

PerformCARE[®]

Instructional Guide for
NJ3000

Progress Notes Extract: (CMO)

NJ3000 – Progress Notes Extract (CMO) – Instructions for Use

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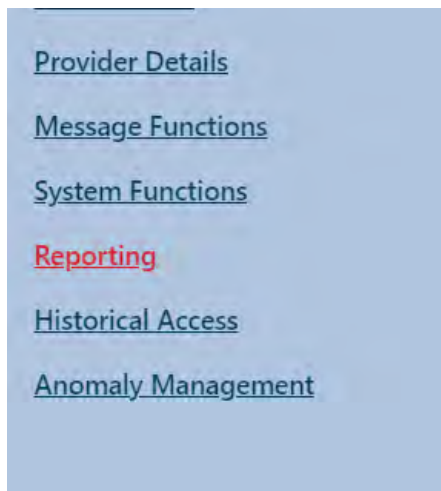
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I. Description

The report, NJ3000-Progress Note, report contains all the fields from the Progress Note table that pertain to the CMO Progress Note data. This report is defined as an extract report which a table of raw data without a report title, allowing user to customize data according to user need. The extract will show data for the children that were open to the user's agency and have progress notes created within a specific timeframe chosen by the user.

See [Dictionary](#) to see the full listing of column heading and description of those headings as outlined in the report.

II. Accessing Reporting

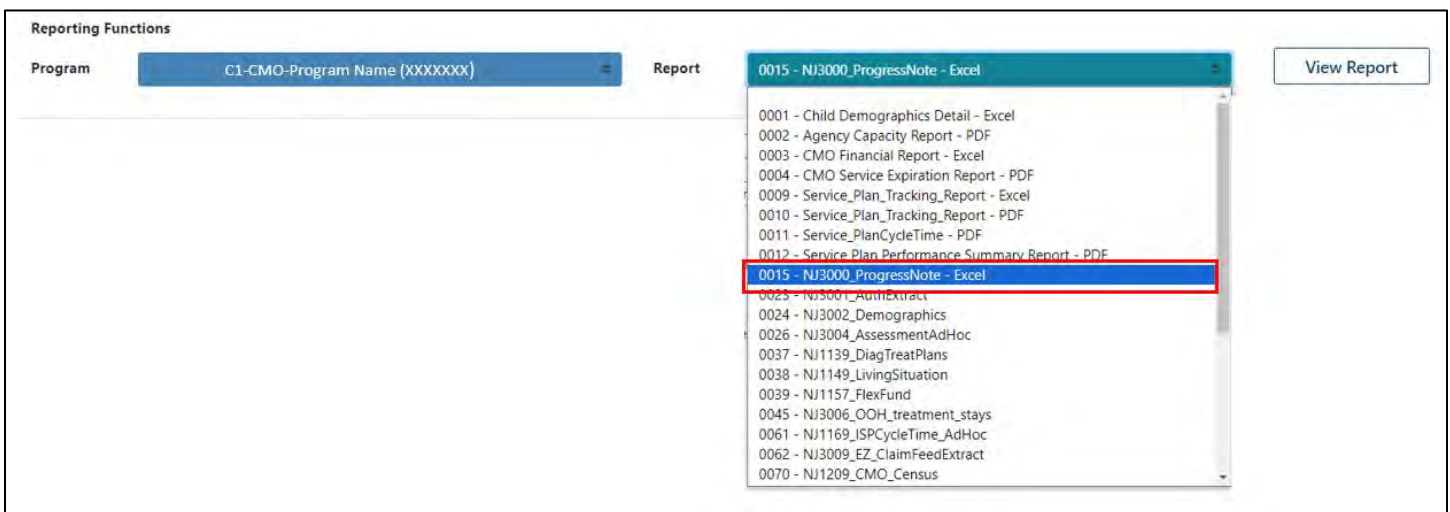


The **NJ3000 Progress Note Extract** is accessed through CYBER by clicking the Reporting button on the left hand menu pane on the Welcome Page.

Note: A user must have Level 3 security to have access to the Reports button. Please refer to your program's Security Administrator to set these levels appropriately.

The program that your CYBER login is attached to will show in the **'Program'** drop down menu. If you are attached to multiple programs, all attached programs will show in this menu. To the right of the **'Program'** drop down will be the **'Report'** drop down. In this box, you will see all the reports available to the chosen program.

Users will choose their Program Name from the first drop down and the extract from the second drop down.



III. Navigating the Report

Users should click on the **'View Report'** button to view the extract within CYBER; this will allow users to change the parameters and customize the extract to be exported.

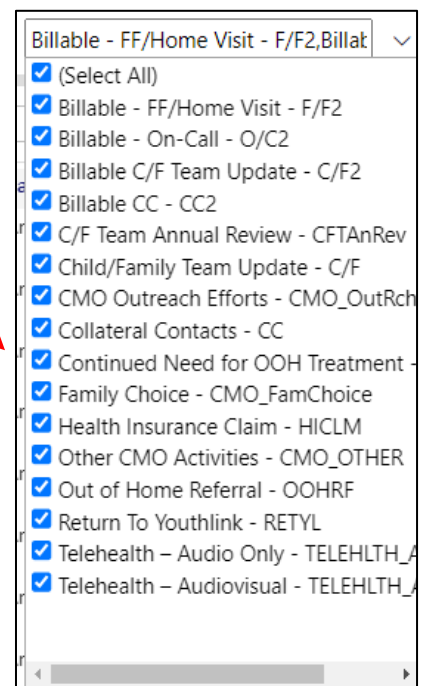
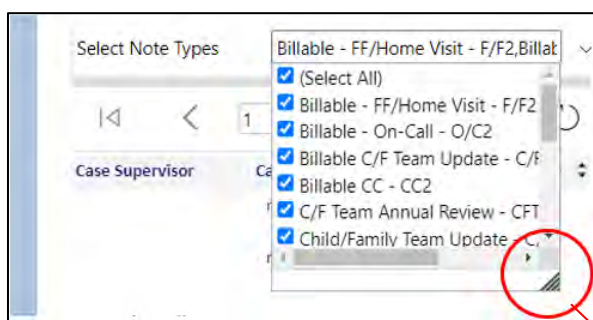
The screenshot shows a form with the following fields: Start Date (12/1/2023), End Date (12/31/2023), Select Case Supervisors, Select Case Managers, Select Note Types (Billable - FF/Home Visit - F/F2,Billat), and IOS (All). A 'View Report' button is highlighted with a red box.

Users will need to enter the parameters to generate the data extract that fits their needs; the information shown in the



screenshot above is the default setting for the extract parameters. Clicking on the calendar button will give the user the ability to choose the date parameters. The parameters are as follows:

- **Start Date/End Date:** The start date and end date range of when the youth's CYBER record was open in Tracking Elements to the user's agency. Defaults to the previous month's start and end date.
- **Select case supervisors:** drop down listing the supervisors the user can select; alphabetized and defaults to the first name in the listing.
- **Select case manager:** drop down listing the managers the user can select; alphabetized and defaults to the first name in the listing.
- **Select Note Types:** drop down listing the CMO note types the user can select, alphabetized and defaults to the first item in the listing. The system will only list a progress note type if there is a note of that type in a youth's record.
- **IOS:** Intensity of Service drop down; choices include 'All', 'HI' or 'MOD'; defaults to 'All'.



Click and drag the 'expander' button to increase the listing to view more of the contents.

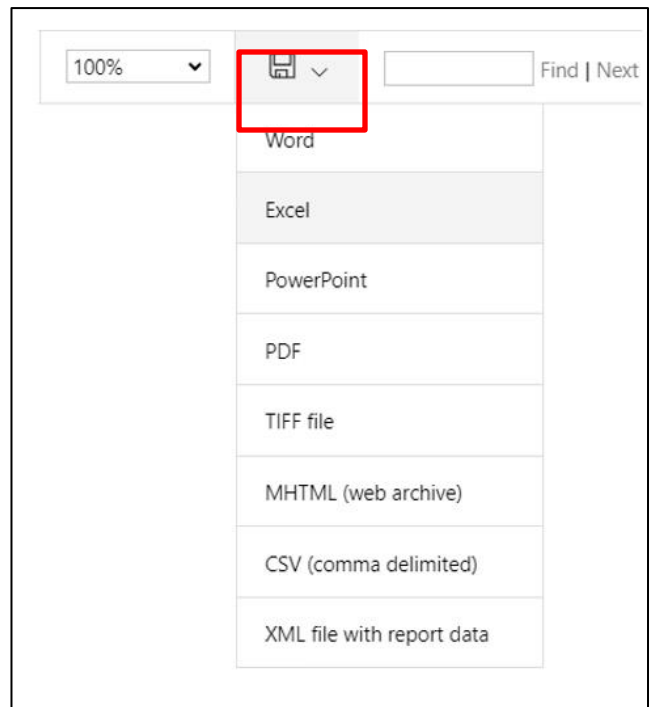
Clicking the **'View Report'** button will generate the extract.

IV. Exporting the Report into Excel

Reports may be exported into multiple formats. **The recommended formats are Excel and PDF.** Excel format is more effective for tables and extracts. Dashboards and graphical data are best viewed in PDF format.

Exporting to Excel/PDF

After selecting *View Report*, the data will load, and the user will have the option to export the data. When exporting to Excel, click on **floppy disk icon** and select **Excel or PDF** from the dropdown.



Based on the browser type that you are using; you will be prompted to download the file to your computer. Once the report is exported into Excel, the user can choose to filter or sort as needed.

Printing Reports

Users are unable to print reports directly from CYBER. Reports must first be exported and then print from the user's computer.

V. Ad Hoc Data Extract Dictionary

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

Field Name	Definition
Case Supervisor	The name of the supervisor
Case Manager	The name of the manager assigned to the youth
CYBER ID	Unique identifier for the youth's record in CYBER
Service Date	The date service provided to youth
Last Name	Last Name of the youth
First Name	First Name of the youth
Note Date	A date entered by the author of the progress note; typically the date of service
Note Type	The name associated with the type of progress note
Progress Note Type	The type of progress note (IIC, CSA Service Center, Billable CC, etc.)
Duration	The length of time entered into the note by the user; usually represents the length of time for a meeting or service
Signed	Indicates 'Y' for Yes if the progress note is committed to the youth's record
Creation Date	The date the Progress Note was created in the system
Creation User	The Username of the individual that authored the progress note
Creator Affiliation	The PE the Creation User is affiliated with (ex: CMO)
Submitted Date	The date the progress note was committed to the youth's record

VI. References

PerformCare website

- Providers Training page: <https://www.performcarenj.org/provider/training.aspx>
- Reports section: <https://www.performcarenj.org/provider/training.aspx#reports>

PerformCare Customer Service

www.performcarenj.org/ServiceDesk

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