upload Information for CMO

Document upload is used to upload clinical and administrative documentation to support the youth during the episode of care with CMO. CMO may view other user documentation to support in coordination of the youth's care. Document upload is also used to support the initial request for and on-going need for Individual Support Services (ISS), initiate the OOH CSAP Referral request or assist Behavior Analysts in uploading documentation.

CMO Users with the following security designations or groups can utilize the Doc tab of a youth's Face Sheet:

- **CMODOCATTACH** and **CMODOCATTACHRead**

CMO Security Administrator must manually assign these security functions.

- **CMOSUP** (has the document upload security bundled into their security title)
- **CMOCM** (has the document upload security bundled into their security title)

### Document Types and Sub-Types Available for CMO
The Doc Tab options for CMO users are as follows:

| Document Type | Sub-Type | Upload? | View? | Examples of Acceptable Documents |
|---|---|---|---|---|
| **Clinical** | o **Clinical Summary Template** | Y | Y | |
| | o **Clinical Updates** | Y | Y | |
| | o **Community Bio Psychosocial Assessment** | Y | Y | **BPS Assessment completed outside of CYBER** |
| | o **Cover Letter with SRTU Checklist** | Y | Y | |
| | o **CSAP Referral Form** | Y | Y | **In support of CSAP-IDD** |
| | o **IEP/Educational Info** | Y | Y | **IEP cover sheet** |
| | o **IMTS Referral Checklist/Form** | Y | Y | |
| | o **IMTS-CABS** | Y | Y | |
| | o **Medical Information** | Y | Y | |
| | o **OOH-CABS***(Within last 6 months)* | Y | Y | **In support of CSAP-IDD** |
| | o **Other Applicable Reports/Documents** | Y | Y | **Out-of-home Referral Document Checklist** |
| | o **Psychiatric Evaluation** | Y | Y | **Psychiatric Eval** |
| | o **Psychological Evaluation/Assessment** | Y | Y | **Psychological Eval** |
| | o **Specialty Assessment/Evaluation** | Y | Y | **Specialty Eval such as Fire Setting** |
| | o **Tier II Referral** | Y | Y | |
| **CMO Attachments** | o **CFT Sign-In** | Y | Y | |
| **Court Orders/ Subpoenas** | o **CMO 14 Day Plan** | Y | Y | |
| | o **Court Ordered Guardianship** | Y | Y | |
| | o **Court Ordered Treatment/Eval** | Y | Y | **Dispositional Court Order** |
| | o **Court Orders for Info/Appearance** | Y | Y | |
| | o **Subpoenas** | Y | Y | |

| Family Support Organization | o Contact Sheet | N | Y | |
| | o Release of Information | N | Y | |
| **IIC/BA Documents** | o **BA ISP*** | **Y** | **Y** | **Hard copy version of the BA ISP if the assessor has not completed the CYBER-based plan** |
| | o **IIC ISD (Interventionist Support Document)** | **Y** | **Y** | |
| **IIH Attachments** | o **ISS-CABS* (5 pages)** | **Y** | **Y** | **In support of ISS** |
| **Intensive Mobile Treatment Services** | o **IMTS ISD (Interventionist Support Document)** | **N** | **Y** | |
| Intermediate Unit | o IU Admission Note | N | Y | |
| | o IU Consent Form | N | Y | |
| | o IU Interventionist Supporting Document (ISD) | N | Y | |
| (Substance Abuse and Mental Health Services) SAMHSA National PPS Documents | o Caregiver Baseline | Y | Y | *Visible to CMOs who previously conducted SAMHSA surveys. This type is no longer in use.* |
| | o Youth Baseline | Y | Y | |
| | o Caregiver Re-assessment | Y | Y | |
| | o Youth Re-assessment | Y | Y | |
| | o Caregiver Transition | Y | Y | |
| | o Youth Transition | Y | Y | |
| | o Caregiver Consent | Y | Y | |
| | o Youth Consent | Y | Y | |
| SAMHSA NOMS PPS (National Outcome Measures) | o NOMS Baseline | Y | Y | *Visible to CMOs who previously conducted SAMHSA surveys. This type is no longer in use* |
| | o NOMS Re-assessment – 6, 12 mos | Y | Y | |
| | o NOMS Transition | Y | Y | |
| | o NOMS Consent | Y | Y | |
| **SAMHSA NOMS2 PPS 2021-2023** | o **NOMS2 Baseline** | **Y** | **Y** | **Used by all CMOs** |
| | o **NOMS2 Re-assessment – 6, 12 mos** | **Y** | **Y** | |
| | o **NOMS2 Transition** | **Y** | **Y** | |
| | o **NOMS2 Consent** | **Y** | **Y** | |

*The BA ISP should be entered directly into CYBER; there are some instances where the BA completes a hard copy template instead of the electronic ISP.  CMO may need to upload the hard copy BA ISP only when the author of the plan, or their agency, has issues uploading it into a youth's record.

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**CMO Document Upload Crosswalk**

The document crosswalk identifies documents that may be uploaded.

| CMO DOCUMENT UPLOAD CROSSWALK | | |
|---|---|---|
| **DOCUMENT** | **USE CYBER DOC TYPE** | **USE CYBER DOC SUB-TYPE** |
| Bio Psychosocial (if not in CYBER) **or** CCIS Psychosocial Assessment | Clinical | Community BPS Assessment |
| OOH Referral Request (Document Upload Requirement Checklist) | Clinical | Other Applicable Reports/Documents |
| Other applicable evaluations/reports | Clinical | Other Applicable Reports/Documents |
| Psychiatric Update* | Clinical | Other Applicable Reports/Documents |
| Substance Use Assessment | N/A (fax only) | N/A (fax only) |

*Required if youth is deemed IDD Eligible or if the DD module was completed within the OOH Referral Request/SNA as part of the TJCR.

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## Appendix B: Document Upload Information for OOH

Document upload is used to support the process of admitting a youth into an OOH program, as well as assist in the transition of a youth from the OOH program to another IOS or to their community.

OOH Users with the following security designations or groups can utilize the Doc tab of a youth's Face Sheet:

- **OOHDOCATTACH** or **OOHDOCATTACHRead**

OOH provider's Security Administrator must manually assign these security functions.

Out-of-home providers with the correct security groups, receive access to view uploaded documents related to a youth's OOH referral request or TJCR once a referral is assigned to the YouthLink Provider Queue.  OOH providers are also required to upload documents related to the Transitional Joint Care Review (TJCR) process.

### Document Types and Sub-Types Available for OOH

| Document Type | Sub-Type | Upload? | View? | Examples of Acceptable Documents |
|---|---|---|---|---|
| **Clinical** | o **Clinical Summary Template** | **Y** | **Y** | |
| | o **Clinical Updates** | **Y** | **Y** | |
| | o **Community Bio Psychosocial Assessment** | **Y** | **Y** | **BPS Assessment completed outside of CYBER** |
| | o Cover Letter with SRTU Checklist | N | Y | |
| | o **IEP/Educational Info** | **Y** | **Y** | **IEP cover sheet** |
| | o **Medical Information** | **Y** | **Y** | |
| | o **OOH-CABS (13 pages)*** | **Y** | **Y** | **In support of CSAP-IDD** |
| | o **Other Applicable Reports/Documents** | **Y** | **Y** | **TJCR Doc Upload Checklist** |
| | o **Psychiatric Evaluation** | **Y** | **Y** | **Psychiatric Eval** |
| | o **Psychological Evaluation/Assessment** | **Y** | **Y** | **Psychological Eval** |
| | o **Specialty Assessment/Evaluation** | **Y** | **Y** | **Specialty Evals such as Fire Setting** |

*CABS must be within the last 6 months

### OOH Document Upload Crosswalk
The document upload crosswalk identifies documents that may be uploaded, but are not listed in the specific types or sub-types of the Doc tab.

| OOH DOCUMENT UPLOAD CROSSWALK | | |
|---|---|---|
| **DOCUMENT** | **CYBER DOC TYPE** | **CYBER DOC SUB-TYPE** |
| BPS (if not in CYBER) *or* CCIS Psychosocial Assessment | Clinical | Community BPS Assessment |
| Neurology Update** | Clinical | Other Applicable Reports/Documents |
| Neuropsychological  Evaluation | Clinical | Other Applicable Reports/Documents |
| OOH Referral Request (Document Upload Requirement Checklist) | Clinical | Other Applicable Reports/Documents |

| Other applicable evaluations/reports | Clinical | Other Applicable Reports/Documents |
|---|---|---|
| Psychiatric Update*** | Clinical | Other Applicable Reports/Documents |
| Transition Joint Care Review (TJCR) (Document Upload Requirement Checklist) | Clinical | Other Applicable Reports/Documents |
| Substance Use Assessment | N/A | N/A |

*CABS must be within last 6 months

**Required if youth is deemed IDD Eligible or if the DD module was completed within the OOH Referral Request/SNA as part of the TJCR.

***Required if Psychiatric/Neuropsychological Evaluation is more than six months old

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## Appendix D: Document Upload Information for MRSS

Document upload is used to support the initial request for and on-going need for Individual Support Services (ISS), initiate the OOH CSAP Referral request or assist Behavior Analysts in uploading documentation.

MRSS Users with the following security designations or groups can utilize the Doc tab of a youth's Face Sheet:

- **MRSSDOCATTACH** and **MRSSDOCATTACHRead**

MRSS Security Administrator must manually assign these security functions.

- **MRSSSUP** (has the document upload security bundled into their security title)
- **MRSSCM** (has the document upload security bundled into their security title)

### Document Types and Sub-Types Available for MRSS
The Doc tab options for MRSS users are as follows:

| Document Type | Sub-Type | Upload? | View? | Examples of Acceptable Documents |
|---|---|---|---|---|
| Clinical | o **CSAP Referral Form** | Y | Y | In support of CSAP-IDD |
| | o **OOH-CABS (13 pages)** | Y | Y | In support of CSAP-IDD |
| IIC/BA Documents | o **BA ISP\*** | Y | Y | Hard copy version of the BA ISP if the assessor has not completed the CYBER-based plan |
| | o **IIC ISD (Interventionist Support Document)** | Y | Y | |
| IIH Attachments | o **ISS-CABS\* (5 pages)** | Y | Y | In support of ISS |

\*The BA ISP should be entered directly into CYBER; there are some instances where the BA completes a hard copy template instead of the electronic ISP.  MRSS may need to upload the hard copy BA ISP only when the author of the plan, or their agency, has issues uploading it into a youth's record.

\*CABS must be within the last 6 months

## Appendix E: Document Upload Information for IIC/BA

IIC/BA Providers utilize the doc upload functionality to view specific document types and upload identified documentation into the youth's CYBER record.

IIC/BA users with the following security designations or groups can utilize the Doc tab of a youth's Face Sheet:

- **IICDOCATTACH** and **IICDOCATTACHRead**

IIC Security Administrator must manually assign these security functions.

**Document Types and Sub-Types Available for IIC/BA**

| Document Type | Sub-Type | Upload? | View? | Examples of Acceptable Documents |
|---|---|---|---|---|
| **IIC/BA Documents** | o **BA ISP *(Behavioral Assistant Individual Support Plan)** | **Y** | **Y** | **Hard copy version of the BA ISP** |
| | o **IIC ISD (Interventionist Support Document)** | **Y** | **Y** | |

*The BA ISP should be entered directly into CYBER; there are some instances where the BA completes a hard copy template instead of the electronic ISP.  IIC users may need to upload the hard copy BA ISP only when the author of the plan or their agency has issues uploading it into a youth's record.

## Appendix F: Document Upload Information for FSO

FSO Providers utilize the doc upload functionality to view specific document types and upload identified documentation into the youth's CYBER record.

FSO users with the following security designations or groups can utilize the Doc tab of a youth's Face Sheet:

- **FSODOCATTACH** and **FSODOCATTACHRead**

FSO Security Administrator must manually assign these security functions.

### Document Type and Sub-Type Available for FSO

| Document Type | Sub-Type | Upload? | View? | Examples of Acceptable Documents |
|---|---|---|---|---|
| Clinical | o   IEP/Educational Info | N | Y | |
| CMO Attachments | o   CFT Sign-In | N | Y | |
| **Family Support Organization** | o   **Contact Sheet** | **Y** | **Y** | |
| **Family Support Organization** | o   **Release of Information** | **Y** | **Y** | |

## Appendix G. Document Upload Information for IU

IU Providers utilize the doc upload functionality to view specific document types and upload identified documentation into the youth's CYBER record.

IU users with the following security designations or groups can utilize the Doc tab of a youth's Face Sheet:

- **IUDOCATTACH** and **IUDOCATTACHRead**

### Document Type and Sub-Type Available for IU

| Document Type | Sub-Type | Upload? | View? | Examples of Acceptable Documents |
|---|---|---|---|---|
| **Intermediate Unit** | o   **IU Admission Note** | **Y** | **Y** | |
| | o   **IU Consent Form** | **Y** | **Y** | |
| | o   **IU Interventionist Supporting Document (ISD)** | **Y** | **Y** | |

## Appendix H: Document Upload Information for IMTS

IMTS Providers utilize the doc upload functionality to view specific document types and upload identified documentation into the youth's CYBER record.

IMTS users with the following security designations or groups can utilize the Doc tab of a youth's Face Sheet:

- **IMTSDOCATTACH and IMTSDOCATTACHRead**

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IMTS Security Administrator must manually assign these security functions.

**Document Types and Sub-Types Available for IMTS**

| Document Type | Sub-Type | Upload? | View? | Examples of Acceptable Documents |
|---|---|---|---|---|
| **IMTS Documents** | o **IMTS ISD (Interventionist Support Document)** | Y | Y | |
| | o **IMTS Referral Form** | Y | Y | |
| | o **IMTS-CABS** | Y | Y | |

# VII. References

PerformCare Website: www.performcarenj.org

Customer Service Request Form:  www.performcarenj.org/ServiceDesk

PerformCare Training Webpage: http://www.performcarenj.org/provider/training.aspx

Provider Forms Page: http://www.performcarenj.org/provider/forms.aspx

Out-of-Home (OOH) Referral Packet Checklist
- OOH referral request checklist for document upload
- Access to SRTU information*
- SRTU cover letter for document upload*
- DCPP telephonic review fax cover sheet for document upload

* The Office of Residential Services (ORS) formerly known as the Specialized Residential Treatment Unit (SRTU)

Tier II Consultation
- Tier II Consultation process
- Tier II Consultation tips for CMEs
- Tier II Consultation request form

Transitional Joint Care Review Checklist
- TJCR document upload requirement checklist

Intermediate Inpatient Units
- Intermediate Inpatient Unit interventionist supporting document
- Authorization for Disclosure of Health Information

Documents Used for CSAP-DD Referrals
- Crisis Stabilization and Assessment Program referral form: Go to https://www.performcarenj.org/provider/forms.aspx and scroll down to Intellectual/Developmental Disability Services.
- Child Adaptive Behavior Summary (Long version, 13 pp) (English)

ISS-CABS used for Individual Support Services (abbreviated version, 5 pp)

- Individual Support Services - Revised Child Adaptive Behavior Summary (CABS)

Documents Used for IMTS

- IMTS ISD (Interventionist Support Document)
- IMTS-CABS
- IMTS Referral Form

Timeframes for Clinical Assessments Submitted for Developmental Disability Eligibility Determination

Intensity of Service Dispute Form

- Intensity of service dispute process
- Intensity of service dispute form

> **Customer Service Request Form**
> **www.performcarenj.org/ServiceDesk**
> **1-877-652-7624**