

# PerformCARE<sup>®</sup>

## Instructional Guide to CYBER Role-Based Security for Intensive In-Community (IIC) Users

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## I. Introduction

User security in the CYBER system includes a feature called 'role-based' security that allows each provider agency to arrange its users in a *hierarchy* by assigning specific security groups to users to control their access or actions.

CYBER's hierarchy has three security group levels:

Plan Level 1

Plan Level 2

Plan Level 3

*Note: Every CYBER user should be assigned only one (1) Plan Level security group. The user's hierarchy will default to the highest Plan Level assigned.*

Hierarchy has multiple functions to allow for:

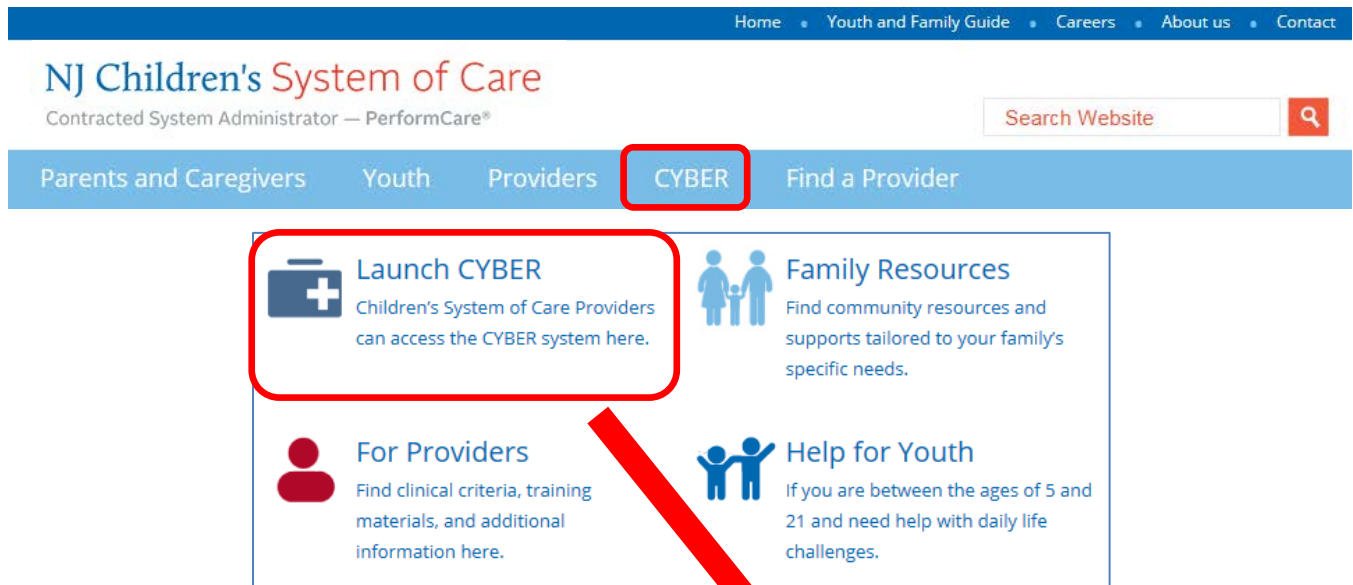
- controlling who may submit plans/assessments to the CSA for review
- transfer, return or submission from within plans/assessments to specific users at an agency
- assign/unassign function of plans/assessments from the Plan Approval window

CYBER also includes views called 'Review History' and 'Treatment Plan History' to log the path that the document has taken as it is reassigned and submitted using the hierarchy structure.

This Instructional Guide will describe CYBER security and the CYBER Welcome Page for Intensive in-Community (IIC) and Behavioral Analyst (BA) Users.

## 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](http://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.

The image shows a screenshot of the 'CYBER LOGIN' page. At the top, it says 'CYBER LOGIN'. Below this is a disclaimer: '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.' Below the disclaimer is a link: 'http://www.hhs.gov/ocr/hipaa/'. Below the link is another disclaimer: '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.' Below the disclaimer is a note: 'Please CLEAR your browser Cache before using this new version of CYBER'. Below the note is a login form with fields for 'Username' and 'Password', and a 'LOGIN' button.

## III. Role-Based Security Hierarchy

Role-based security is established by the Security Administrator(s) at each agency. There are three levels of security for hierarchy of plan and assessment creation. Security groups are listed in the CYBER Security Administrator Instructional Guide. (See [References](#))

- [Plan Level 1](#) This security group allows users to author plans/assessments, transfer them to other users within the organization or submit plans to a Plan Level 2 or Plan Level 3 user. Plan Level 1 users cannot not submit plans to the CSA for review. In the [Plan Approval](#) window the Plan Level 1 user can only assign documents to themselves or unassign from themselves leaving the document assigned to no one.
- [Plan Level 2](#) This security group allows users to author plans/assessments, transfer them to other users within the organization, return plans to the originating user or submit plans to a Plan Level 3 user or to the CSA for review. In Plan Approval, the Plan Level 2 user may assign plans/assessments to anyone.
- [Plan Level 3](#) Provided in case of the need for three levels of hierarchy, this security group allows users to author, transfer, and return plans/assessments to the originating user or submit to the CSA for review.

If no plan levels are assigned, the user is set to Plan Level 1 by default.

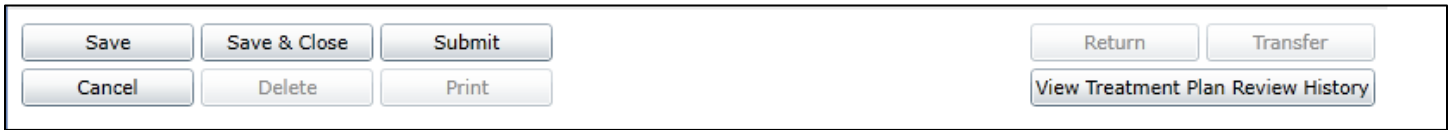
## IV. Action Buttons

Action buttons are displayed at the bottom of an assessment or plan and selected by the user to assign the document or take an action. There are four types of actions that users may choose and two different button designs that may be found on plans and assessments. These actions can only be selected by a user who has a plan/assessment assigned to them for editing or action. (See [Expanded Action Buttons](#) below)

- [Delete](#) – allows the user to delete a plan/assessment only if it has not been submitted to CSA regardless of whether it has been returned
- [Return](#) – allows the user to return the assessment to a user who has previously had it assigned to them within the agency/program
- [Submit](#) – submits the document to a user in the hierarchy above them or to the CSA for review dependent on the user's hierarchy security plan level
- [Transfer](#) – allows the user to transfer the assessment to any other user at the agency/program

## Using Action Buttons

There are different arrangements of action buttons on both plans and assessments in CYBER. The functions of action buttons behave the same regardless of the plan or assessment type however. Here are some of the variations:



*Expanded Action buttons (IIC Treatment Plan)*

Assessments have the **'Select an Action'** menu to allow the user to choose from the list of the four actions.

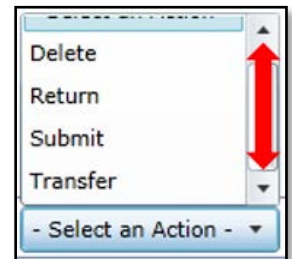


*'Select an Action' buttons (BioPsycho Social Assessment, Strength and Needs, etc.)*

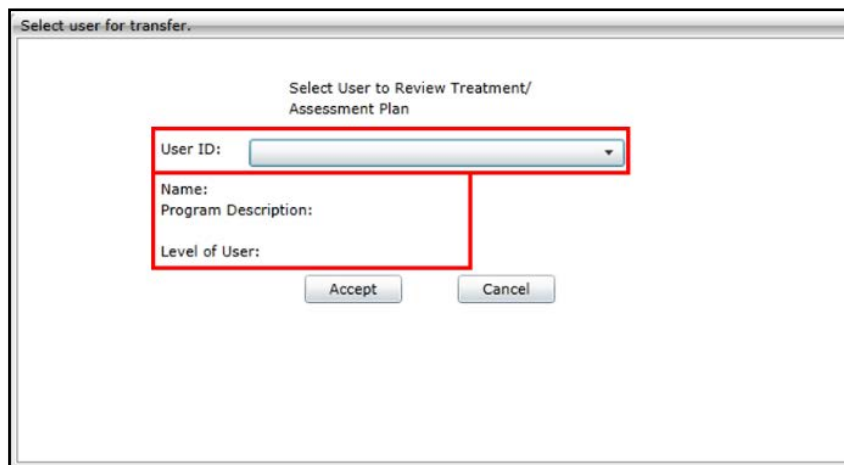
The primary difference among the types is the two ways they function. The expanded menu of action buttons has a **'one button click function'** whereas the **'Select an Action'** menu styles require two clicks, one to select action and one click on **Update Status** to complete the action.

### Select an Action Menu

The steps to use the **'Select an Action'** menu start with first saving the document. The user can then click the **Select an Action** pop up menu at the bottom of the assessment and the user may scroll down to select to choose an action and then click **Update Status**.



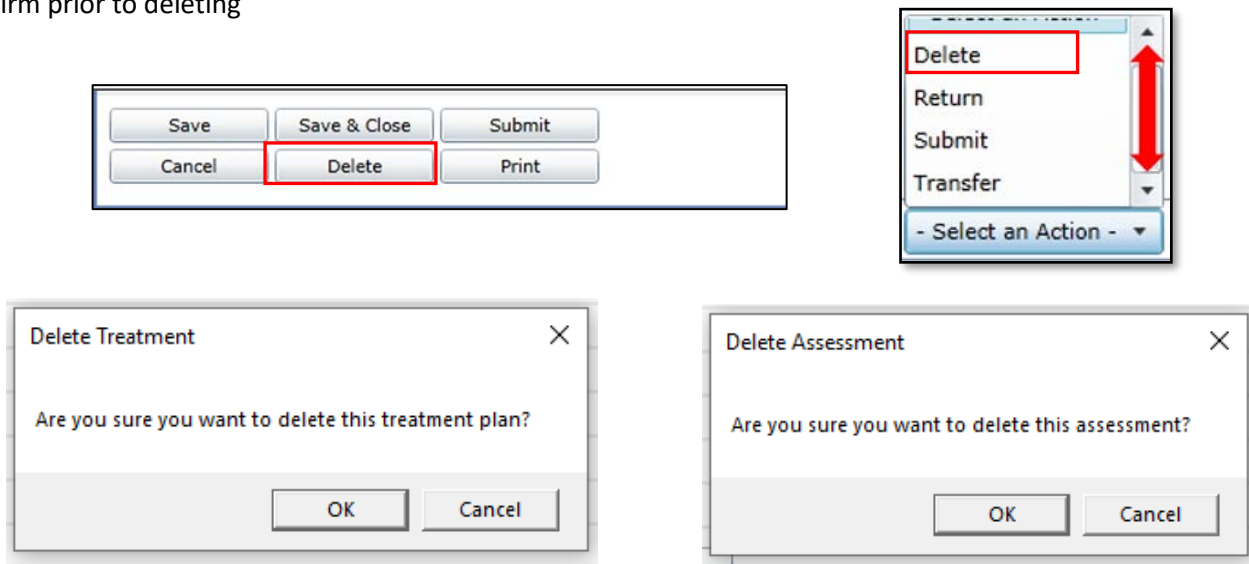
In the selected actions of Transfer or Return, clicking on the **Update Status** button will bring up a **'Select user for (chosen action)'** window where the user will select another user within the agency to send the assessment. When the user is selected, the system will show the User's Name, Program and Plan Level security for confirmation. The user then clicks Accept to send the document.



*Select user for (action) window*

## Delete Action

The **Delete** action allows the user to remove the document from CYBER. The delete action will be available after the document has been saved; it cannot be used once the document has been submitted to the CSA. The user will be asked to confirm prior to deleting



## Return Action

The **Return** action allows the user to return a document to another user who has already had the document assigned to them. When using the Return action, users will only see the User IDs of those users that have worked on the plan or assessment. Choosing this selection will bring up the 'Select User for Return' window (see [Select user for \(action\) window](#) above).

### Validation Message

Sometimes attempting to return a document to another user, may result in a validation message, 'There are no current users to submit to.' This message will display if the author has been deactivated. Use the Plan Approval screen to assign the assessment to another user for completion or complete the document and submit it to CSA.

Users (who have received returned documents) will be able to access the document on the Plan Approval window in the My Plans section.

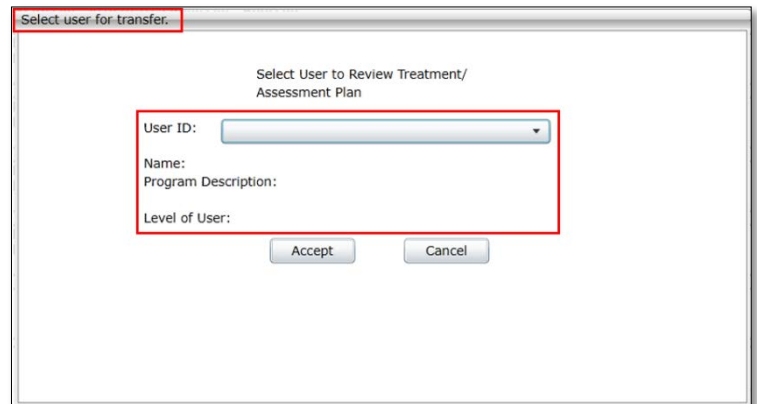
- The Assigned user will see the document on their Welcome Page via the Service Plans/Assessment 'Rejected' link if the youth is still open to the agency.
- The document will also appear on the author's Welcome Page after it has been returned, as long as the agency is still open to the youth.
- All users can locate the un-submitted assessment on the Plan Approval window.
- The original author can see the document on the youth's Treatment Plans and Assessments grid however, the document will be read-only to the author until it is either transferred or returned to them from the current user.

## Transfer Action

The **Transfer** action allows users to transfer an assessment to any other user at their agency, but the assessment must first be saved.



The action will bring up the Select User for (action) window. Selecting a user, the window will populate the Name, Program Description, and Level of User. Once the user clicks 'Accept', the document will be assigned to the new user.



Users (who have received transferred documents) will be able to access the document on the Plan Approval window in the My Plans section.

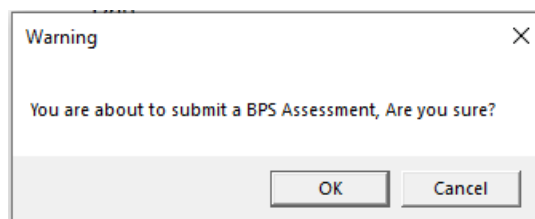
- The Assigned user will see the document on their Welcome Page via the 'In Progress' link if the youth is still open to the agency.
- The document will also appear on the author's Welcome Page after it has been transferred, as long as the agency is still open to the youth.
- All users can locate the un-submitted assessment on the Plan Approval window.
- The original author can see the document on the youth's Treatment Plans and Assessments grid however, the document will be read-only to the author until it is either transferred or returned to them from the current user.

## Submit Action

The **Submit** action will prepare for submission by confirming that all validations are satisfied. If there are validations to be completed, the user may not submit until they are addressed.

A Plan Level 1 user may submit a document to a Plan Level 2 or 3 agency user for review. Once the document is reviewed internally and considered complete, the document can then be submitted to CSA for approval. The system will again check for requirements and if confirmed, then permit the submission to proceed.

**Submitting Assessments:** Depending upon the type of assessment tool, the Submit confirmation box will vary with the assessment name:





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Clicking the OK button will bring up the 'Select user for review' window. Depending on the submitting user's plan level, there will be an option to choose a Plan Level 2 or 3 user at the agency or to submit to CSA. Either buttons, 'Accept' or 'Send to CSA' will be available depending on the User's security.

The screenshot shows a window titled "Select user for review" with a subtitle "Select User to Review Treatment/ Assessment Plan". It contains a "User ID:" dropdown menu, and labels for "Name:", "Program Description:", and "Level of User:", all with "None" as the value. At the bottom, there are three buttons: "Accept", "Send to CSA", and "Cancel". The "Accept" button is highlighted with a red box.

*'Select user for review' window for Plan Level 1 user view*

**Submitting Plans:** Submitting plans will also bring up a confirmation window. Click OK and the 'Select user for review' screen will appear allowing for the selection of a user to review the plan. Depending on the submitting user's plan level, there will be an option to choose another user at the agency by pulling the User ID menu down or to submit to CSA. Either buttons, 'Accept' or 'Send to CSA' will be available depending on the User's Plan Level security.

The screenshot shows a "Submit" window with the text "You are about to submit a Treatment Plan. Are you sure?". At the bottom, there are two buttons: "OK" and "Cancel".

*Submit confirmation window*

The screenshot shows a window titled "Select user for review" with a subtitle "Select User to Review Treatment/ Assessment Plan". It contains a "User ID:" dropdown menu with "Submit to CSA" selected, and labels for "Name:", "Program Description:", and "Level of User:", all with "None" as the value. At the bottom, there are three buttons: "Accept", "Send to CSA", and "Cancel". The "Send to CSA" button is highlighted with a red box.

*'Select user for review' window Plan Level 2 or 3 user*

## V. Plan Approval Window

The Plan Approval window is used for the viewing and reassignment of plans and assessments. This area is used to assist others in gaining access to documents in progress. If an assigned Care Manager is not available and a plan or assessment requires completion, the Plan Level 2 or Plan Level 3 user can locate the document on the Plan Approval screen and assign it to another user. Plans and assessments can be submitted to a Plan Level 2 or 3 user to submit to the CSA.

Plan/Plan type selection areas

Filtered Plans (all in progress documents at the agency)

My Plans (assigned to the logged-in user)

The screenshot shows the 'Plan Approval' window with the following sections:

- Plan/Plan type selection areas:** A top section with three 'Plan' checkboxes and a 'Plan Type' section with seven 'Plan Type' checkboxes.
- Filters:** A 'Doc Type' dropdown set to 'ALL', 'Assigned To' dropdown set to 'All Users - All', and date filters for 'Past Due', 'Due Today', and 'Due Tomorrow' (all checked). There are also 'Select All', 'Clear All', 'OR', 'FROM', and 'TO' date pickers.
- Filtered Plans (0):** A table with columns: PLAN, PLANTYPE, ASSIGNEDTO, RETURN HISTORY, YOUTH/CHILD, DUE DATE, REQUESTOR, AGENCY, DATESL. Below the table are 'Clear All' and 'Select All' buttons.
- My Plans (0):** A table with columns: PLAN, PLANTYPE, ASSIGNEDTO, YOUTH/CHILD, DUE DATE, REQUESTOR, AGENCY, DATESUBMI. Below the table are 'Assign' and 'Unassign' buttons.

At the top of the screen, users will find the Plan/Plan type selection areas. By default, these areas will only show the plans and assessments types that are currently in progress in the agency (they have not been submitted to the CSA).

Checking the boxes in the Plan section filters or populate the Plans Type section.

Checking the boxes in the Plan Type section will filter or populate the Filtered Plans section.

## Filtering Plan Approval

Examples of the Plan Approval screens for IIC/BA Providers.

The screenshot shows a 'Plan Approval' window with two main grids. The top grid has columns for 'Plan' and checkboxes for 'BA\_2', 'IIC\_2', and 'Assessment'. The bottom grid has columns for 'Plan Type' and checkboxes for 'BA\_2', 'BPS Asmt', 'BPS Asmt-1', and 'IIC\_2'. On the right side, there are several filtering controls: a 'Doc Type' dropdown menu (labeled 1) set to 'ALL'; three checkboxes for 'Past Due', 'Due Today', and 'Due Tomorrow' (labeled 2); a 'Program' dropdown menu (labeled 3); an 'Assigned To' dropdown menu (labeled 4) set to 'All Users - All'; and a 'Refresh' button (labeled 5). Below these controls are 'Select All', 'Clear All', and 'OR FROM: TO:' date pickers.

1. **Doc Type** menu gives the user the option to look at either Treatment Plans only, Assessments only, or All (plans and assessments). If the user makes a selection here, it will cause the Plan grid (to the left of the menu) to show only what is applicable and available to the user. For example, if the user were to select *ASMT*, or Assessments, the Plan grid would only show those Assessment types that are available for the user to select.
2. Next to this area are the check boxes for due dates and time frames. These time frames are associated with when the plan or assessment is due. If the user enters a time frame into the boxes here, they will be unable to select any of the other options listed above.
3. The user also has the option of choosing to look at the plans and assessments for a specific *Program*; this menu will only have more than one program available if the user's CYBER ID is associated with more than one program.
4. The **Assigned To** menu allows the logged in user to look for plans and assessments that are assigned to a specific user in their agency. Supervisors may use this menu to look for the plans and assessments that are currently in progress and are assigned to a user that is no longer with the agency (deactivated). Using this function, the Supervisor can locate the documents and reassign them to other users within the agency (including themselves).

*Note: Deactivated users will appear in the 'Assigned to' column until all work that was assigned to their ID has been assigned to other users (see [References for Welcome Page Features with High Level Access](#)).*

5. If the user is on the Plan Approval screen for an extended period, there is a possibility that new plans and assessments have been entered into the system but are not appearing on this screen (the grids will not automatically refresh). To see if new documents have been entered, clicking on the Refresh button will refresh the filter parameters, which will refresh the Filtered Plans grid.

Filtered Plans (20)						
PLAN	PLANTYPE	ASSIGNEDTO	RETURN HISTORY	YOUTH/CHILD	DUE DATE	REQUEST
BA_2	BA_2- Transferred					
IIC_2	IIC_2- Assigned					
IIC_2	IIC_2- Assigned					
IIC_2	IIC_2- Assigned					
IIC_2	IIC_2- Transferred					

Assign

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The Filtered Plans grid will show all plans and assessments (based upon the filters chosen above) that either have not been submitted to the CSA or that have been returned to the agency following CSA review. The grid will show the Plan and Plan Type, the status of the document, who may edit the document (Assigned To), the Name and CYBER ID of the youth, the Requestor (Author) of the document, and the due date (when applicable). Return History refers to whether the document has been returned by the CSA, the name of the CSA Reviewer that returned the document will appear here. This will be the most recent return; in order to see a full history, the user will need to open the document to see the full history (see the Review history button below).

## Assigning Documents

Users can assign a plan or assessment to themselves, even if it is currently assigned to another user. In order to assign a document to a user, the document must be selected (highlighted in blue) in the grid (by single clicking on the row, and then the user can click on the Assign button, below the grid. Once the plan or assessment has been assigned to a user, it will appear in the My Plans grid at the bottom of the window for that user. (Plans and assessments that have been submitted to the CSA will not appear on this screen.)

PLAN	PLANTYPE	ASSIGNEDTO	YOUTH/CHILD	DUE DATE	REQUESTOR	AGE
IIC_2	IIC_2- Assigned					PRI ▲
IIC_2	IIC_2- Assigned					PRI
IIC_2	IIC_2- Assigned					PRI
BPS Asmt	BPS Asmt - InReview					PRI ▼

In My Plans, double-clicking on a row (not a hyperlink) in this grid will open the document up to the user, who will be able to work on the document, return or transfer it to another user within the agency (if needed) or, submit it directly to the CSA with the proper Plan Level security.

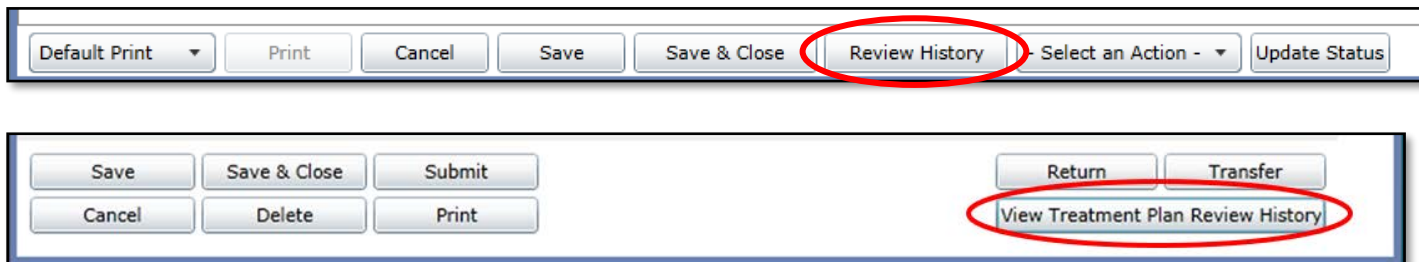
## Unassigning Documents

Users have the option of *unassigning* a plan or assessment from their own ID; doing this will show it in the Filtered Plans grid as being unassigned. This does not transfer the document to another user; if the logged in user is the author, the document will remain visible to them on the Treatment Plans and Assessments grid of the youth's record. When the document needs to be transferred to another user, the current owner of the document should go into the assessment or plan and, using the Transfer action button, assign it to another user within their agency for work or review.

Keep in mind that the assessment will be in read-only status to the author once it has been transferred to another user or submitted to the CSA. In order to make revisions to the document prior to it being submitted, it must be assigned to a specific user and only that user can make the revisions.

## VI. Review History

If a user needs to determine who currently owns an assessment or plan, or what the current status of the document is (In Progress, Approved, Returned), they can refer to **Review History** or **Treatment Plan Review History** button from within the plan or assessment.



In order to check the Review History, the user must first locate the document and open it. There is a Review History button at the bottom of each document that shows users the document's movement. The **Review History** button, when clicked, will display a history of who has been in possession of the document, as well as the current status of the document.

*Note: The Review History button can be clicked at any time; the user does not have to be assigned to the document, nor wait until the full document has loaded.*

Assessment Review History is shown below

FromUser	ToUser	Status	Date	Program
		Assigned	12/4/2019 9:49:50 AM	
		InProgress	11/27/2019 9:03:35 AM	

*BioPsycho Social Assessment Review History*

Treatment Plan Review History is shown below

FromUser	ToUser	Status	Date	Program
		Assigned	12/4/2019 9:34:11 AM	
		Assigned	12/4/2019 9:34:02 AM	
		Transferred	11/24/2019 9:02:01 AM	

*IIC\_2 - Intensive In Community Treatment Plan Review History*

The **Review History** window will show the document's history starting with the creator of the document on the bottom line of the grid, and may indicate who the assessment was transferred to as the document progresses. In the case of the assessment being submitted to the CSA, *Submitted* will be listed in the Status column and the Program name will be CSA.

The Status of the document may include:

- InProgress – an document is still in draft form with the provider
- In-review – a document is being reviewed internally
- Assigned – this document has been selected and assigned to a user
- Transferred – this document was selected and transferred to a user
- Returned – this document was returned to someone who was previously assigned to this document
- Submitted\* – an assessment was submitted to CSA and automatically approved
- Submitted to CSA – this document was submitted to CSA for review

- Approved – the document was reviewed by CSA and approved

The most recently recorded status will appear in the top row of the grid. The Date column will show the date and time of the status change. The Program column will indicate the name of the program to whom the users are associated.

\*Submitted is often the final status for assessments. Often assessments are reviewed in association with a submitted plan.

## Appendix A: Provider and Document Types

User Type	Assessment Types	Plan Types
Intensive In-Community (IIC)	BioPsycho Social Needs Assessment	IIC Treatment Plan BA Treatment Plan

## VII. References

PerformCare Training Web Page <http://www.performcarenj.org/provider/training.aspx>

See **General Trainings for All CSOC Providers** for these trainings:

Instructional Guide to Document Upload Functionality

- <https://www.performcarenj.org/pdf/provider/training/general-csoc/20190423-document-upload-functionality.pdf>

Instructional Guide to CYBER Face Sheet

- <http://www.performcarenj.org/pdf/provider/training/care-management-organization/cyber-face-sheet.pdf>

Instructional Guide for Welcome Page Features for CYBER Users with High-Level Access

- <http://www.performcarenj.org/pdf/provider/training/general-csoc/welcome-page-features-high-level-access.pdf>

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