

EI Hub Cheat Sheet:

Entering a New Child/Referrals (In-House):

1. Choose User Profile (**MuniProgAllNY**)

2. Select Child Tab on far left

- a. Select Lookup

- i. Enter First name, and Last name then search

- ii. If not in the system move on to next step to add child. If already in the system

select on the child's chart, follow the next steps to ensure Child's Info is correct and update as accordingly. If information is correct utilize step 6 and on to add new referral for child.

3. Select Under Child Tab on left hand side

4. Select Tab Across Top

- a. First Name

- b. Last Name

- c. Birth Date

- d. Ethnicity

- e. Race (Can have multiple options)

- f. Sex

- g. Primary Language

- h. School District

- i. If Needed:

- i. Check Multilingual Box

- ii. Check if Child received EI Services in Another State or Territory and where

- j. Select

- i. *After you hit submit the system will search all counties in NYS to see if there is a child in the system already with this information, if there is you can request a transfer*

5. Select Tab on Left hand side

- a. Select

- i. *Mask Information Box is to hide the address from official record not needed unless indicated*

- ii. Address Type

- iii. Address Status

- iv. Start Date

v. Address Priority

vi. Address

vii. Zip Code

viii. City/Town

ix. Address State

b. Select

c. Select

6. Select Tab on Left Hand Side

a. Select *The grid under this will show all referrals for this child including previous referrals*

i. Referral Date

ii. Referral Method

iii. Referral Reason

iv. Referral Source Type

v. Referral Source Lookup **OR** Manually Enter Referral Source Information

vi. Check Box *By checking this box...

vii. Select

b. Select Tab along Left-hand side

i. Check box *Capturing the information below requires that informed parental consent...

ii. Enter any information as applicable

iii. ICD Code Search: Enter Dx code if included in referral, if not included type in Z13.40

iv. Select

****You cannot change anything in the referral information 24 hours after you enter it. Please make sure all information is complete and correct before hitting submit****

7. Utilize the “breadcrumbs” at the top of the Chart to get back to the Child’s chart. Select their name

8. Select

a. In the Grid a Family ID has already been created for the child. Select to complete

b. Under the Tab on the Left-hand Side

i. Select

1. Tab on the Left-hand side
 - a. Family Member Type
 - b. Family Status: Active
 - c. First Name
 - d. Last Name
 - e. Email Address
 - f. Contact Type ***There must be 1 Primary Contact***
 - g. Dominate Language
 - h. Check Box: Permission to Always Contact
 - i. If Needed
 - i. Multilingual (must complete secondary language section)
 - ii. Interpreter Needed
 - iii. Insures Child (Must put DOB)
 - j. Select
2. Tab on the Left-hand side
 - a. In the Grid hit
 - i. Phone Number Type
 - ii. Phone Number
 - iii. Okay to Text: **Unknown**
 - iv. Select
3. Tab on the Left-hand side
 - a. In the Grid hit
 - i. Address Type
 - ii. Address Status: **Active**
 - iii. If the same address as child utilize the “List of Child Addresses to Copy” If not complete the section on the bottom
 - iv. Select
 - v. Select
4. Utilize Breadcrumbs across top to go back to Family Member tab by Selecting Family ID
- a. Repeat Steps i1-i4 as applicable for each family member
5. Utilize Breadcrumbs at the top to go back to Child’s Main Chart by Selecting Child’s Name

9. Select Tab Across the top
- a. Select
- i. EIO/D or Coordinator Type: **EIO/D**
- ii. Agency Lookup: **Saratoga County Department of Health**
1. ****Do Not Enter Names Here yet****
- iii. Start Date: **Must be today's date**
- iv. Select
- b. Select
- i. EIO/D or Coordinator Type: **Initial Service Coordinator**
- ii. Agency Lookup: **Saratoga County Department of Health**
1. ****Do Not Enter Names Here yet****
- iii. Start Date: **Must be today's date**
- iv. Select
10. Change User Profile in the Top Right to Saratoga County Provider
(**UniversalPROVNY**)
11. From your home screen Under Children Assigned to Caseload Select
- a. Filter the Selection by the Action Needed Section, by clicking on Action Needed twice, when the small down arrow turns blue and all children who have an action needed are at the top.
- OR**
- Utilize the search bar to find the specific child you are working on
12. Select for the Child you are working with
- a. Pop-Up Window for Agency Accept/Reject Assignment for ISC
- i. Agency Accept/Reject Assignment: **Accepted**
- ii. Select
13. Select for the Child you are working with
- a. Pop-Up Window for Agency Accept/Reject Assignment for EIO/D
- i. Agency Accept/Reject Assignment: **Accepted**
- ii. Select
14. Select to enter the Child's Chart that you are working with
15. Select Tab across the top

a. The EIO/D or Service Coordinator Grid is populated with the roles you accepted in the previous steps

i. Select under the EIO/D Assignment

1. Complete EIO/D or Service Coordinator Lookup

2. Select

ii. Select under the Initial Service Coordinator Assignment

1. Complete EIO/D or Service Coordinator Lookup

2. Select

****Child's Chart is now created, the referral is entered, and they are assigned to an EIO/D and ISC. At this point the EIO/D will have to accept the assignment of both the EIO/D and the ISC.****

Note: If at any time during this process you are signed out of the HCS system, log back in and return to the child's chart to pick up where you left off. You can do this by entering into the User Profile you were currently using (MuniProgAllNY or UniversalProvNY) and under Children Assigned to Caseload search for the child you were working on. Select the Edit button to enter a child.

Remember that each Tab across the top of the page on the Child's Chart should be treated like a different divider tab. Each tab houses different information for the child. Once in a tab on the top you will be working with tabs along the left-hand side which delineate information even more. The tabs on the far left of the page (Home, Child, Therapist, Provider etc.) should not be utilized if you are working inside a child's specific chart.