

# PerformCARE<sup>®</sup>

## Instructional Guide for Intermediate Units

### Table of Contents

|   |    |
|---|----|
| I. Introduction .....                             | 2  |
| II. Accessing CYBER through NaviNet.....          | 3  |
| CYBER Access through the PerformCare Website..... | 3  |
| III. CYBER Welcome Page .....                     | 4  |
| System Functions.....                             | 5  |
| Reporting.....                                    | 5  |
| Historical Access .....                           | 6  |
| Anomaly Management.....                           | 7  |
| Searching for a Youth Record .....                | 7  |
| Quick Search.....                                 | 7  |
| Youth/Child Search .....                          | 7  |
| IV. Face Sheet Tabs .....                         | 9  |
| V. Admission Process .....                        | 12 |
| Admission.....                                    | 12 |
| Continuing Stay .....                             | 13 |
| VI. Document Upload.....                          | 14 |
| Naming Convention .....                           | 15 |
| VII. Progress Notes .....                         | 17 |
| Treatment Plans and Assessments.....              | 19 |
| Authorizations .....                              | 19 |
| VIII. Transition Process.....                     | 21 |
| IX. Troubleshooting.....                          | 22 |
| X. References .....                               | 22 |

## I. Introduction

Intermediate Units (IU) provide psychiatric stabilization and treatment for youth between the ages of 5 and 17 who require extended psychiatric hospitalization after their stay on a children's crisis intervention services (CCIS) unit. The treatment is provided within the context and guiding philosophy of a therapeutic community and implemented by a multidisciplinary team. Youth receive ongoing psychiatric supervision, evaluation for psychopharmacological treatment, and individual, group, and family therapy.

### **CSOC's vision for the Intermediate Units includes the following:**

- To identify high needs youth who could benefit from CSOC services;
- To support transitions from the subacute setting;
- To mitigate barriers to accessing additional resources.

In CYBER, Intermediate Units are a provider type with features and functions to support the work of the unit.

The overall process for admission, continued stay, and transition include the following:

#### Admission:

- IU psychiatrist will make the determinations for all IU admissions.
- The IU users will telephonically report the youth's admission to PerformCare within one (1) business day of the youth's admission date.
- Upon reporting the admission, the youth's record will be opened to the IU, the Care Management Organization (CMO), and the Family Support Organization (FSO). The CMO will assist in care coordination and transition planning.
- Within 72 hours of reporting the youth's admission, the IU will upload the psychiatrist's admission note to the youth's CYBER record. Once this required documentation is uploaded, the IU will receive the initial 30 day authorization.

#### Continued Stay:

- If youth requires continued stay beyond the initial 30 day authorization, the IU will complete identified sections of the IU Interventionist Support Document (ISD) and upload it to the youth's CYBER record within fourteen (14) calendar days of the current authorization expiration date.
- Following review and approval of the ISD, the IU will receive another 30 day authorization (subsequent continued stay requests, as needed, will follow the same process).

#### Transition:

- When the youth officially transitions out of the IU, the IU user will complete the identified sections of a IU ISD and upload it to the youth's CYBER record.
- Upon review and approval, PerformCare will end the episode of care in the youth's CYBER record.

April 2019 - CYBER Release 1.44.11.0 creates the user type for IU with Security groups, Welcome Page, Episodes, Doc Upload functionality and progress notes for Trinitas Hospital and Inspira Medical Center.

## II. Accessing CYBER through NaviNet

NaviNet is an integrated health care communications network that PerformCare utilizes as its Provider Portal and an administrative tool to help streamline and enhance CSOC processes.

Users should obtain a Username for NaviNet through their provider's NaviNet Security Officer. Users may log into NaviNet using their NaviNet Username and Password on the webpage <https://navinet.navimedix.com/>, locate the New Jersey Children's System of Care Health Plan and Launch CYBER. Users will initially be required to link NaviNet to CYBER using a Single Sign-On process. Following the linkage, the user will be able to access the associated CYBER Username without entering the CYBER Username or Password. Users must have a NaviNet Username for each associated CYBER Username. See [References](#) for detailed NaviNet Instructions.



## CYBER Access through the PerformCare Website

IU users may also log into CYBER through the PerformCare website only when NaviNet is not available. This may be during scheduled NaviNet maintenance or an outage. CYBER can be accessed via the PerformCare website – [www.performcarenj.org](http://www.performcarenj.org). The link is available at the top bottom of the main page.



Each provider organization has at least one CYBER Security Administrator, and your agency's CYBER Security Administrator can set up a login for you.

Your access will be based on your login type and security levels.

### Before you log in, keep in mind...

- There is no 'back button' use in CYBER!
- Most areas/buttons are single-click – do not double-click on a button!
- Every time you launch CYBER, you will be required to enter your Username and Password to continue.

Below the log in area is a statement that, as a CYBER user, you acknowledge your responsibility to protect the privacy of, and to guard against, the inappropriate use of the Protected Health Information (PHI) contained within the system.

This statement will appear each time you log in.



Please also check the **Providers** section on the PerformCare website for the most up-to-date technical requirements (such as browser compatibility and operating systems) that a user would need to access CYBER.

## III. CYBER Welcome Page

After logging in, all IU users land on the Welcome Page. The Welcome Page within CYBER give users the ability to track ongoing authorization activity with census.

The screenshot shows the PerformCARE CYBER Welcome Page. At the top, there is a header with the logo and 'Welcome to CYBER'. Below the header is a 'Quick Search' section with input fields for Cyber ID, First Name, Last Name, and DOB. To the left is a sidebar with navigation links. The main content area is titled 'Authorization - Current' and contains a table with the following data:

| Youth/Child ID | First Name | Last Name | Auth # | Start Date | End Date   | CIMID | Prov MA |
|----------------|------------|-----------|--------|------------|------------|-------|---------|
|                |            |           |        | 2020/03/30 | 2020/04/28 |       |         |
|                |            |           |        | 2020/03/21 | 2020/04/19 |       |         |
|                |            |           |        | 2020/03/11 | 2020/04/09 |       |         |
|                |            |           |        | 2020/03/10 | 2020/04/08 |       |         |
|                |            |           |        | 2020/01/15 | 2020/04/13 |       |         |

IU users should use the Welcome Page links to populate the center grid. The grid is noted as having a default sort order below, however, the user may temporarily sort the grid based on different column by clicking the heading of the column one time. A second click will sort the column in the opposite direction. A youth's transition will end the episode of care and close the youth record thereby removing the youth from certain grid views on the Welcome Page.

The Security Administrator information including the user's name and phone number displays in the top left of the Welcome Page. The links beneath will open CYBER FAQ's, CYBER Updates, Help, Service Desk Request Form for making inquiries and requests, and Training Information will bring users to the Training Page of the PerformCare website. (See [References](#) for the Welcome Page training materials.)

On the right-hand side of the Welcome Page, IU users may click the Refresh Total button to refresh a display of the numbers in each link indicating the items in the specific area. The following sections and links on the right-hand side are described below:

**Authorization** section displays the following links

- [Current\(\)](#) - Lists authorizations where the current date falls on or between the authorization Start and End Dates

# PerformCARE®

- [Expiring\( \)](#) - Lists authorizations that will expire within the next 15 calendar days
- [Auth History\( \)](#) – Lists authorizations that have an End Date that is between 31 calendar days and 365 calendar days in the past.

The columns in this grid are sorted by the authorization start date:

- Youth/Child ID (hyperlink) – this is the youth’s unique identifying number in CYBER. When clicked, it will bring the user to the youth’s face sheet
- First Name and Last Name
- Auth # - an authorization for services associated with the youth
- Start Date/End Date – the start/end date of the authorization
- Prov MAID – the Provider Medicaid number
- Prov Name – the Provider name
- Service Code – the service code of the authorization

**Census** section displays the following link:

- [Admitted\( \)](#) – List of all the Youth currently admitted to the IU.

The columns in this grid are sorted by the admission date:

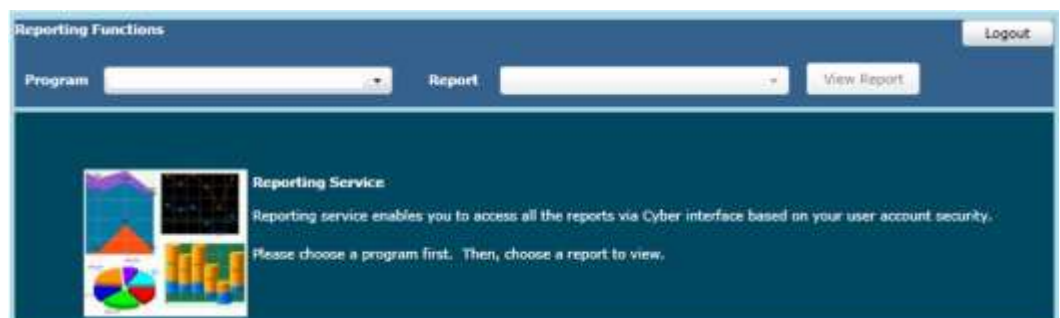
- Provider Name
- CYBER ID – the youth’s identification number in CYBER
- Youth First Name and Last Name
- Admission Date – the date the youth was recorded as being admitted at the IU

## System Functions

Clicking System Function button and then the Manage Access button will allow the user to update their contact information or reset their CYBER password. This feature is described in the *Password Reset for All Providers* training document on the PerformCare website. (See [References](#) for the training links). For Security Administrators this section is for managing the CYBER security login and passwords for all the provider’s staff.

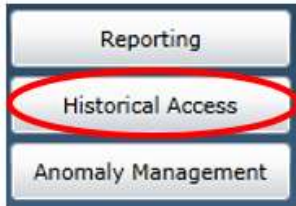
## Reporting

IU users with Level 3 security may select the Reporting button and access the Reporting Functions. The reporting function allows users to run reports for their provider group.



The user should first select the program in the 'Program' dropdown menu. To the right of the 'Program' dropdown will be the 'Report' dropdown menu. In this box you will see all the reports available for the chosen program. The user may select a report and click the 'View Report' button. The report will generate. (See [References](#) for further information about viewing and printing reports.)

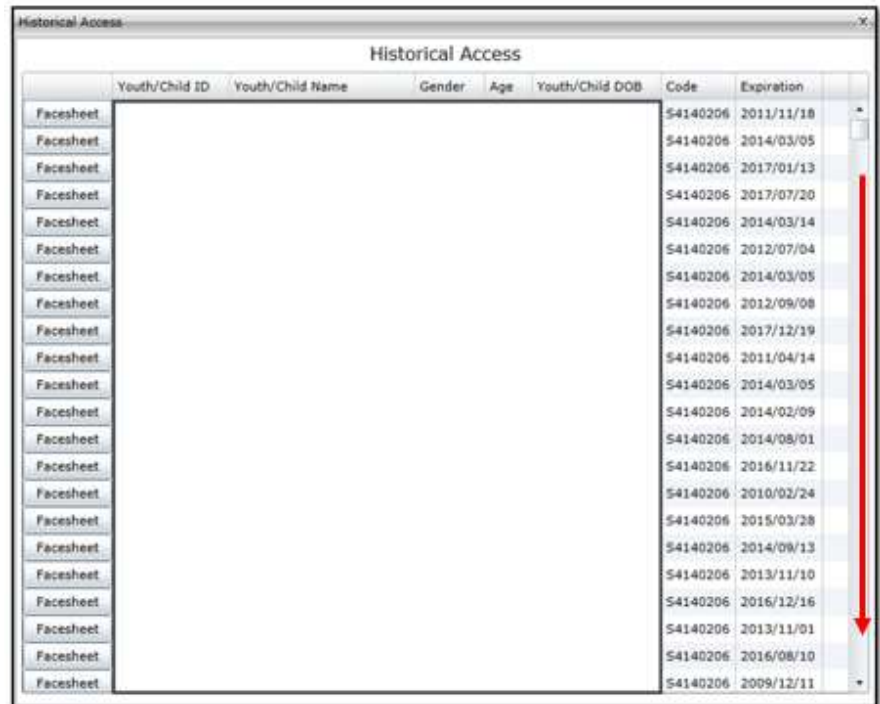
## Historical Access



All provider's users may select the Historical Access button to view Historical Access information. This screen displays a list of youth who had been open to the provider in the past but are no longer open.

Historical Access will list all of the youth that have been transitioned from the program in CYBER. Historical access is a read and print-only view.

By default the screen lists youth by last name. Scrolling down the right side, a user may change the grid sort order by clicking on a heading in the grid. Once a youth is located by the user, they can click on the Face Sheet button in the selected row to be able to view the youth's record as it was when the program closed; this also allows users to view and print data from when the youth was admitted to the program. No modifications or additional data may be added to the record while in Historical Access.



|           | Youth/Child ID | Youth/Child Name | Gender | Age | Youth/Child DOB | Code     | Expiration |  |
|-----------|----------------|------------------|--------|-----|-----------------|----------|------------|--|
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2011/11/18 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2014/03/05 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2017/01/13 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2017/07/20 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2014/03/14 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2012/07/04 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2014/03/05 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2012/09/08 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2017/12/19 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2011/04/14 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2014/03/05 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2014/02/09 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2014/08/01 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2016/11/22 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2010/02/24 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2015/03/28 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2014/08/13 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2013/11/10 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2016/12/16 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2013/11/01 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2016/08/10 |  |
| Facesheet | S4140206       |                  |        |     |                 | S4140206 | 2009/12/11 |  |

## Anomaly Management

IU users with Level 2 or 3 security may select the Anomaly Management button and access the Anomaly Management Functions. The Anomaly Management Functions allows users to view and resolve some anomalies that appear in the youth record. (See [References](#) for further instructions on this area of CYBER.)



| YOUTH/CHILD ID | DESCRIPTION                                 | DATE       |
|----------------|---|------------|
|                | Open Tracking Element/No Medicaid           | 2019/03/21 |
|                | Exceeds Expected Length of Stay             | 2019/03/21 |
|                | Open Tracking Element Missing/Malformed SSN | 2019/03/21 |
|                | Open Tracking Element Missing/Malformed SSN | 2019/03/21 |
|                | Open Tracking Element/No Medicaid           | 2019/03/21 |

## Searching for a Youth Record

There are multiple ways search for a youth record in CYBER:

1. **Quick Search** on the Welcome Page
2. **Youth/Child Search** on the Face Sheet
3. Reviewing the **Active Agency Youth List**
4. Checking **My Active Youth**

### Quick Search



The Quick Search feature on the Welcome Screen can be used to quickly locate a youth record. Users may enter the CYBER ID of the youth, or part of the first name or last name of the youth, and press Enter on the keyboard to find a youth in CYBER. (An example of partial entry is: Mary Smith = Mar in First name field and Smi in the Last name field).

### Youth/Child Search

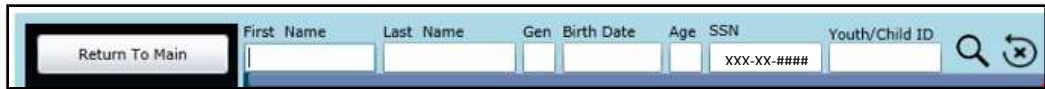
From the Welcome Page users may click the Youth/Child Search button on the left side and enter a partial first or last name at the top of the screen and click the magnifying glass to run a search.



# PerformCARE®

At the top of the screen, there are fields in which the user can search for a youth. The user can search using any of the following fields:

- First Name
- Last Name
- CYBER ID
- Date of Birth



Click the **Magnifying glass** to Search or **Clear Youth/Search** icon to start over.

Partial entry searches can also be performed and depending on the youth at the agency, more than one youth could appear. In that case, double clicking the specific youth record will open the correct youth. If the youth entered is open to the agency, the Face Sheet for that youth will appear. If the search returns only one match, then the youth's Face Sheet will populate with the youth's information.

## Active Agency Youth



From the **Youth / Child Search**, the user can list the **Active Agency Youth**.



If the user points the mouse at the icons shown, a brief description of each will appear.



The **Active Agency Youth** is a grid of all youth currently open to the agency. The column headings can be clicked to sort, and the Print button allows the list to be exported and printed. Double-clicking on any row in the Active Agency Youth will open the Face Sheet for that youth's record.



| First Name | Last Name | MI | Gender | DOB | Age | SSN | Youth/Child ID | Opened    | Program | Re: |
|------------|-----------|----|--------|-----|-----|-----|----------------|-----------|---------|-----|
|            |           |    |        |     |     |     |                | 3/15/2019 |         |     |
|            |           |    |        |     |     |     |                | 2/26/2019 |         |     |

## My Active Youth

Once a youth record is open, a list of youth can be assigned to specific workers by adding one or more staff names to the Provider tab on youth records.

- Open the youth record from Active Agency Youth by double clicking the row.
- Click on Provider Tab
- Click Add Provider button
- Select name(s) from drop down menu and set the start date. (Do not select an end date)

The staff person may click the **My Active Youth** button on the Welcome Page or Youth/Child Search page and display a list of the youth assigned to them. The user may double click any row to open the face sheet for the youth. If only one youth is assigned, that one will open.

| First Name | Last Name | MI | Gender | DOB | Age | SSN | Youth/Child ID | Opened   | Program | Read O |
|------------|-----------|----|--------|-----|-----|-----|----------------|----------|---------|--------|
|            |           |    |        |     |     |     |                | 7/3/2018 |         |        |
|            |           |    |        |     |     |     |                | 1/2/2019 |         |        |

## IV. Face Sheet Tabs

The Face Sheet holds all of the youth's essential information. The information contained on the Face Sheet tabs is read-only to IU providers except for the Dx/Med Tab and the Doc Tab.

Dashboard Demographics Episodes Provider Supports Dx/Med Eligibility Insurance Legal Doc

**Youth Specific Information** Print Print Selection

### Dashboard Tab

The Dashboard tab is the starting point, or landing tab for all CYBER users. The Dashboard provides a youth-centered 'snapshot' of the youth's information drawn from different areas and tabs in the youth's record. The Dashboard tab is read-only to all providers – it is not editable, nor is the text available to be copied and pasted. However, there is functionality for PDF printing of all the tabs in the Face Sheet, including the Dashboard tab.

*NOTE: When youth are open to IU, there will be a note in Flags for Special Occurrences with the IU admission date.*

Dashboard contains information from:

- Demographics
- Alerts/Flags
- Supports
- Eligibility
- Episodes
- Authorizations

## Demographics Tab

Demographics tab contains the youth's demographic and identification information. Provider restrictions to editing specific information in a youth record is dependent on whether care management (CMO and/or MRSS) providers are involved and open to the youth in CYBER. Any changes to information on this tab should be communicated to the CMO who will be open while IU is open. See the Provider tab for CMO contact information.

Demographics Tab contains:

- Youth demographics (name, age, gender, marital/military status, eye/hair color)
- Location of the youth
- Address information
- Contact information
- Race/Ethnicity
- Languages
- School information

## Episodes Tab

Episodes tab displays the Active episodes of care by default. The primary purpose of the Episodes tab is to display actual Length of Stay. Users may toggle to see All Episodes (active and no longer active).

# PerformCARE®

| Program | Program Type | Service Type | Start Date | Transition Date | Referral Date | Referral Source |
|---------|--------------|--------------|------------|-----------------|---------------|-----------------|
|         | IU           | IU           | 4/8/2019   | 4/20/2019       | 4/8/2019      |                 |
|         | FSO          | FSO          | 4/8/2019   | 4/20/2019       | 4/8/2019      |                 |
|         | IU           | IU           | 4/2/2019   | 4/23/2019       | 4/2/2019      |                 |

## Provider Tab

Provider tab displays all Active staff working with the youth by default. IU may add staff to this tab to utilize the My Active Youth list. Users may also filter by provider type and toggle to see All Providers (active and no longer actively working with the youth).

| User | First Name | Last Name | Type | Agency Type | Program Name | Email |
|------|------------|-----------|------|-------------|--------------|-------|
|      |            |           |      | IU          |              |       |

## Supports Tab

Supports tab displays all Active family, formal and informal supports by default, but may toggle to see All supports as well. IU must contact CMO to edit or add additional supports to this list. Double clicking a support will display any details collected about that support.

## Dx/Med Tab

Dx/Med tab displays all documented diagnoses and medications for the youth. If a diagnosis is entered, the Diagnosis section requires users to identify the diagnosing clinician, clinician credentials, and date of diagnosis. Diagnosis may be entered by searching for the appropriate ICD-10 diagnosis code, selecting it and adding it in the Dx/Med tab.

*NOTE: IU users have full access to enter diagnosis and medication information under this tab regardless of CMO involvement.*

| Date       | Type | Code | Description |
|------------|------|------|-------------|
| 01/30/2018 |      |      | LCRW        |
| 01/30/2018 |      |      | LCRW        |

| Date       | Type | Code | Description                                      |
|------------|------|------|--|
| 01/30/2018 |      |      | GUAFACINE 1 MG ORAL TABLET (GUAFACINE HYDROCHLOR |
| 01/30/2018 |      |      | Albany ER AMPHETAMINE 1.25 mg/mL ORAL SUSPENSION |
| 01/30/2018 |      |      | GUAFACINE 1 MG ORAL TABLET (GUAFACINE HYDROCHLOR |
| 01/30/2018 |      |      | Albany ER AMPHETAMINE 1.25 mg/mL ORAL SUSPENSION |
| 01/30/2018 |      |      | GUAFACINE 1 MG ORAL TABLET (GUAFACINE HYDROCHLOR |
| 01/30/2018 |      |      | Albany ER AMPHETAMINE 1.25 mg/mL ORAL SUSPENSION |

| Type | Code | Description | Diagnosis Comment |
|------|------|-------------|-------------------|
|------|------|-------------|-------------------|

For detailed instructions on entering Diagnoses and Medications, please review the sections on Entering Diagnosis and Medications from the Face Sheet in the ICD-10 Instructional Guide.

<http://www.performcarenj.org/pdf/provider/training/geral-csoc/icd10-instructional-guide.pdf>

## Eligibility Tab

The Eligibility screen can display different types of Medicaid numbers (displayed on the Dashboard tab).

## Insurance tab

Insurance tab captures and displays Third Party Liability (TPL), or private insurance, information. *Active* information is displayed by default and will include the start and end date of coverage and a description of the type of coverage entered; a record that is marked as “Verified” indicates that the State has verified that this insurance record is complete and accurate.

## Legal Tab

The Legal Tab lists any legal or juvenile justice information about the youth from assessments, DCP&P custody or Court Orders/Subpoenas.

## Doc Tab

Doc Tab is for uploading documents relevant to the youth record. IU has access to upload specific documents to the youth record including the IU Admission Note, IU Consent Form and IU Interventionist Supporting Document (ISD). See [References](#) for a guide to Document Upload.

## V. Admission Process

### Admission

IU may receive referrals directly from Children’s Crisis Intervention Services (CCIS) units and private hospitals. Once the referral is received, the admission process begins as follows:

# PerformCARE®

1. The CCIS/private hospital refers the youth to the IU.
2. The IU Psychiatrist reviews youth information and confirms that IU services will meet youth's presenting needs. The CCIS/private hospital coordinates with IU for youth's admission.
3. Once the youth is formally admitted to the IU, the admitting IU will telephonically report the youth's admission to PerformCare within one business day of admission by calling 1-877-652-7624.
4. The PerformCare Member Services Specialist (MSS) will register the youth in CYBER (if not already registered) then will transfer the caller to a Care Coordinator (CC) who will complete the following:
  - Open youth to the IU (provides access to the youth record)
  - Enter progress note verifying call and admission
  - Open the youth to Care Management Organization (CMO) and Family Support Organization (FSO)\*
5. Within 72 hours of reporting the youth's admission, the IU will upload the following document to the youth's CYBER record:
  - IU Psychiatrist's Admission Note
6. Once the document is uploaded, PerformCare will review it then will enter a 30-day authorization\*\* in the youth's record. This clinical review will occur within one (1) business day of receipt.
7. An Episode of Care is generated with the start and end date of the authorization.

\*All youth admitted to IU will be opened to CMO and FSO. The CMO will assist in care coordination and transition planning. CMO involvement is required throughout the entirety of the youth's stay at IU, as it is for all other CSOC out-of-home settings.

\*\*The 30-day authorization will not be entered until the required document noted above is uploaded to the youth's record by the IU.

## Continuing Stay

1. The IU user must complete and upload the IU Interventionist Supporting Document (ISD) to the youth's CYBER record within fourteen (14) days of current authorization expiration:
  - a. Initial continued stay request: Sections I, II, and III are required (Check 'No' on Section I).
  - b. All subsequent continued stay requests: Sections I and III are required (Check 'No' on Section I).
2. Once the ISD is uploaded, PerformCare will conduct a review within two (2) business days.
3. If approved, PerformCare will issue a 30-day Continued Stay Authorization. If additional information is required, PerformCare will enter a progress note requesting the information.

*Note: There is no limit to the number of authorizations IU can receive; if youth continues to meet clinical criteria, services will be authorized. A psychiatrist sign-off approval is not required for continued stay requests.*

## VI. Document Upload

Document Upload is CYBER function that allows certain users to upload or view uploaded documents in a youth's record; these documents can be found on the Doc Tab of a youth's Face Sheet. Users with the ability to upload and view documents need to have certain security attached to their ID in CYBER.

Access to this functionality is managed by the IU's CYBER Security Administrator.

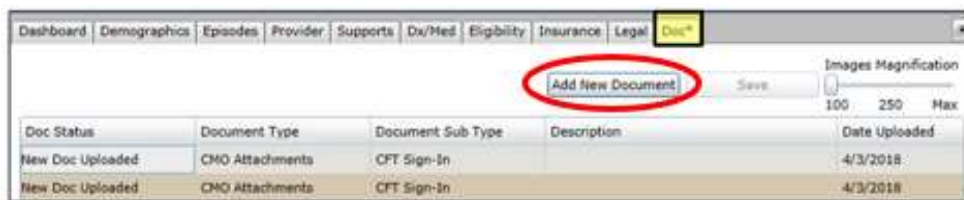
*Note: Please visit <http://www.performcarenj.org/provider/performcare-presentations.aspx> for more training documents that review Security Administrator-specific functionality and detailed Document Upload functionality.*

*Additionally, for more information on uploading document functionality please refer to the Instructional Guide to Document Upload Functionality at <https://www.performcarenj.org/pdf/provider/training/general-csoc/document-upload-functionality.pdf>.*

An IU CYBER user should be assigned both security groups, IUDOCATTCH and IUDOCATTACHRead, to have the ability to **upload and read documents** as outlined. An IU CYBER user may be assigned only IUDOCATTACHRead to have **read only** capabilities of the documents as outlined.

Within 72 hours of reporting the youth's admission, the IU will upload the **IU Psychiatrist's admission note**.

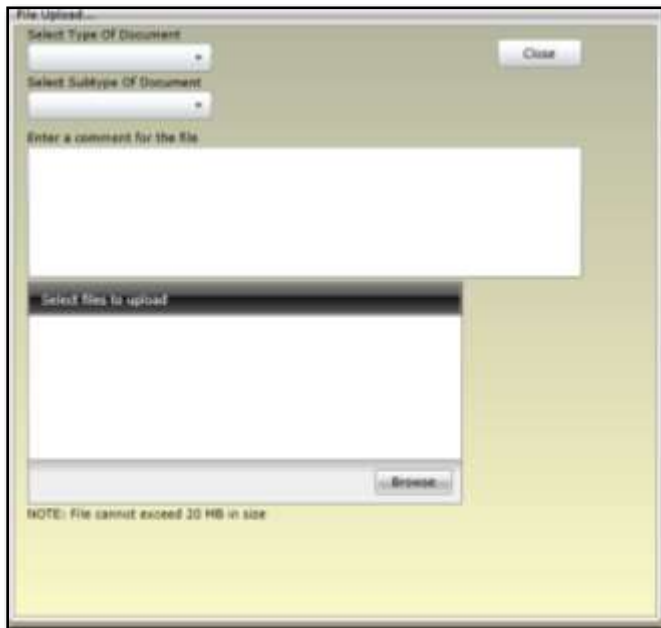
To upload documents, users will click on the Doc Tab within the youth's Face Sheet (highlighted in the example below).



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

- Doc Status – identifies when a new doc is Uploaded
- Document Type – chosen by the user that uploaded the document; the main category that the document falls under, for example, “Intermediate Unit”
- Document Sub Type – chosen by the user that uploaded the document; the sub-category that the document falls under, more specific than the Type, for example IU has only three sub types of uploaded documents, ‘IU Admission Note’, ‘IU Consent Form’, and ‘IU Interventionist Supporting Document’
- Description – open text that may be 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: Transition ISD, Dr. Smith, 4/1/19
- Date Uploaded – Date document was actually uploaded (this is not entered, but auto assigned when the document is uploaded)
- File Name – Name of the file that was uploaded (see the below recommendation for naming convention of **Cyber ID, Document Type, Date Received**)
- Uploaded By – User ID of the individual that uploaded the document
- Program Name – The Provider name of the program to which the uploading user is assigned

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



The user must make a selection from the Type of Document menu before selecting a Subtype. Click Select Type of Document and select 'Intermediate Unit' from the menu. Click Select Subtype of Document and select from the options.

Once selections are made in both the Document type and Subtype menus, 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. Clicking on the **Browse** button will open up the user's local files either on their computer or network.

## 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 be rejected 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 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

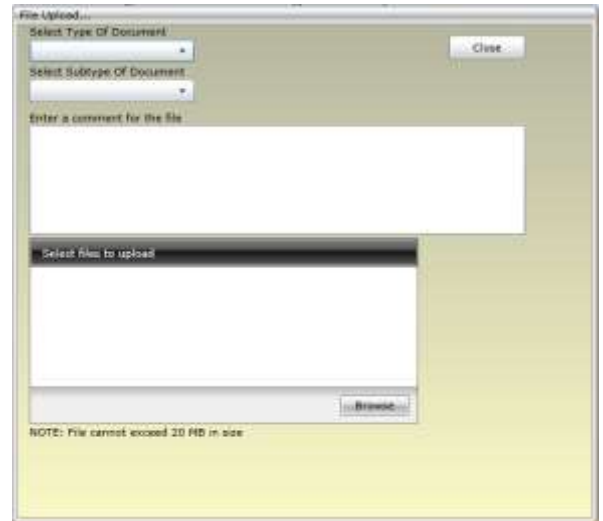
All file names must follow this naming convention – **CyberID, Document Type, Date Received**. For example, a user uploading the IU Action Plan for Youth ID 23456, which was received by their agency on January 1, 2019 should name the file '**23456 IU Transition ISD 01012019**'. Once a file is selected, the user will see it appear in the Selected Files area.



# PerformCARE®

Users will see that the size of the file appears within this area; if the file exceeds 20 MB (1000 KB = 1 MB), please delete it (using the X next to the file name and size in the first line) and replace it with a smaller file(s).

Clicking the Upload button will run the upload; the user will see the progress bar (where the word Total appears) and the percentage number will increase as the upload is completed. If the upload is successful, the user will be brought back to the youth's Doc Tab, where the file will be listed.



| Doc Status       | Document Type   | Document Sub Type | Description | Date Uploaded |
|------------------|-----------------|-------------------|-------------|---------------|
| New Doc Uploaded | CMO Attachments | CFT Sign-In       |             | 4/3/2018      |
| New Doc Uploaded | CMO Attachments | CFT Sign-In       |             | 4/3/2018      |

**OPEN the Document** - Double-clicking on a row of a record in the grid will open up the document in a new window; users may be asked if they want to open or save the document, depending upon the type of document they have selected. The selected document may be printed by simultaneously clicking Ctrl/P.

**CLOSE the Document** - In order to close the document once it has been opened, the user must click on the 'X' in the upper right-hand corner of the document window. If the user clicks on the back button in their browser, they will be logged out of the system.

Users will see an **Images Magnification** scroll bar to the right of the grid. If there is a picture file in the youth's record, the user can utilize this scroll bar to magnify the image. The user must select the file from the grid by single-clicking on it, and then change the magnification; double-clicking on the file in the grid will then open it with the corresponding magnification.

If a document is uploaded to CYBER in error, the IU user must submit a request through the Service Desk Request Form to have it addressed. Using the link on the PerformCare website, <https://apps.performcarenj.org/HelpDesk/csareqajax.aspx/>, the IU user can identify the Type of Request as 'Other' and the Type of Issue can detail the youth's CYBER ID and document name and the concern the provider has. Only PerformCare has the ability to delete uploaded documents.

## VII. Progress Notes

Progress notes are an essential part of the electronic record for youth in CYBER. Regularly entered progress notes document what services are being provided, and the meetings and activities happening with the youth and family. IU users have the ability to read most notes in the youth record, to enter one type of progress note for youth open to their agency called Intermediate Units.

### Progress Notes Grid

The Progress Notes grid shows:

- **Note Date:** The date entered on the Enter Progress Note screen (user defined).
- **Note Type/Sub Type:** The Progress Note Type and Subtype selected by the user.
- **Created By:** The Username of the person who committed the note.
- **Note:** The details documenting the provider's activity regarding the youth.
- **Hours and Minutes:** The number of hours and minutes the user entered in the Duration fields on the progress note.
- **Created Date:** This is the date the user committed the progress note.

| Note Date           | Note Type               | Note SubType | Created By | Note  | Hours | Mins | Created Date        |
|---------------------|-------------------------|--------------|------------|---|-------|------|---------------------|
| 2019/01/30 15:30:00 | Intensive In Community  |              |            | Signed by<br>Session rescheduled  | 00    | 00   | 2019/02/01 11:34:57 |
| 2019/01/28 16:00:00 | Bilable - FF/Home Visit |              |            | Signed by<br>Care Management Ad<br>Attendee's<br>Youth<br>(caregiver)           | 00    | 45   | 2019/01/30 17:29:21 |
| 2019/01/28 15:00:00 | Bilable CC              |              |            | The above attendee<br>signed by<br>Treatment planning<br>This writer called Ben | 00    | 05   | 2019/01/30 16:51:45 |

### Entering a Progress Note

IU users can post Progress Notes for youth. The user can create progress notes only for 'Intermediate Unit' types. IU can view most other progress notes.

All IU Progress Notes should be completed with the Notation Type, date of activity, time the activity begins and duration of the activity.

The **Date** may be selected from the calendar icon. **Time** should indicate the start time of the event documented in the progress note. If the activity began at 5:05 PM, the Time should be indicated as 5

**Enter a Progress Note...**

Time:   AM  PM Dur:

Intermediate Unit

Type note in this blank area. Spell check is available.

To Save and edit later, choose Save Draft; to Save the Progress Note to the record, choose Commit (you will no longer be able to edit the note).

Font Size: 10 12 20

Save Draft Commit Cancel Delete

# PerformCARE®

in the H (hour) box, 5 in the M (minute) box and PM should be selected. **Duration** indicates the length of time the activity occurred. If the length of time of the activity was 30 minutes, 30 should be entered in the M box. Type the note in the blank space (spell check is available).

To Save and edit later, choose Save Draft; to Save the Progress Note to the record, choose Commit (you will no longer be able to edit the note).

## Draft Progress Notes

Users may save a progress note that is not ready to be committed into the youth record. If a note is created and Save Draft is selected, only the user who created the note may return to the draft note, open it, and commit the note.

In the Progress Notes area of the youth's record, the user should select **Show My Draft Progress Notes**, double click on the draft note, it will open. Review the note and then click Commit to enter the note into the youth record.

Enter a Progress Note....

Notation Type: [dropdown] Date: <MM/dd/yyyy> 15 Time: [H] [M] AM [radio] PM [radio] Dur: [H] [M]

Notification Sub Type: [dropdown]

Font Size: 10 12 20

Save Draft Commit Cancel

**Progress Notes**

Show My Draft Progress Notes  Show Committed and Signed Progress Notes

Truncate Notes

Filter Notes Show All Notes New Progress Note

Print Selected Print All

| Note Date           | Note Type | Note SubType | Created By | Note               | Hours | Mins | Cre |
|---------------------|-----------|--------------|------------|--------------------|-------|------|-----|
| 2018/06/08 01:00:00 |           |              |            | Test progress note | 00    | 00   | 201 |

**Printing Progress Notes** - Notes can be printed, using the Print Selected or Print All buttons. Click on a single note and choose **Print Selected** or filter the notes first, then choose Print All. Using Print All will print all the displayed notes in the grid; this may be a lengthy process. Notes print one per page.

First Name Last Name Gen Birth Date Age SSN Youth/Child ID [Search] [Refresh] [Help] [Logout]

**Progress Notes**

Show All Draft Progress Notes  Show My Draft Progress Notes  Show Committed and Signed Progress Notes

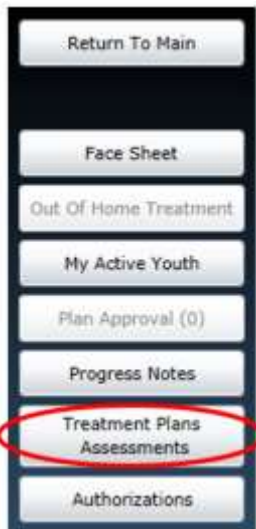
Truncate Notes

Filter Notes Show All Notes New Progress Note

Print Selected Print All

| Note Date | Note Type              | Note SubType | Created By | Note                                 |
|-----------|------------------------|--------------|------------|--------------------------------------|
| 2018/0    | Intensive In Community |              |            | Signed by<br>Writer met<br>Signed by |

## Treatment Plans and Assessments

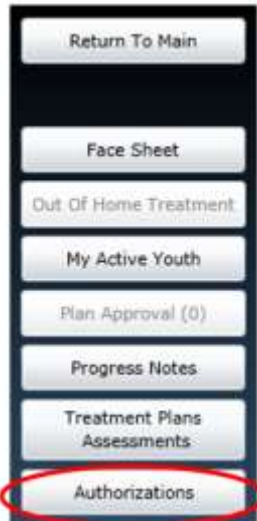


| First Name  | Last Name             | Gen                 | Birth Date          | Age    | SSN                   | Youth/Child ID | Logout |
|---|-----------------------|---------------------|---------------------|--------|-----------------------|----------------|--------|
| Outcomes Report: Select Treatment Plan or Assessment type to create: <input type="text"/> Add New |                       |                     |                     |        |                       |                |        |
| Double click an existing assessment to open it for Review/Edit.                                   |                       |                     |                     |        |                       |                |        |
| Longitudinal Outcomes Report  | Assessment Type       | Assessment Sub Type | Assessment/CFT Date | Author | Submitted To CSA Date | Assessme       |        |
| Individual Outcomes Report  | OOH                   |                     | 2018/04             |        | 2018/04               | 6-             |        |
|   | TREATMENT PLAN        | IIC_2 - IIC_2       | 2018/01             |        | 2018/03               | 14             |        |
|   | TREATMENT PLAN        | UCH - CR90D         | 2018/03             |        | 2018/03               | 14             |        |
|   | StrengthsAndNeedsAsmt | Routine             | 2018/03             |        | 2018/03               | 11             |        |
|   | TREATMENT PLAN        | UCH - SC            | 2018/01             |        | 2018/01               | 14             |        |
|   | TREATMENT PLAN        | UCH - CR90D         | 2017/12             |        | 2017/12               | 13             |        |

The Treatment Plans Assessments button is located on the left side of the Face Sheet. Selecting this push button will bring the user to the Treatment Plans and Assessments Grid in the youth's record, displaying all the completed Treatment Plans and Assessments. The grid shown can be sorted by clicking on any column heading. Double-clicking on the row with the Treatment Plan or Assessment will open the document for viewing.

IU users can view all Treatment Plans and Assessments in the youth's record that were submitted on or before the IU episode began. IU users do not have the ability to create a new Treatment Plan or Assessment.

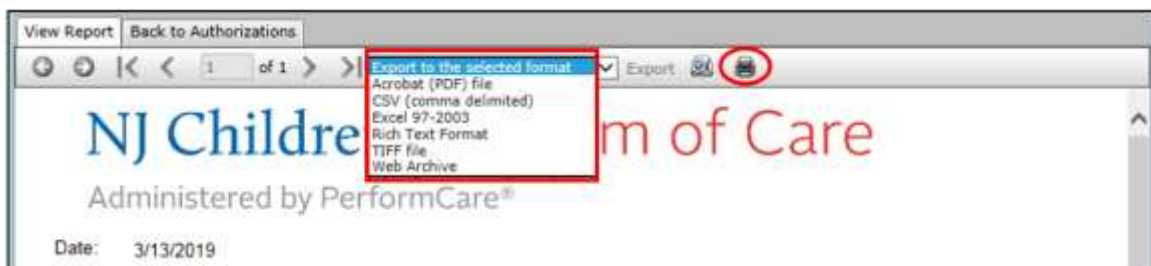
## Authorizations



| Authorizations on file |          |             |          |            |         | Print All | Print Provider Selected | Print Parent Selected | New Authorization |
|------------------------|----------|-------------|----------|------------|---------|-----------|-------------------------|-----------------------|-------------------|
| AUTHNUM                | PROVIDER | SERVICECODE | AUTHTYPE | STARTDATE  | ENDDAT  |           |                         |                       |                   |
|                        |          | Z5008       | Approved | 03/01/2019 | 04/30/2 |           |                         |                       |                   |
|                        |          | Z5008       | Approved | 02/01/2019 | 02/28/2 |           |                         |                       |                   |
|                        |          | T202122HA   | Approved | 01/05/2019 | 04/04/2 |           |                         |                       |                   |

When the Authorizations button is clicked, the Authorizations on file grid will populate showing all Authorizations for the youth. IU users can view all Authorizations with a start date on or before their program's episode began.

IU users can select to Print All, Print Provider Selected or Print Parent Selected Authorizations. Clicking the arrow by Export to the selected format drop-down provides the user with the options to export authorizations to a PDF, CSV, Excel Spreadsheet, TIFF or Web Archive file type. The user can also select to toggle between Interactive View and Print Preview. In addition, the user can click the printer icon to print the document.



The Intermediate Unit (IU) Interventionist Supporting Document (ISD) is used to request continued stay authorization and transition of youth. This fillable document is completed by the IU and then uploaded to the CYBER system for a specific youth.

Users may locate the form under the **Providers** section of the PerformCare website by clicking the **Forms** link on the left hand side of page at <http://www.performcarenj.org/provider/forms.aspx>.

The IU providers can upload the IU ISD document within 14 calendar days of the current authorization expiration. CSA will review this document within 2 business days and will issue a Continued Stay 30 Day Authorization.

All ISDs have an identification section that must be completed for all uploads.

**Stay and Transition** – Upload the *Interventionist Support Document (ISD)*

Within 14 days of the expiration of the current authorization

- Initial Continued Stay Request – ISD Sections I, II and III (check ‘No’ on Section I)
- Ongoing Continued Stay Request – ISD Sections I and III (check ‘No’ on Section I)
- Transition – ISD Section I and III

**The form contains the following fields required for every submission:**

- Youth Name – the first name and last name of the youth
- CYBER ID – the CYBER ID of the youth
- DOB – the youth’s date of birth; required at every submission
- Date of Admission – the date the youth was admitted to the IU
- Intermediate Unit – check box choices of INSPIRA or TRINITAS
- Submitted by – includes the name and credentials of the IU provider completing form
- Contact # - phone number of the IU point of contact

**Section I: Transition Request – Section I is required for all ISD uploads**

- Are you reporting a transition? – Yes/No check boxes; if *No* is selected, user should proceed to Section II of the form (Continued Stay Request-History).
- Actual Transition Date – required entry if ‘yes’ selected above; MM/DD/YYYY format
- Where did the youth transition to? - Include any services/supports that were recommended/provided at the time of transition - required entry if ‘yes’ selected for “Are you reporting a transition?”

**Section II: Continued Stay Request-History – Section II is only required at the initial continued stay request.**

- Reason for IU admission - only required upon initial continued stay request
- Previous Hospitalizations - list dates and reason for admission
- Trauma History - history, current family, household, environmental violence, abuse or neglect, or exploitation; Yes/No check boxes; *Yes* requires explanation
- Medical Considerations – None/Other check boxes; *Other* requires explanation; include allergies, diabetes, asthma, etc. as well as medical treatment or monitoring required

- Substance Use Challenges - Yes/No check boxes; Yes requires explanation; include both history and current challenges
- Legal Challenges - Yes/No check boxes; Yes requires explanation; include history/current, probation, etc.
- Level of Functioning – Multiple check box options (Age appropriate, Developmental/Cognitive Delay, Able to perform ADLs independently, Able to maneuver stairs without assistance, Able to eat without assistance, Other (requires explanation))

### **Section III: Continued Stay Request-Current Status – Section III is required for every ISD upload.**

- Current DSM-5 Diagnosis – **Diagnosis is required.** User can enter 1 to 3 diagnoses
- Date of Diagnosis - **Required**
- Diagnosing Clinician and Credentials – **Required;** the name and credentials of the diagnosing clinician
- Current Prescription Medications – User will specify all medications the youth is currently taking including the Name, dosage, frequency, reason prescribed/diagnosis, start/end dates, prescribing practitioner.
- Describe the status of the youth’s stability and readiness for transition from the IU – user will include projected timeframes.
- Current course of hospitalization – User can enter Interventions, Goals, Strengths, Precautions i.e. 1:1, 15-minute checks, etc.
- Youth/Family Engagement: What is the youth’s perspective about their current hospitalization and the helpfulness of the related treatment interventions? Describe the family’s understanding of their strengths, needs, and role in the youth’s care.
- What clinical issues are being addressed at IU and what can be provided to meet the youth post-transition in the community? – Include recommendations for services/supports post-IU transition.

Once this document is completed and saved as a graphic file, the IU user can upload it to CYBER.

*Note: For more information on uploading document please refer to the Instructional Guide to Document Upload Functionality at <https://www.performcarenj.org/pdf/provider/training/general-csoc/document-upload-functionality.pdf>.*

## **VIII. Transition Process**

At the time of the youth’s transition from IU, the user will upload the Interventionist Supporting Document (ISD) with Sections I and III completed. Upon review, PerformCare will set the end of the episode.

*Note: The system does not manage bed capacity, however a list of all currently admitted youth appear on the IU Welcome Page. Therefore, it is important for the IU to monitor the CYBER census daily in order to ensure accuracy.*

For more information on uploading documents, please refer to the **Document Upload** section of this instructional guide.

## IX. Troubleshooting

| Question  | Response  | Where to look  |
|---|---|--|
| I called PerformCare to report an admission. Why don't I have access?   | Have you entered the Admission Note? Is it legible?   | Check progress notes for a message from PerformCare.   |
| There are admitted youth showing on my Welcome Page who are no longer at our site.                                | Process Transition ISDs with the proper transition date for each youth to have them removed.  | On the Welcome Page, click the 'Admitted' link under the Census Section to locate the youth. Complete Sections I and III of the ISD and upload it to the youth record. |
| A youth was open to my IU yesterday, but not there today. How does this happen?                                   | Review Historical Access for the youth to see if they have been closed. Check the progress notes for a note from PerformCare.<br><br>Check to see if you neglected to make a Continued stay request, which may result in a youth disappearing from your census. | Historical Access is a button on the Welcome Page. Youth are shown in alphabetical order by default. Youth will close 14 days after the episode end date.              |
| I entered the wrong document in the Document Upload section. I entered a progress note in the wrong youth record. | Please identify the youth CYBER ID name, date and time of the document or progress note. Use the Service Desk Request Form to request assistance with the documents.  | Check the Doc upload tab or progress notes and notify PerformCare as soon as you become aware of the issue.  |

## X. References

PerformCare website: <http://www.performcarenj.org/>

CYBER Training: <http://www.performcarenj.org/provider/training.aspx>

- Welcome Page for Intermediate Units: <http://www.performcarenj.org/pdf/provider/training/intermediate-units/welcome-page-intermediate-units.pdf>
- Instructional Guide to CYBER Face Sheet: <http://www.performcarenj.org/pdf/provider/training/care-management-organization/cyber-face-sheet.pdf>
- Instructional Guide to Document Upload Functionality: <https://www.performcarenj.org/pdf/provider/training/general-csoc/document-upload-functionality.pdf>
- Instructional Guide for the Use of ICD-10 in CYBER: <http://www.performcarenj.org/pdf/provider/training/general-csoc/icd10-instructional-guide.pdf>

CYBER Security

- Instructional Guide for Security Administrators: <http://www.performcarenj.org/pdf/provider/training/security/role-based-security-system-admin.pdf>
- Password Reset for All Providers: <http://www.performcarenj.org/pdf/provider/training/security/instructional-guide-password-reset-all-providers.pdf>
- Quick Reference Guide to Secure Email: <http://www.performcarenj.org/pdf/provider/training/security/quick-reference-guide-to-secure-email.pdf>

# PerformCARE®

FORMS: <http://www.performcarenj.org/provider/forms.aspx>

- Interventionist Supporting Document

NAVINET: <https://navinet.navimedix.com/>

- Instructional Guide to NaviNet for CYBER Users: <http://www.performcarenj.org/hidden/navinet-instructional-guide.pdf>

**PerformCare Service Desk for CYBER** is available 24/7/365:

Phone: **1-877-652-7624**

Customer Service Request Form:

<https://apps.performcarenj.org/HelpDesk/csareqajax.aspx/>