Instructional Guide to Welcome Page Features for CYBER Users with "High-Level" Access ('Supervisor' designation and higher)

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Instructional Guide for Welcome Page Features

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I. Introduction

The Welcome Page provides all CYBER users access to the most frequently used areas of CYBER. It also functions as a reporting service; users have access to data in grids that display documents associated with themselves such as plans that are coming due and authorizations that will expire, helping to prompt follow-up work.

This guide describes functionality that is associated to "**High-Level**" security groups in the hierarchy structure: Supervisor, Manager, and Director titles. This functionality permits users with these security titles to have access to features on the Welcome Page to assist in managing others' work.

The hierarchy structure is based on CYBER's role-based security model. The model allows the "High-Level" user to filter their Welcome Page by a specific staff to view their activity.

In addition, on the Welcome Page, users with "High–Level" access will also be able to review documentation that was formerly associated with deactivated users. The **Deactivated Users** accordion displays incomplete service plans, assessments, and draft progress notes.

This document describes the features available to "High-Level" CYBER users on the Welcome Page.

II. Accessing CYBER

CYBER can be accessed via the PerformCare website – <u>www.performcarenj.org</u>. 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.

NJ Children's System of Care		1-877-652-7624		A Home	x Language ▼ A Careers		옥 About 옥 Contact	
Contracted System Administrator PerformCare*		24 hours a day, 7 days a week			Search website		Search	
Parents and Caregivers •	Youth 🔻	Providers T	Educators	CYBE	ER Find a	a Provider	En es	spañol

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: <u>CYBER Access Requirements</u> page on the PerformCare website for the most up-todate 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.

CYBER LOGIN

As a CYBER user, I understand that my work will involve access to Protected Health Information (PHI) as defined by HIPAA (Health Insurance Portability and Accountability Act) for the purpose of providing or arranging treatment, payment, or other health care operations. I also acknowledge that I am engaged by a covered entity. I further acknowledge my responsibility to protect the privacy of and to guard against inappropriate use of disclosure of this PHI by logging in as a CYBER user.

This acknowledgement is in compliance with the Health Insurance Portability and Accountability Act (HIPAA) of 1996 and its implementation regulations. For more information on HIPAA, please go to http://www.hhs.gov/ocr/hipaa/

CYBER contains substance use diagnosis and treatment information that is protected by federal confidentiality rules (42 CFR Part 2). Users that access such confidential information pursuant to a valid written consent are prohibited from making any further disclosure of this information unless further disclosure is expressly permitted by the written consent of the person to whom it pertains or as otherwise permitted by 42 CFR Part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose. The federal rules restrict any use of the information to criminally investigate or prosecute any person with substance use treatment needs.

Password	
	۲
LOGIN	
Customer Service Request Form Forgot Password?	

For technical support, please use the <u>Customer Service Request Form</u> link under the login.

III. Role-Based Security Hierarchy

Users in CYBER are assigned security groups that designate their roles and hierarchy within their agency. These security groups allow the assigned user to have access to specific functions and features in CYBER. Some of those features are on the Welcome Page.

The Security Administrator's role in CYBER is to create and manage CYBER User IDs that define each user's role and hierarchy with security groups. A description of the security groups and instructions for creating CYBER User IDs may be found on the PerformCare website training page, in the Security section (see <u>References</u>).

Welcome Page Features for "High-Level" Users

"High-Level" User Security Group Titles

When one of the below security groups titles are assigned to a CYBER User ID, the user will be able to utilize the "High-Level" user functionality:

- DIR/CE Director/Chief Executive
- EXE Executive Director
- FIN Finance Officer
- MGR or MGT Manager/Management
- QA Quality Assurance
- SUP Supervisor

These security group titles have <u>no "High-Level"</u> user functionality:

- ADM Security Administrator (this type security can only be added by the PerformCare Service Desk)
- CM Care Manager
- WOR Worker

Welcome Page 'Select a User' Feature

	Select a U	lser	Clear Search
Create Date	Assessment Type	Status	
	Assessment type	310103	

The *Select a User* feature appears as a pull-down menu on the Welcome Page that allows the "High-Level" user access to "view the work of all other users at an equal or a lower level (below them in the hierarchy). Care Managers are the first access level and will not have options in this menu; they will only see their own Welcome Page. This feature is for <u>Supervisors</u> and <u>Managers</u> to track the work of their staff.

Selecting a name from the menu will filter and populate the links on the Welcome Page with that user's information; the selected user's name will appear in the window of the menu as a reminder to the "High-Level" user.

Select a User 🔶	Service Plans/Assessments
ect a User 🔺	
er 1 F	In Progress(0)
er 2	Awaiting Approval(0)
er 3	Rejected(0)
er 4	Submitted (128)
er 5	Submitted (126)

Note: The "High-Level" user is only <u>viewing the Welcome Page</u> of the *selected user*. Rules of assignment do not apply on the Welcome Page, so clicking a youth ID link on one of the grids will not reassign the plan or assessment to the "High-Level" user. Assigning, transferring or returning plans or assessments can only be done through the Plan Approval screen, or by the current assigned user of the document from within that document (See <u>References</u>).

The Select a User feature allows Supervisors and Managers to view staff work in these Welcome Page accordions only:

- BPS Needs Assessment
- Service Plans/Assessments
- Authorizations
- Eligibility

After selecting a user, clicking any link in the right-hand accordions, with a count in parentheses from the above sections will populate the center grid with details of that status.

Deactivated Users

"High-Level" users with the designation of Supervisor or above within an agency will have access to an accordion on the Welcome Page titled *Deactivated Users*; it will be the last accordion on the right side of the page.

Deact	ivated Users	
P	ogress/Assigned Work (13)

"High-Level" users will find one link under the **Deactivated Users** accordion named 'Progress/Assigned Work'. Clicking this link will populate the center grid with a list of all work that was formerly assigned to a user that is now deactivated.

Deactivated Users' Service Plans / Assessments

If there are service plans, assessments or progress notes in this section that can be resolved, the "High-Level" user can locate them using the Plan Approval screen.

CMO "High-Level" user view

	ers - Progress/Assig				Select a User	Clear Search 🔒 Print	Assessments
-							Authorizations
Youth/Child ID	Doc Type	User ID	Status	Treatment ID			YouthLink View
	Prógress Notes-C/F2		Draft				Deactivated Users
	Progress Notes-CC2		Draft				
	Progress Notes-BHHW_		Draft				Progress/Assigned Work(13)

IIC "High-Level" user view

Deactivated Use	ers - Progress/A				Select a User	Clear Search	🖨 Print	Non Med Auths
Youth/Child ID	Doc Type	User ID	Status	Treatment ID				Deactivated Users
	Assessment Treatment - IIC_2		In-progress					Progress/Assigned Work()
	Treatment - IIC_2		Unassigned					
	Treatment - IIC_2		In-progress					

Documents identified on the **Plan Approval** screen can be reassigned to another user within the agency for review, deletion*, or submission. The Plan Approval button is available from the Youth/Child Search screen or in any youth's record. (For information on Plan Approval see <u>References</u>)

	Plan Plan Plan Doc Type Past Due Program		
My Active Youth Plan Approval.(0) Progress Note: Treatment Plans Assessments Authorizations	All Due Today All Due Today Due Tomorrow Assigned To Select All RROM: TO: TO:	lsers - All	
	Plan Type BPS Asmt IIC_2 IIC_2 IIC_2 IIC_2 IIC_2 IIC_2	Clear All Select Al	
	Filtered Plans (6) PLAN PLANTYPE ASSIGNEDTO RETURN HISTORY YOUTH/CHILD DUEDATE Select plan or assessment and click Assign	REQUESTOR AC	

*Plans or assessments submitted to CSA and returned to the provider cannot be deleted.

Deactivated Users' Progress Notes

If there are draft Progress Notes in the system, the "High-Level, the user can review them. If the agency is still providing services to the youth, the user will be able to navigate to the record from the Welcome Page Deactivated Users:

- 1. Click the Youth/Child ID link
- 2. Click the Progress Notes button
- 3. Select the "Show All Draft Progress Notes" button

If the agency is closed to the youth, the user will not see the draft progress notes and the note will not be accessible.

Progress Notes	Filter Notes	Clear Search Ne	ew Progress Note				
Show All Draft Progress Notes	Print	✓ Truncate Notes	Print Progress Note Grid				
O Show My Draft Progress Notes							
○ Show Committed and Signed Progress Notes							
Note Date Note Type Note Su	ıbType Created By Note	Program	Program Type Hours Mins Created Date				

Only users with a designation of Supervisor or higher will have access to this deactivated draft progress note function; no other users will see the accordion or hyperlinks.

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Note: This functionality allows "High-Level" users to see all draft progress notes that are associated with an individual youth's record.

Users should take care that they are only editing, deleting. or committing those progress notes that were attached to a user who is now deactivated. Users that are still active in the system should be completing a clean-up of their own draft notes on a regular basis. The Created By column in Progress Notes grid will indicate the User ID of the user that authored the note; this information should be referred to as to ensure the correct note is being accessed.

IV. References

PerformCare Provider Training webpage: <u>https://www.performcarenj.org/provider/training.aspx</u>

- Security section:
 - CYBER Security Administrator Instructional Guide <u>https://www.performcarenj.org/pdf/provider/training/security/role-based-security-system-admin.pdf</u>
 - Plan Approval: Instructional Guide to CYBER Role-Based Security for Providers <u>https://www.performcarenj.org/pdf/provider/training/security/role-based-security-for-all.pdf</u>

PerformCare Customer Service

www.performcarenj.org/ServiceDesk

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