

PerformCARE[®]

Instructional Guide to Document Upload Functionality

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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 user ID. The security groups allow a user to both upload AND view specific documents, or *only* view specific documents that have been uploaded to a youth's record. 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.*

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, as well as the operational guidelines that are supported by the functionality.

Note: The only documents that can be uploaded into a youth record are files with file extensions: .PDF, .BMP, .GIF, .JPEG, .JPG, .PNG, .TIF, and .TIFF. Effective March 9, 2017 Word documents (.DOC) are no longer accepted due to the inability to secure them from future editing. Existing Word documents will be viewable but users will be unable to upload new Word documents after that date.

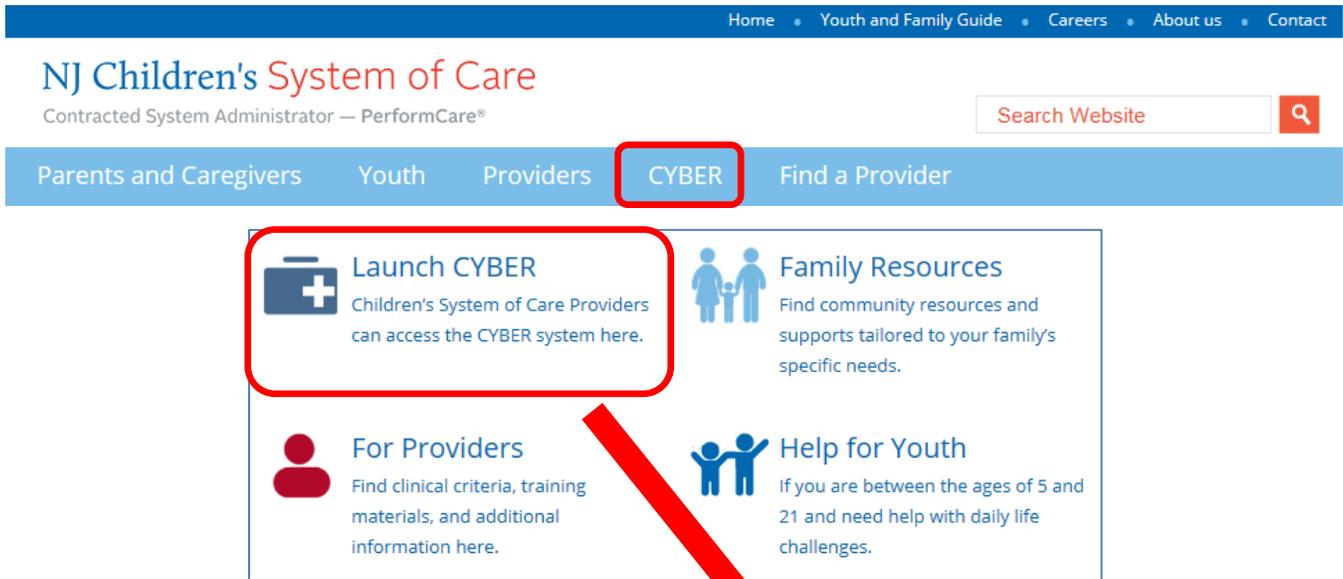
Due to disclosure restrictions pursuant to 42 CFR Part 2, any documents related to substance use treatment are only visible to PerformCare and CSOC staff. Therefore, submit all substance use assessments and other related substance use treatment documents via secure fax to 1-877-949-6590. Substance use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

Uploaded documents are reviewed by PerformCare and CSOC *as necessary*; some uploaded documents may not be reviewed. 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 categories. If a document is uploaded in error, users must contact PerformCare to correct the error. The Care Manager must submit a request using the Customer Service Request Form <https://apps.performcarenj.org/HelpDesk/csareqajax.aspx/servicedesk@performcarenj.org> in order to have the document deleted from the youth's record. Only specific users at PerformCare may delete items from the Doc tab.

*On the Training page of the PerformCare website is the training guide, "CYBER Security System Administrator Instructional Guide" that describes Security Administrator-specific functionality. **Please ensure that your agency's Security Administrator(s) review this updated training document prior to making any security changes.**

II. Accessing CYBER

Users must first log into CYBER with their Username and Password. CYBER can be accessed via the PerformCare website – www.performcarenj.org. The link is available at the top and 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, Every time you launch CYBER, **you will be required to enter your Username and Password and Enter, Tab and Enter or click the LOGIN button to continue.**

Above 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.

CYBER LOGIN

As a CYBER User I understand that my work will involve access to Protected Health Information (PHI) as defined by HIPAA (The 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 or disclosure of this PHI by logging in as a CYBER User.

This 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 abuse diagnosis and treatment information that is protected by federal confidentiality rules (42 CFR Part 2). CYBER users are not permitted access to that information without a valid written consent that meets the requirements of 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 alcohol or drug abuse patient.

Please CLEAR your browser Cache before using this new version of CYBER

Username

Password

III. Accessing the Document Tab and Upload Functionality

Users must first locate the correct record prior to uploading 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 button on the Provider Queue and Census tabs within Youth Link
- The My Active Youth button on the left-side button bar
- The Youth/Child Search button from the Welcome Page, leads to the 2 children icon (Active Agency Youth) or the search function above the record screen.

Once the correct record is found, 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.

The screenshot shows the 'Youth Specific Information' section with the 'Doc' tab selected. Below this, a detailed view of the document upload grid is shown, which includes the following table:

Doc Status	Document Type	Document Sub Type	Description	Date Uploaded
New Doc Uploaded	IIC/BA Documents	BA ISP	BA ISP	4/19/2018

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

- Doc Status – identifies when a states when a new doc is Uploaded
- 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, 3/1/18
- File Name – Name given to the file that was uploaded
- Uploaded By – User ID of the individual that uploaded the document
- Program Name – The CYBER ID of the program to which the uploading user is assigned

IV. Uploading Documents

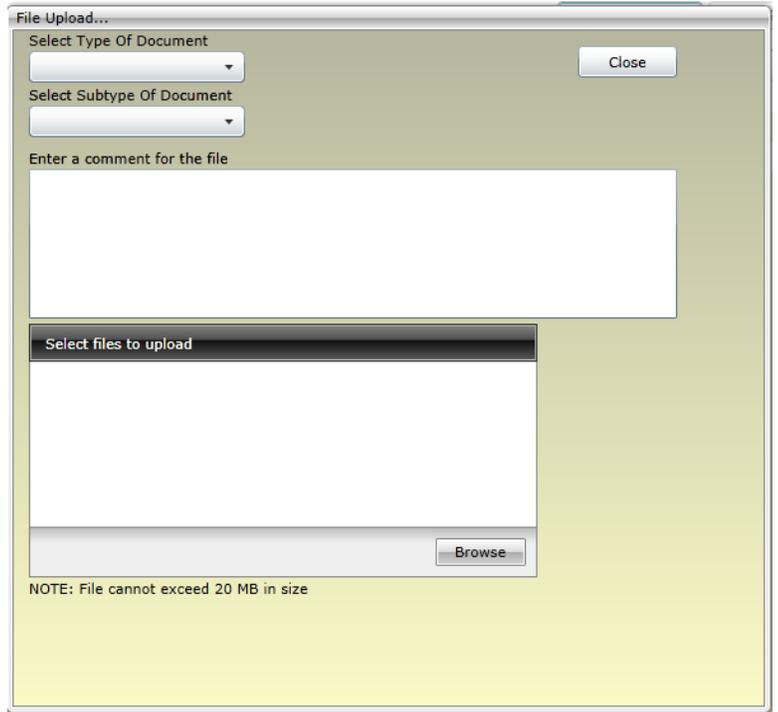
Once the user has clicked on the Add New Document button, the Upload Files window will appear.

The user must make a selection from the Type of Document menu before selecting a Subtype.

Please review your specific 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.

For billing using the CYBER CMS 1500 form, users with the specific security upload appropriate documentation in the billing area of CYBER. 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’.



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 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 – **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 see that the size of the file appears within this area; if the file exceeds 20 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) fill with a color – most likely yellow – 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.

Document Type	Document Sub Type	Description	File Name
Clinical	IEP/Educational Info	IEP Cover Letter from Sept 2016 meeting	1234 IEP Cover Letter 01
Clinical	Psychiatric Evaluation		161349-Psychiatric-2016
Clinical	Medical Information		161349-Medical-201602
Clinical	Other Applicable Reports/I		161349-Other-20160812

OPEN the Document - Double-clicking on 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.

V. Security

Certain users will automatically be given the ability to view and upload documents via the Doc tab within a youth's record. Other users will need to have this security added to their user IDs by their agency's System Administrator.

Users within CMO and MRSS with the designation of CM or SUP in their profile will automatically receive the ability to view and 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 security added onto their profiles by their System Administrator.**

Certain security groups will start with the provider type designation; for example, CMO will start with 'UCM', MRSS will start with 'CRI', OOH will start with 'RES' and IIC will start with 'IIC'. The most recently added security groups that are available to System Administrators to add to their users' profiles are:

- Document Upload – **DOCATTACH** – when added to a user's profile, will allow a user to add new documents and view any documents uploaded by a user within their agency and into a youth's record.
- Document View – **DOCATTACHREAD** – when added to a user's profile, will allow a user to view any documents uploaded by a user within their agency.

These new 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 UCMQA, CRIQA, etc.

VI. Appendices

Appendix A: Document Type/Sub-Type Information for CMO Users

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

- UCMDOCATTACH
- UCMDOCATTACHREAD
- UCMSUP
- UCMCM

Please note: UCMSUP and UCMCM will have the needed security bundled into their designation (SUP or CM) so they can view and upload documents into a youth's record. If an agency needs to remove this ability from a SUP or CM, the agency's System Administrator will need to change the user's designation from SUP or CM to a different designation that does not have the Document Upload-related security attached (such as UCMQA or UCMFIN).

OOH Referral Request Process for CMOs

Only CMO users utilize this functionality to upload specific documents to a youth's CYBER record in support of the Out-of-Home Referral Request process. Therefore, the CMO is required to upload required documentation into a youth's record at the time of the OOH Referral Request. Intensity of Service (IOS) determinations will not be made with incomplete documents.

Please refer to Appendix B for process changes related to the Transitional Joint Care Review (TJCR) in which OOH providers will now upload documents for TJCRs.

GOALS OF DOCUMENT UPLOAD FOR OOH PROCESS:

- ✓ To improve the quality of out-of-home IOS determinations
- ✓ To decrease OOH Referral Request and TJCR returns
- ✓ To eliminate paper referral packets for SRTU consultation
- ✓ To streamline existing processes

GENERAL PROCESS INFORMATION:

- In order to allow for sufficient time for review of all documentation, the review time for OOH Referral Requests is two (2) business days.
- A comprehensive checklist has been created which will assist CMO's in gathering all required documents. Document requirements for substance use and IDD are included. This checklist must be uploaded at the time of the OOH request and is available on the PerformCare website: <http://www.performcarenj.org/provider/forms.aspx> or <http://www.performcarenj.org/pdf/provider/ooh-referral-request.pdf>.

Note: The OOH Referral Checklist reflects the new document upload processes including CMO uploading court-related documents pertaining to OOH (when applicable), updated document subtype categories, and acceptable evaluation types for clinical documentation.

- A standardized cover letter has been developed for SRTU consultation. This document is available on the PerformCare website or use the link here - [SRTU Cover Letter](#).
- Care Managers have the ability to view the name, effective date, and contact information of their assigned SRTU consultant via the Provider tab of a youth's face sheet:

User	First Name	Last Name	Type	Agency Type	Program Name	Start Date	End Date	Email	Agency
NJ	V		UCMSUP	UCM	UCM	/2017	/2018	NoReply@cbhnp.org	

PROCESS: OOH REFERRAL REQUESTS

1. Care Manager* will gather all required documents (per checklist requirements) and complete the OOH Referral Request in CYBER based on the information within the documents. Care Manager will complete the checklist in order to ensure that all required documents are available.

2. Care Manager will proceed to upload all documents (including the checklist) to CYBER. (*Note: all documents uploaded must have a standard file name to identify the type of file. All files should be named following the standard naming convention: **CYBER ID Document Type Date Received**. This will assist the user in ensuring they are uploading the correct document(s).)
3. All required documents (including the completed checklist) must be in CYBER at the time of the OOH Referral Request submission. An OOH Referral Request that is received without the necessary supporting documentation will be returned. For example, if you are pending the outcome of a Psychosexual Evaluation, please do not submit the OOH Referral Request as this document is critical to the IOS decision-making process.
4. Upon upload of documents and submission of the OOH Referral Request, the Care Manager will enter an *Out-of-Home Referral* progress note which verifies that all required documents were uploaded and are ready for review.
5. PerformCare will review the OOH Referral Request and supporting documents and will render an IOS determination (or return incomplete submissions) within two (2) business days.

*Although this process is typically carried out by a youth's Care Manager, it is possible (now that the security is available) that a Supervisor may also completed this process.

Note: If a document is uploaded to CYBER in error, the Care Manager must submit a request using the Customer Service Request Form <https://apps.performcarenj.org/HelpDesk/csareqajax.aspx/> servicedesk@performcarenj.org in order to have the document deleted from the youth's record. Only PerformCare has the ability to delete uploaded documents.

SRTU CONSULTATION

1. If the Intensity of Service (IOS) meets criteria for SRTU consultation, PerformCare will instruct the Care Manager to follow the instructions on the SRTU Consultation Request Form. The Care Manager should upload the form to the Doc Tab of the youth's CYBER record. <http://www.performcarenj.org/pdf/provider/srtu-cover-letter.pdf>.
2. As mentioned previously, the Care Manager has the ability to obtain the name, effective date, and contact information of their assigned SRTU consultant via the Provider tab of the youth's face sheet.
3. The assigned SRTU consultant will contact the Care Manager with recommendations within three (3) business days of assignment.

IMPORTANT TIPS TO REMEMBER:

- ✓ If a document is uploaded to CYBER in error, the Care Manager must submit a request using the Customer Service Request Form <https://apps.performcarenj.org/HelpDesk/csareqajax.aspx/> servicedesk@performcarenj.org in order to have the document deleted from the youth's record. Only PerformCare has the ability to delete uploaded documents.
- ✓ IOS determination timeframe for OOH Referral Requests is two (2) business days.
- ✓ The document uploading responsibilities for the TJCR process has changed as a result of Document Upload-Phase 2. Please refer to Appendix B for more information.
- ✓ The *OOH Referral Request Checklist** and the SRTU Cover Letter are all posted on the PerformCare website under *Provider/Forms* and must also be uploaded into the youth's record to verify that all required documents have been gathered and uploaded.

***Note:** The *OOH Referral Checklist* has been updated to reflect the new document upload processes, to include CMO uploading court-related documents pertaining to OOH (when applicable), updated document subtype categories, and acceptable evaluation types for clinical documentation.

- ✓ If the youth is educationally classified, the Care Manager **does NOT** need to upload the entire IEP. Rather, only upload the cover sheet which verifies the youth's educational classification.
- ✓ 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 at <http://www.performcarenj.org/pdf/provider/substance/consent-form.pdf>. Please check box if assessment was faxed.

Uploading the CABS

CMO will use this functionality to upload the Child Adaptive Behavior Summary (CABS) to a youth's CYBER record; the CABS is completed by the youth's Intensive Support Services (ISS) provider, in conjunction with the family, and discussed during the Child Family Team Meeting (CFT).

The CABS is completed, initially, to show the youth's baseline; the CABS is also completed on an on-going basis in support of the need for continued stay in ISS and should reflect progress or change with respect to baseline. The CABS will be submitted to the CMO by ISS in an agreed upon manner; ISS currently does not have document upload functionality so they are unable to upload it directly to the youth's record.

ISS will complete an ISS Treatment Plan to document the plan for skill development; the CABS is completed to document progress or regression in response to the plan.

GOALS OF DOCUMENT UPLOAD:

- ✓ To assist in determining the need for clinically appropriate services
- ✓ To eliminate the need for paper/faxes to PerformCare

PROCESS: REQUESTS FOR ISS SERVICES and CONTINUED STAY

1. The determination is made that ISS is appropriate for the youth and family. The following must be considered in making that determination:
 - a. The youth is DD Eligible
 - b. The youth is remaining with CMO
 - c. The youth meets clinical criteria for ISS
 - d. The youth and family may currently be receiving other IIH services but cannot receive IIH Behavioral Support services at the same time as ISS; ISS is considered a step-down from the Behavioral Support services.
 - i. ISS can be provided as a stand-alone service or provided with IIH Clinical Therapeutic services.
2. Once ISS services are authorized from the CMO ISP and associated Strength and Needs Assessment, the ISS agency must meet with the youth and family within 3 days of receiving the referral.
3. The initial Treatment Plan from ISS must be submitted within 10 business days.

4. The ISS worker completes the CABS and Treatment Plan approximately every 90 days, prior to the end of authorization; both should be completed in a timely manner so that they are reviewed at the CFT.
 - a. The CABS will be summarized in a progress note within the youth's record by the ISS provider; the progress note type titled Individual Support Services is to be utilized.
 - b. The CABS is submitted to the CMO in an agreed upon manner; CMO then uploads the document into the youth's record.
 - i. For the CABS, the Document Type selected is **IIH Attachments** and the Sub-Type is **ISS-CABS**.
 - ii. All uploaded documents **must** have the following naming convention for tracking purposes – **CYBER ID Document Type Date Received** – optional fields may be entered at the end for CMO or ISS tracking such as County of CMO, DOB of youth, etc.
5. The CABS and the associated progress note summarizing the findings must be in the youth's record at the time the CMO ISP is reviewed. If the CABS and/or progress note is not included along with the ISS Treatment Plan, or if they cannot be located, the CMO ISP will be returned – it is important that the CMO and ISS provider are coordinating so that the required documentation is in the system at the time the ISP is submitted to PerformCare.
6. The CABS is updated every 90 days and submitted to CMO in the same manner prior to the CFT meeting for review and discussion. CMO will request continued stay if the CFT deems it to be appropriate; PerformCare will review and authorize based upon clinical criteria for the ISS.

Note: If a document is uploaded to CYBER in error, the Care Manager must submit a request using the Customer Service Request Form <https://apps.performcarenj.org/HelpDesk/csareqajax.aspx/> servicedesk@performcarenj.org in order to have the document deleted from the youth's record. Only PerformCare has the ability to delete uploaded documents.

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	○ Certificate of Need*	N	Y	*CON is now an electronic process
	○ Clinical Summary Template	Y	Y	BPS Assessment completed outside of CYBER
	○ Clinical Updates	Y	Y	
	○ Community BPS Assessment	Y	Y	
	○ Cover Sheet with SRTU Checklist	Y	Y	IEP cover sheet
	○ IEP/Educational Info	Y	Y	OOH Referral Document Checklist
	○ Medical Information	Y	Y	
	○ Other Applicable Reports/Documents	Y	Y	Psychological Eval
	○ Psychological Evaluation/Assessment	Y	Y	Psychiatric Eval
	○ Psychiatric Evaluation	Y	Y	Specialty Evals such as Fire Setting
○ Specialty Assessment/Evaluation	Y	Y	Packets are no longer mailed	
○ Tier II Referral	Y	Y		
CMO Attachments	○ CFT Sign-In	Y	Y	
Court Orders/ Subpoenas	○ CMO 14-day Plan	Y	Y	Dispositional Court Order
	○ Court Orders for Info/Appearance	Y	Y	
	○ Court Ordered Guardianship	Y	Y	
	○ Court Ordered Treatment/Eval	Y	Y	
	○ Subpoenas	Y	Y	
Family Support Organization	○ Contact Sheet	N	Y	
Family Support Organization	○ Release of Information	N	Y	
IIC/BA Documents	○ BA ISP*	Y	Y	Paper-version of the BA ISP if the assessor has not completed the CYBER-based plan*
IIH Attachments	○ ISS CABS	Y	Y	CABS in support of ISS
Intermediate Unit	○ IU Admission Note	N	Y	
	○ IU Consent Form	N	Y	
	○ IU Interventionist Supporting Document (ISD)	N	Y	
SAMHSA National PPS Documents**	○ Caregiver Baseline	Y	Y	Only used by those CMOs participating in the SAMHSA program – as of March 2017, this includes CMO Hudson, CMO Morris/Sussex and CMO Monmouth
	○ Youth Baseline	Y	Y	
	○ Caregiver Re-assessment	Y	Y	
	○ Youth Re-assessment	Y	Y	
	○ Caregiver Transition	Y	Y	
	○ Youth Transition	Y	Y	
	○ Caregiver Consent	Y	Y	
○ Youth Consent	Y	Y		

SAMHSA National Outcome Measures (NOMS) PPS**	<ul style="list-style-type: none"> ○ NOMS Baseline ○ NOMS Re-assessment – 6, 12 months ○ NOMS Transition ○ NOMS Consent 	Y	Y	Only used by those CMOs participating in the SAMHSA program
		Y	Y	
		Y	Y	
		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.

**Those CMOs that are participating in the SAMHSA program should review section [SAMHSA-Specific Requirements for CMO](#) in this appendix.

Please note: 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
- CFT sign-in sheets should be placed under the Document Type ‘CMO Attachments’ and Sub-Type ‘CFT Sign-In’
- **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.

DOCUMENT UPLOAD CROSSWALK		
DOCUMENT	CYBER DOC TYPE	CYBER DOC SUBTYPE
OOH Referral Document Checklist	Clinical	Other Applicable Reports/Evaluation
BPS (if not in CYBER)	Clinical	Community BPS Assessment
Psychological Evaluation	Clinical	Psychological Eval/Assessment
Psychiatric Evaluation	Clinical	Psychiatric Evaluation
*Psychiatric Update	Clinical	Other Applicable Reports/Updates
Specialty Evaluations	Clinical	Specialty Assessment/Evaluation
Substance Use Assessment	N/A (fax only)	N/A (fax only)
IEP Cover Sheet/Evaluation	Clinical	IEP/Educational Info
Medical Reports	Clinical	Medical Information
Other applicable evaluations/reports	Clinical	Other Applicable Reports/Documents
Court Orders	Court Orders/Subpoenas	Use applicable subtype based on court order
CABS	IIH Attachment	ISS CABS

SAMHSA-Specific Document Upload Requirements for CMO

For those CMOs that are participating in the SAMHSA program, they must follow the process listed below:

1. Youth is referred to Morris/Sussex, Hudson or Monmouth CMO
2. CMO staff will assign PPS youth and provide Care Manager with consent and survey documents for both National Outcome Measures (NOMS) and National/CMHI reporting

3. During the initial face-to-face, the Care Manager will explain evaluation process to the caregiver and youth and if they agree to participate:
 - a. The CM will have the caregiver (for all youth) sign the consent forms, and youth (if 11-17 years old) sign the consent forms. Permission must be granted by parent or legal guardian, if that is not the caregiver. Only one consent form needs to be signed for the NOMS: either the caregiver or the youth if age 11-17.
 - b. All parents of PPS youth will be asked to complete surveys
 - c. Youth ages 10 and younger will not complete surveys
4. If consent is signed for the NOMS, CMO will complete the Baseline NOMS within 7 days with either the caregiver or the youth (if age 11-17). The NOMS reassessment is then completed every 6 months until transition or end of grant period. If possible, the interviewee should be consistent across surveys.
5. At the initial CFT or within the first 30 days, the CM will have the parent (for all youth) complete the National Reporting Document: Caregiver Survey. If youth is age 11-17 years old, they will also be asked to complete a separate Youth Survey.
 - a. CM will complete the National Reassessments for 6 month & 12 month (or transition, whichever comes first) for a total of 3 possible surveys.
6. At the time transition out of CMO, CM will complete National Discharge Survey (if 12 month reassessment has not been completed yet) and the transition NOMS
7. All completed baseline, reassessment/discharge documents shall be uploaded to CYBER with a CSA code:
 - a. Baseline NOMS
 - b. Baseline National
 - c. NOMS 6 month reassessment
 - d. National 6 month reassessment
 - e. NOMS 12 month reassessment
 - f. National 12 month reassessment
 - g. NOMS 18 month reassessment
 - h. NOMS 24 month reassessment
 - i. NOMS 30 month reassessment
 - j. NOMS 36 month reassessment
 - k. NOMS Transition/Discharge
 - l. National Transition/Discharge (if prior to 12 months)
8. CMO will compensate family that they participate in the evaluation process \$30/round of surveys

IMPORTANT TIP FOR CARE MANAGERS:

- ✓ Please use the following table in order to ensure that documents are uploaded within the correct Document Type and Sub-Type categories:

DOCUMENT UPLOAD CROSSWALK		
DOCUMENT	CYBER DOC TYPE	CYBER DOC SUBTYPE
Caregiver Baseline	SAMHSA National PPS Documents	Caregiver Baseline
Youth Baseline	SAMHSA National PPS Documents	Youth Baseline
Caregiver Re-Assessment	SAMHSA National PPS Documents	Caregiver Re-assessment
Youth Re-Assessment	SAMHSA National PPS Documents	Youth Re-assessment
Caregiver Transition	SAMHSA National PPS Documents	Caregiver Transition
Youth Transition	SAMHSA National PPS Documents	Youth Transition
Caregiver Consent	SAMHSA National PPS Documents	Caregiver Consent
Youth Consent	SAMHSA National PPS Documents	Youth Consent
NOMS Baseline	SAMHSA NOMS PPS	NOMS Baseline
NOMS Re-Assessment	SAMHSA NOMS PPS	NOMS Re-assessment – 6, 12 months
NOMS Transition	SAMHSA NOMS PPS	NOMS Transition
NOMS Consent	SAMHSA NOMS PPS	NOMS Consent

Tier II Process

Care Managers (and Supervisors) will now be able to upload Tier II related documents directly into a youth's CYBER record instead of mailing the Tier II packet to PerformCare. The consultation process remains the same.

As a reminder, the following Intensities of Service (IOS) qualify for Tier II Consultation:

- Treatment Home (TH)
- Group Home (GH)
- Residential Treatment Center (RTC)
- I/DD (SSH, GH)

Care Managers will follow this process for a Tier II Consultation:

1. The Care Manager will ensure that the youth meets Tier II Consultation criteria, which includes **at least** one of the following:
 - a. At least three (3) providers at the youth's identified IOS have entered 'Not Accept' for the referral in YouthLink
 - b. The Out of Home (OOH) Referral Request has been on YouthLink for 30+ days and placement has not been secured
2. The Care Manager will upload the completed *Tier II Consultation Request Form and Cover Letter* to the youth's CYBER record. The clinical evaluations associated with the OOH Referral are already uploaded at the time of the OOH Referral Request/TJCR submission and therefore do not need to be uploaded again.

3. PerformCare will complete the Tier II consultation within 3 business days of receive the required uploaded Tier II documents.
 - a. All referrals with a status of 'Not Accept' should match the IOS given as a result of the OOH Referral Request or TJCR
 - b. All referrals with a status of 'Not Accept' must be documented in YouthLink
 - c. 'Not Accept' referrals that are not documented in YouthLink cannot be presented as a denial. The Care Manager should contact the provider to ensure that documentation is entered into YouthLink.
4. Referrals that do not meet the above mentioned criteria will not be considered for Tier II Consultation.

For more information on the Tier II Consultation process, please review the following document on the PerformCare website: <http://www.performcarenj.org/pdf/provider/tier-ii-consultation-process.pdf>

IMPORTANT TIPS FOR CARE MANAGERS

- ✓ If a document is uploaded to CYBER in error, the Care Manager must submit a request using the Customer Service Request Form <https://apps.performcarenj.org/HelpDesk/csareqajax.aspx/> servicedesk@performcarenj.org in order to have the document deleted from the youth's record. Only PerformCare has the ability to delete uploaded documents.
- ✓ If the Caregiver or youth revokes consent at any time, then indicate that on the particular survey, and their participation is complete. CMO must still complete required sections of reporting documents in provided timeframes.
- ✓ CSA can view Data Collection document, CMO and CSOC can view PerformCare Data Collection Document, National Reporting Document and NOMS document

Appendix B: Document Upload Process for OOH

Effective 4/3/17, OOH providers will utilize Document Upload functionality for two distinct purposes: 1) To view uploaded documents related to a youth's OOH referral request or TJCR once a referral is assigned to the Provider Queue, and 2) To upload required documents related to the Transitional Joint Care Review (TJCR) process.

Users with **RESDOCATTACH** or **RESDOCATTACHREAD** security designations or groups can utilize the Doc tab of a youth's Face Sheet. As mentioned prior, please take note that the OOH provider's Security Administrator must manually assign these functions to applicable staff.

Overview: Document upload will be 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.

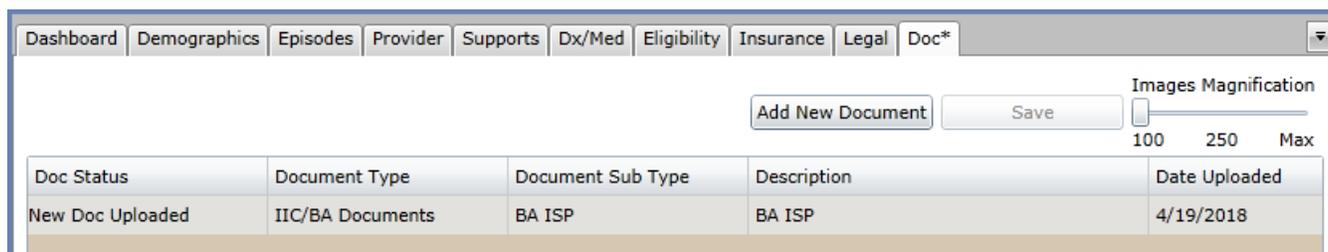
The goals of document upload:

- ✓ To give the OOH provider immediate access to important evaluation information within a youth's record upon assigning the referral to the provider queue
- ✓ To improve the documentation that is available in a youth's record
- ✓ To improve the clinical decision making process
- ✓ To decrease the need for paper or fax submissions

Viewing OOH Referral Documents via the Doc Tab

Once a youth's OOH Referral or TJCR is assigned to the OOH provider queue, the OOH provider can immediately view and print the referral document and the supporting documentation in the youth's record.

1. The OOH provider will click on the 'Facesheet' button from their program's queue within YouthLink.
2. Once in the youth's record, clicking on the Doc tab will give the OOH provider access to the documents uploaded into the youth's record (the * indicates that there are new documents uploaded to the record within the last 30 days).



3. Double-clicking on a record in the grid will open the document in a new window.
4. OOH provider can print the document(s) by simultaneously clicking 'Control+P' on their keyboard.

****As of April 3, 2017 OOH providers will no longer receive mailed referral packets from Care Managers. Once the youth's referral is assigned to the OOH Providers Queue within YouthLink, the provider will have immediate access to the uploaded documents.**

Uploading Documents for the TJCR

1. Immediately following the Child Family Team (CFT) meeting, which confirms the need for OOH transition, the OOH treatment provider will gather all required documents and complete the *TJCR Document Upload Requirement Checklist* to ensure that all required documents are present.
2. The *TJCR Document Upload Requirement Checklist** is available via the following link:
<http://www.performcarenj.org/pdf/provider/tjcr-referral-checklist.pdf>

***Note:** The *TJCR Document Upload Requirement Checklist* has been updated to reflect the new document upload processes, to include OOH uploading supporting documentation for the TJCR and acceptable evaluation types for clinical documentation.

3. The OOH provider will proceed to upload all required documents (including the TJCR Checklist) into the youth's CYBER record via the following steps:
 - a. Document upload functionality can be found on the Doc tab of the youth's Face Sheet. Clicking on the Add New Document button will open a new window where the user will select the appropriate Document Type, Sub-Type, and enter a description before uploading the document to the record.
 - i. All available Document Types and Sub-Types can be found in this Appendix under item 'a.', as well as a crosswalk of documents, document types, and sub-types.
 - b. Upon entering the Document Type and Sub-Type and description, click the Browse button to locate the document to upload.
 - c. Click the Upload button, which will upload the document into the youth's record.
 - d. Upon completion of the above tasks, the OOH provider may proceed to submit the TJCR for review. The TJCR should not be submitted until all documents have been uploaded **AND** the CMO entered the required CFT progress note which verifies that they are in agreement with the youth's transition. A TJCR that is received without the necessary supporting documentation will be returned. For example, if you are pending the outcome of a Psychosexual Evaluation, please do not submit the TJCR as this document is critical to the IOS decision-making process.
 - e. PerformCare will review the TJCR and supporting documents and will render an IOS determination (or return the incomplete submission) within five (5) business days.

IMPORTANT TIPS FOR OOH PROVIDERS

- ✓ If a document is uploaded to CYBER in error, the Care Manager must submit a request using the Customer Service Request Form <https://apps.performcarenj.org/HelpDesk/csareqajax.aspx/> [servicedesk@performcarenj.org](mailto: servicedesk@performcarenj.org) in order to have the document deleted from the youth's record. Only PerformCare has the ability to delete uploaded documents.
- ✓ The *TJCR Document Upload Requirement Checklist* can be found on the PerformCare website at <http://www.performcarenj.org/pdf/provider/tjcr-referral-checklist.pdf>.

- ✓ As of April 3, 2017, OOH providers no longer receive mailed referral packets from Care Managers. Once the youth's referral is assigned to the OOH Providers Queue within YouthLink, the provider will have immediate access to the uploaded documents.
- ✓ CMO Care Managers no longer upload documents as part of the TJCR process. OOH providers have assumed this role.
- ✓ The TJCR should not be submitted until all documents are uploaded and the CMO enters the required CFT progress note.
- ✓ If the youth has a SPEC, PCH, SPEC-IDD, PCH-IDD, INT-IDD IOS, or the youth meets 'special needs' criteria, refer to the *SRTU Consultation Request Form* <http://www.performcarenj.org/pdf/provider/srtu-cover-letter.pdf> on the PerformCare website for applicable Intensities of Service (IOSs) that require SRTU consultation.
- ✓ If the youth is educationally classified, do not upload the entire IEP. Rather, only upload the cover sheet which verifies the youth's educational classification. If additional IEP information is needed, the Care Manager can provide this information to the OOH provider.
 - ✓ 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 at <http://www.performcarenj.org/pdf/provider/substance/consent-form.pdf>. Please check box if assessment was faxed.

Document Types and Sub-Types Available to OOH

Document Type	Sub-Type	Upload?	View?	Examples of Acceptable Documents
Clinical	○ Clinical Summary Template	Y	Y	BPS Assessment completed outside of CYBER
	○ Clinical Updates	Y	Y	
	○ Community BPS Assessment	Y	Y	
	○ Cover Sheet with SRTU Checklist		Y	IEP cover sheet
	○ IEP/Educational Info	Y	Y	
	○ Medical Information	Y	Y	OOH Referral Document Checklist Psychological Eval Psychiatric Eval Specialty Evals such as Fire Setting
	○ Other Applicable Reports/Documents	Y	Y	
	○ Psychological Evaluation/Assessment	Y	Y	
	○ Psychiatric Evaluation	Y	Y	
○ Specialty Assessment/Evaluation	Y	Y		
Court Orders/ Subpoenas	○ CMO 14 Day Plans	N	Y	Dispositional Court Order
	○ Court Orders for Information/Appearance	N	Y	
	○ Court Ordered Guardianship	N	Y	
	○ Court Ordered Treatment/Eval	N	Y	
	○ Subpoenas	N	Y	
Intermediate Unit	○ IU Admission Note	N	Y	
	○ IU Consent Form	N	Y	

○ IU Interventionist Supporting Document (ISD)	N	Y	
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DOCUMENT UPLOAD CROSSWALK (FOR CMO USE)		
DOCUMENT	CYBER DOC TYPE	CYBER DOC SUBTYPE
OOH Referral Document Checklist	Clinical	Other Applicable Reports/Evaluation
BPS (if not in CYBER) or CCIS Psychosocial Assessment	Clinical	Bio Psychosocial Assessment
Child Adaptive Behavior Summary (CABS)*	Clinical	Other Applicable Reports/Evaluation
Psychological Evaluation	Clinical	Psychological Eval/Assessment
Psychiatric Evaluation	Clinical	Psychiatric Evaluation
Psychiatric Update**	Clinical	Other Applicable Reports/Updates
Specialty Evaluations	Clinical	Specialty Assessment/Evaluation
Substance Use Assessment	N/A	N/A
IEP Cover Sheet/Evaluation	Clinical	IEP/Educational Info
Medical Reports	Clinical	Medical Information
Neuropsychological Evaluation	Clinical	Other Applicable Reports/Updates
Neurology Update*	Clinical	Other Applicable Reports/Updates
Other applicable evaluations/reports	Clinical	Other Applicable Reports/Documents
Court order for treatment/dispositional order	Court Order/Subpoenas	Court Order for Treatment/Eval

*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. CABS must have been completed within the last six months.

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

Appendix C: Document Upload Process for DCP&P

Overview: Document upload is to be used for the Out-of-Home Intensity of Service (IOS) Determination Process. DCP&P will fax required supporting documents as part of the telephonic review process for involved youth in need of OOH treatment.

The goals of document upload:

- ✓ To improve the quality of out-of-home Intensity of Service (IOS) determinations
- ✓ To decrease the amount of phone time for telephonic reviews (for DCP&P)
- ✓ To decrease OOH Referral Request and TJCR returns (for CMO's)
- ✓ To eliminate paper referral packets and decrease wait time for SRTU consultation

How document upload affects DCP&P:

- This process does not require CYBER functionality for DCP&P.
- Rather, the DCP&P worker will fax all required clinical documents to PerformCare, who will manually upload the documents to the youth's CYBER record.
- Intensity of Service (IOS) determinations will be rendered within one (1) business day of receipt of all required faxed documents and telephonic review.
- DCP&P does not mail referral packets to the Specialized Residential Treatment Services Unit (SRTU) for consultation.

Telephonic Review Process:

1. DCP&P worker will gather required documents per the *Document Upload Requirement Checklist for OOH Referrals Requests** (can be accessed on the PerformCare website - <http://www.performcarenj.org/pdf/provider/ooh-referral-request.pdf> .)
2. DCP&P worker will fax *DCPP Telephonic Review Fax Cover Sheet for Document Upload**, document requirement checklist (above), and documents to PerformCare at **877-736-9166**.
3. PerformCare will clinically review documents and will manually upload the documents to the youth's CYBER record.
4. DCP&P worker will contact PerformCare in one (1) business day after fax submission of documents in order to complete the telephonic review.
5. PerformCare will issue an IOS determination.

SRTU CONSULTATION

1. If the Intensity of Service (IOS) meets criteria for SRTU (Specialized Residential Treatment Unit) consultation, PerformCare will instruct the DCP&P worker to follow the instructions on the *Out of Home Referral Request Manual* <http://www.performcarenj.org/pdf/provider/out-of-home-referral-request.pdf> and the *SRTU Consultation Request Form* <http://www.performcarenj.org/pdf/provider/srtu-cover-letter.pdf>, both found on the PerformCare website.

***All items - SRTU Cover Letter, Document Requirement Checklist, and DCP&P Fax Sheet are available on the PerformCare website at www.performcarenj.org under Provider/Forms under the Out-of-Home (OOH) providers section.**

Appendix D: Document Type/Sub-Type Information for MRSS

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

- CRIDOCATTACH
- CRIDOCATTACHREAD
- CRISUP
- CRICM

Note: CRISUP and CRICM will have the needed security bundled into their designation (SUP or CM) so they can view and upload documents into a youth's record. If an agency needs to remove this ability from a SUP or CM, the agency's System Administrator will need to change the user's designation from SUP or CM to a different designation that does not have the Document Upload-related security attached (such as CRIMGR or CRIQA).

Overview: Document upload will be used to support the initial request for, and on-going need for Individual Support Services (ISS). MRSS will upload the *Child Adaptive Behavior Summary (CABS)* to the youth's record to support the service request for ISS. The CABS is completed by the ISS provider, in conjunction with the family, and discussed with MRSS, the youth, family and any identified collateral contacts. ISS providers cannot currently upload documents into a youth's record; the provider will submit the CABS to the MRSS in an agreed upon manner and MRSS will upload it into CYBER.

The goals of document upload:

- ✓ To improve the documentation that is available in a youth's record
- ✓ To improve the clinical decision making process
- ✓ To decrease the need for paper or fax submissions

CABS Upload Process:

1. The determination is made that ISS is appropriate for the youth and family. The following must be considered in making that determination:
 - a. The youth is DD Eligible
 - b. The youth meets clinical criteria for MRSS
 - c. The youth meets clinical criteria for ISS
 - d. The youth and family may be receiving other IIH services but cannot receive IIH Behavioral Support services at the same time as ISS; ISS is considered to be a step-down from Behavioral Supports.
 - i. ISS can be provided as a stand-alone service or provided with IIH Clinical Therapeutic services.
2. The ICP is created, including the request for ISS.
3. Once the request is approved and the authorization is created, the ISS provider meets with the family within 3 days of being authorized and completes the revised CABS-ISS, as well as any other necessary assessments.
4. ISS provider submits the CABS to MRSS within 10 days of meeting with the family; this can be done via fax or another agreed upon manner.

- a. The initial Treatment Plan from ISS must be submitted within 10 business days.
5. MRSS uploads the CABS into the youth's record.
 - a. For the CABS, the Document Type selected is **IIH Attachments** and the Sub-Type is **ISS-CABS**.
 - b. Please note: all uploaded documents must have the following naming convention for tracking purposes – **CYBER ID Document Type Date Received** – optional fields may be entered at the end of the file name such as County, DOB of youth, etc.
6. ISS provider enters a progress note into CYBER, summarizing the findings of the revised CABS-ISS.
7. MRSS will review the CABS and ISS Treatment Plan to ensure that the needs identified in the ICP are being appropriately addressed.
8. Continued ISS are discussed by MRSS with the family and the CMO when a youth transitions to CMO.

The CABS is completed, initially, to show the youth's baseline; the CABS is also completed on an on-going basis in support of the need for continued stay in ISS and should reflect progress or change with respect to baseline.

ISS will complete an ISS Treatment Plan to document the plan for skill development; the CABS is completed to document progress or lack of progress in response to the plan. MRSS will submit the appropriate ICP into CYBER for the youth; the ICP will be returned if the CABS, associated progress note and/or ISS Treatment Plan is not in the system at the time of the ICP review by PerformCare.

Note: If a document is uploaded to CYBER in error, the Care Manager must submit a request using the Customer Service Request Form <https://apps.performcarenj.org/HelpDesk/csareqajax.aspx/> servicedesk@performcarenj.org in order to have the document deleted from the youth's record. Only PerformCare has the ability to delete uploaded documents.

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	○ Clinical Summary Template	N	Y	BPS Assessment completed outside of CYBER
	○ Clinical Updates	N	Y	
	○ Community BPS Assessment	N	Y	
	○ IEP/Educational Info	N	Y	OOH Referral Document Checklist
	○ Medical Information	N	Y	
	○ Other Applicable Reports/Documents	N	Y	Specialty Evals such as Fire Setting
	○ Psychological Evaluation/Assessment	N	Y	
	○ Psychiatric Evaluation	N	Y	
○ Specialty Assessment/Evaluation	N	Y		
Court Orders/ Subpoenas	○ CMO 14-day Plan	N	Y	
	○ Court Orders for Info/Appearance	N	Y	
	○ Court Ordered Guardianship	N	Y	
	○ Court Ordered Treatment/Eval	N	Y	
	○ Subpoenas	N	Y	
Family Support Organization	○ Contact Sheet	N	Y	
Family Support Organization	○ Release of Information	N	Y	
IIC/BA Documents	○ BA ISP*	Y	Y	Paper-version of the BA ISP if the assessor has not completed the CYBER-based plan
IIH Attachments	○ ISS CABS	Y	Y	CABS in support of ISS
Intermediate Unit	○ IU Admission Note	N	Y	
	○ IU Consent Form	N	Y	
	○ IU Interventionist Supporting Document (ISD)	N	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. 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.

Appendix E: Document Upload Process for IIC

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

- IICDOCATTACH
- IICDOCATTACHREAD

Overview: Providers that complete the BA ISP should utilize the electronic BA ISP that is available in CYBER; for those who are not able to utilize that functionality, they may complete the hard copy template of the BA ISP. When a hard copy BA ISP is completed, the agency that completed it is responsible for uploading it into the youth's CYBER record.

The goals of document upload:

- ✓ To improve the documentation that is available in a youth's record
- ✓ To improve the clinical decision making process
- ✓ To decrease the need for paper or fax submissions

BA ISP Upload Process:

Once the BA ISP has been completed in hard copy, the author or their agency will upload it into the youth's record.

Document Type and Sub-Type Available for IIC/BA

Document Type	Sub-Type	Upload?	View?	Examples of Acceptable Documents
IIC/BA Documents	○ BA ISP	Y	Y	Hard copy version of the BA ISP

Appendix F: Document Upload Process for FSO

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

- FSODOCATTACH
- FSODOCATTACHREAD

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

The goals of document upload:

- ✓ To improve the documentation that is available in a youth's record
- ✓ To improve the clinical decision making process
- ✓ To decrease the need for paper or fax submissions

FSO Upload Process:

Agency will upload it into the youth's record.

Document Type and Sub-Type Available for FSO

Document Type	Sub-Type	Upload?	View?	Examples of Acceptable Documents
Clinical	○ BA ISP	N	Y	Hard copy version of the BA ISP
CMO Attachments	○ CFT Sign-In	N	Y	
Family Support Organization	○ Contact Sheet	Y	Y	
Family Support Organization	○ Release of Information	Y	Y	

Appendix G. Document Upload Process for Intermediate Units IU

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

- IUDOCATTACH
- IUDOCATTACHRead

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

The goals of document upload:

- ✓ To improve the documentation that is available in a youth's record
- ✓ To improve the clinical decision making process
- ✓ To decrease the need for paper or fax submissions

IU Upload Process:

- Upload Admission Note within 72 hours
 - The 30-day authorization will not be entered until the IU Admission Note is uploaded
- Upload Interventionist Supporting Document (ISD) 14 days before end of authorization to request continued stay. On review and approval, IU will receive additional 30 day authorization
 - Initial continued stay request: Sections I, II, and III are required
 - All subsequent continued stay requests: Sections I and III are required
- Upload ISD to transition youth out of IU
 - Transition: Section I and III are required

Document Type and Sub-Type Available for IU

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

VII. References

PerformCare Website: www.performcarenj.org

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](#)

Tier II Consultation

- [Tier II Consultation process](#)
- [Tier II Consultation tips for CMEs](#)
- [Tier II Consultation request form](#)

Transitional joint Care Review

- [TJCR document upload requirement checklist](#)

Intermediate Inpatient Units

- [Intermediate Inpatient Unit interventionist supporting document](#)
- [Release of information form](#)

Individual Support Services – CABS (This is the abbreviated version specific to ISS services)

- [Individual Support Services - Revised Child Adaptive Behavior Summary \(CABS\)](#)

Intensity of Service Dispute Form

- [Intensity of service dispute process](#)
- [Intensity of service dispute form](#)

PerformCare Service Desk is available 24/7/365:

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

Service Desk Request Form:

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