EI-Hub User Management Admin Guide

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Revision History

Version Number	Release Date	Author	Revision Summary
v0.1.0	12.30.2021	Paul Michael Ross	First Draft Internal Review
v0.2.0	1.10.2022	Paul Michael Ross	Second Draft Internal Review
v0.3.0	3.31.2022	Lauren Zelinsky Ryan White Paul Michael Ross	The third Draft Release; combines multiple authors, Internal Review, and Release to BEI for review.
v0.4.0	4.26.2022	Lauren Zelinsky Paul Michael Ross	Made edits per BEI's review
v0.5.0	06.20.2022	Lauren Zelinsky Paul Michael Ross	Made edits per BEI's review
v0.6.0	07.12.2022	Lauren Zelinsky Paul Michael Ross	Made edits per BEI's review (Appendix 1 section)
v0.7.0	08.15.2023	Lauren Zelinsky	Made edits based on updates to user role configurations
v0.7.1	09.15.2023	Lauren Zelinsky	Made edits based on updates to user role configurations

Unit 1.   Introduction

The EI-Hub Landing Page houses the components of the system; this includes:
- Case Management module
- Service Logging module
- Billing module (formerly EI Billing)
- Learning Management System (LMS)
- Knowledge Base
- User Management

User roles determine user access to the EI-Hub and its components.

This document introduces the EI-Hub user roles, compares them to NYEIS user roles, and provides detailed descriptions of EI-Hub Case Management component roles.

Unit 2.   About EI-Hub User Roles

There are some essential features of EI-Hub user roles:
- Each EI-Hub component has a unique set of user roles.
- The Case Management Role serves as the Master role for a user; access to other components is tied to the Case Management Role.
- Users can have multiple roles for a component, if appropriate.
- Users will easily access all components and roles assigned to them through the EI-Hub Landing Page.
- Provider Agencies and Municipalities will manage their staff's user roles and access through the EI-Hub Landing Page.
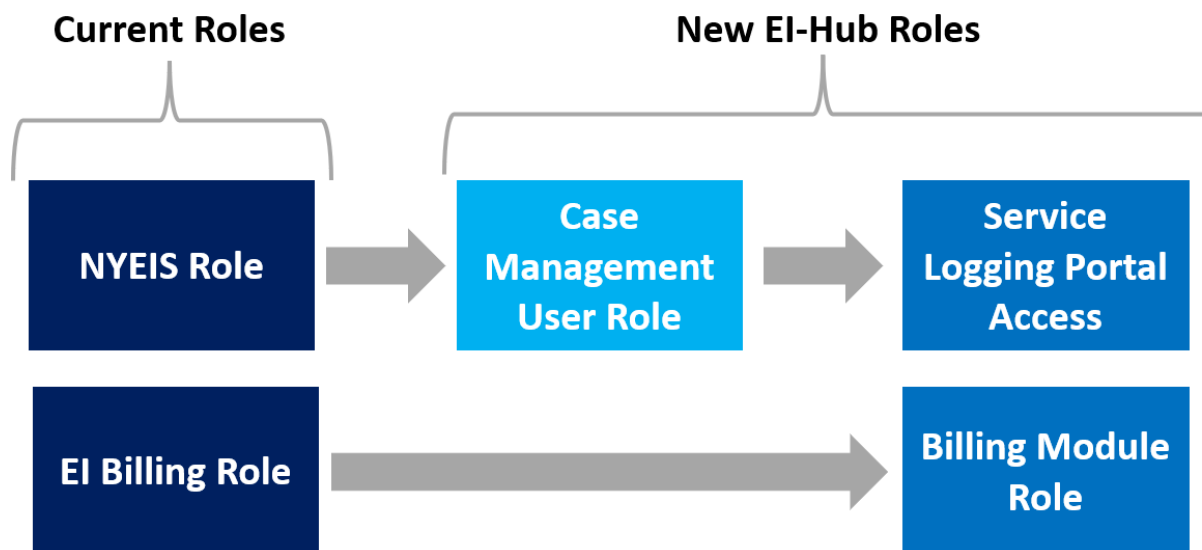
Unit 3.   NYEIS and EI-Hub User Roles Diagram

The diagram shows a high-level overview of how the user roles compare in this guide. The NYEIS and EI Billing roles are current; all other roles are new for EI-Hub.

Diagram Color Key:
- Current Roles:
- New EI-Hub Roles:
- New EI-Hub Master Roles:

Because the EI-Hub solution has several components (and roles), the Case Management role is the deciding role user. Meaning, that access to the Service Logging is tied to the Case Management Role, and users will gain access to these EI-Hub components based on their Case Management user role. For example, if granted access to Service Logging, a rendering provider with a Rendering Provider Case Management role will see the Rendering Provider Portal in Service Logging.

EI Billing Roles will not change in the EI-Hub. Access is determined at the county or provider level, and is not determined by a user's Case Management user role.

Please note, there is no access restriction for the Learning Management System (LMS); however, upon a user's initial login, they will reach a separate landing page where they will be asked to indicate their Case Management user role(s).

Unit 4.   NYEIS to EI-Hub Provider User Roles Crosswalk

The table below shows the NYEIS Provider User Roles and how they compare to the EI-Hub Provider User Roles:

Current Role	New (EI-Hub) Roles	
NYEIS Role	**Case Management Role**	**Service Logging Portal Access**
PROV All (Universal Provider)	UniversalProvNY (Super User)	Billing Provider
PROV Service Director	ProvDataEntryNY	Billing Provider
PROV Service Manager (Provider Services Manager)	ProvDataEntryNY	Billing Provider
PROV All Fiscal (Provider All Fiscal)	ProvFiscalMgrNY	Billing Provider
PROV Fiscal Admin (Provider Fiscal Administrator)	ProvFiscalMgrNY	Billing Provider
PROV Fiscal Manager (Provider Fiscal Manager)	ProvFiscalMgrNY	Billing Provider
PROV All Program (Provider All Program)	ProvDataEntryNY	Provider QA
PROV QA (Provider Quality Assurance)	ProvQA NY	Provider QA
PROV Eval (Provider Evaluator)	RenderProvNY	Rendering
PROV Render Prov Staff (Provider Rendering Provider)	RenderProvNY and JrRenderProvNY	Rendering
PROV Program Data Entry (Provider Data Entry)	ProvDataEntryNY	Clerical
PROV Service Coordinator (Provider Service Coordinator)	ISC/OSC NY	Service Coordinator
PROV All (Universal Provider)	InProviderNY	Billing Provider, *Independent providers will also need a RenderProvNY Case Management user role to access the Rendering portal*

Unit 5.   NYEIS to EI-Hub Municipality User Roles Crosswalk

The table below shows the NYEIS Municipality User Roles and how they compare to the EI-Hub Municipality User Roles:

Current Role	New (EI-Hub) Roles	
NYEIS Role	**Case Management Role**	**Service Logging Portal Access**
MUNI All (Universal Municipal)	MuniProgAllNY (Superuser)	County
MUNI Program User Admin	MuniProgAllNY (Superuser)	County
MUNI All Program	MuniProgAllNY (Superuser)	County
MUNI All Fiscal (Municipal All Fiscal)	MuniFiscalAllNY	County
MUNI Fiscal Admin	MuniFiscalAllNY	County
MUNI Fiscal Manager	MuniFiscalAllNY	County
MUNI EIOD (EIO/D)	EIO/D NY	County
Muni EIO/D – SC	EIO/D NY	County
MUNI EIO	EIO/D NY	County
MUNI Fiscal Data Entry	MuniDataEntryNY	County
MUNI Program Data Entry	MuniDataEntryNY	County
MUNI Intake Staff	MuniDataEntryNY	County
MUNI Service Coord	ISC/OSC NY	Service Coordinator
MUNI QA	MuniViewOnlyNY	County
MUNI At-Risk	MuniAtRiskMgtNY	County
N/A	*MuniTransferNY*	N/A - No Access
MUNI IT System Admin	*N/A - this is a Hub Role*	*N/A - this is a Hub Role*

Unit 6. Complete EI-Hub User Roles Crosswalk

☞The table below shows the complete list of EI-Hub user roles, including EI Billing:

Case Management Role	Service Logging Portal Access	EI Billing Role
EIO/D NY	County	County
InProviderNY	Billing Provider *Independent providers will also need a RenderProvNY Case Management user role to access the Rendering portal*	Provider
ISC/OSC NY **This user may be a municipal or agency employee*	Service Coordinator	No Access
JrRenderProvNY	Rendering	No Access
MuniAtRiskMgtNY	County	No Access or County
MuniDataEntryNY	County	No Access or County
MuniFiscalAllNY	County	County
MuniProgAllNY (Superuser)	County *View service log for children and release claims for billing. Access does not mean users will need to access this component*	County *Not all users with the ability to access EI-Billing will use the component*
MuniTransferNY	No Access	No Access
MuniViewOnlyNY	County	County
ProvDataEntryNY	Clerical *Perform data entry tasks for providers and view reports on services*	No Access
ProvFiscalMgrNY	Billing Provider	Provider
ProvQA NY	Provider QA *View service log for children and release claims to billing*	Provider
RenderProvNY	Rendering	No Access

Case Management Role	Service Logging Portal Access	EI Billing Role
	Add log for services, edit calendar, and view reports	
UniversalProvNY	Billing Provider *View service log for children and release claims to billing*	Provider *Not all users with the ability to access EI-Billing will use the module*

Unit 7. Case Management Roles and Descriptions

☝The table below shows all EI-Hub Case Management Roles and descriptions. Case Management roles are the Master roles that determine access to other EI-Hub components.

Case Management Role Name	General Description	Detailed Activities/Access Description
EIO/D NY	Individual(s) designated by the Early Intervention Official (EIO) is responsible for the regulatory tasks of the EIO.	This user can perform all other responsibilities of an EIO/D, including: • Create referrals, including referrals to At-Risk • View a child's insurance information • Designate the ISC/OSC assignment • Approve Eligibility determination • Approve service authorizations, including waivers: • Evaluations • EI Services, including Transportation and Respite • Approve submitted and amended IFSPs • Exit a child from the Early Intervention Program (EIP) • Initiate a transfer to another county • View limited Provider (*Agency & Independent Providers*) information • View limited Therapist information • View reports under the Child menu
InProviderNY	The role is for individual providers. This user can perform all provider programs, services, and fiscal activities.	This user can: • Accept/Reject assignments and/or designate Therapist assignments for: o Evaluations o EI Services • Enter Evaluation outcomes

Case Management Role Name	General Description	Detailed Activities/Access Description
		• Enter Eligibility determination for EIO/D approval • Review/Resubmit Evaluations and/or Eligibility determinations that were rejected as incomplete and/or need additional information • Submit waiver requests • View the child's insurance coverage information • Add and view attachments • Can update limited information, including license and credentials, within the Provider and Therapist records • Submit amendments and re-approval requests • View Child, Provider, and Therapist reports • Access to the 837-file loader, if designated as a third-party biller • Access to the Billing to State menu, if designed as an EI-Hub Service Logging user

ISC/OSC NY
(Initial Service Coordinator/Ongoing Service Coordinator)
 	
**This user may be a municipal or agency employee
	Individual(s) who deliver EI service coordination services.	This user can:
		
		• View/Edit entire child record for children assigned to caseload
		• Create SAs for EIO/D approval
		• May assign:
		  • Evaluation Agency of family choice
		  • Agency of family choice for delivery of EI services
		• May request:
		  • Transportation or Respite services
		  • Waivers for evaluations or EI services
		• Create interim IFSPs for EIO/D for approval
		• Copy / Amend IFSPs for EIO/D approval
		• Create transition information
		• Exit the child from the EIP
		• Initiate transfer to another county
		• View Child, Provider, and Therapist reports

JrRenderProvNY / RenderProvNY	Individual(s) who deliver authorized EI services to an eligible child.	This user can:
		
		• View information about the children assigned to their caseload
		• Accept/reject assignments for:
		  • Evaluations
		  • EI services
		• Enter evaluations outcomes
		• Enter Eligibility determination for EIO/D approval

Case Management Role Name	General Description	Detailed Activities/Access Description
		• Upload attachments for children assigned to their caseload • Request wavier(s) for Evaluations and EI services • View their personal information *(Therapist information)*
MuniAtRiskMgtNY	The role of this user is to enter and maintain child records for children identified at risk for developmental delay.	This user can: • Monitor child status in at-risk track • Access children's information, limited edit rights • Exit/Close children from at-risk track
MuniDataEntryNY	Individual(s) responsible for the intake and management of children birth to age 3.	This user can: • Create new child records • Enter referral information into the system • View/Edit most panels in a child's record, except the Eligibility tab (view only) • Designate the EIO/D assignment • Upload attachments • View Child, Provider, and Therapist reports
MuniFiscalAllNY	The individual is responsible for high-level oversight of the local Early Intervention Program's (EIP) fiscal activities. The individual is responsible for the day-to-day implementation of the fiscal activities and ensuring fiscal policies are followed.	This user can: • View child records within the county • View fiscal reports: • Billing Rejection • Unbilled Attendance • Child Info and Auth • 271 Response reports • View Provider and Therapist reports
MuniProgAllNY (Superuser)	The individual responsible for oversight of the local Early Intervention Program (EIP), including programmatic and fiscal activities (e.g., policies are in place and utilized). It is the highest level of	This user can: • View/Edit all child records within the county • May assume actions of EIO/D and/or ISC/OSC users, with some limitations within the Evaluations and Eligibility tabs. • Create new child records • Designate EIO/D • View Child, Provider, and Therapist reports

Case Management Role Name	General Description	Detailed Activities/Access Description
	access for a municipality. Individual(s) designated by the Early Intervention Official (EIO) is responsible for the regulatory tasks of the EIO.	
MuniTransferNY	This role has statewide view access to the child records to initiate transfer requests to receive.	This user can: • Request transfer of a child from another county • Approve transfer of children to other counties • Accept transfer children from other counties • View limited child information **NOTE:** A State Administrator must assign this role. For more information, In addition, the user assigned the transfer role cannot be a Role Administrator.
MuniViewOnlyNY	This role is for users who require view-only access to municipal information.	This user has view-only rights. This user can: • View all child records at the county level • View Provider and Billing reports

ProvDataEntryNY	This individual is responsible for all data entry for their employer. This user enters data from a hard copy as directed by the Fiscal Manager or Universal Provider.	This user can:
		
		 • View entire child record for children assigned to agency/county
		 • Edit limited child and family information
		 • Create SAs for EIO/D approval
		 • May assign:
		   • ISC for initial service coordination
		   • Rendering provider for delivery of EI services
		 • May request:
		   • Transportation or Respite services
		   • Waivers for evaluations or EI services
		 • Enter Evaluation and Eligibility information from a rendering or evaluating provider
		 • Enter IFSP information from a rendering or evaluating provider
		 • View Child, Provider, and Therapist reports
		 • Can update limited information, including license and credentials, within the Provider and Therapist records

Case Management Role Name	General Description	Detailed Activities/Access Description
		• Access to the 837-file loader, if designated as a third-party biller • Access to the Billing to State menu, if designed as an EI-Hub Service Logging user • Upload attachments
ProvFiscalMgrNY	The individual is responsible for the day-to-day implementation of the local EIP's fiscal activities (e.g., following specific fiscal policies, invoices and claims processed, providers paid, etc.).	This user can: • View entire child records for children assigned to an agency • Access to the 837-file loader, if designated as a third-party biller • Access to the Billing to State menu, if designed as an EI-Hub Service Logging user • View Provider and Therapist reports
ProvQA NY	This role is for users that require view-only access to provider information.	This user can: • View entire child records for children assigned to an agency • View Provider and Therapist reports

UniversalProvNY (Superuser)	This role can complete every function for the provider. Therefore, it is the highest level of access for the organization.
	
	**More than one individual in the same agency can be assigned this user role
		This user can:
		
		• View entire child record for children assigned to agency/county
		• Accept/Reject assignments and/or designate Therapist assignments (rendering provider) for:
		  • Initial Service Coordination
		  • Evaluations
		  • EI Services
		• Enter Evaluation outcomes
		• Enter Eligibility determination for EIO/D approval
		• Review/Resubmit Evaluations and/or Eligibility determinations that were rejected as incomplete and/or need additional information Submit waiver requests
		• Add and view attachments
		• Can update limited information, including license and credentials, within the Provider and Therapist records
		• Submit amendments and re-approval requests
		• View Child, Provider, and Therapist reports
		• Access to the 837-file loader, if designated as a third-party biller

Case Management Role Name	General Description	Detailed Activities/Access Description
		• Access to the Billing to State menu, if designed as an EI-Hub Service Logging user

Unit 8.   User Account Types

The EI-Hub has two *User Account types*, User or Role Administrator. Account Type differs from a User Role as it determines whether an individual has administrative rights to edit other users' access to the EI-Hub modules.

Users with a Role Administrator account type have administrative rights and are responsible for setting up and maintaining all the individual user role accounts for their entity. This role is typically held by an individual(s) in administrative leadership for a county/agency or by an independent provider.

To view your account type, visit the '**My Profile**' section on the EI-Hub Landing Page. Your designated account type will be highlighted in purple under the '**Type**' section (shown below). You do not have a Role Administrator designation if 'User' is highlighted in purple. If you are a Role Administrator, one of the two types will be highlighted in purple:

- County Role Administrators (**AdminCounty**)
- Agency Role Administrators (**AdminAgency**)

EI-HUB ACCOUNT TYPE	DESCRIPTION	ADDITIONAL DETAILS
User	User – Given to general user no ability to access Maintenance, User Management	Initially, all user ids have an EI-Hub type of user.
AdminCounty	Given to County – Access to User Management • A county admin is only able to	Assigned to an individual in the county that will be the Administrator of all users within their county. Each county will have an AdminCounty user. This user can configure

EI-HUB ACCOUNT TYPE	DESCRIPTION	ADDITIONAL DETAILS
	manage and see their users.	user roles for the Case Management, EI Billing, and Service Logging components.
AdminAgency	Given to Agency – Access to User Management • An agency admin is only able to manage and see their users.	Assigned to an individual in the agency who will be the Administrator of all users within their agency. You can configure user roles for the case management, EI billing, and service logging components.
AdminState	Given to State – Access to User Management • A state admin can manage and see all users throughout the State.	Assigned to an individual at a state level who will be the Administrator of all users at the state level. You can configure user roles for the Case Management, EI Billing, and Service Logging components.
AcctAdmin	Given PCG Employees Access to view and edit all screens • Acct Admin/PCG users can see the roles/modules without editing them to work on an issue.	PCG has overall administrative rights over all administrators/users.

Unit 9.   User Login (EI-Hub)

The EI-Hub application resides in the Health Commerce System (HCS) behind the HCS firewall, providing an additional security level. This unit explains how to log in to the HCS system and access the EI-Hub Landing Page.

9.1   Add New User
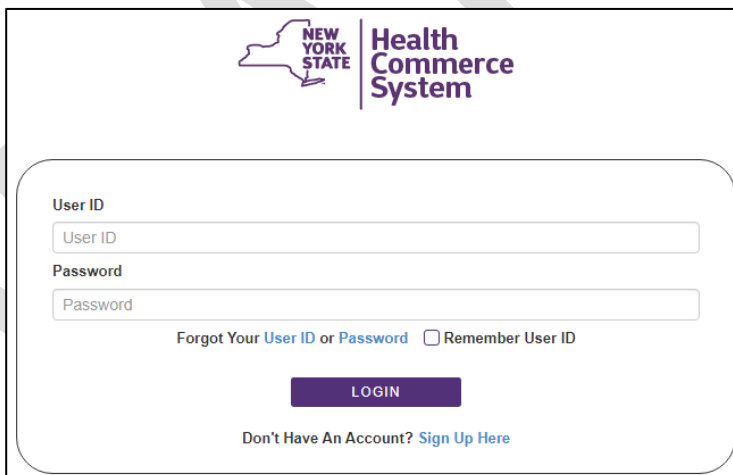
When adding a new user, the individual must first obtain a Health Commerce System (HCS) account. For instructions on how to obtain an HCS account, please reference **Appendix 1**.

9.2   Signing in with an HCS Account

To log onto the HCS system, users must have an active HCS account. However, an individual only needs one HCS account (even if they work for multiple agencies). To create and register an HCS account, please see Appendix 1.

Step / Action
1. Access **(HCS).**
2. Next, log in with your HCS **User ID** and **Password** and select/click the **LOGIN** button (shown below).

3. Select the **EI-Hub application** hyperlink (currently not shown in the image below) under the **My Applications** in the left pane.

4. The EI-Hub Landing Page appears after successfully logging into the HCS (below).

9.3 First time accessing the EI-Hub Portal

☝The first time you access the EI-Hub portal landing page, you must agree to the New York State Department of Health Bureau of Early Intervention Data System Terms of Use and User Agreement. After reading the terms and conditions, select/click the **checkmark** (radio button) and **Confirm** buttons.
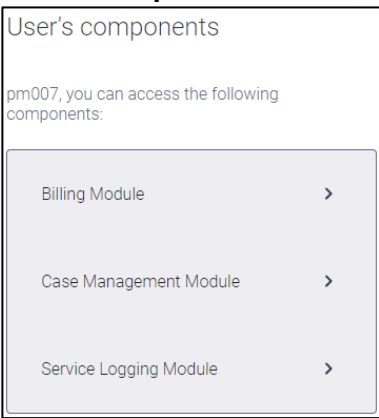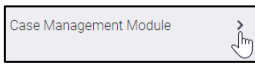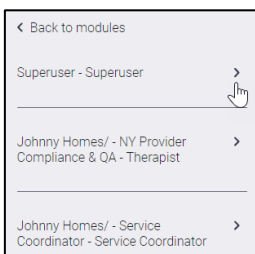
Unit 10. Navigation

10.1 EI-Hub Landing Page (Homepage)

The EI-Hub Landing page is the introductory page of the EI-Hub and serves as a table of contents for the site. From the EI-Hub Landing page, users can access the EI-Hub components, view system alerts and news, and update account information.
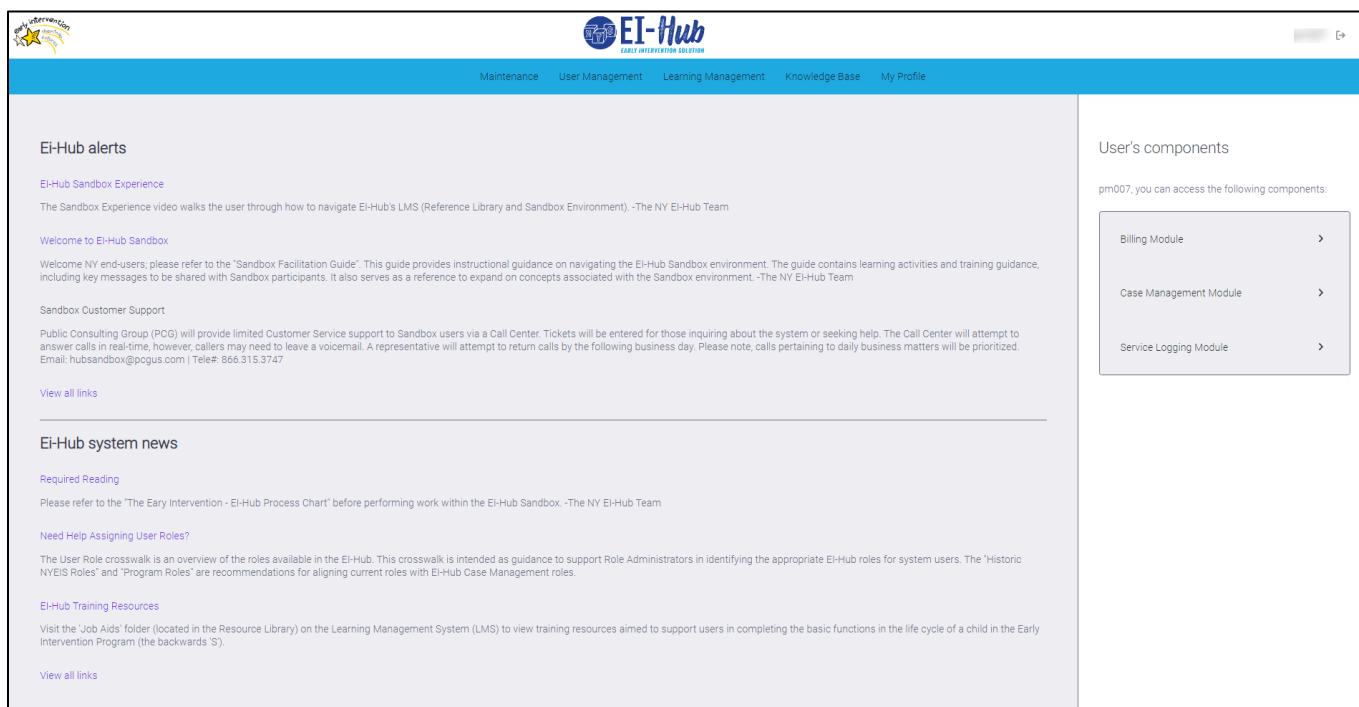
ITEM	DESCRIPTION
EI-Hub Alerts 	To access EI-Hub Alerts, Select/click the **View all links**. When clicked/selected, the Alerts page appears.
EI-Hub System News 	Select/click the **View all links** to access EI-Hub System News. When clicked/selected, the News page appears.

ITEM	DESCRIPTION
User'' Components Menu User's components pm007, you can access the following components: Billing Module > Case Management Module > Service Logging Module >	Select/click the appropriate application module to access El-Hub User's Components. For example, if you want to access the Case Management Module, the steps are as follows: Case Management Module > Select Case Management Module. ‹ Back to modules Superuser - Superuser > Johnny Homes/ - NY Provider > Compliance & QA - Therapist Johnny Homes/ - Service > Coordinator - Service Coordinator Select the appropriate user role. ⓘ**You can set up a user with multiple roles for the same agency. For example, a "Superuser" role reflects permissions within the El-Hub Case Management module.**

10.1.1   Web Site Header Section

The Header section is the top part of this website containing the logo. The header is the region at the top of the page that stays constant and visible to users.
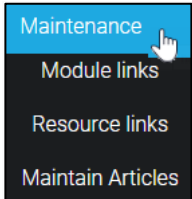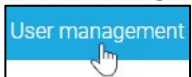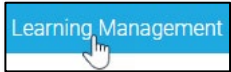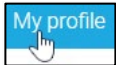
MENU ITEM	DESCRIPTION
El-Hub Icon	Clicking/selecting returns you to the El-Hub Home/landing page.
El-Hub system logo	El-Hub system logo; this logo is for visual purposes only.
Sign Out Icon	Clicking/selecting this icon signs you out of the El-Hub.

10.1.2   Menu Bar

☝Links in the Menu Bar navigate users to a specific section of the EI-Hub. What appears in the menu bar will vary based on the user's EI-Hub account type.

| Maintenance | User Management | Learning Management | Knowledge Base | My Profile |

MENU ITEM	DESCRIPTION
Maintenance (Main menu) Maintenance Module links Resource links Maintain Articles	The 'Maintenance' main menu has three (3) sub-menu items: Module Links, Resource Links, and Maintain Articles. We will discuss these individual sub-menus items in this document. ⓘ **This option is only visible to Role Administrators. Only Role Administrators with an 'AdminAcct' or 'AdminState' account type can access the links.** **For more information on this menu option, please see <u>Appendix 2</u>.**
User Management User management	The User Management section permits users with administrative credentials to view and edit user permissions within the EI-Hub and any connected modules. ⓘ**This option is only visible and accessible to Role Administrators.** **For more information on this menu option, please see <u>Section 11.1 – User Management.</u>**
Learning Management Learning Management	The Learning Management System (LMS) is accessible to all EI Hub users. The LMS contains EI-Hub-specific training resources to support users in completing the steps of the 'backward S' and other functions in the EI-Hub. Most training resources are housed in the **Resource Library** on the LMS. Users may repeat the training as needed. **For more information on this menu option, please see <u>Section 11.2 Learning Management.</u>**
Knowledge Base Knowledge base	The EI Billing Knowledge Base (KB) Portal provides access to Knowledge Base Articles and allows users to find answers to common questions related specifically to billing matters. **For more information on this menu option, please see <u>Section 11.3 Knowledge Base.</u>**
My Profile My profile	The My Profile page allows site users to view/modify their EI-Hub user profile. **For more information on this menu option, please see <u>Section 11.4, My Profile.</u>**

10.1.3   Web Page Footer Section

👊The footer is at the bottom of the EI-Hub Landing Page, consistent from page to page. This area links the Terms & Conditions, Privacy Policy, and Cookies Policy.

PUBLIC	2022 PCG Human Services		Terms&Conditions Privacy policy Cookies policy

Unit 11.   Menu Items

11.1   User Management

👊Users with **Role Administrator** account types (AdminCounty, AdminAgency, and AdminState) access this screen to view and edit user permissions within the EI-Hub and any connected modules. Uses for this menu option include assigning and/or changing user roles and user access.

11.1.1   Search Field

Use the search text field ("Input phrase for search..") to enter a username and click the **Search button** to search for a user's name (example below).
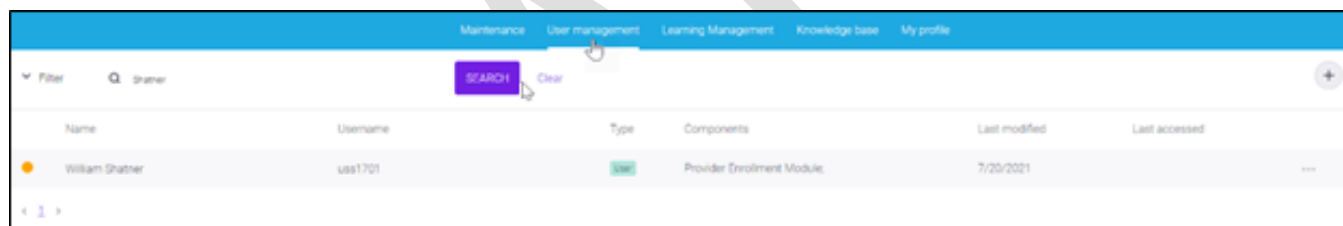
COLUMN	DESCRIPTION
Name	This column displays the user's first and last name.
Username	This column displays the person's username (HCS ID) for accessing the EI-Hub Landing Page.
Type	This column displays the user (person) access type (User, AdminCounty, AdminAgency, AdminState, and AdminAcct).
Components	This column displays the user (person) modules within the EI-Hub.
Last Modified	This column displays the date the user's account/role was last modified.
Last Accessed	This column displays the date the user's account/role was last accessed.

11.1.1.1   Search Filter Options

👊Filter Options allow administrators to apply sets of applied filters to narrow their search. You can categorize multiple applied filters with varying configurations. The available filter options will appear after clicking/selecting the filter button.

FILTER / STATUS / DROP-DOWN SELECTION	DESCRIPTION
Filter 	Select/click the Filter drop-down arrow to search for specific statewide users. When clicked/selected, the following criteria appear Type, Component, Role, and Status (shown above).
Type	Select/click one or all three (6) label buttons that apply to your criteria. An example below shows two choices; when clicked/selected, the label buttons turn color (purple).
Component	Select/click the drop-down and select one of the four (4) components/modules from the list.

FILTER / STATUS / DROP-DOWN SELECTION	DESCRIPTION
Account Type	Select/click the drop-down and choose one or more appropriate types from the list. 📝**Please note that the following 'Type' selections are available based on the 'Component' selection (examples below)**

FILTER / STATUS / DROP-DOWN SELECTION	DESCRIPTION
Role	Select/click the drop-down and choose one or more appropriate roles from the list. 📝**Please note that the following 'Role' selections are available based on the 'Component' and 'Type' selections (examples below). The User must select an account type first, and then the available roles will be available for selection.** ![Component: Billing Module, Type: Agency/Provider, Role: Select option — PROVIDER — Press enter to select] ![Component: Billing Module, Type: County/SPOE, Role: Select option — COUNTY — Press enter to select] ![Component: Billing Module, Type: Office, Role: Select option — PROVIDER-EM — Press enter to select] ![Component: Billing Module, Type: PCG, Role: Select option — OFFICE — Press enter to select] ![Component: Billing Module, Type: State, Role: Select option — NYSDOH — Press enter to select]

FILTER / STATUS / DROP-DOWN SELECTION	DESCRIPTION

FILTER / STATUS / DROP-DOWN SELECTION	DESCRIPTION

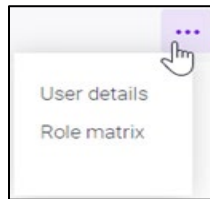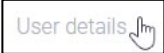| FILTER / STATUS / DROP-DOWN SELECTION	DESCRIPTION
Status	Select/click one or all three (3) Status label buttons that apply to your criteria to search users by status. ⓘ**Active, Disabled, and Deleted are the only viewable options for account admins.** Status : (Active) Disabled Deleted • Indicated by a green dot to the left of the user's name. 🟢 Status : Active (Disabled) Deleted • Indicated by an orange dot to the left of the user's name. 🔴 Status : Active Disabled (Deleted) • Indicated by a black dot to the left of the user's name. ⚫
Input phrase for search | Search | Clear Q Input phrase for search... SEARCH Clear	**Step / Action** 1. Select/click in this text search field to narrow your search, such as typing in a user's name. 2. Select/click the **Search** button. When clicked/selected, the application lists the results. 3. To clear results (retrieved data), select/click the **Clear** button.

11.1.2   User Management Menu Options (Ellipse button)

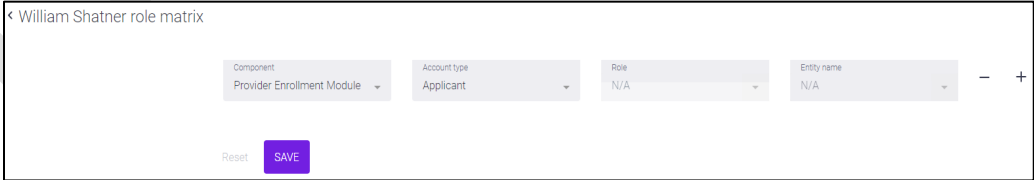Users with a **Role Administrative** account type (AdminCounty, AdminAgency, and AdminState) will access the **User details** option or **Role matrix** option to edit various parts of a user's account.

- Edit a user's name, email address, and phone is under **User details**.
- Edit a user's access to the El-Hub components under **Role Matrix**.

Select/click the Ellipse (···) button to access these menu options, as shown below.

MENU OPTION	DESCRIPTION
User Details User details	To view/edit (limited) an existing user's detail, Select/click the ellipsis (…) button adjacent far-right to a user record/row and select **User details** from the drop-down list. When clicked/selected, the Edit page appears (example below).

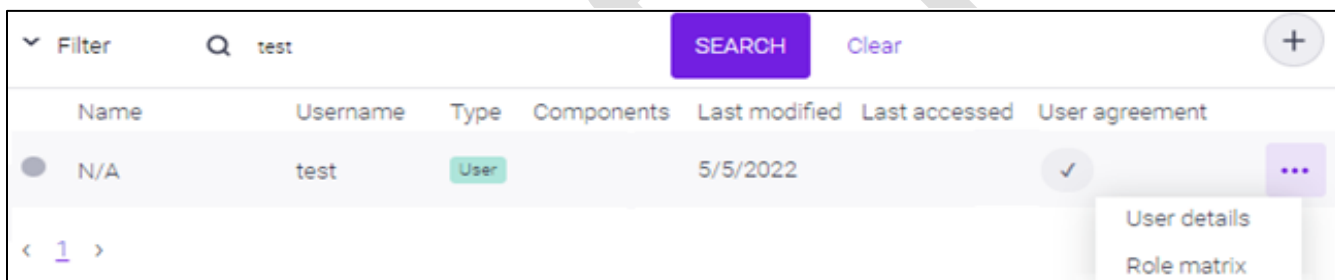| MENU OPTION	DESCRIPTION
	<table><tr><th>FIELD</th><th>DESCRIPTION</th></tr><tr><td>Username</td><td>This read-only field displays the username; this information will come from Health Commerce System (HCS).</td></tr><tr><td>First Name</td><td>This field is editable and displays the user's first name; this information will initially come from HCS.</td></tr><tr><td>Last Name</td><td>This field is editable and displays the user's last name; this information will initially come from HCS.</td></tr><tr><td>Email</td><td>This field is editable and displays the user's email address; this information will initially come from HCS.</td></tr><tr><td>Phone Number</td><td>This field is editable and displays the user's telephone number; this information will initially come from HCS.</td></tr><tr><td>Type</td><td>Editable field and determines a user's EI-Hub type (User or Role Administrator).</td></tr><tr><td>Last Modified</td><td>This read-only field displays the date the user's account/role was last modified.</td></tr><tr><td>Reason for Disabling</td><td>This read-only field displays the reason a system user's account was disabled. To populate this field, an agency or county administrator (AdminAgency or AdminCounty) to contact BEI.</td></tr></table> <table><tr><th>BUTTON</th><th>DESCRIPTION</th></tr><tr><td>Reset Reset</td><td>To cancel any edits made, Select/click this button. When clicked/selected, the Edit page restores the original data.</td></tr><tr><td>Save SAVE</td><td>Select/click this button to save your edits on the Edit page. When clicked/selected, the User Management page appears.</td></tr></table>
Role Matrix Role matrix	To view/edit an existing user's role matrix, Select/click the ellipsis (**…**) button adjacent far-right to a user record/row and select **Role matrix** from the drop-down list. When clicked/selected, the matrix page appears (example below). For information on how to use the Role Matrix to configure a user's access, please reference section **11.1.3 - Configuring User's Access in the Role Matrix**.

11.1.3   Configuring User's Access in the Role Matrix

Users with a **Role Administrative** account type will use the Role Matrix to view/edit an existing user's El-Hub account.

*(i)***Individuals that can update an existing user's El-Hub account must have the following El-Hub account type and Case Management user role:**

- AdminCounty/MuniProgAllNY/UniversalProvNY
- AdminAgency/UniversalProvNY
- AdminAgency/InProviderNY
- AdminState/BEIAdminNY

After searching and locating the appropriate user, select/click the ellipsis (three dots) to the right of the user's account information and select the Role Matrix option from the drop-down menu.

∨ Filter	Q test			SEARCH	Clear		+
Name	Username	Type	Components	Last modified	Last accessed	User agreement	
● N/A	test	User		5/5/2022		✓	•••
						User details	
‹ 1 ›						Role matrix	
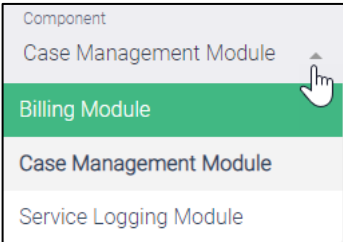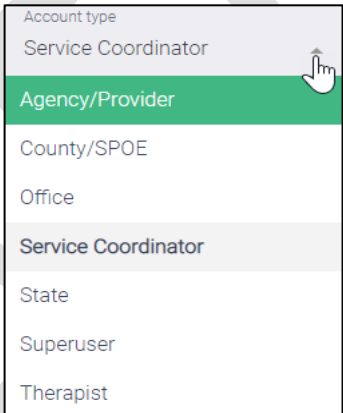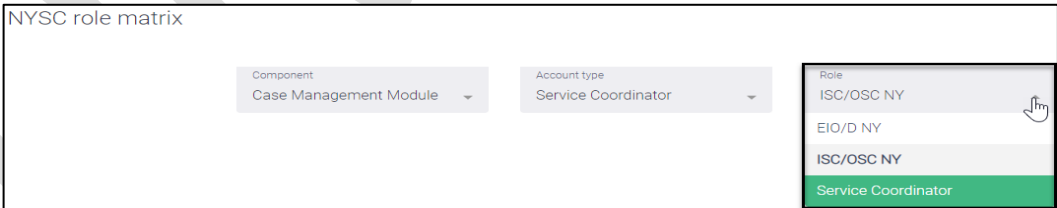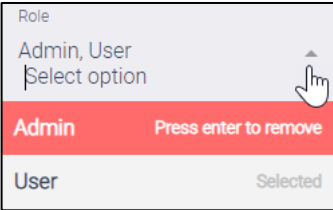
The Role Administrator selects the component(s) and appropriate role(s) for the user using the drop-down menus. Next, select/click the '**+**' sign beside a user's role to add additional roles. Selecting the '**-**' sign will remove that role for the user. After adding all the appropriate component(s) and role(s), then select/click **Save**.
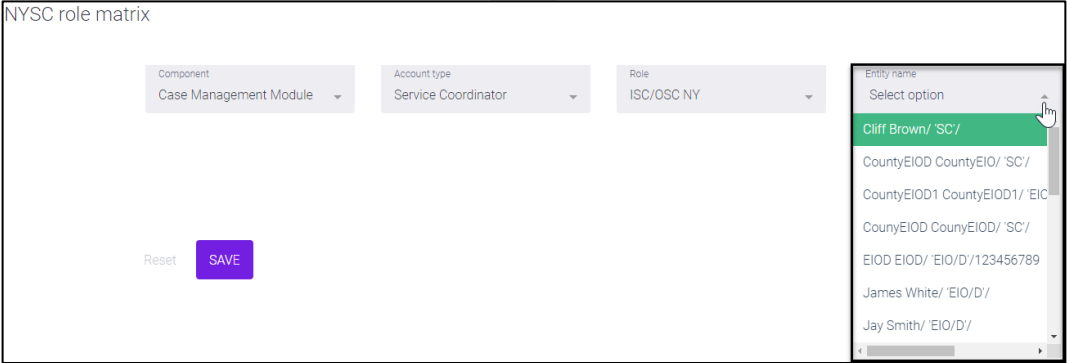
*(i)***When a Role Administrator chooses a role to assign an individual for each component, they can only assign roles for an 'Entity' they are associated with. For example, a Role Administrator for 'ABC agency' cannot assign user roles for 'YXY agency.'**

Component	Account type	Role	Entity name		
Case Management Module ▾	Service Coordinator ▾	ISC/OSC NY ▾	Jeff Brown/ 'EIO/D', 'SC'/1234567899 ▾	−	+
Component ▾	Account type ▾	Role ▾	Entity name ▾	−	+

Reset   **SAVE**

DROP-DOWN	DESCRIPTION
Component	Select/click this drop-down and select/assign the appropriate module the new user can access. *Component* Case Management Module ▲ **Billing Module** Case Management Module Service Logging Module 📝 Users must have a **Case Management Module** role to access the **Service Logging Module**.
Account Type	Select/click this drop-down and select/assign the appropriate account type for the new user. *Account type* Service Coordinator ▲ **Agency/Provider** County/SPOE Office Service Coordinator State Superuser Therapist
Role	Select/click this drop-down and select/assign the new user's appropriate role. You can have multiple roles for the user. When hovering over a selection, **green** indicates 'add' a role (example below): NYSC role matrix Component: Case Management Module ▼ Account type: Service Coordinator ▼ Role: ISC/OSC NY EIO/D NY **ISC/OSC NY** Service Coordinator When hovering over a selection, **red** indicates 'remove' a role; clicking/selecting your mouse pointer can do this. *Role* Admin, User ▲ Select option **Admin** Press enter to remove User Selected 📝**The User must select an account type first, and then the available roles will be available for selection.**

DROP-DOWN	DESCRIPTION
Entity Name	Select/click this drop-down and select/assign the appropriate entity name for the new user. The data in this list appears based on selecting the four drop-down fields. Role Administrators will only be able to configure accounts for users within their county/agency. For example: • **Component** = Case Management Module • **Account Type** = Service Coordinator • **Role** = ICS/OSC NY • **Entity name** = Cliff Brown/' SC'/
Add ⊞	Select/click the Add (**+**) button to add a row (Components, Account Type, Role, and Entity Name). When clicked/selected, a second row appears beneath your first role (example below).
Remove ⊟	Select/click the Minus (**-**) button to remove a row (Component, Account Type, Role, and Entity Name).
Back Back	To return to the previous page (e.g., make changes), select/click this button. When clicked/selected, the first section of the Add Use page appears.
Save SAVE	To **save** your new user configuration on the Add User pages' first and second sections, select/click this button. When clicked/selected, the User Management page appears.

11.2   Learning Management

The Learning Management System (LMS) is accessible to **all users**.

To access the LMS website, hover your mouse pointer over 'Learning Management' (shown below).

11.3   Knowledge Base

The EI Billing Knowledge Base (KB) Portal is accessible to **all users** to access KB Articles and find answers to frequent questions related to billing matters.

Step / Action

1.   Located on the EI-Hub Access Portal menu bar, select/click Knowledge Base (shown below).

2.   The EI Billing landing page appears (shown below)

3. To search in the knowledge base, select/click the **Knowledge Base** text or icon (shown below)
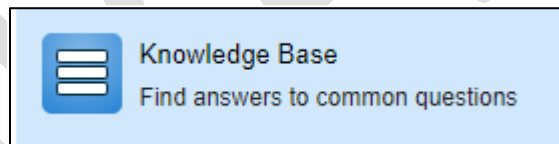
4. When selected/clicked (Knowledge Base text/icon), the Knowledge Base search feature appears (shown below). Enter text into the search bar and select/click the Search button. Returns will appear under the Search Results section.
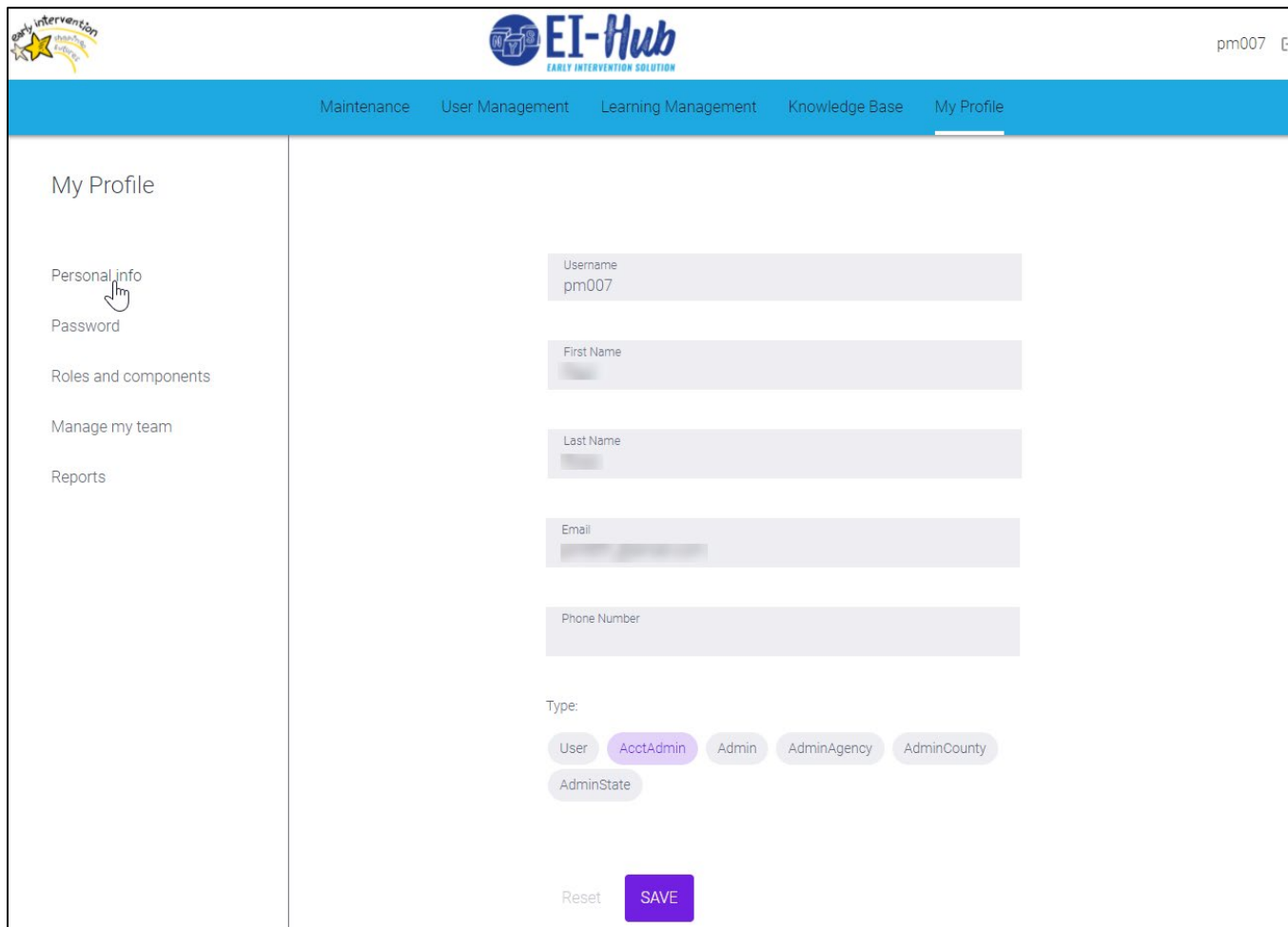
11.4   My Profile

The My Profile page allows **all users** to modify their EI Hub user profiles. Under 'Personal Info,' users can update their First Name, Last Name, Email, and Phone Number.

11.4.1   Personal Info Page

FIELD	DESCRIPTION
Username	This field (read-only) displays the person's username for accessing the EI-Hub Landing Page.
First Name	Edit/enter the new user's first name.
Last Name	Edit/enter the new user's first name.
Email	Edit/enter the new user's email address.
Phone	Edit/enter the new user's phone number.

FIELD	DESCRIPTION
Type	Depending on the user's role: Edit/enter the new user access type (User, AcctAdmin, or Admin). The end-user roles are as follows: • **User** • **AcctAdmin** • **Admin** • **AdminAgency** • **AdminCounty** • **AdminState** ⓘ **Only individuals with a Role Administrator status can update this section.** 📝**For user role descriptions, please see section 7, <u>Case Management Roles and Descriptions</u>, above.**
Reset Reset	To cancel any edits made, select/click this button. When clicked/selected, the fields on the 'Personal info' page restore the original data.
Save SAVE	To **save** your edits on the 'Personal info' page, select/click this button.

11.4.2   Roles and Components Page

All users can view their account access under the **Roles and Components** section. However, only users with sufficient administrative credentials (i.e., **AdminCounty** or **AdminAgency**) can adjust a user's access.

COLUMN	DESCRIPTION
Component	This column displays the modules within the EI-Hub Landing Page.
Account Type	This column displays the account type associated with their user role within a particular component of the EI-Hub.
Role	This column displays the user role with a particular EI-Hub component (i.e., MuniProgAllNY.).
Entity Name	This column displays the entity's name with which the user is associated.

'Manage my Team' and 'Reports' are disabled.

Appendix 1: Health Commerce System (HCS) Instructions

Please select (**bold** text hyperlinked to LMS) the appropriate HCS instructions; there's one for professionals with a license and the other for professionals without a license.

Please note that you must log into the LMS before accessing the hyperlinks below.

11.1 [Paperless Health Commerce System (HCS) Professions Account Instructions for](:)**:**

- EIP Professionals with a Healthcare License Issued by the NYS Education Department Office of Professions.
- Includes PT, OT, SLP, Psychologist, Nurse, etc.

11.2 [New Health Commerce System (HCS) Account Instructions for:](:)

- EIP Professionals Who Do Not Hold a License Issued by the NYS Education Department Office of Professions.
- New HCS Account Instructions also pertain to Other Agency Staff needing access to the EI Hub (Certified Teachers, SCs, EIODs, data entry staff, etc.).

Appendix 2: Maintenance menu

11.3 Module links

☝This page is restricted to the **PCG administrator** assigning URLs to the Billing Module, Case Management Module, and Service Logging Module.
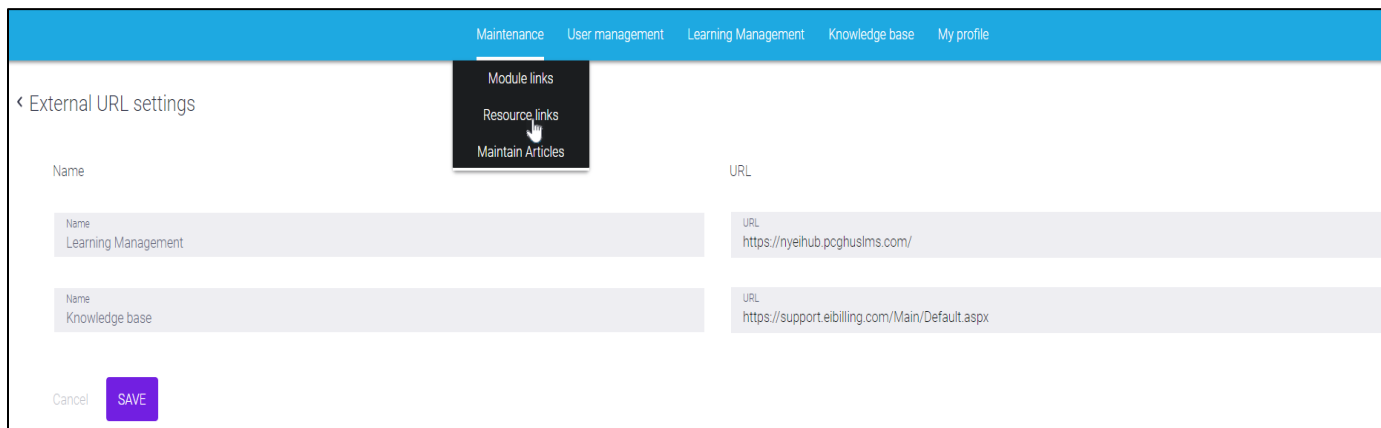
📝**You will only see Learning Management, Knowledge Base, and My Profile for menu bar selections with' User' rights.**

FIELD NAME (Read-Only)	URL FIELD (Editable w/PCG Administrator)
Billing Module	Enter the appropriate URL address where the Billing Module resides.
Case Management Module	Enter the appropriate URL address where the Case Management Module resides.
Service Logging Module	Enter the appropriate URL address where the Service Logging Module resides.

BUTTON	DESCRIPTION
Cancel	To cancel any edits made to the URLs mentioned above, select/click this button. 📝**Click/selecting the '< URL settings' breadcrumb (top left of your screen) acts the same as canceling edits made to the page.**
Save	To **save** any edits made to the URLs mentioned above, select/click this button.

11.4 Resource links

Users with sufficient administrative credentials (**PCG administrator / BEI administrator)** can access the links for the following resources and edit as needed. Examples include the Learning Management System (LMS) and informational libraries like the Knowledge Base.

FIELD NAME (Read-Only)	URL FIELD (Editable w/PCG Administrator)
Learning Management	Enter the appropriate URL address where the Learning Management System (LMS) resides.
Knowledge Base	Enter the appropriate URL address where the Knowledge Base resides.

BUTTON	DESCRIPTION
Cancel 	To cancel any edits made to the URLs mentioned above, select/click this button. **Click/selecting the '< External URL settings' breadcrumb (top left of your screen) acts the same as canceling edits made to the page.**
Save 	To **save** any edits made to the URLs mentioned above, select/click this button.

11.5 Maintain Articles

✍Users with sufficient administrative credentials (**PCG administrator / BEI administrator)** can access this menu to manage information content available for viewing on the EI-Hub Landing Page.

- This information content includes short announcements, called 'Alerts,' or longer entries, called 'News.'
- Alerts include system maintenance notice or an office closing due to a holiday.
- Examples of News include a change in procedure, tips & tricks, or any piece of information that would impact the client's day-to-day operations and their users.

COLUMN	DESCRIPTION
Sequence	This column displays the chronological order of news and alert articles.
Title	This column displays the title of news and alert articles.
Begin	This column displays the start date for news and alert articles.
End	This column displays the end date for news and alert articles.

BUTTON	DESCRIPTION
Add ⊕	To create an article, Select/click this button. When clicked/selected, the Create Article page appears (see below).

11.5.1   Create Article Page

☞Use this page to link an appropriate article relevant to the EI-Hub portal.

< Create Article

Type:

News   Alerts

Sequence
1

Title

Summary
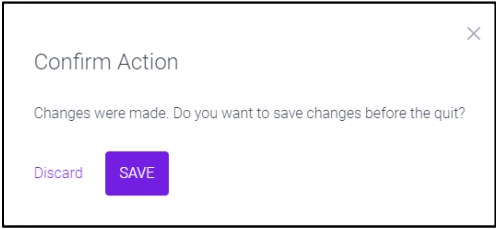
URL

Start date
07/20/2021

End date
mm/dd/yyyy

Cancel   SAVE

LABEL BUTTON	DESCRIPTION
Create Article (Exit) < Create Article	If selected, a dialog popup appears (shown below). Confirm Action Changes were made. Do you want to save changes before the quit? Discard SAVE **Disregard:** Select/click this button; no changes are saved. **Save:** Select/click this button to save changes.

LABEL BUTTON	DESCRIPTION
News News	Select/click this label to assign your article as a 'News' type.
Alerts Alerts	Select/click this label to assign your article to the 'Alerts' type.

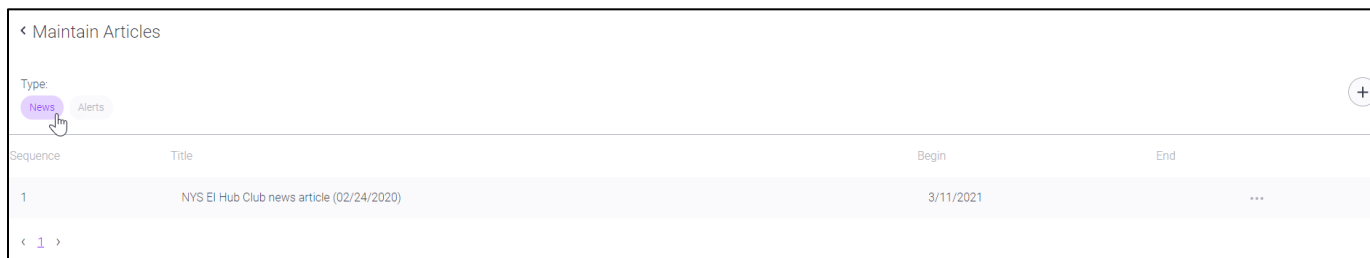| FIELD	DESCRIPTION
Sequence	This user property configures a sequence field to create a chronological order for your news or alert articles. Enter this field's appropriate sequence number (e.g., 1, 2, 3)**.**
Title	Enter the name/title of the news/alerts article linked.
Summary	Enter a summary of the news/alerts article.
URL	Use this URL field to enter a URL (Uniform Resource Locator) - the link to a website or web page. Then, enter/paste the correct URL into this field.
Start date	Manually enter the start date (or use the calendar picker button), and select/click to activate) when you want the article to appear. 📝 **The application defaults to the current date that the user (you) logged in to the El-Hub Landing Page**
End date	Manually enter the end date (or use the calendar picker button), and select/click to activate) when you want the article to no longer appear. 📝 **Leaving the End date, your news/alerts will remain indefinitely.**

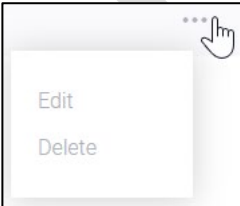| BUTTON	DESCRIPTION
Calendar Icon 🗓	To use a calendar picker for selecting dates, Select/click this button. When clicked/selected, the Calendar Picker appears (see below).
Cancel Cancel	To cancel your entries to the Create Article page mentioned above, Select/click this button. 📝**Click/selecting the '< Create Article' breadcrumb (top left of your screen) acts the same as canceling edits made to the page.**
Save SAVE	To **save** your entries to the Create Article page mentioned above, select/click this button. When clicked/selected, the Maintain Articles page appears (shown below).

11.5.2   Maintain Articles Page

☝This page shows 'News' articles (displayed by default, pictured below) and 'Alerts' (Click/select the 'Alerts') labels. Use this page to add additional **News** or **Alerts** articles and edit existing articles.

‹ Maintain Articles				
Type: News Alerts				+
Sequence	Title		Begin	End
1	NYS EI Hub Club news article (02/24/2020)		3/11/2021	...
‹ 1 ›				

LABEL TYPE / BUTTON	DESCRIPTION
News News	Select/click this label to view 'News' articles.
Alerts Alerts	Select/click this label to view 'Alerts' articles.

COLUMN	DESCRIPTION
Sequence	This column displays the chronological order of news and alert articles.
Title	This column displays the title of news and alert articles.
Begin	This column displays the start date for news and alert articles.
End	This column displays the end date for news and alert articles.

BUTTON	DESCRIPTION
Ellipsis ··· Edit Delete	To **Edit** or **Delete** a News or Alerts article(s), select/click the ellipsis button (**…**) adjacent to the appropriate News or Alerts record/row. A drop-down menu appears when clicked/selected; select the appropriate action (Edit or Delete). For the Edit and Delete functionality, please see below.

11.5.3 Edit Article Page

This page appears after clicking/selecting the ellipse button and selecting 'Edit' from the drop-down menu. An example below shows a **News** article.

LABEL BUTTON	DESCRIPTION
News 	To edit, select/click this label to assign your article as a 'News' type.
Alerts 	To edit, select/click this label to assign your article as an 'Alerts' type.

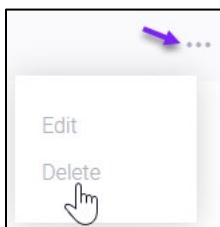| FIELD	DESCRIPTION
Sequence	In this field, edit/enter the appropriate sequence number (e.g., 1, 2, 3, etc.).
Title	Edit/enter the name/title of the news/alerts article name/title.
Summary	Edit/enter a summary of the news/alerts article.
URL	Edit/enter/paste the URL (Uniform Resource Locator) link to a website or web page in this field.
Start date	When you want the article to appear, manually edit/enter the start date (or use the calendar picker button to select/click to activate). ▦ To use a calendar picker for selecting dates, select/click this button. When clicked/selected, the Calendar Picker appears. 📝**The application defaults to the date the user (you) logged in to the El-Hub Landing Page.**
End date	Manually edit/enter the end date (or use the calendar picker button - Select/click to activate) when you want the article to no longer appear. ▦ To use a calendar picker for selecting dates, select/click this button. When clicked/selected, the Calendar Picker appears. 📝**By leaving the end date, your news/alerts will remain indefinite.**

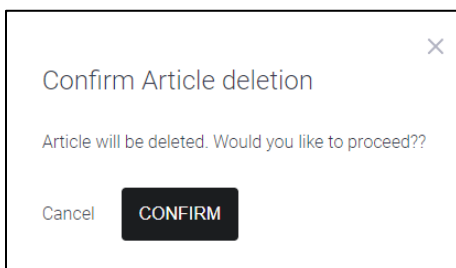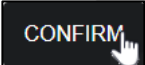| BUTTON	DESCRIPTION
Cancel Cancel 👆	To cancel your edits to the Create Article page mentioned above, select/click this button. 📝**Click/selecting the '< Create Article' breadcrumb (top left of your screen) acts the same as canceling edits made to the page.**
Save SAVE	To **save** your edits to the Create Article page mentioned above, select/click this button. When clicked/selected, the Maintain Articles page appears. ⓘ**If you did not click Save after an edit or go to exit Edit Article or Alert, the system prompts a message as follows:** Confirm Action ✕ Changes were made. Do you want to save changes before the quit? Discard SAVE

11.5.4 Delete an Article

Step / Action

1. Delete a News or Alerts article(s), and select/click the ellipsis button (**…**) adjacent to the appropriate News or Alerts record/row. A drop-down menu appears when clicked/selected; select/Select/click **delete** (shown below).

2. The 'Confirmation Article deletion' message pad appears (shown below).

BUTTON	DESCRIPTION
Cancel 	To cancel the deletion of a News or Alerts article, select/click this button.
Confirm 	To **confirm** the deletion of a News or Alerts article, select/click this button. When clicked/selected, the system removes the record/row from the Maintain Articles page.

--- END OF DOCUMENT ---