EI-Hub Start Up Guide – Data

early intervention
shaping futures

EI-Hub
EARLY INTERVENTION SOLUTION

PUBLIC
CONSULTING GROUP

Table of Contents

Revision History

Version Number	Release Date	Author	Revision Summary
v.0.1.0	8.1.2024	Lauren Zelinsky	First Draft Release

Section 1: Before Getting Started

1. Start Up Guide Introduction

The EI-Hub Start Up Guide – Data is a quick and easy-to-read document that will help new users to understand where to find data in the EI-Hub. The guide provides an overview of the reports within the EI-Hub and what data is being migrated from NYEIS.

2. Required Steps to Access the EI-Hub

The EI-Hub is a web-based product accessible through the Health Commerce System (HCS) website. To access the EI-Hub, all users will need the following:

☑ Active HCS account
☑ Compatible Web Browser

NEED HELP?

If you do not have access to one or more of the requirements listed above or need more information, click the links below for further instructions.

- HCS instructions
- Web Browser Requirements

3. Initial Account Setup

At the launch of the EI-Hub, anyone with an active NYEIS user role will have one equivalent role migrated to the EI- Hub. Role Administrators must configure access to the Billing module and Service Logging module for applicable users and assign additional user roles as needed.

This is important because different roles in the EI-Hub have different access to view data. If you require access to data that is currently unavailable, please reach out to your Role Administrator to acquire an additional user role. This role is typically held by an individual(s) in administrative leadership for a county/agency or by an independent provider. Please consult your supervisor for more information.

HELPFUL HINT

From the EI-Hub Landing page, users can view their user role assignments under My Profile and Roles and Components.

NEED HELP?

Contact your **EI-Hub Role Administrator** for assistance if you need an additional user role(s) or access to a component.

If you are looking for more information on user roles, please reference the following resources:

- EI-Hub User Role Crosswalk
- EI-Hub User Roles Job Aid

Section 2: Data Migration

1. Data Migrated from New York Early Intervention System (NYEIS)

Data migration is the process of selecting, preparing, and extracting data from one system, and transferring it into another system. Data migration is an essential component in the transition from NYEIS to the EI-Hub. Through the data migration process provider, therapist, child, and financial data currently in NYEIS was converted and migrated to the EI-Hub's Case Management module so users will not lose information relevant to their work.
Listed below are the data categories along with the historical migration period, indicating how many years back the migration will extend.

- Child data: Any data for children who are 6 years or younger (up to 6 years and 355 days old) from the date NYEIS is taken offline for data migration.
- Provider data: all provider records (active and inactive)
- Therapist data: all therapist records (active and inactive)
- Financial data: Any financial data with a service date that is 6 years or less (up to 6 years and 355 days) from the date NYEIS is taken offline for data migration.

Attachments were not migrated from NYEIS to EI-Hub. Attachments in NYEIS or the EI-Hub do not fulfill the record keeping requirements for providers and municipalities. Providers must retain the child record, including attachments, in their records for at least the number of years required to meet Medicaid and Family Educational Rights and Privacy Act (FERPA) requirements and for additional years to comport with their respective professional practice acts.

2. Data Extract Requests

Historical data in NYEIS that was not migrated to the EI-Hub is securely stored and available by request.

- Data requests related to audit, litigation, Freedom of Information Law (FOIL) must be initiated by calling Public Consulting Group's Call Center.
  - **PCG Call Center Contact Information**:
  - Telephone: 866-315-3747
  - Email: NYEITraining@pcgus.com
  - Agents are available 7:00 am – 7:00 pm EST
- Other requests for data older than 7 years can be initiated through a data request form available on the Learning Management System (LMS).
  - Link to Data Request form: (link will become available at the EI-Hub system launch)

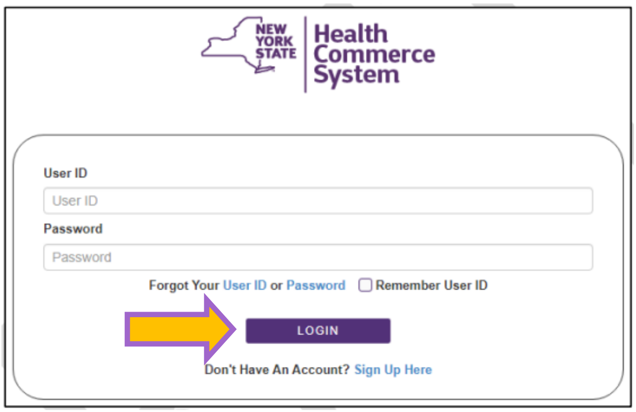
All requests will be reviewed and approved/denied by the Bureau of Early Intervention (BEI).

Section 3: EI-Hub System Information

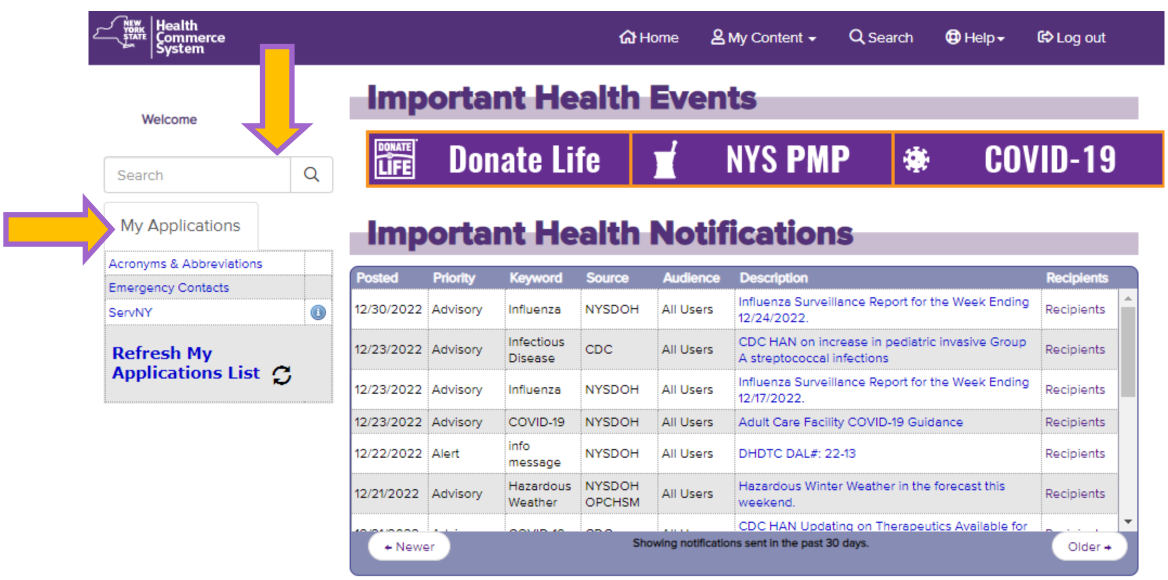
1. How to Log into the EI-Hub

To access the EI-Hub through the Health Commerce System (HCS) website, follow the instructions below:

1. Visit the Health Commerce System (HCS) website: https://commerce.health.state.ny.us
2. Enter your HCS User ID and Password and select/click the LOGIN button (shown below).



3. Select the EI-Hub application hyperlink under My Applications. If not shown in My Applications, use the search feature to find the application.



4. The EI-Hub Landing Page appears after successfully logging in through the HCS.

NEED HELP?

You can reach the Health Commerce System (HCS) Commerce Account Management Unit (CAMU) Help Desk at:

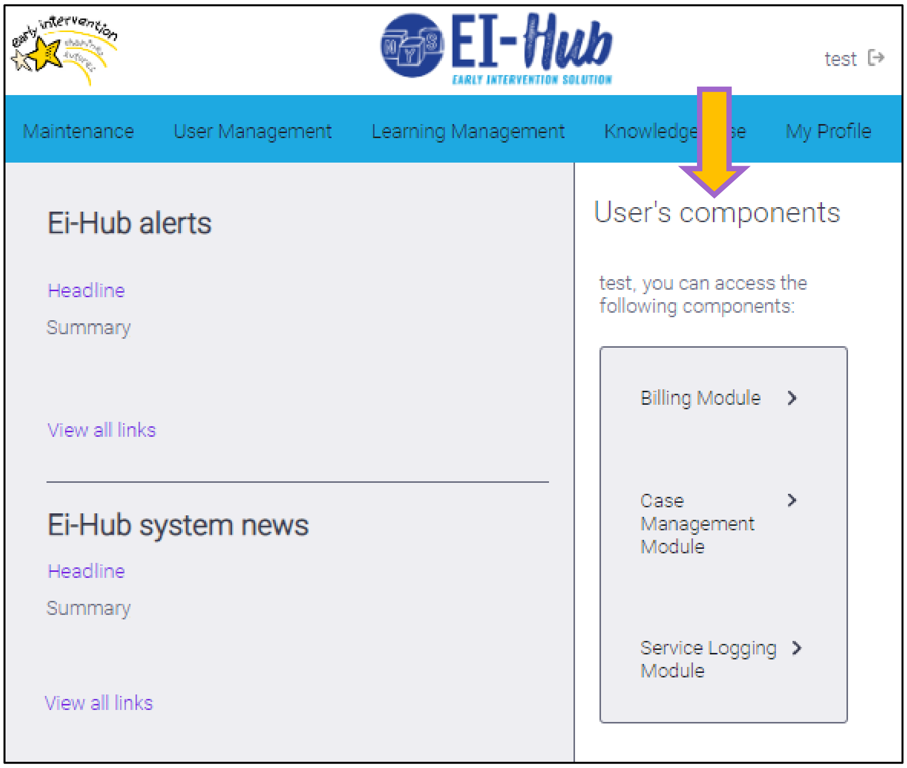
- **Telephone:** 1-866-529-1890

The **CAMU** Hours of Operation for account information and passwords – are 8:00 am - 4:45 pm, Monday through Friday.

2. EI-Hub Landing Page Overview

From the EI-Hub Landing Page (shown below), users will access the EI-Hub components. In addition, the EI-Hub Landing Page also displays important alerts and system news.

From the ‘**User’s components**’ section, users will be able to access the Billing module, Case Management module, and the Service Logging module.



HELPFUL HINTS

- Components are visible based on a user's account access / user role(s)
- The **Maintenance** and **User Management** menu options are only available to Role Administrators
- Headlines in purple under **Ei-Hub alerts** or **Ei-Hub system news** are hyperlinks that will bring the user to an external website to find additional information on that topic.

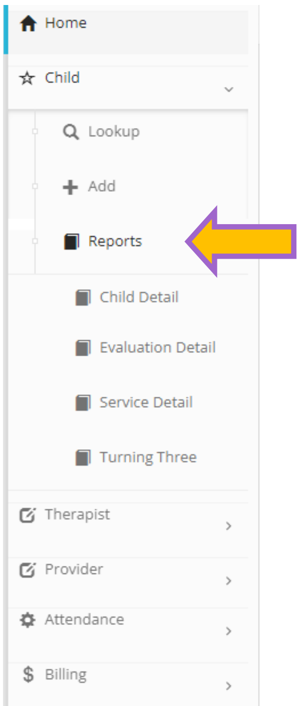
NEED HELP?

Contact your **EI-Hub Role Administrator** for assistance if you need an additional user role or access to a component.

3. Case Management Reports Overview

In the EI-Hub's Case Management module, users will maintain information on the children and families they serve. The Case Management module also includes provider, therapists, and financial data and functions.

In Case Management, data is located in dedicated report folders within each menu option. Users can access these folders and can view reports according to their assigned user roles.



HELPFUL HINTS

If you have multiple user roles remember to check that you are in your highest-level user role to view a wider range of reports. The highest-level roles available to end users are MuniProgAllNY or UniversalProvNY.

All reports within the report folders are equipped with an export to Microsoft Excel 

option, where reports can be further filtered and/or printed.

NEED HELP?

For more information on how to use Microsoft Excel, please reference [Microsoft Excel's Support page].

2.1 Child Menu Reports Overview / Access

- **Child Details report:** List of children assigned to county, including Early Intervention Official/Designee (EIO/D) and Service Coordinator assignments. This report can be exported and further filtered by name (child, EIO/D, or Service Coordinator) for specific individual searches.

- **Report Access:** EIO/D NY; InProviderNY; ISC/OSC NY; MuniAtRiskMgtNY; MuniDataEntryNY; MuniFiscalAllNY; MuniProgAllNY; MuniViewOnlyNY; ProvDataEntryNY; UniversalProvNY
- **Report Filters:** A report filter changes the data set based on the selected criteria. This report has the following filter options:
    - Filter for (Equal To):
        - Children with a date of birth within the selected period
        - Children with no enrollments yet
        - Children with active evaluations within the selected period
        - Children in at-risk within the selected period
    - Lookup Last Name
    - Lookup First Name
    - Name Lookup (Equal to)
        - Name lookup (Child's name)
        - Guardian name
        - Service Coordinator name
        - EIO/D name
        - Therapist name
    - Begin from
    - Begin to

      ⓘ Note: The data ranges cannot exceed a 9-month period
    - County of Residence
    - Child Status (Equal to)
        - Active
        - Closed
        - Duplicate
        - Exited
    - EI Child ID
- [Data points in report](#) (click link)

When might you use this report?

- To view the date of a child's referral to the EIP or At-Risk
- To sort between children At-Risk and in the EIP
- To see if a child is missing an EIO/D assignment
- To see if a child is missing a Service Coordinator assignment
- To get a listing of all children assigned to a county

- **Evaluations Detail report:** List of evaluations, evaluation statuses, and information captured from any other evaluations performed during a specific period.
    - **Report Access:** EIO/D NY; InProviderNY; ISC/OSC NY; MuniDataEntryNY; MuniFiscalAllNY; MuniProgAllNY; MuniViewOnlyNY; ProvDataEntryNY; UniversalProvNY
    - **Report Filters:** A report filter changes the data set based on the selected criteria. This report has the following filter options:
        - Filter for (Equal To):
            - Children with a date of birth within the selected period
            - Children with no enrollments yet
            - Children with active evaluations within the selected period
            - Children in at-risk within the selected period
        - Lookup Last Name
        - Lookup First Name
        - Name Lookup (Equal to)
            - Name lookup (Child's name)
            - Guardian name

      - Service Coordinator name
      - EIO/D name
      - Therapist name
    - Begin from
    - Begin to
      ⓘ Note: The data ranges cannot exceed a 9-month period
    - County of Residence
    - Child Status (Equal to)
      - Active
      - Closed
      - Duplicate
      - Exited
    - EI Child ID
  - Data Points in report (click link)

When might you use this report?

  - To see the date of an evaluation by child
  - To find the service authorization number of the evaluation
  - To see the agency and/or evaluator assigned to the evaluation

- **Service Detail report:** List of children with details of the services they are receiving or how many services are authorized within a given service type during a specific period.
  - **Report Access:** EIO/D NY; InProviderNY; ISC/OSC NY; MuniDataEntryNY; MuniFiscalAllNY; MuniProgAllNY; MuniViewOnlyNY; ProvDataEntryNY; UniversalProvNY
  - **Report Filters:** A report filter changes the data set based on the selected criteria. This report has the following filter options:
    - Filter for (Equal To):
      - Children with a date of birth within the selected period
      - Children with active services within the selected period
    - Lookup Last Name
    - Lookup First Name
    - Name Lookup (Equal to)
      - Name lookup (Child's name)
      - Guardian name
      - Service Coordinator name
      - EIO/D name
      - Therapist name
    - Begin from
    - Begin to
      ⓘ Note: The data ranges cannot exceed 9-month period
    - County of Residence
    - Child Status (Equal to)
      - Active
      - Closed
      - Duplicate
      - Exited
    - EI Child ID
  - Data Points in report (click link)

When might you use this report?

  - To see the services assigned by child
  - To see the frequency or number or frequency units by child
  - To see makeup and/or co-visit data
  - To see the service location

- **Turning Three report:** Captures children within nine (9) months of their 3rd birthday. Identify what children need to start the transition process.
  - **Report Access:** EIO/D NY; InProviderNY; ISC/OSC NY; MuniDataEntryNY; MuniFiscalAllNY; MuniProgAllNY; MuniViewOnlyNY; ProvDataEntryNY; UniversalProvNY
  - **Report Filters:** A report filter changes the data set based on the selected criteria. This report has the following filter options:
    - Select Report (Equal To)
    - Month-Year (Equal To)
    - Select School District (Equal To)
    - POE Office (Equal To)
  - Data points in report (click link)

When might you use this report?
- To see birthday of children turning three by service coordinator
- To get parent/guardian contact information of children close to transition
  - Note: Parent or guardian contact information will not display in this report for migrated child records. This data will display for new child records created in the EI-Hub.
- To see the name of the child's impending school district

2.2 Therapist Menu Reports Overview

- **Therapist Detail report:** List of therapists, including name, service type, or profession.
  - **Report Access:** EIO/D NY; InProviderNY; ISC/OSC NY; JrRenderProvNY; MuniAtRiskMgtNY; MuniDataEntryNY; MuniFiscalAllNY; MuniProgAllNY; ProvDataEntryNY; ProvFiscalMgrNY; ProvQA NY; RenderProvNY; UniversalProvNY
  - **Report Filters:** A report filter changes the data set based on the selected criteria. This report has the following filter options:
    - Service Type (Contains)
    - Profession (Contains)
    - Last Name (Contains)
    - First Name (Contains)
    - Therapist Status (Equal to)
      - Active
      - Inactive
  - Data Points in report (click link)

When might you use this report?
- To see contact information for therapists, including EIO/Ds and Service Coordinators
- To see licensure numbers and/or National Provider Identifier (NPI)number

- **Therapist Company Detail report:** Same information as the Therapist Detail report, plus a list of all companies associated with the therapist. Includes their catchment areas and active/inactive status.
  - ***Report Access***: EIO/D NY; InProviderNY; ISC/OSC NY; JrRenderProvNY; MuniAtRiskMgtNY; MuniDataEntryNY; MuniFiscalAllNY; MuniProgAllNY; ProvDataEntryNY; ProvFiscalMgrNY; ProvQA NY; RenderProvNY; UniversalProvNY

- **Report Filters:** A report filter changes the data set based on the selected criteria. This report has the following filter options:
  - Profession (Contains)
  - Service Type (Contains)
  - Therapist Agency (Contains)
  - Provider Type (Equal To)
    - County
    - Provider
    - Vendor
  - Employment Role (Equal To)
    - EIO/D
    - Evaluation Assessment Team
    - Rendering Provider
    - Service Coordinator
  - Therapist Catchment (Equal To)
  - Therapist Status (Equal To)
    - Inactive
    - Active
- Data Points in report (click link)

When might you use this report?

- To see catchment areas for therapist, including EIO/Ds and Service Coordinators
- To see company names of therapists working at multiple locations

2.3 Provider Menu Reports Overview

- **Central Directory report:** List of agencies and individuals with an approved agreement to deliver Early Intervention Program (EIP) services. This is the primary resource to use when searching for service providers.
  - **Report Access:** EIO/D NY; InProviderNY; ISC/OSC NY; MuniAtRiskMgtNY; MuniDataEntryNY; MuniFiscalAllNY; MuniProgAllNY; MuniTransferNY; MuniViewOnlyNY; ProvDataEntryNY; ProvFiscalMgrNY; ProvQA NY; UniversalProvNY
  - **Report Filters:** A report filter changes the data set based on the selected criteria. This report has the following filter options:
    - Provider Type (Equal To)
      - County
      - Provider
      - Vendor
    - Provider Category (Equal To)
      - Agency
      - Individual
    - Provider Status (Equal To)
      - Active
      - Inactive
    - Provider Name (Contains)
    - NPI 1 (Contains)
    - Agreement Disposition Status (Equal To)
      - Conditional
      - Disapproved
      - Final Approval
      - In Process
      - Initial Approval
      - Migrated
      - Submitted

      - Withdrawn
    - Primary Agreement (Equal To)
      - Agency: Appendix 1 Agreement
      - Individual: Appendix 1 Agreement
      - Individual: Basic Agreement Only
    - City (Contains)
    - County (Contains)
    - Zip (Contains)
    - Professional Discipline / Qualified Personnel (Equal To)
    - Service Model (Equal To)
    - Service Area (Equal To)
    - Languages (Equal To)
  - **Data Points in report** (click link)

When might you use this report?

- To check status of provider agreements, including effective end dates
- To see a provider's contact information
- To see the types of EI services and/or service models by provider
- To see special populations and/or languages by provider

2.4 Attendance Menu Reports Overview

- **Unbilled report:** View claims that have moved from Service Logging to Case Management (or) submitted through the 837-file upload but were not accepted and require review.
  - **Report Access:** EIO/D NY; InProviderNY; ISC/OSC NY; JrRenderProvNY; MuniAtRiskMgtNY; MuniDataEntryNY; MuniFiscalAllNY; MuniProgAllNY; MuniViewOnlyNY; ProvDataEntryNY; ProvFiscalMgrNY; ProvQA NY; RenderProvNY; UniversalProvNY
  - **Report Filters:** A report filter changes the data set based on the selected criteria. This report has the following filter options:
    - Child name (Contains)
    - EI Child Reference ID (Contains)
    - Billing Provider Name (Contains)
    - Billing Provider NPI (Contains)
    - Service Type (Equal To)
    - Service Date From
    - Service Date To
      - Note: The data ranges used in this report cannot exceed 3-month period
    - Claims Status (Equal To)
      - Accepted
      - Approved
      - Billed
      - Closed
      - Denied
      - HIPAA Reject
      - Open
      - Paid
      - Pending
      - Processing
      - Rejected
      - Released
      - System Approved
      - Void
      - Void Processing
      - Void Recovered

- Voided
- Data Points in report (click link)

When might you use this report?
- To see status of claims that moved from Service Logging to Case Management. Claims in this report were not accepted and require further review.

- **Child Info and Authorization report:** Designed for users utilizing a third-party billing system. List of child information and service information, including service authorizations.
  - **Report Access:** EIO/D NY; InProviderNY; MuniDataEntryNY; MuniFiscalAllNY; MuniViewOnlyNY; ProvDataEntryNY; MuniProgAllNY; UniversalProvNY
  - **Report Filters:** A report filter changes the data set based on the selected criteria. This report has the following filter options:
    - Billing Provider or EIP Provider ID (Contains)
    - County (Contains)
    - Start Date (Greater Than or Equal To)
    - End Date (Less Than or Equal To)
      - Note: The data ranges used in this report cannot exceed 100-day period
  - Data Points in report (click link)

When might you use this report?
- To see the services assigned by child, including the service authorization number
- To see IFSP related dates and/or assigned service coordinator
- To see the frequency or number or frequency units by child
- To see makeup sessions authorized and/or used

- **Posted Attendances report:** (Note: This report is under the Attendance menu but not in the Reports folder): View status of claims received via Service Logging or the 837P file.
  - **Report Access:** InProviderNY; ProvDataEntryNY; ProvFiscalMgrNY; UniversalProvNY
  - **Report Filters:** A report filter changes the data set based on the selected criteria. This report has the following filter options:
    - Child Name (Contains)
    - *Billing Provider or EIP Provider ID (Contains)
    - Service Type (Equal To)
    - *Service Date From
    - *Service Date To
      - Note: The data ranges used in this report cannot exceed 3-month period
    - Billing Provider NPI (Contains)
    - Claim Status (Equal To)
      - Accepted
      - Approved
      - Billed
      - Closed
      - Denied
      - HIPAA Reject
      - Open
      - Paid
      - Pending

- Processing
- Rejected
- Released
- System Approved
- Void
- Void Processing
- Void Recovered
- Voided

  - Data Points in report (click link)

When might you use this report?

- To see status of claims that transition from Service Logging to Case Management. Claims in an approved status are ready to be placed on a voucher for payment.

2.5 Billing Menu Reports Overview

- **AR (Attendance Report) Details report:** View status of submitted claims, including amount billed, received, or denied.
  - **Report Access:** EIO/D NY; InProviderNY; MuniAtRiskMgtNY; MuniDataEntryNY; MuniFiscalAllNY; MuniProgAllNY; MuniViewOnlyNY; ProvFiscalMgrNY; UniversalProvNY
  - **Report Filters:** A report filter changes the data set based on the selected criteria. This report has the following filter options:
    - Date Billed From
    - Date Billed to
      - Note: The data ranges used in this report cannot exceed 90-day period
    - Biling Provider or EIP Provider ID (Contains)
  - Data Points in report (click link)

When might you use this report?

- To see claims that transition to the Billing module for final payment.

- **County Respite Allocation report:** (This report will be available post go-live) View allocation and balance information for respite services per county, per calendar year
  - **Report Access:** MuniFiscalAllNY; MuniProgAllNY
  - **Report Filters:** A report filter changes the data set based on the selected criteria. This report has the following filter options:
    - County (Equal To)
    - Allocation Year (Equal To)
  - Data Points in report (click link)

When might you use this report?

- To see allocated funds for respite services by county
- To see used funds and remaining balance of funds

HELPFUL HINTS

All reports with the report folders are equipped with an export to Microsoft Excel option, where reports can be further filtered and/or printed.

Look for the Excel button, in the right hand corner of the report.

NEED HELP?

For more information on how to use Microsoft Excel, please reference [Microsoft Excel's Support page](#).

2.6 Data Points by Report

Below is a list of all the available reports in the EI-Hub Case Management module and the data points available within each report. Click/Select the name of any report and it will bring you to the section of this document that explains when you may want to use this report.

Child Details report

- EI Child ID
- Child Last Name
- Child First Name
- DOB
- Address
- City
- State
- Zip
- Gender
- Ethnicity
- Race
- Child Age
- Primary Language
- County of Residence
- Address County
- Referral Date
- At-Risk Referral Date
- Referral At-Risk Status
- Referral Type
- Referral Method
- Referral Reason
- Referral Source Type
- Eligibility Status
- Guardian Last Name
- Guardian First Name
- Guardian Phone
- Coordinator Last Name
- Coordinator First Name
- Coordinator Phone
- Coordinator Company
- EIOD Last Name
- EIOD First Name
- Current IFSP Start Date
- Current IFSP End Date
- Current IFSP Status
- Current IFSP Type

Evaluation Detail report

- EI Child ID
- DOB
- Sex
- Child Address
- Child City
- Date of Evaluation
- Child State
- Child Zip
- Child Phone Number
- Child First Name
- Primary Language
- Child Last Name
- Coordinator Company
- Coordinator First Name
- Coordinator Last Name
- EIOD First Name
- EIOD Last Name
- EIOD Approval
- EIOD Review Date
- Active IFSP Start Date
- Active IFSP End Date
- IFSP Type
- IFSP Status
- Pay Source
- Program Name
- Service Type
- Authorization Status
- Authorization Number
- Eval Start Date
- Eval End Date
- Agency

- Location Type
- Agency Provider Site
- Evaluator First Name
- Evaluator Last Name

Service Detail report

- EI Child ID
- Last Name
- First Name
- DOB
- Ethnicity
- Child Address
- Child City
- Child State
- Child Zip
- County of Residence
- Child Sex
- Child Coordinator First Name
- Child Coordinator Last Name
- EIOD
- IFSP Status
- IFSP Type
- IFSP Start Date
- IFSP End Date
- PaySource Code
- Program Name
- Service Type
- Enrollment Status
- First Date Service Delivered
- Service Start Date
- Service End Date
- Intensity
- Frequency
- Frequency Unit
- Length
- Outcome Name
- Session Duration Minutes
- Sessions Approved
- Makeup Quantity
- Makeup Frequency Unit
- CoVisit Quantity
- CoVisit Frequency Unit
- Service Company Name
- Service Site Name
- Therapist Last Name
- Therapist First Name
- Service Location Type
- Service Location Name
- Service Location Address
- Service Location Address 2
- Service Location City
- Service Location State
- Service Location Zip
- Service Location Setting
- Natural Environment
- Alternate Service Location Type
- Alternate Service Location Name
- Alternate Service Location Address
- Alternate Service Location Address 2
- Alternate Service Location City
- Alternate Service Location State
- Alternate Service Location Zip
- Alternate Service Location Setting
- Waivers

Turning Three report

- Child's First Name
- Child's Last Name
- Birth Date
- 3rd Birthday
- Primary Language
- Primary Contact Phone Number
- Primary Contact First Name
- Primary Contact Last Name
- Primary Contact Address
- Primary Contact City

- Primary Contact State
- Primary Contact Zip Code
- POE Office
- School District Name
- EI Child ID
- Child Status
- Child Address
- Child Age
- Child City
- Sex
- Coordinator First Name
- Coordinator Last Name
- Coordinator Company
- Coordinator Phone
- Guardian Salutation
- Race/Ethnicity

Therapist Detail Report

- Salutation
- Last Name
- First Name
- Middle Initial
- Title
- Address 1
- Address 2
- City
- State
- Zip
- Primary Email
- Secondary Email
- Primary Phone
- Secondary Phones
- Birth Date
- Ethnicity
- Sex
- Service Areas
- Therapist NPI
- License Number
- Certification Type
- Certification Number
- Enrolled in OPRA
- Medicaid Number
- Active
- Company Name
- Staff ID
- Clinical Supervisor
- Employee Type
- Therapist Start Date
- Therapist Termination Date
- Suffix
- Professions
- License/Certification Effective Date
- License/Certification Expiration Date

Therapist Company Detail report

- Last Name
- First Name
- Status
- EIP Provider ID
- Company Name
- Employee Type
- Employee Status
- Employment Start Date
- Employment End Date
- Employee Contact Email
- Provider Types
- Provider Categories
- Employment Role
- Employment Role Effective Date From
- Employment Role Effective Date To
- Catchment Area
- Availability
- Profession
- Profession Start Date
- Profession End Date
- Clinical Supervisor
- Supervisor Profession
- Supvr NPI Number
- Supvr Start Date
- Supvr End Date

Central Directory report

- Provider Type
- Provider Category
- Provider Status
- Provider Name
- Provider ID
- NPI 1

- Agreement Disposition Status
- Approved/Denied Date
- Provider Agreement Type
- Primary Agreement Effective Date
- Primary Agreement End Date
- Physical Address Line 1
- Physical Address Line 2
- City
- County
- State
- Zip
- Primary Phone Number
- Primary E-Mail
- Professional Discipline / Qualified Personnel
- Service Models
- Service Areas
- Languages
- Special Populations Served
- Web Address

Unbilled Report

- Claim Source
- Child First Name
- Child Last Name
- EI Child Reference ID
- DOB
- Billing Provider Name
- Billing Provider NPI
- Rendering Provider Name
- Rendering Provider NPI
- Service Authorization Number
- Service Type
- Claim Type
- Service Date
- Start Time
- End Time
- CPT Code Modifier (CPT Units)
- CPT Description
- ICD Diagnosis Code
- Municipality Code
- CM Claim Status
- 277CA Category Code
- 277CA Status Code
- 277CA Entity Code
- Error Description
- 277 Response Date
- Provider Assigned Claim ID
- Invoice Number

Child Info and Authorization report

- Billing Provider
- EIP Provider ID
- EI Child ID
- Child First Name
- Child Middle Name
- Child Last Name
- DOB
- Child Address
- Child City
- Child State
- Child Zip
- Sex
- County of Residence
- Child Status
- Date Aging Out
- Service Coordinator First Name
- Service Coordinator Last Name
- Service Coordinator Company
- Service Coordinator Phone
- Service Coordinator Email
- EIO/D First Name
- EIO/D Last Name
- EIO/D Phone
- EIO/D Email
- Program
- Enrollment Type
- Enrollment Status
- Authorization Number
- Start Date

- End Date
- Location Type
- Suspended Start Date
- Suspended End Date
- Length
- Frequency
- Frequency Unit
- Total Sessions Authorized
- Total Co-Visit Units
- Visits Per Day
- IFSP ID
- IFSP Signed Date
- IFSP Type
- IFSP Status
- IFSP Start Date
- IFSP End Date
- Exit Date
- Therapist First Name
- Therapist Last Name
- Therapist NPI
- Referring Provider First Name
- Referring Provider Last Name
- Referring Provider NPI
- Last Session Date
- Number of Make-up Sessions / Units Authorized
- Total Make-Up Session / Units Used
- Number of Remaining Units / Sessions

Posted Attendance report

- Claim Source
- CM Claim Status
- Invoice Number
- CM Claim Status Date
- Original Claim ID
- Corrected Claim ID
- Visit Type
- Child First Name
- Child Last Name
- DOB
- EI Child Reference ID
- Service Authorization Number
- Service Type
- Service Date
- Start Time
- End Time
- CPT Code
- CPT Description
- Modifier
- Units
- ICD Diagnosis Code
- Billing Provider Name
- EIP Provider ID
- Rendering Provider NPI
- Child County of Residence
- Place of Service
- Rendering Provider Name

AR Detail report

- Original Claim ID

- Voucher Number
- Voucher Description
- Billing Provider Name
- Date Billed
- Amount Billed
- Amount Rebilled
- County Name
- Child Name
- Units Billed
- Number of Sessions
- EIP Number
- Total Minutes
- Aged Months
- Aged Month Category
- Aging Date
- PaySource Name
- Service Type
- Program Name
- Service Date
- Claim Status
- AR Status

County Respite Allocation report

- County

- Allocation Year
- Allocation Total
- Allocation Used
- Allocation Balance

2.7 How the Lookup Feature Functions as a Report

In Case Management, the lookup feature within the child, therapist, and provider menus also functions as a reporting tool. Any information retrieved during a search can be easily exported to Microsoft Excel. This provides a convenient method for accessing contact details and additional data.

2.8 How Grids Function as a Report

In Case Management, data is organized into tabs, each corresponding to a stage of the Early Intervention Program. Typically, when information is input into these tabs, the first panel within the tab will display as a grid compiling the information into a user-friendly format. Below are the tabs that have grids.

- Child Info Tab: Referral; Referral At-Risk; Child Address, Child Attribute Report, County of Fiscal Responsibility
- Family Info Tab: Family; Family Member; Parent Consent Detail Report; Surrogate Parent Appointment; Caseworker; Contact Log
- Ins Info Tab: Insurance*; Insurance Prior Approval*; Insurance Declinations*; Scripts, Orders, Recommendation and Referrals; 271 Response
- Teams Tab: EIO/D / Service Coordinator
- Eval Info Tab: Evaluation Information; Child Medical Record; Current Medical Professional involved with Child; Medical Diagnostics Codes Summary; Family Assessment Report; External Evaluation; MDE Summary Report; Waivers; Evaluation Assessment (Developmental Assessment and Supplemental Evaluation)
- Eligibility Tab: Eligibility; Eligibility Delay Detail Report
- IFSP Tab: IFSP; IFSP Team; IFSP Meeting; Level of Development; IFSP Outcomes; IFSP Ongoing Evaluations; IFSP Services; Waivers; Additional Notes*; Active IFSP Services Panel
- Service Tab: Service Information; Therapist Assignment; Assistive Technology Device; Waiver; Service Delay Reason
- Child/Family Outcomes Tab: COSF*
- Transition Tab: Transition Plan Members; Part B Program – Form A Part 1B; Transition Plan Part B Program Family Outcomes Form A; Transition Plan Non-Part B – Program Form B Part 1B; Non-Part B Program – Family Outcomes Worksheet – Form B
- Transfer, Exit & Close Tab: Child Transfer; Child Exit/Close; Reopen/Reactivate Child
- Documents Tab: Document Management
    - * indicates that there is no export to Microsoft Excel option.

Section 3: Service Logging Module Reports

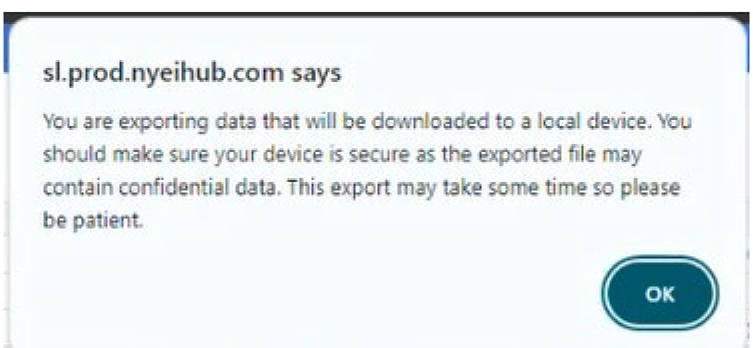
Service Logging Module Reports Overview

The EI-Hub Service Logging module is a responsive, Health Insurance Portability and Accountability Act (HIPAA) / Family Education Rights and Privacy Act (FERPA) compliant module of EI-Hub that allows administrative roles (including Quality Assurance and Clinical Supervisors), Service Coordinators, Rendering Providers, and Billing Providers to schedule, log, manage, and audit each service rendered. Service information entered into Service Logging later becomes claims.

The EI-Hub Service Logging module is permission-based. A user's role(s) in Case Management determines their portal access. Portals are user's access points to view and enter data in the Service Logging module. For a list of reports available by portal, please reference **Appendix 1**.

In Service Logging, every menu option within a portal has an export option. This allows the user to export the information as a report. Information is available for export in the following formats:

Once an export option is selected, users will receive a pop-up notification indicating that they are about to download data that contains Protected Health Information (PHI) and they should have a secure location to store the information. Users will select the 'ok' option [see screenshot below] and the report will download in the requested format.

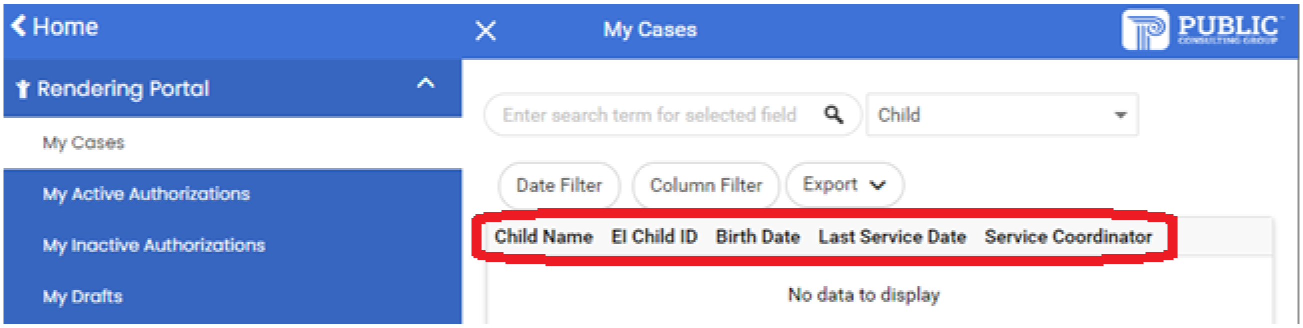


HELPFUL HINTS

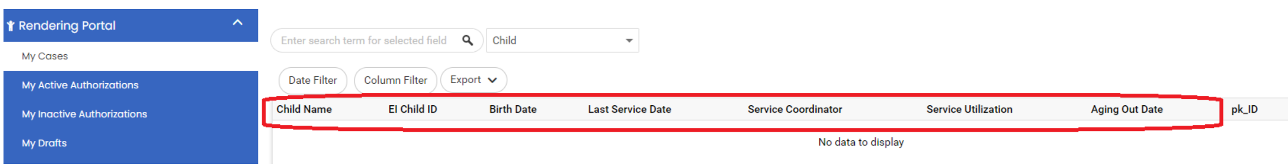
If you are not seeing all of the options within a report, you may need to adjust your browser view by resizing the window and/or zooming in or out. See the examples below for reference.

In this example, we are showing the “My Cases” report within the Rendering Provider portal. In view #1, only 5 report options are visible. In view 2, the browser view was adjusted, and 7 report options are now visible.

View #1:



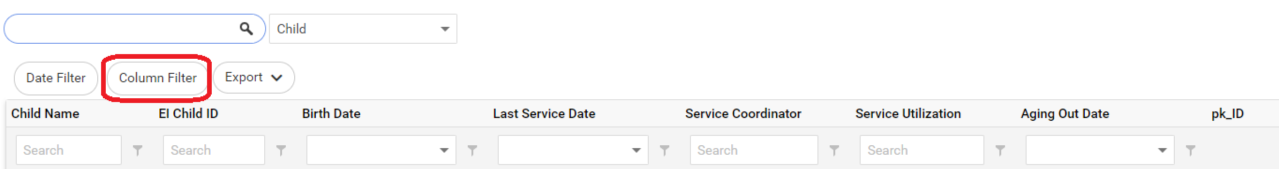
View #2:



1. All Cases Report

Portals with “My Cases” or “All Cases” options: This section shows all cases assigned to a provider. From here, users can export the full report or use the ‘Column Filter’ button to refine the report before exporting.

- Note: Service Logging reports are limited to 10000 rows
  - Filter options:



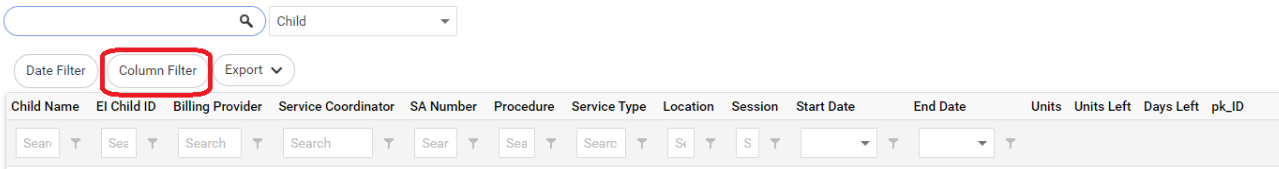
- Child Name
- EI Child ID
- Birth Date
- Last Service Date
- Service Coordinator
- Service Utilization (only for My Cases)
- Aging Out Date

2. Active Authorization Reports

Portals with “My Active Authorizations” or “Active Authorizations” options:

- The active authorization sections show service authorization as of today's date. From either section, users can export the full report or use the ‘Column Filter’ button to refine the report before exporting.
- Note: Service Logging reports are limited to 10000 rows

- Filter options:

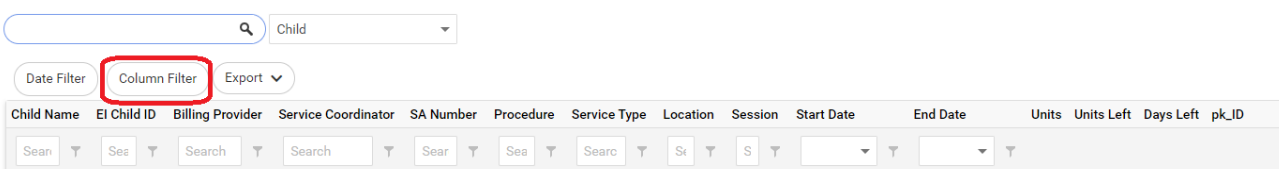


  - Child Name
  - EI Child ID
  - Billing Provider
  - Assigned Therapist
  - Service Type
  - Location
  - Session
  - Start Date
  - End Date
  - Days Left
  - Units
  - Units Left or Units Remain
  - **Billing provider portal will have additional options not shown above.*

3. Inactive Authorization Reports

Portals with “My Inactive Authorizations” or “Inactive Authorizations” options:

- The inactive authorization sections displays service authorizations where the end date is before today's date. Users can continue to log against this authorization, provided the visit date falls within the authorization's date range.
- Note: Service Logging reports are limited to 10000 rows
  - Filter options:

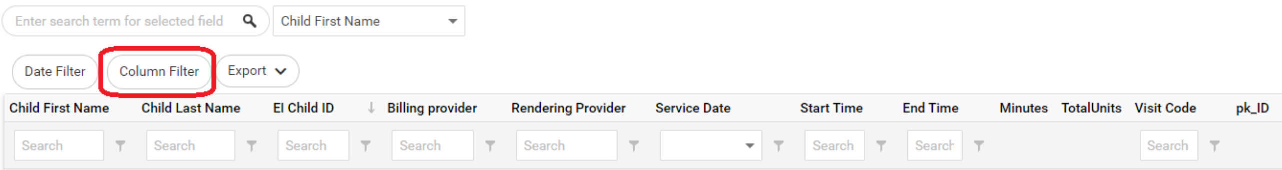


  - Child Name
  - EI Child ID
  - Billing Provider
  - SA Number
  - Assigned Therapist or Rendering Provider
  - Service Type
  - Location
  - Session
  - Start Date
  - End Date
  - Days Left
  - Units
  - Units Left
  - **Billing provider portal will have additional options not shown above.*

4. SC Notes Reports

Portals with "MY SC Notes" or "SC Notes" options: The SC notes sections show notes completed by or on behalf of a service coordinator. From these sections, users can export the full report or use the 'Column Filter' open to refine the report before exporting.

- Note: Service Logging reports are limited to 10000 rows
  - Filter options:

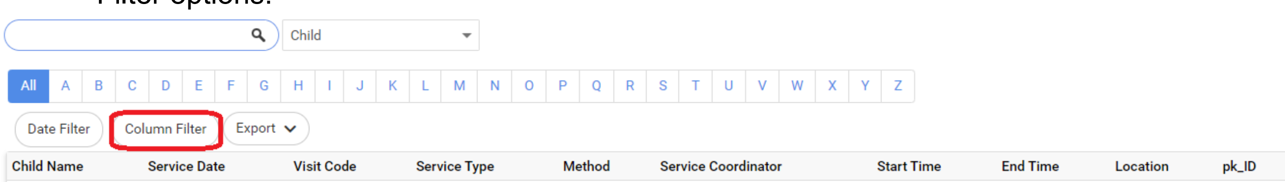


  - Child First Name
  - Child Last Name
  - EI Child Reference ID
  - Billing Provider (only in My SC Notes)
  - Rendering Provider (only in My SC Notes)
  - Service Date
  - Start Time
  - End Time
  - Service Coordinator (available in Billing Provider, County, Clerical, and Provider QA Portals)
  - Visit Code

5. SC Claims Reports

Portals with "MY SC Claims" or "SC Claims" options: The notes sections show claims completed by or on behalf of a service coordinator. From these sections, users can export the full report or use the 'Column Filter' open to refine the report before exporting.

- Note: Service Logging reports are limited to 10000 rows
  - Filter options:

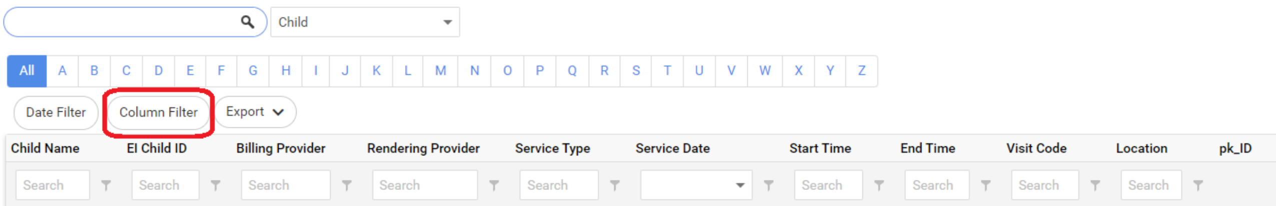


  - Child Name
  - Service Date
  - Visit Code
  - Service Type
  - Method
  - Service Coordinator
  - Start Time
  - End Time
  - Location

6. Visit Notes Reports

Portals with “My Visit Notes” or “All Visit Notes” options: The notes sections show notes completed by or on behalf of a rendering provider. From these sections, users can export the full report or use the ‘Column Filter’ open to refine the report before exporting.

- Note: Service Logging reports are limited to 10000 rows
  - Filter options:

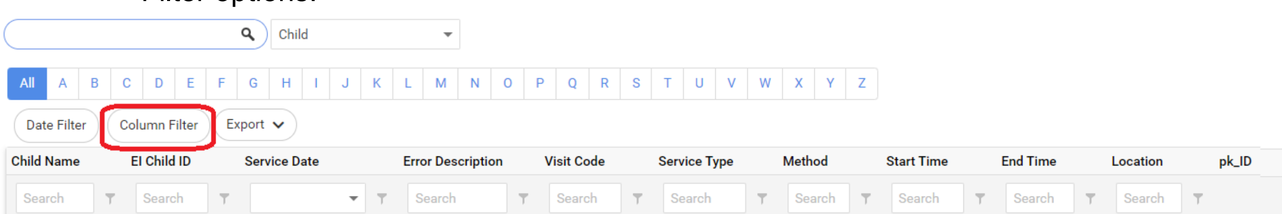


- Child Name
- EI Child ID
- Billing Provider
- Rendering Provider
- Service Type
- Service Date
- Start Time
- End Time
- Visit Code
- Location (available in Rendering and County portals)
- Service Type (available in County portal)
- Method (available in County portal)

7. Error Notes Reports

Portal with “My Visit Errors”, “My SC Errors”, “My Visit Errors” or “All Visit Errors” options. The notes sections show visit notes with errors completed by a provider. From these sections, users can export the full report or use the ‘Column Filter’ button to refine the report before exporting.

- Note: Service Logging reports are limited to 10000 rows
  - Filter options:



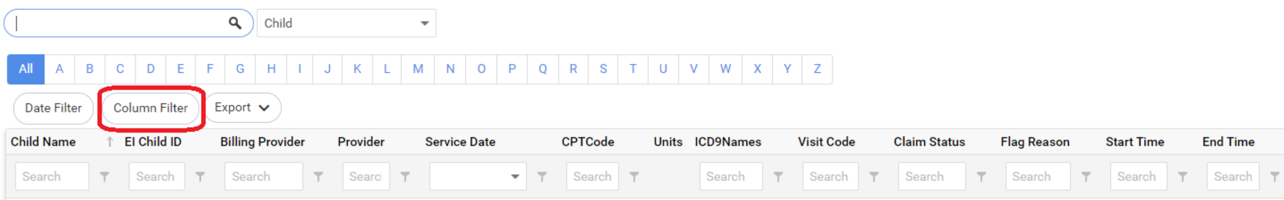
- Child Name
- EI Child ID
- Service Date
- Error Description
- Visit Code
- Service Type
- Method
- Rendering Provider (available in Billing Provider, Clerical, and County
- Service Coordinator (available in Service Coordinator)

- Billing Provider
- Start Time
- End Time
- Location (not available in All Visit Errors)

8. View Hold Visits Report

This report is available in the Billing Provider, Clerical, and County portals only. This report shows items are in a Ready status and can be billed. These visits require action; users will need to "toggle off hold" to move the claim from Service Logging Case Management for placement on a voucher. From this section, users can export the full report or use the 'Column Filter' button to refine the report before exporting.

- Note: Service Logging reports are limited to 10000 rows
  - Filter options:

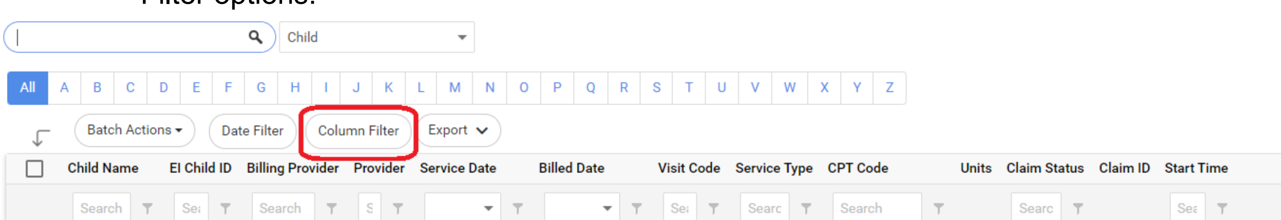


- Child Name
- EI Child ID
- Billing Provider
- Provider
- Service Type
- Method (available in County)
- Hold (available in County)
- Service Date
- Visit Code
- Claim Status
- Flag Reason
- Start Time
- End Time (available in Billing Provider and Clerical)

9. View Billed Visits Report

This report is available in the Billing Provider, Clerical, and County portals only. This report captures a combination of visits, including visits that are 'Ready to Bill' or in a 'Flagged to Fix' state. From this section, users can export the full report or use the 'Column Filter' button to refine the report before exporting.

- Note: Service Logging reports are limited to 10000 rows
  - Filter options:



- Child Name
- EI Child ID
- Billing Provider
- Provider
- Service Date
- Billed Date (available in Billing Provider and Clerical)
- Visit Code
- Service Type
- CPT Code
- Claim Status
- Start Time
- End Time

10. Other Reports

Reports are available in following sections of Service Logging:

- My Drafts / Drafts
- My Deleted Drafts
- My Scheduled Visits
- My Missed Visits
- My Calendar
- My Flagged Claims
- Rebilled Visits
- Void Visits

NEED HELP?

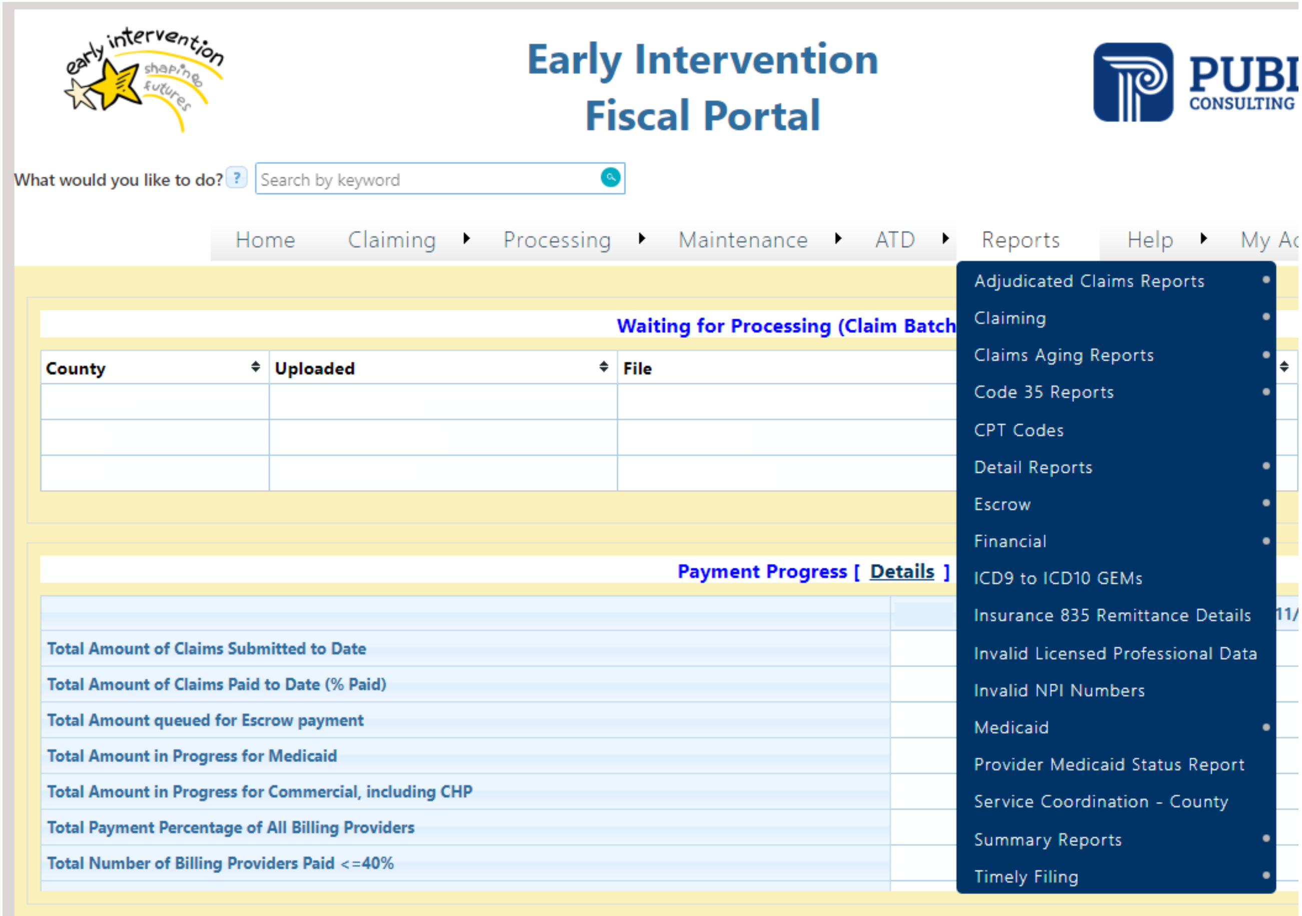
For more information, please reference the resources on the Learning Management System for Service Logging.

Section 4: Billing Module Reports

Billing Module Reports Overview

The Billing module, formerly known as EI Billing, is where Early Intervention (EI) Service Providers can review and update billing for Early Intervention services through the Department's State Fiscal Agent (SFA). It is an access point for Municipalities and EI Service Coordinators to obtain information about the EI fiscal process.

In Billing, reports are located in the Reports section of the module. The data presented in the reports has an up to 24-hour lag, meaning that the data returned in the reports will take overnight to process.



1. Summary Reports

- **Summary Trend by Month**: Allows users to view a summary of claims that are paid and pending. The report results will list all claims that were billed in the month, based on the specified parameters. The report will only show the past six months of full claim data. Please note, the report is pulling claim lines, not claims; one claim can contain multiple lines.
- **Summary by Municipality**: Allows users to view a summary of claims that are paid and pending. Please note, the report is pulling claim lines, not claims; one claim can contain multiple lines.
- **Summary by Provider**: Allows users to view a summary of claims that are paid and pending. Please note, the report is pulling claim lines, not claims; one claim can contain multiple lines.
- **Summary by Payer for Provider Payments**: Allows users to view a summary of claims that are paid and pending. Please note, the report is pulling claim lines, not claims; one claim can contain multiple lines.
- **Payment Summary by Service Month**: Allows users to view a summary of claims. The report lists claims by one month of service. Selecting one month of service for the date parameters will only render services provided in that month. If users select date received as the date type, the report will break down claims based on the service month.

- **Summary by Service Type:** Allows users to view a summary of number of claims billed, billed amount, paid amount and pending amounts. The report is summarized by service category, service type and service method. The report includes filters such as Dates, County, Provider, Service Type, Service Category and Service Method.

2. Detail Reports

- **Detail Claims:** Shows the current adjudication status of all claims based on the criteria entered, including the amounts paid by each payer type (Commercial, Medicaid, and Escrow), at a claim level. This report allows the user to view claims up to, and including, final adjudication. When specifying a payer type, the report generates based on the primary payer.
- **Detail Transaction:** Allows the user to view transactions associated with claims. This report displays the transactions of claims shown on the Detail Claims report. To assist in transaction lookup, Procedure Code, Claim Adjustment Reason (CAR), and Remittance Advice Remark (RAR) have been added as report parameters. A description of each code is also provided. Users will be able to see the CAR and RAR codes, the payer associated with the transaction, and the amount paid/pending by the payer of the transaction.
- **Voided Transaction Report:** Allows the user to view all transactions associated with Voided claims. To assist in transaction lookup, the report has date, payer type and insurance carrier filters. The report displays transaction level information including claim number, child, billed amount, and paid amount.

3. Adjudicated Claims Reports

- **Adjudicated Claims Turnaround Detail**: Allows users to view details of claims that have been fully adjudicated. In this report you will be able to select your payer type: Commercial, Medicaid, Escrow, or all three together. The report will generate claims based on the primary payer (the payer that the claim is billed to first). This report includes primary payer (first payer billed) and final payer (last payer paid) columns to display the turnaround time of claims. Additionally, this report lists the invoice number billing providers have entered into the source system to assist in tracking payments.
- **Adjudicated Claims Turnaround Summary by Municipality**: Allows users to view a summary of claims that have been fully paid. The report results will list claims by Municipality, which provides a unique way of displaying results. The brackets display the total adjudication time, from the date the claim was submitted in the first transaction through the final adjudication date in the last transaction.
- **Adjudicated Claims Turnaround Summary by Payer**: Allows users to view a summary of claims that have been fully paid. In this report you will be able to select your payer type: Commercial, Medicaid, Escrow, or all three together. The report will generate claims based on the final payer (the payer that the claim is paid by last). Therefore, if you select Commercial as your payer, the report will show claims that were paid fully by commercial insurance.
- **Adjudicated Claims Turnaround Summary by Provider**: Allows users to view a summary of claims that have been fully paid. The report results will list claims by Billing Provider which provides a unique way of displaying results. The brackets display the total adjudication time from the date the claim was submitted in the first transaction through the final adjudication date in the last transaction.

4. Claims Aging Reports

- **Claims Aging Detail**: Allows users to view the details of claims that are not fully adjudicated. In this report you will be able to select your payer type: Commercial, Medicaid, Escrow, or all three together. The report will show claims based on the current payer. This report may show claims that are partially aging, meaning a claim has been partially paid by some payers, and is still awaiting final adjudication by others. You will be able to identify claims that are partially adjudicated by comparing the Amount Submitted and Amount Aging columns.
- **Claims Aging Summary by Municipality**: Allows users to view claims that are not fully adjudicated at a summary level. The report displays aging claims in 5 sets of date ranges, in order to create a visual for users to see the approximate amount of time groups of claims have been awaiting adjudication. The date ranges are based on the day the claim is submitted to the primary payer. To see the exact amount of time that a claim has been aging, refer to the Claims Aging Detail Report.
- **Claims Aging Summary by Payer**: Allows users to view claims that are not fully adjudicated at a summary level. The report displays aging claims in 5 sets of date ranges, in order to create a visual for users to see the approximate amount of time groups of claims has been awaiting adjudication. The report date ranges are based on the day the claim is submitted to the primary payer. To see the exact number of days a claim has been aging, refer to the Claims Aging Detail Report.
- **Claims Aging Summary by Provider**: Allows users to view claims that are not fully adjudicated at a summary level. The report displays aging claims in 5 sets of date ranges, in order to create a visual for users to see the approximate amount of time groups of claims has been awaiting adjudication. The date ranges are based on the day the claim is submitted to the primary payer. To see the exact number of days a claim has been aging, refer to the Claims Aging Detail Report

5. Claiming Reports

- **Child Lookup:** Allows the users to lookup a child and see their general information, services, Insurance Policies, Medicaid Eligibility and Claims.
- **Claim Lookup:** Allows the users to lookup claim information based on county, service date, Client Identification Number (CIN) and last name. The report produces information including child information, Authorization information, and links to the billing history for the claim.
- **Claims Research:** Allows the users to lookup claim information based on payer, county, status, child, authorization, and dates. The report produces information including child, therapist, billed amount, paid amounts, claim number, check number, status, and a link to billing history for each claim.
- **Claim Status:** Allows the users to lookup claim information based on county, status, and service date.
- **Claims In Progress:** Allows user to see summary of claims in progress including status, insurance company, number of claims and amount.
- **Workable Claims – Summary:** Allows user to lookup summary of claims in workable status by county and date of service. The summary is by category and aging date range.

6. Financial Reports

- **Escrow Checks:** Allows user to lookup checks by payment date. The report produces information including check number, amount, municipality that paid, and links to the claim information.
- **Invoice Batch Statuses:** Allows user to lookup invoices and produces information including total billed, pending amounts, paid amounts, and a link to details.
- **Provider Payment Profile:** Allows the user to see the summary of their payments by Escrow, Medicaid, and Insurance as well as payment details.

7. Medicaid Reports

- **Medicaid 835 Checks:** Allows user to view Medicaid payments. The report produces information including cycle, check information, check amount and link to the details.
- **Medicaid 835 Remittance Details:** Allows user to lookup up a Medicaid remittance by check number and date. The report produces information including cycle, child name, dates of service, authorization, amounts billed and paid, Transaction Control Number (TCN), and denial information.
- **Medicaid Claim Batches:** Allows user to see Medicaid batch summary including batch date, claim count, and claim amount. The report has a link to see the details of the batch including child information, provider invoice, and 277 responses.
- **Medicaid Claims By Status:** Allows user to see Medicaid 835 responses on a claim level including TSN, Provider, Therapist and Child information. There is a link to view the billing history associated with the claim.
- **Medicaid 835 Results:** Allows user to look up Medicaid 835 Results by cycle. The results include status, adjustment code, billed, and payment information. There is also a link to the Medicaid Cycle Calendar.
- **Medicaid Code 35 Errors – Provider:** Allows user to see Medicaid Code 35 Errors summarized by provider and results include CIN, Child Reference Number, Data source and amount.
- **Medicaid Pending Claims – Provider:** Allows users to lookup Medicaid pending claims by cycle number. The results include Claim information such as Child, Error codes, and amounts.
- **Medicaid Claim Monthly Revenue Summary:** Allows user to see Claim count, Billed amount, and payment amount summarized by Month and Year.
- **Medicaid Service Monthly Revenue Summary:** Allows user to see service count and payment amount summarized by Month and Year.

8. Other Reports

- **Timely Filing - Extraordinary Circumstances:** Allows user to view all Extraordinary Circumstances entered including reason and dates.
- **Financial - Municipality Expense and Revenue**: Allows the user to view the time that claims were billed within a specific Escrow check period. Additionally, users will be able to view a summary of claims billed by each funding category (Commercial, Medicaid, and Escrow).
- **Financial - Municipality of Residence / Fiscal Responsibility Differences Detail**: Allows the user to view children that have a different municipality of Fiscal Responsibility versus Residency (Authorization). The report produces information including the service category

and service type, and the authorization number. When specifying a billing provider, the report will only display providers associated with the county selected. To see the entire list of providers where the county is fiscally responsible, select 'All' as the billing provider.

NEED HELP?

If you are looking for more information on reports available in the Billing module, please reference the Training and Support Information page within the module

Section 5: Training Resources & Support

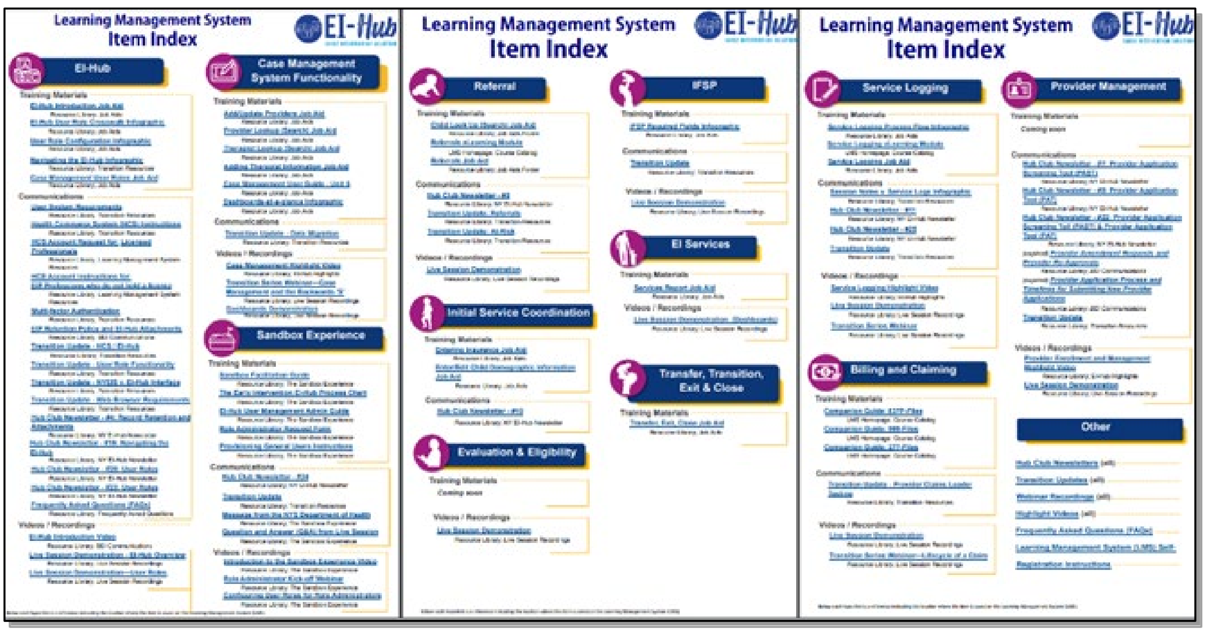
1. Accessing Training Resources

All training resources are on the Learning Management System (LMS). The LMS is accessible through self-registration. Users choose their own username and password when creating an account. A user's LMS login is not the same as their EI-Hub login as the LMS is not linked to Health Commerce System (HCS).

If you forgot your username or password, use the "Forgot your password" option on the LMS login page. Or if you need to create an LMS account, [click here](#) for instructions.

2. LMS Item Index

The Bureau of Early Intervention and Public Consulting Group (PCG) developed a comprehensive set of training resources to help new users learn how to perform particular functions in the EI-Hub. The Item Index will help users navigate the LMS and find available training resources. Training resources are regularly updated. We recommend that users look for red flags next to resources to identify new content.



3. Customer Support

PCG will provide Customer Service support to EI-Hub users via a Call Center. The Call Center will attempt to answer calls in real-time. However, callers may be asked to leave a voicemail. A representative will return calls by the following business day. You can reach the PCG Call Center at the below:

Telephone: 866-315-3747

Email: NYEITraining@pcgus.com

Agents are available 7:00 am – 7:00 pm EST

Appendix 1: Service Logging Matrix: Reports by Portal

Reports	**Portals**							
Menu In Portal	Service Coordinator	Rendering	State	Clerical	Billing Provider	Clinical Supervisor	County	Provider QA
Active Authorizations				x	x			
All Active Authorizations			x				x	
All Cases			x	x	x		x	x
All Deleted Drafts			x					
All Inactive Authorization			x				x	
All SC Claims			x				x	
All SC Notes			x				x	
All Scheduled Notes			x					
All Visit Errors			x				x	
Calendar by Child	x	x						
Calendar by Provider				x	x			
All Visit Notes			x				x	
Drafts			x	x	x	x	x	
Flagged Claims to Fix			x	x	x		x	x
Inactive Authorizations				x	x			
My Active Authorizations	x	x						
My Calendar		x						
My Cases	x	x						
My Deleted Drafts		x		x				

My Drafts	x	x						
My Flagged Claims to Fix	x	x						
My Inactive Authorizations	x	x						
My Missed Visits	x	x						
My SC Calendar	x							
My SC Claims	x							
My SC Errors	x							
My SC Notes	x							
My Scheduled Visits	x	x						
My Visit Errors		x				x		
My Visit Notes		x				x		
Resources								
SC Claims				x	x			x
SC Notes				x	x			x
Scheduled Notes				x				
View Billed Visits			x	x	x		x	
View Deleted Visits			x					
View Hold Visits			x	x	x		x	x
View Ready/Off Hold Visits			x	x	x		x	
View Rebill Visits				x	x			
View Rebilled Visits				x	x			
View Void Visits				x	x			
Visit Details								
Visit Errors				x	x			x
Visit Notes				x	x			x
My Scheduled SC Notes	x							

Transportation and Respite			x				x	
All active Authorizations (Trans/Respite)			x				x	
All inactive Authorizations (Trans/Respite)			x				x	