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CYBER Release 1.16:
Instructional Guide for
MST, FFT, PHP and CCIS Users

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Role-Based Security – Instructions for Use for MST, FFT, PHP and CCIS Users

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I. Introduction

Needs Assessments have not had a review and submittal process, or a hierarchy, attached to them within CYBER in past releases. This new release includes a hierarchy structure for this Assessment type that allows for the Assessment to be assigned to users other than the author within the same agency prior to submittal to the CSA.

This new structure will be housed in the redesigned Plan Approval screen, which is accessible from the Youth/Child Search screen. Once accessed, the user will have the ability to search for and filter the specific assessment types that are currently In Progress within their agency; any assessments that have been submitted to the CSA will not appear in the window.

All Assessment Types have been enhanced to include a History button (which functions the same as the History button on Treatment Plans), which allows the user to review the path that the assessment has taken prior to being approved.

This Instructional Guide will also review the enhancements that have been made to CYBER security.

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II. Accessing CYBER

Users must first log-into CYBER with their UserID and Password. The log-in screen can be found via the PerformCare website – www.performcarenj.org.

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II. Changes to Security

Starting 90 days after the release of 1.16, users will begin to receive a notice on the log-in page that asks them to change their password. This will be done on a rolling basis; the notifications will be done slowly throughout the system starting 90 days after the release (users will get a notification message 10 days prior to the date their password needs to be changed).

Once the user receives notification, they will be brought to a new screen where they will enter their old password, their new password, and then confirm the new password. The new password, which must be at least 8 characters in length, must meet three of the following four requirements in order to be accepted by the system:

- Upper-case letter
- Lower-case letter
- Number
- Special character (@, !, $, etc.)

Please note: A user may change their password at any time. Once on the Welcome Page, the user clicks on the System Functions button on the left-side of the screen. This will bring them to the Manage Access area, which is accessible via the button on the upper-left side of the screen.
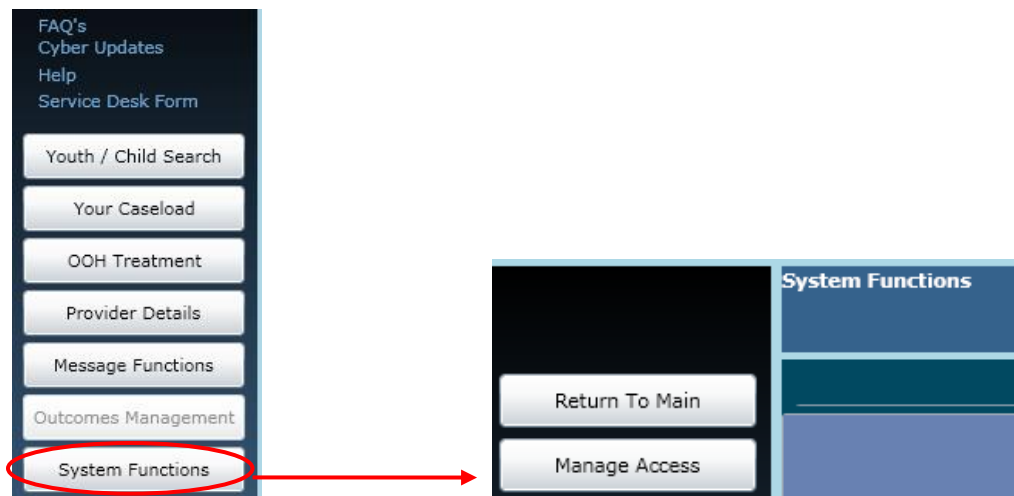
Clicking on the Manage Access button will bring up the user's detail window, where the user can change their password, as well as their phone number and email address.

Changing the password here resets the 90-day clock and the user will not receive notification to change their password again for another 90 days. *Please note – if the user accesses this screen and finds that their email address is either missing or incorrect, it is recommended that the user complete this field. If, at any time, they need their password reset their System Administrator will be able reset it and have the system send a temporary password to the user via email.

The functions that are available to your agency's System Administrator have also changed in order to increase their ability to assist the users within their organization.

If a user locks their account (by entering an incorrect ID or password 3 times) or forgets their password, they should contact their Systems Administrator who can now unlock accounts and reset passwords. Users should also contact their System Administrator if they need access to a new program, or need an adjustment made to in their access level to CYBER (for example, if a Supervisor currently does not have access to reporting and they now need to gain access, they should contact their System Administrator who can grant them access).

III. Assessment Hierarchy

This CYBER release includes new functionality that will allow users that are creating Needs Assessments to transfer the assessment to another user within their agency prior to submitting to the CSA. All users within the agency will continue to have the ability to author an assessment and send it directly to the CSA.

In order to transfer an assessment to another user, the assessment must first be saved by the author. Once it is saved, the author will find the new Transfer button at the bottom of the assessment is now active.

Clicking on the Transfer button will bring up a window where the user will select another user within the agency to send the assessment to.

Selecting a user from the User ID menu will populate the other options – Name, Program Description and Level of User.

*Note: All MST, FFT, PHP and CCIS users will have the Plan Level 3 designation; this allows all users within these agency types to submit assessments directly to the CSA without having to submit it for internal approval.

Once the user clicks "Accept", the assessment will be sent to the new user. The assessment will continue to be accessible on the youth's Treatment Plans and Assessments grid as well as on the new Plan Approval window; the current owner of the Assessment will find the document in the My Plans grid of the new Plan Approval window and all other users will see it in the Filtered Plans grid (see page 8 for more information). The assessment will be read-only for the author on the youth's Treatment Plans and Assessments grid.

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IV. Plan Approval Window

The Plan Approval window was formally used for Treatment Plans only; this area has been enhanced to include all Assessments.

At the top of the screen, users will find the Plan selection area. By default, this area will only show the assessments that the user has access to; this area fuels the assessments that the user will see and will have access to in the next area of the screen. For example, a CCIS user will see an Assessment option here. Once the selection is made, the Plan Type area will populate with the option to choose a Needs Assessment. The selection made here are what fuel the assessments that appear in the next grid.

This top area also contains a number of filter options available for this screen.

The "Doc Type" menu gives the user the option to look at plans only, assessments only, or all. CCIS, PHP, MST and FFT users should either leave the select at the default (All) or chose "ASMT" for assessments.

Next to this area are the check-boxes for time-frames. These time-frames are associated with when the assessment is due. If the user enters a time frame into the boxes here, they will be unable to select any of the other options listed above.

The user also has the option of choosing to look at the assessments for a specific program; this menu will only have more than one program available if the user's CYBER ID is associated with more than one program.

The Assigned To menu allows the logged in user to look for assessments that are assigned to a specific user in their agency; Supervisors or Managers may use this menu to look for assessments that are currently In Progress and are assigned to a user that is no longer with the agency (and has been deactivated). Using this function allows the Supervisor or Manager to locate the documents and reassign them to other users within the agency.

The Filtered Plans grid will show all assessments (based upon the filters chosen above) that are still within the agency and have not been submitted to the CSA for approval. The grid will show the type of Plan and Plan Type, the status of the document (In Progress indicates that it is still with the author), who currently owns the document (Assigned To), the Name and ID of the youth, who the Requestor or Author of the document is, and the due date (when applicable). Users will also find a new column here – Return History. If the document has been returned by the CSA, the name of the CSA Reviewer that returned the document will appear here. (This will be the most recent return; in order to see a full history, the user will need to open the document and click on the History button. See page 11 for more details.)

If a user needs to, they can assign a plan or assessment to themselves, even if it is currently assigned to another user. In order to assign it to the logged-in user, the assessment must be selected in the grid (by single-clicking on it) and then the

user will click on the Assign button, below the grid. Once the assessment has been assigned to the user, it will appear in the My Plans grid at the bottom of the window. (Assessments that have been submitted to the CSA will not appear on this screen.)

Users have the option of Unassigning an assessment from their own ID; doing this will allow another user to see it in the Filtered Plans grid as being Unassigned. This does not transfer the document to another user; if the logged in user is the author, the document will remain available to them on this screen as well as the Treatment Plans and Assessments grid of the youth's record. When the document needs to be transferred to another user, the current owner of the document should go into the assessment and, using the Transfer button, send it to another user within their agency for work or review.

Keep in mind that the assessment will be in read-only status to the author after it has been transferred to another user or submitted to the CSA; if the author needs to make revisions to the document prior to it being submitted, they can assign it to themselves on the Plan Approval window, from the Filtered Plans grid.

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V. View Assessment History

If a user needs to determine where an assessment currently is, or what its current status is (in progress, approved, returned), they can refer to the assessment itself.
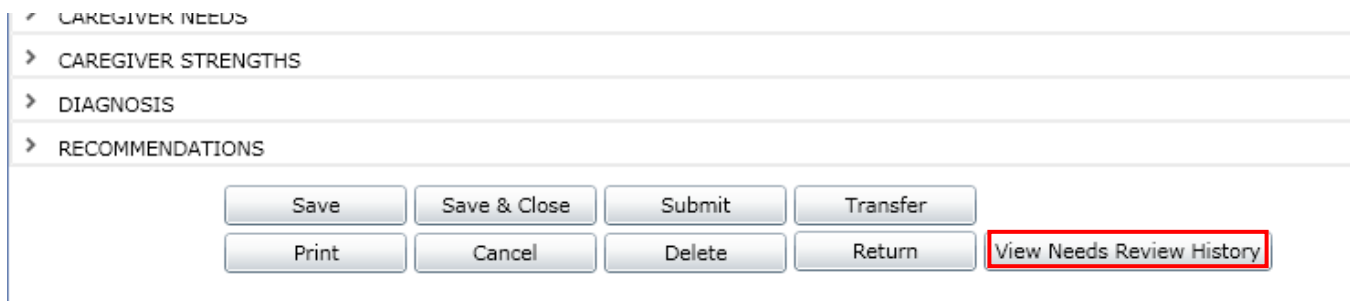
A new button has been placed at the bottom of the assessments so that users can access the document's history. The "View Needs Review History", when clicked, will show the user a history of who has owned the document, as well as the current status of the assessment. (*Note: the button can be clicked at any time; the user does not have to wait until the full document has loaded.)

The Review History window will show the originator of the document (FromUser) in the bottom line of the grid. "ToUser" will indicate who the assessment was transferred to; in the case of the assessment being submitted to the CSA, "CSA" will be listed here. Status will show the current status of the assessment – Assigned, Transferred, Submitted, Returned, or Approved. The Date column will show the date and time of the status change. The Program column will indicate the name of the program that the "ToUser" is associated with.