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

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Instructional Guide to Role-Based Security

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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:

<u>Plan Level 1</u>   <u>Plan Level 2</u>   <u>Plan Level 3</u>

> *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.

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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.
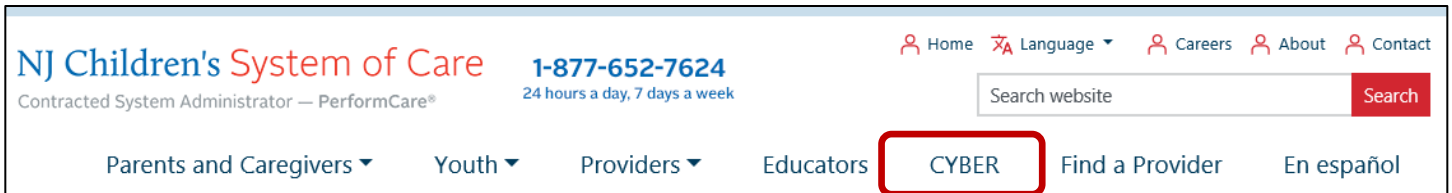
Each provider organization has at least two CYBER Security Administrators, and your agency's CYBER Security Administrators can set up a login and temporary password. Access will be based upon login type and security levels.

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.

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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)

- o 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.

- o 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.

- o 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.
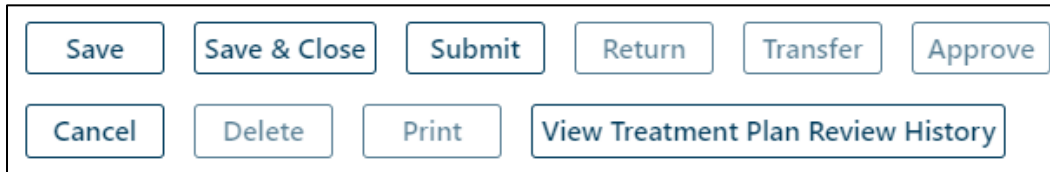
IV. Action Buttons

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.

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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.

Treatment Plans action button layout:

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 (Biopsychosocial Assessment, Strength and Needs, etc.)

> **The primary difference between 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.
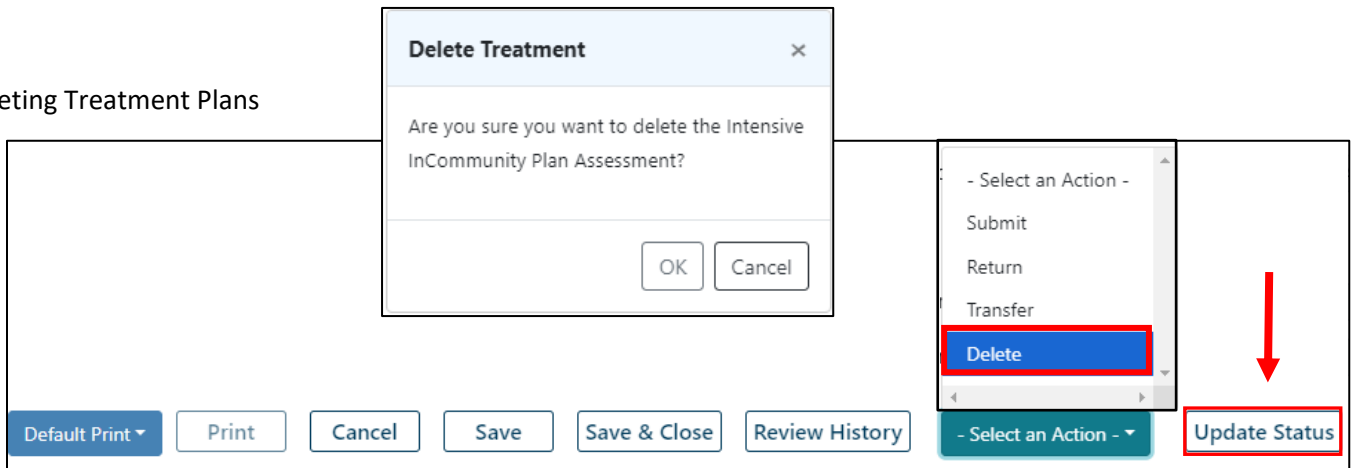
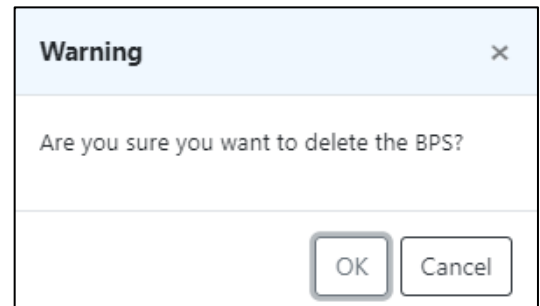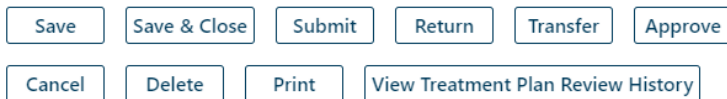

Select user for (action) window

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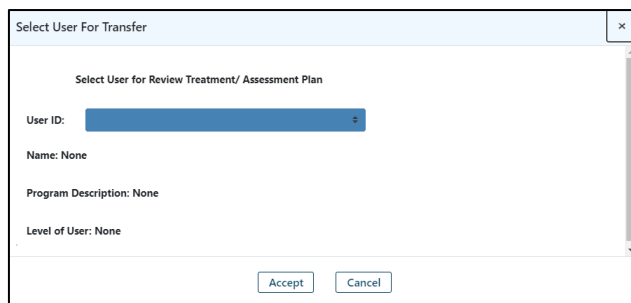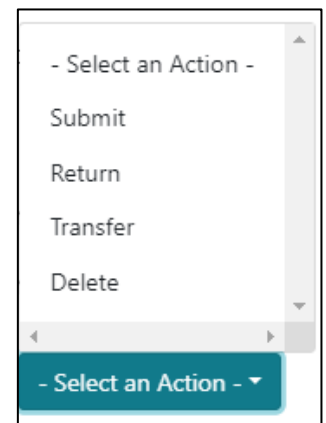
Delete Action

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.

Deleting Treatment Plans

Delete Treatment ✕

Are you sure you want to delete the Intensive InCommunity Plan Assessment?

OK | Cancel

- Select an Action -
Submit
Return
Transfer
Delete

| Default Print ▾ | Print | Cancel | Save | Save & Close | Review History | - Select an Action - ▾ | Update Status |

Deleting Assessments

| Save | Save & Close | Submit | Return | Transfer | Approve |
| Cancel | Delete | Print | View Treatment Plan Review History |

Warning ✕

Are you sure you want to delete the BPS?

OK | Cancel

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).

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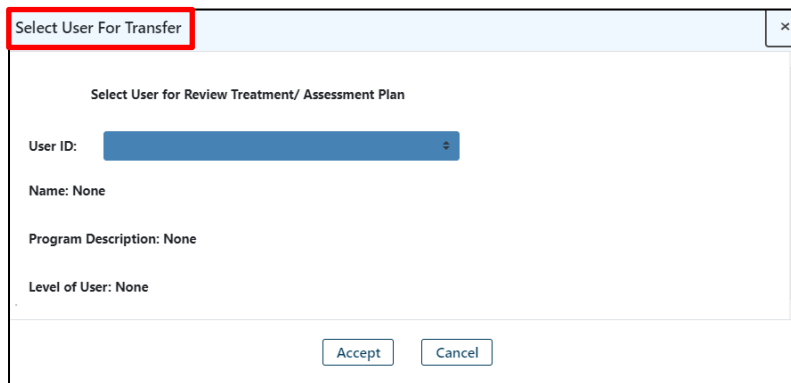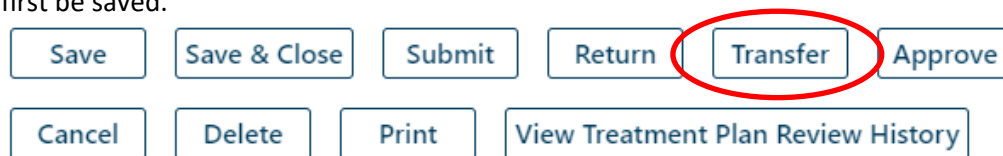
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Users (who have received returned documents) will be able to access the document on the Plan Approval window in the My Plans section.

- 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, if 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 a plan or assessment to any other user at their agency, but the plan or assessment must first be saved.

The Transfer action will bring up the Select User for (action) window. Selecting a User ID, the window will populate the Name, Program Description, and Level of User. The 'Accept' button will assign the document to the new user.

Users (who have received transferred documents) will be able to access the document on their 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, if 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.
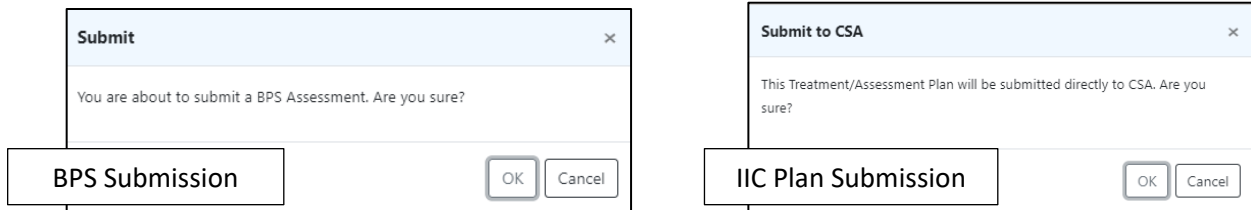
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Submit Action

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 Plans or Assessments: The Submit confirmation box will vary with the document type.
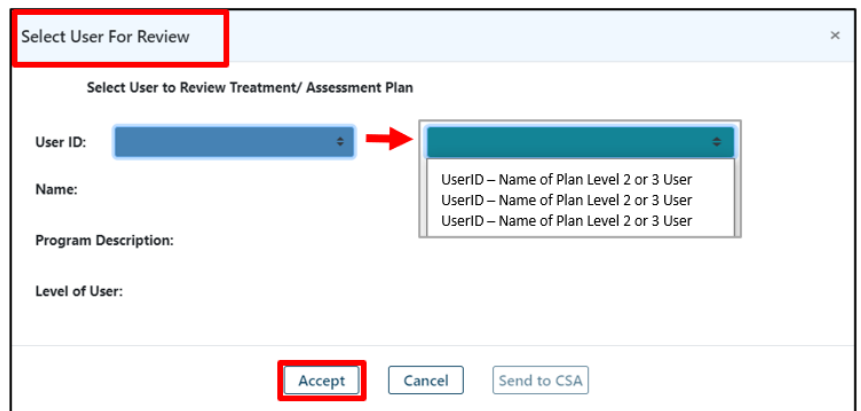
Submit	×
You are about to submit a BPS Assessment. Are you sure?	
	OK Cancel

BPS Submission

Submit to CSA	×
This Treatment/Assessment Plan will be submitted directly to CSA. Are you sure?	
	OK Cancel

IIC Plan Submission

Clicking the OK button will bring up the 'Select User for Review' window.
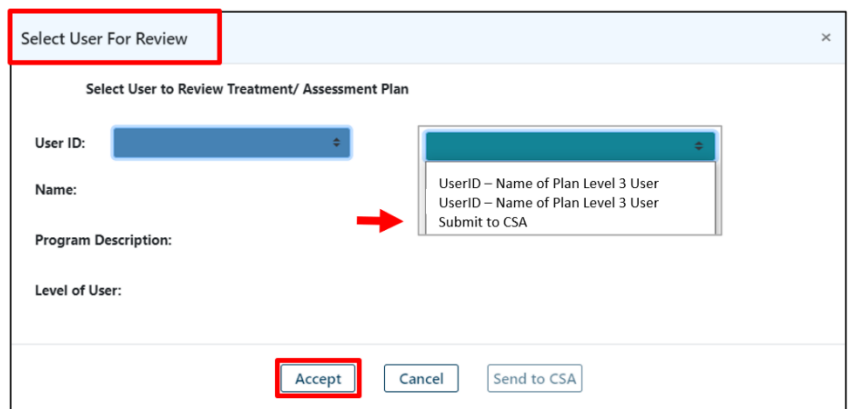
Submission and Plan Level Security

A user's plan level security will determine to whom they can submit a plan.

If the assigned user has *Plan Level 1* security, the user must submit to a Plan Level 2 or 3 user at the agency. The 'Accept' button will be available.

Select User For Review

Select User to Review Treatment/ Assessment Plan

User ID:

Name:

Program Description:

Level of User:

UserID – Name of Plan Level 2 or 3 User
UserID – Name of Plan Level 2 or 3 User
UserID – Name of Plan Level 2 or 3 User

Accept   Cancel   Send to CSA

If the user has *Plan Level 2* security, the user can only submit to a Plan Level 3 user or the CSA. The 'Accept button will be available.

Select User For Review

Select User to Review Treatment/ Assessment Plan

User ID:

Name:

Program Description:

Level of User:

UserID – Name of Plan Level 3 User
UserID – Name of Plan Level 3 User
Submit to CSA

Accept   Cancel   Send to CSA

If the user has *Plan Level 3* security, the user can <u>only submit to the CSA</u>. The 'Send to CSA' button will be available.

Select User For Review ✕

Select User to Review Treatment/ Assessment Plan

User ID: Submit to CSA ⬌ ⬅

Name: None

Program Description: None

Level of User: None

[Accept] [Cancel] [Send to CSA]

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.

Select a "Plan" to populate Plan Type.

Plan Approval ✕

	Plan		Plan		Plan	
☑	Assessment	☑	IIC_2	☐		
☐		☐		☐		

Doc Type
ALL ⬌
☑ Past Due
☑ Due Today
☑ Due Tomorrow
[Select All]
OR
FROM: MM/DD/YYYY 📅
[Clear All]
TO: MM/DD/YYYY 📅

Program ⬌
Assigned To
All Users – All ⬌
[Refresh]

Select a filtered "Plan Type" to populate Filtered Plans.

	Plan Type		Plan Type		Plan Type		Plan Type		Plan Type		Plan Type		Plan Type
☐	BPS Asmt	☐	IIC_2	☐		☐		☐		☐		☐	

[Clear All] [Select All]

Filtered Plans (0)

PLAN	PLANTYPE	ASSIGNEDTO	RETURN HISTORY	YOUTH/CHILD	DUEDATE	REQUESTOR	AGE
			No data to show				

Displayed "Filtered Plans" are not submitted to CSA (in progress, returned, transferred, etc., and can be assigned to others at the agency.

[Assign] [Clear Search]

My Plans (2) Double click on a treatment plan to review.

PLAN	PLANTYPE	ASSIGNEDTO	YOUTH/CHILD	DUEDATE	REQUESTOR	AGENCY
IIC_2	IIC_2- Assigned					
BPS Asmt	BPS AsmtIn Progress					

"My Plans" are documents assigned to the user.

[Unassign] [Clear Search]

At the top of the screen, users will find the Plan/Plan type selection areas. By default, these areas will only show the plan and assessment 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.

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Filtering Plan Approval

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

1. **Doc Type** The 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, the Plan grid (to the left of the menu) will filter to show the selection.

2. **Due Dates** The check boxes and date range are for due dates and time frames. These time frames are associated with the document's expected due date. If the user enters a date range into the boxes here, they will be unable to select any of the check boxes above.

3. **Program** allows the user to choose a specific *program or site*; this menu can have one or more programs if the user is open to the program(s).

4. **Assigned To** allows the user to look for documents that are assigned to a specific user in their agency. Supervisors may use this menu to look for documents 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 a document and reassign it to other active 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. **Refresh** 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 clear all selections and refresh the Plan Approval screen.

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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.)

In 'My Plans' section, double-clicking on a row (not a hyperlink) in this grid will open the document up to the assigned user, who can work on the document, return or transfer it to another user within the agency (if needed) or, submit it directly to the CSA for review/approval.

Unassigning Documents

Users have the ability to *unassign* a plan or assessment from their own ID; in the Filtered Plans grid it will show as 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. To revise to the document prior to it being submitted, it must be *assigned* to a specific user and only that user can make the revisions.

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VI. Review History

If a user needs to determine who is currently assigned to 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.

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 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.

Biopsychosocial Assessment Review History

IIC_2 - Intensive In-Community Treatment Plan Review History

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The **Review History** window will show the document's history starting with the author of the document on the bottom line of the grid and indicates who the document was transferred to. In the case of a document being submitted to the CSA, 'Submitted to CSA' 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.

Appendix A: Provider and Document Types

User Type	Assessment Types	Plan Types
Intensive In-Community (IIC)	Biopsychosocial Needs Assessment (BPS)	IIC Treatment Plan (IIC_2) BA Treatment Plan (BA_2)

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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