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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 username. 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. The training document, ‘CYBER Security System Administrator Instructional Guide’ describes the doc upload security (see References).

**Goals of the Document Upload:**

- To assist in determining the need for clinically appropriate services and improve the clinical decision making process
- To improve the accessibility of documentation in a youth’s record
- To decrease the amount of phone time for telephonic reviews (for DCP&P)
- To decrease Out-of-Home (OOH) Referral Request and Transition Joint Care Review (TJCR) returns (for CMO’s)
- To eliminate paper submission and referral packets
- To decrease wait time for Specialized Residential Treatment Unit (SRTU) consultation

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.

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.

PerformCare, and CSOC, as necessary, review uploaded documents; 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 type and sub-type.

If a document intended for one youth is uploaded into a different youth’s record in error, PerformCare must be notified to correct the error. The user should submit a request using the Customer Service Request Form (see Amending a Youth Record) in order to have the document removed from the youth’s record.
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, 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.
III. Accessing the Document Tab and Upload Functionality

Once a user is given the correct document upload security, the user must locate the correct record prior to uploading any 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, the user can 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.

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

- **Doc Status** – identifies the status of a document (Status ‘New Doc Uploaded’ appears for 30 days)
- **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, 3/1/19
- **Date Uploaded** – the date the document was actually uploaded and the record was created
- **File Name** – Name given to the file that was uploaded recommended naming convention is CYBER ID Document Type Date Received (see Naming Convention)
- **Uploaded By** – Username of the individual that uploaded the document
- **Program Name** – The code for 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 Sub-type. *Please review your provider type 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.

Users with access to the CYBER CMS 1500 form for billing purposes require document upload functionality to provide appropriate documentation in order to bill. 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 not be accepted 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 on their 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 and the percentage number will increase as the upload is completed. If the upload is successful, the screen will return to the youth’s Doc tab, where the file will be listed by Date Uploaded.

**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, the user must click on the ‘X’ in the upper right-hand corner of the document window.

   - *Do not click on the back button in the browser; it will log out the user*

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.
Documents that should not be uploaded
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.
- **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.
- **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.
- **All Social Security Numbers must be redacted in uploaded documentation.**

Amending a Youth Record
If a user enters or uploads documentation into a youth’s record that requires modification, the user or the user’s supervisor must enter an amended progress note indicating:

- Uploaded Document Type, Document Sub-type, Description, Date Uploaded and Filename
- Information that is not correct or entered in error, and that it should not be further disclosed

If uploaded documents with youth specific information is entered into the wrong youth’s record, the user should submit a request using the Customer Service Request Form (see References) in order to have the document removed from the youth’s record. Only PerformCare has the ability to delete uploaded documents.

**Note: Documentation is never completely eliminated from the CYBER record. It can be removed from view by the Service Desk with Quality Department approval.**

Revocation of SAMHSA Consent
If the Caregiver or youth revokes consent at any time, then indicate that on the particular SAMHSA survey, and their participation is complete. CMO must still complete required sections of reporting documents in provided timeframes.
V. Security

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 doc upload security groups added onto their profiles by their System Administrator.**

Security groups contain 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’, etc. The security groups for doc upload are:

- Document Upload – *(provider type designation)*DOCATTACH
- Document View – *(provider type designation)*DOCATTACHRead

It is recommended that both groups added together to a user’s profile, will allow a user to upload documents and view any uploaded documents in a youth’s record.

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 Upload Information for CMO

Document upload is used to upload clinical and administrative documentation to support the youth during the episode of care with CMO. CMO may view other user documentation to support in coordination of the youth’s care. Document upload is also used to support the initial request for and on-going need for Individual Support Services (ISS), initiate the OOH CSAP Referral request or assist Behavior Analysts in uploading documentation.

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

- **UCMDOCATTACH** and **UCMDOCATTACHRead**

CMO Security Administrator must manually assign these security functions.

- **UCMSUP** (has the document upload security bundled into their security title)
- **UCMCM** (has the document upload security bundled into their security title)

Document Types and Sub-Types Available for CMO

The Doc Tab options for CMO users are as follows:

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Sub-Type</th>
<th>Upload?</th>
<th>View?</th>
<th>Examples of Acceptable Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinical</td>
<td>Clinical Summary Template</td>
<td>Y</td>
<td>Y</td>
<td>BPS Assessment completed outside of CYBER</td>
</tr>
<tr>
<td></td>
<td>Clinical Updates</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Community Bio Psychosocial Assessment</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cover Letter with SRTU Checklist</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CSAP Referral Form</td>
<td>Y</td>
<td>Y</td>
<td>In support of CSAP-IDD</td>
</tr>
<tr>
<td></td>
<td>IEP/Educational Info</td>
<td>Y</td>
<td>Y</td>
<td>IEP cover sheet</td>
</tr>
<tr>
<td></td>
<td>Medical Information</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>OOH-CABS*</td>
<td>Y</td>
<td>Y</td>
<td>In support of CSAP-IDD</td>
</tr>
<tr>
<td></td>
<td>Other Applicable Reports/Documents</td>
<td>Y</td>
<td>Y</td>
<td>Out-of-home Referral Document Checklist</td>
</tr>
<tr>
<td></td>
<td>Psychiatric Evaluation</td>
<td>Y</td>
<td>Y</td>
<td>Psychiatric Eval</td>
</tr>
<tr>
<td></td>
<td>Psychological Evaluation/Evaluation</td>
<td>Y</td>
<td>Y</td>
<td>Psychological Eval</td>
</tr>
<tr>
<td></td>
<td>Specialty Assessment/Evaluation</td>
<td>Y</td>
<td>Y</td>
<td>Specialty Eval such as Fire Setting</td>
</tr>
<tr>
<td></td>
<td>Tier II Referral</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>CMO Attachments</td>
<td>CFT Sign-In</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Court Orders/Subpoenas</td>
<td>CMO 14 Day Plan</td>
<td>Y</td>
<td>Y</td>
<td>Dispositional Court Order</td>
</tr>
<tr>
<td></td>
<td>Court Ordered Guardianship</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Court Ordered Treatment/Eval</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Court Orders for Info/Appearance</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Subpoenas</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
</tbody>
</table>

*CABS must have been completed within the last six months.*
<table>
<thead>
<tr>
<th>Family Support Organization</th>
<th>Contact Sheet</th>
<th>N</th>
<th>Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family Support Organization</td>
<td>Release of Information</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>IIC/BA Documents</td>
<td>BA ISP (Behavioral Assistant Individual Support Plan)*</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>IIC Attachments</td>
<td>ISS-CABS (5 pages)</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Intermediate Unit</td>
<td>IU Admission Note</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td>IU Consent Form</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td>IU Interventionist Supporting Document (ISD)</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>SAMHSA National PPS Documents**</td>
<td>Caregiver Baseline</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td>Youth Baseline</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td>Caregiver Re-assessment</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td>Youth Re-assessment</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td>Caregiver Transition</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td>Youth Transition</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td>Caregiver Consent</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td>Youth Consent</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>SAMHSA National Outcome Measures (NOMS) PPS**</td>
<td>NOMS Baseline</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td>NOMS Re-assessment – 6, 12 mos</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td>NOMS Transition</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td></td>
<td>NOMS Consent</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>

*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.

**Only those CMOs that are participating in the SAMHSA program should review section in this appendix.

**CMO Document Upload Crosswalk**

The document crosswalk identifies documents that may be uploaded, but are not listed in the specific types or sub-types in the Doc tab.

<table>
<thead>
<tr>
<th>DOCUMENT</th>
<th>USE CYBER DOC TYPE</th>
<th>USE CYBER DOC SUB-TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bio Psychosocial (if not in CYBER) or CCIS Psychosocial Assessment</td>
<td>Clinical</td>
<td>Community BPS Assessment</td>
</tr>
<tr>
<td>OOH Referral Request (Document Upload Requirement Checklist)</td>
<td>Clinical</td>
<td>Other Applicable Reports/Documents</td>
</tr>
<tr>
<td>Other applicable evaluations/reports</td>
<td>Clinical</td>
<td>Other Applicable Reports/Documents</td>
</tr>
<tr>
<td>Psychiatric Update*</td>
<td>Clinical</td>
<td>Other Applicable Reports/Documents</td>
</tr>
<tr>
<td>Substance Use Assessment</td>
<td>N/A (fax only)</td>
<td>N/A (fax only)</td>
</tr>
</tbody>
</table>

*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.
Appendix B: Document Upload Information for OOH

Document upload is 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.

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

- **RESDOCATTACH or RESDOCATTACHRead**

OOH provider’s Security Administrator must manually assign these security functions.

Out-of-home providers with the correct security groups, receive access to view uploaded documents related to a youth’s OOH referral request or TJCR once a referral is assigned to the YouthLink Provider Queue. OOH providers are also required to upload documents related to the Transitional Joint Care Review (TJCR) process.

### Document Types and Sub-Types Available for OOH

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Sub-Type</th>
<th>Upload?</th>
<th>View?</th>
<th>Examples of Acceptable Documents</th>
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</thead>
<tbody>
<tr>
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<td>Y</td>
<td>BPS Assessment completed outside of CYBER</td>
</tr>
<tr>
<td></td>
<td>Clinical Updates</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Community Bio Psychosocial Assessment</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cover Letter with SRTU Checklist</td>
<td>N</td>
<td>Y</td>
<td>IEP cover sheet</td>
</tr>
<tr>
<td></td>
<td>IEP/Educational Info</td>
<td>Y</td>
<td>Y</td>
<td>In support of CSAP-IDD</td>
</tr>
<tr>
<td></td>
<td>Medical Information</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>OOH-CABS (13 pages)</td>
<td>Y</td>
<td>Y</td>
<td>TJCR Doc Upload Checklist</td>
</tr>
<tr>
<td></td>
<td>Other Applicable Reports/Documents</td>
<td>Y</td>
<td>Y</td>
<td>Psychiatric Eval</td>
</tr>
<tr>
<td></td>
<td>Psychiatric Evaluation</td>
<td>Y</td>
<td>Y</td>
<td>Psychological Eval</td>
</tr>
<tr>
<td></td>
<td>Psychological Evaluation/Assessment</td>
<td>Y</td>
<td>Y</td>
<td>Specialty Evals such as Fire Setting</td>
</tr>
<tr>
<td></td>
<td>Specialty Assessment/Evaluation</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Court Orders/Subpoenas</td>
<td>CMO 14 Day Plans</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Court Orders for Information/Appearance</td>
<td>N</td>
<td>Y</td>
<td>Dispositional Court Order</td>
</tr>
<tr>
<td></td>
<td>Court Ordered Guardianship</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Court Ordered Treatment/Eval</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Subpoenas</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Intermediate Unit</td>
<td>IU Admission Note</td>
<td>N</td>
<td>Y</td>
<td>Q</td>
</tr>
<tr>
<td></td>
<td>IU Consent Form</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>IU Interventionist Supporting Document (ISD)</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
</tbody>
</table>

*CABS must have been completed within the last six months.*
OOH Document Upload Crosswalk
The document upload crosswalk identifies documents that may be uploaded, but are not listed in the specific types or sub-types of the Doc tab.

<table>
<thead>
<tr>
<th>DOCUMENT</th>
<th>CYBER DOC TYPE</th>
<th>CYBER DOC SUB-TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>BPS (if not in CYBER) or CCIS Psychosocial Assessment</td>
<td>Clinical</td>
<td>Community BPS Assessment</td>
</tr>
<tr>
<td>Neurology Update**</td>
<td>Clinical</td>
<td>Other Applicable Reports/Documents</td>
</tr>
<tr>
<td>Neuropsychological Evaluation</td>
<td>Clinical</td>
<td>Other Applicable Reports/Documents</td>
</tr>
<tr>
<td>OOH Referral Request (Document Upload Requirement Checklist)</td>
<td>Clinical</td>
<td>Other Applicable Reports/Documents</td>
</tr>
<tr>
<td>Other applicable evaluations/reports</td>
<td>Clinical</td>
<td>Other Applicable Reports/Documents</td>
</tr>
<tr>
<td>Psychiatric Update***</td>
<td>Clinical</td>
<td>Other Applicable Reports/Documents</td>
</tr>
<tr>
<td>Transition Joint Care Review (TJCR) (Document Upload Requirement Checklist)</td>
<td>Clinical</td>
<td>Other Applicable Reports/Documents</td>
</tr>
<tr>
<td>Substance Use Assessment</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

* CABS must be within last 6 months
** 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.
*** Required if Psychiatric/Neuropsychological Evaluation is more than six months old
Appendix D: Document Upload Information for MRSS

Document upload is used to support the initial request for and on-going need for Individual Support Services (ISS), initiate the OOH CSAP Referral request or assist Behavior Analysts in uploading documentation.

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

- **CRIDOCATTACH** and **CRIDOCATTACHRead**
  
  MRSS Security Administrator must manually assign these security functions.

- **CRISUP** (has the document upload security bundled into their security title)
- **CRICM** (has the document upload security bundled into their security title)

### Document Types and Sub-Types Available for MRSS

The Doc tab options for MRSS users are as follows:

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Sub-Type</th>
<th>Upload?</th>
<th>View?</th>
<th>Examples of Acceptable Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinical</td>
<td>o Clinical Summary Template</td>
<td>N</td>
<td>Y</td>
<td>BPS Assessment completed outside of CYBER</td>
</tr>
<tr>
<td></td>
<td>o Clinical Updates</td>
<td>N</td>
<td>Y</td>
<td>In support of CSAP-IDD</td>
</tr>
<tr>
<td></td>
<td>o Community BPS Assessment</td>
<td>N</td>
<td>Y</td>
<td>OOH Referral Document Checklist</td>
</tr>
<tr>
<td></td>
<td>o <strong>CSAP Referral Form</strong></td>
<td>Y</td>
<td>Y</td>
<td>In support of CSAP-IDD</td>
</tr>
<tr>
<td></td>
<td>o IEP/Educational Info</td>
<td>N</td>
<td>Y</td>
<td>OOH Referral Document</td>
</tr>
<tr>
<td></td>
<td>o Medical Information</td>
<td>N</td>
<td>Y</td>
<td>Psychiatric Evaluation</td>
</tr>
<tr>
<td></td>
<td>o <strong>OOH-CABS (13 pages)</strong></td>
<td>Y</td>
<td>Y</td>
<td>Specialty Evals such as Fire Setting</td>
</tr>
<tr>
<td></td>
<td>o Other Applicable Reports/Documents</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Psychological Evaluation/Assessment</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Psychiatric Evaluation</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Specialty Evaluation</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Court Orders/</td>
<td>o <strong>CMO 14-day Plan</strong></td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Subpoenas</td>
<td>o Court Orders for Info/Appearance</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Court Ordered Guardianship</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Court Ordered Treatment/Eval</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Subpoenas</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Family Support</td>
<td>o Contact Sheet</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Organization</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Release of Information</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>IIIC/BA</strong> Documents</td>
<td>o <strong>BA ISP</strong></td>
<td>Y</td>
<td>Y</td>
<td>Hard copy version of the BA ISP if the assessor has not completed the CYBER-based plan</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IIH Attachments</td>
<td>o <strong>ISS-CABS (5 pages)</strong></td>
<td>Y</td>
<td>Y</td>
<td>In support of ISS</td>
</tr>
</tbody>
</table>

*CABS must be within last 6 months
Intermediate Unit
- IU Admission Note
- IU Consent Form
- IU Interventionist Supporting Document (ISD)

<table>
<thead>
<tr>
<th></th>
<th>N</th>
<th>Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>IU Admission Note</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IU Consent Form</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IU Interventionist Supporting Document (ISD)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*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 Information for IIC/BA
IIC/BA Providers utilize the doc upload functionality to view specific document types and upload identified documentation into the youth’s CYBER record.

IIC/BA users with the following security designations or groups can utilize the Doc tab of a youth’s Face Sheet:

- **IICDOCATTACH** and **IICDOCATTACHRead**

IIC Security Administrator must manually assign these security functions.

**Document Types and Sub-Types Available for IIC/BA**

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Sub-Type</th>
<th>Upload?</th>
<th>View?</th>
<th>Examples of Acceptable Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>IIC/BA Documents</td>
<td>BA ISP <em>(Behavioral Assistant individual Support Plan)</em></td>
<td>Y</td>
<td>Y</td>
<td>Hard copy version of the BA ISP</td>
</tr>
</tbody>
</table>

*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. IIC users 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 F: Document Upload Information for FSO
FSO Providers utilize the doc upload functionality to view specific document types and upload identified documentation into the youth’s CYBER record.

FSO users with the following security designations or groups can utilize the Doc tab of a youth’s Face Sheet:

- **FSODOCATTACH** and **FSODOCATTACHRead**

FSO Security Administrator must manually assign these security functions.

**Document Type and Sub-Type Available for FSO**

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Sub-Type</th>
<th>Upload?</th>
<th>View?</th>
<th>Examples of Acceptable Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinical</td>
<td>o BA ISP</td>
<td>N</td>
<td>Y</td>
<td>Hard copy version of the BA ISP</td>
</tr>
<tr>
<td>CMO Attachments</td>
<td>o CFT Sign-In</td>
<td>N</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Family Support Organization</td>
<td>o Contact Sheet</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Family Support Organization</td>
<td>o Release of Information</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
</tbody>
</table>

Appendix G. Document Upload Information for IU
IU Providers utilize the doc upload functionality to view specific document types and upload identified documentation into the youth’s CYBER record.

IU users with the following security designations or groups can utilize the Doc tab of a youth’s Face Sheet:

- **IUDOCATTACH** and **IUDOCATTACHRead**

**Document Type and Sub-Type Available for IU**

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Sub-Type</th>
<th>Upload?</th>
<th>View?</th>
<th>Examples of Acceptable Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intermediate Unit</td>
<td>o IU Admission Note</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o IU Consent Form</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o IU Interventionist</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Supporting Document (ISD)</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
</tbody>
</table>
VII. References

PerformCare Website: www.performcarenj.org

Customer Service Request Form: www.performcarenj.org/ServiceDesk

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 Checklist
- TJCR document upload requirement checklist

Intermediate Inpatient Units
- Intermediate Inpatient Unit interventionist supporting document
- Release of information form

Documents Used for CSAP-DD Referrals
- Child Adaptive Behavior Summary (Long version, 13 pp) (English)

ISS-CABS used for Individual Support Services (abbreviated version, 5 pp)
- Individual Support Services - Revised Child Adaptive Behavior Summary (CABS)

Intensity of Service Dispute Form
- Intensity of service dispute process
- Intensity of service dispute form

Customer Service Request Form
www.performcarenj.org/ServiceDesk
1-877-652-7624