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

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Instructional Guide for Welcome Page Features

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I. Introduction

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

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

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

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

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

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II. Accessing CYBER

CYBER can be accessed via the PerformCare website – www.performcarenj.org . The link is available under the CYBER menu at the top of the home page or the button at the bottom of the page. Users must log into CYBER with their Username and Password.
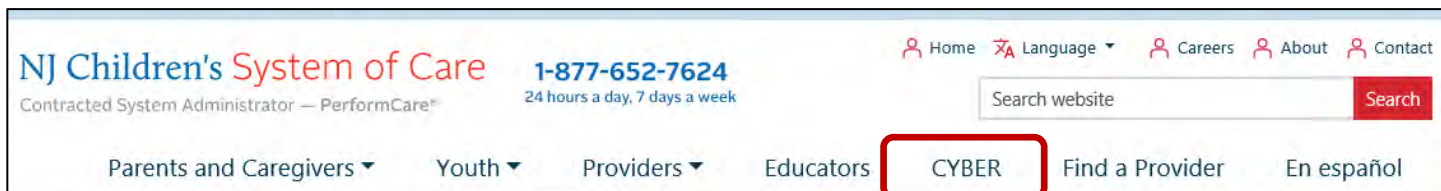
Each provider organization has at least two CYBER Security Administrators, and your agency's CYBER Security Administrators can set up a login and temporary password. Access will be based upon login type and security levels.

Before logging in, keep in mind…

- Every time CYBER is launched, the **Username and Password is required, then click the LOGIN button to continue**.
- Users are required to **change their password every 90 days.**

Above the login area is a statement that, CYBER users acknowledge their responsibility to protect the privacy of and to guard against the inappropriate use or disclosure the Protected Health Information (PHI) contained within the system.

This statement will appear during each log in.

Please also check the link: CYBER Access Requirements page on the PerformCare website for the most up-to-date technical requirements (such as browser compatibility and operating systems) needed to access CYBER.

At the bottom of the login page is the version of CYBER. The server number is the last 2 digits at the end (-XX). This is helpful to note when requesting assistance.
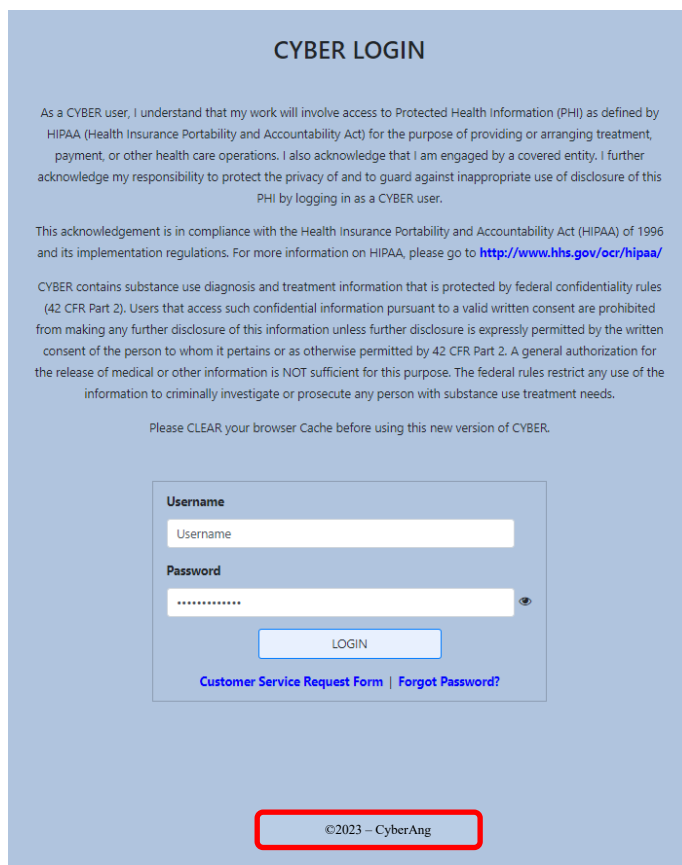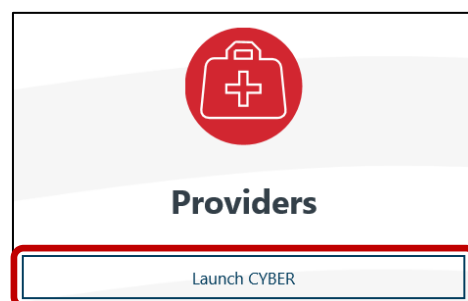
For technical support, please use the Customer Service Request Form link under the login.

III. Role-Based Security Hierarchy

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

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

Welcome Page Features for "High-Level" Users

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

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

These security group titles have no "High-Level" user functionality:

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

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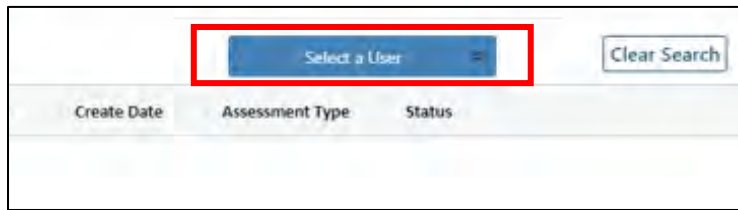
The *Select a User* feature appears as a pull-down menu on the Welcome Page that allows the "High-Level" user access to "view the work of all other users at an equal or a lower level (below them in the hierarchy). Care Managers are the first access level and will not have options in this menu; they will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

Selecting a name from the menu will filter and populate the links on the Welcome Page with that user's information; the selected user's name will appear in the window of the menu as a reminder to the "High-Level" user.
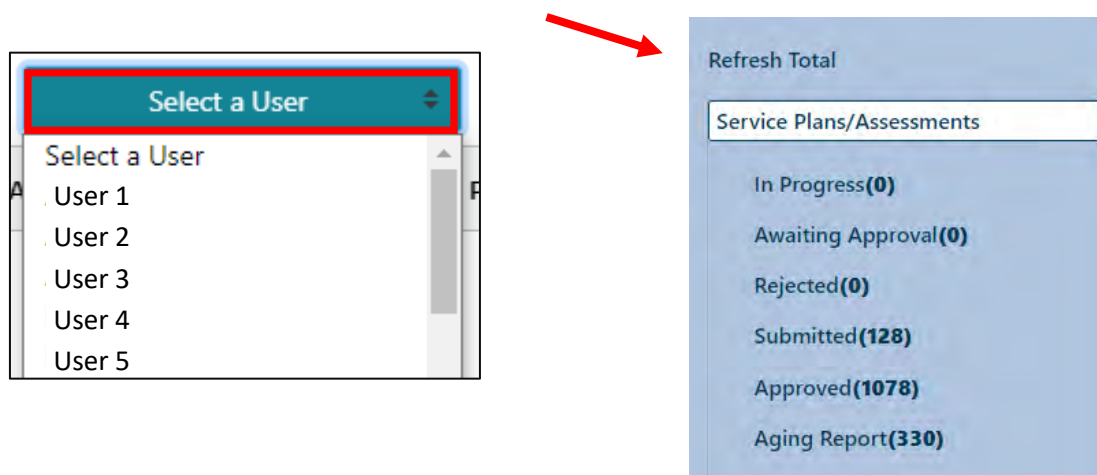
Note: The "High-Level" user is only viewing the Welcome Page of the *selected user*. Rules of assignment do not apply on the Welcome Page, so clicking a youth ID link on one of the grids will not reassign the plan or assessment to the "High-Level" user. Assigning, transferring or returning plans or assessments can only be done through the Plan Approval screen, or by the current assigned user of the document from within that document (See References).

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

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

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

Deactivated Users

"High-Level" users with the designation of Supervisor or above within an agency will have access to an accordion on the Welcome Page titled *Deactivated Users*; it will be the last accordion on the right side of the page.
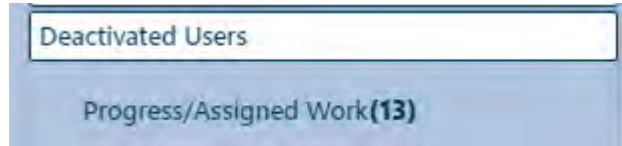
"High-Level" users will find one link under the **Deactivated Users** accordion named 'Progress/Assigned Work'. Clicking this link will populate the center grid with a list of all work that was formerly assigned to a user that is now deactivated.

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

CMO "High-Level" user view

IIC "High-Level" user view

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

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

Deactivated Users' Progress Notes

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

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

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

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

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

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

IV. References

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

- Security section:
    - CYBER Security Administrator Instructional Guide
      https://www.performcarenj.org/pdf/provider/training/security/role-based-security-system-admin.pdf

    - Plan Approval: Instructional Guide to CYBER Role-Based Security for Providers
      https://www.performcarenj.org/pdf/provider/training/security/role-based-security-for-all.pdf

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PerformCare Customer Service

www.performcarenj.org/ServiceDesk

1-877-652-7624

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