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I. Introduction

The extract contains all the fields from the progress note table except the actual progress note. The extract will show data for the children that have been served by the agency from the enrollment date to the CSA until the end date of the last Tracking Element. (Definitions of each field are available on page 11.)

The extract uses cascading parameters, which appear at the top of the reports window, to populate the extract fields; meaning, the extract parameters are dependent upon each other. The default extract (which will appear as soon as the user clicks on the “Export” button) is created from the prior month’s data and will run automatically for all Case Supervisors, Case Managers and Note Types. If users change one of the parameters they may need to click through the other parameters that fall after the one changed to make sure that they are updated by the internal code (the parameters are linked left to right and top to bottom; see page 6 for an example). After reviewing/changing each parameter, users must click in a white space to get all of the extract parameters to run and re-generate the extract with the updated criteria.

Included in the extract parameters area is a menu item which will show the number of records that are included in the extract (Check Record Count). This information is needed to run and export the extract. If the check record count is greater than 65,000 you must export to CVS (comma delimited format) even if you have Excel 2007. Otherwise, if the check record count is less than 65,000, you can export to Excel. Please note that the field names for Excel exports and CSV exports will be different. See page 11 for field names.

**For the purpose of these instructions, the report is defined as a data extraction**

Important Note: **The progress note ad-hoc extract is complex and care must be used in running the extract or users may get unexpected/incorrect results or the extract will fail.**
II. Accessing the Extract

Users must first log-into CYBER with their UserID and Password. The log-in screen can be found via the PerformCare website – [www.performcarenj.org](http://www.performcarenj.org).
To access the Ad Hoc Extracts, users will click on the “Reporting” button on the left-side of their Welcome Page.

*If a user does not have a functional Reporting button on their Welcome Page, they should contact their Systems Administrator or the Service Desk for assistance with their security access. Only users with Level 3 security may access functionality from the Reporting button.
Users will choose their Program Name from the first menu and the extract from the second menu (see below).

*The Progress Note Ad Hoc Extract is titled – “15 – NJ3000_ProgressNote – Excel”.

**III. How to Customize the Extract**

Users should click on the “Export” button to view the extract within CYBER; this will allow users to change the parameters and customize the extract to be exported. (Choosing “View Report” will not create an extract unless the user has their PC set-up to automatically open the file from the download and pop-ups are disabled in the browser.)

The default extract will generate with all the default parameters filled in at the top of the window.
Users will need to change the parameters to generate the data extract that fits their needs.

**Keep in mind that each parameter is linked to the others that follow it; meaning that when a change is made to one parameter, the parameters that follow it must be reviewed to make sure that each matches what the user is looking for.** (see example below; if the Start Year is changed, all parameters following should be reviewed starting with Start Month, then End Year, End Month, Case Supervisors, etc.) Remember to click in a white space after changing any parameter, so that the system updates the other parameters accordingly.

**Example 1:** Creating an extract of progress note data for a specific time-frame.

Users will focus on the first four parameters at the top of the window, which will allow the user to select the time-frame for the data. Once chosen, these will define the information that is found in the parameters for Case Supervisor, Case Manager and Note Types; only those that were active or found in CYBER during the defined time-frames will be available for use.

Start Year and End Year will default to the current year; Start Month and End Month will default to the month prior to the current month.
Once a parameter has been changed, the default extract data will disappear until the user has clicked on the “View Report” button in the window.

Users must review the Case Supervisors and Case Managers parameters; these will default to “All” but may change depending upon the time frame chosen from the parameters. Users may need to click on the option next to Check Record Count; this value may change to “<select a value>” and the extract will not run unless the value is selected.

Once all parameters are selected, the user will click on the “View Report” button in the window (circled above). This will generate the data with the new parameters.

IV. Exporting the Extract into Excel

If the number of records that appear in the extract is less than 65,000 (see highlighted area below), the user can export the file into Excel using the Export function. (**If the extract contains more than 65,000 records, the user can adjust the parameters or export the data using the CSV format; please see page 10 for directions)

Once the data is exported into Excel, the user can choose to filter or sort it as needed.

*Please note – durations in the data extract will appear differently than the above sample; they will appear as minutes.
Example 2: Creating an extract of progress note data for specific Case Supervisors/Case Managers.

Users will focus on the last three parameters at the top of the window, which will allow the user to select the specific Case Supervisors, Case Managers and/or Note Types that will populate the extract.

Case Supervisors, Case Managers and Note Types will all default to “Select All”. Each parameter has a pull-down menu, which includes check-off boxes for the included selections.

*Once a parameter has been changed, the default extract data will disappear until the user has clicked on the “View Report” button in the window. Users will need to click in a “white space”, or blank area of the window, in order to have the selection run in the extract after each parameter has been changed/reviewed.

Users should review the parameters that follow the one that was changed (if Case Supervisor was changed, review Case Managers and Note Type parameters); these may change depending upon the data parameters chosen. Users may need to click on the option next to Check Record Count; this value may change to “<select a value>” and the extract will not run unless the value is selected.

Once all parameters are selected, the user will click on the “View Report” button in the window. This will generate the data with the new parameters.
If the number of records that appear in the extract is less than 65,000 (see highlighted area below), the user can export the file into Excel using the Export function. (**If the extract contains more than 65,000 records, the user can adjust the parameters or export the data using the CSV format; please see page 10 for directions)

Once the data is exported into Excel, the user can choose to filter or sort it as needed.

*Please note – durations in the data extract will appear differently than the above sample; they will appear as minutes.
V. Exporting the Extract to CSV Format

Record Count higher than 65,000 Records

Once all parameters are set, the user will see the number of records in the extract in the “Check Record Count” field. If the number if the count is over 65,000 records (see highlight below), the user will need to export the data using the CSV (Comma Delimited) format.

Once the Export button is clicked, the extract will generate as an Excel file.

Once the file opens in Excel, the user will need to save the file as a Excel 2007 file (using the .xlsx file extension) in order to use or manipulate the data.

**Excel 2003 cannot be used if more than 65,000 records around in the extract.**

For a list of definitions for each field included in the extract, please see page 11.
VI. AD HOC DATA EXTRACT DICTIONARY

*Progress Notes*

The definitions below explain the various data field in the data extract

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Definition</th>
<th>CSV Export field name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case Supervisor</td>
<td>The Case Supervisor is the supervisor overseeing case management or clinical services at the agency or provider entity</td>
<td>CaseSup</td>
</tr>
<tr>
<td>Case Manager</td>
<td>The Case Manager is the assigned staff that manages or provided services to a child/family</td>
<td>CaseMgr1</td>
</tr>
<tr>
<td>Member ID</td>
<td>The Member ID is the unique identifier number for a child/ youth or young adult associated with the progress note in CYBER</td>
<td>MemberID</td>
</tr>
<tr>
<td>Last Name</td>
<td>Member’s last name</td>
<td>LastName</td>
</tr>
<tr>
<td>First Name</td>
<td>Member’s first name</td>
<td>First Name</td>
</tr>
<tr>
<td>Service Date</td>
<td>The Service Date is the date the service was provided or activity occurred</td>
<td>NoteDate1</td>
</tr>
<tr>
<td>Note Type</td>
<td>The Note Type corresponds to the type of service or activity provided. The Note Type is the selection made by the user within the agency that enters the progress note.</td>
<td>NoteType</td>
</tr>
<tr>
<td>Progress Note Type</td>
<td>Progress note type is a description of the Note Type. Progress Note type categories the note to fully define the meaning of the note in relationship to the family/child or youth (e.g. Collateral contact, home visit, clinical progress note, Child/Family Team update etc)</td>
<td>Progress NoteType</td>
</tr>
<tr>
<td>Duration</td>
<td>Duration is the length of time shown in total minutes</td>
<td>Duration</td>
</tr>
<tr>
<td>Signed</td>
<td>An indicator or flag in CYBER which indicates that the progress note has been committed.</td>
<td>Signed</td>
</tr>
<tr>
<td>Creation Date</td>
<td>Creation Date is the date the progress note was saved the first time</td>
<td>Creation Date</td>
</tr>
<tr>
<td>Creation User</td>
<td>Creation User is the person that logged into CYBER to enter the progress note, usually shown as the initial of the first name and last name in the heading of the progress note. (e.g.: SWilson)</td>
<td>Creation User</td>
</tr>
<tr>
<td>Submitted Date</td>
<td>Submission Date is the date the progress note was committed after it was created.</td>
<td>Submitted Date</td>
</tr>
</tbody>
</table>