DISCLAIMER

The EI-Hub Quick Start Guide has been specifically designed to assist users during the launch phase of the system. By posting this guide, we aim to provide you with essential information, allowing you to gain insights into how the EI-Hub will operate at go-live. Please note that certain functionalities listed in the guide may differ from what is currently available in the EI-Hub Sandbox. To learn more about setting up and using the Sandbox, please refer to the Sandbox Facilitation Guide.

The Quick Start Guide is currently in a draft form and certain links may not be accessible. The guide will be finalized and reposted two weeks prior to the EI-Hub system launch.

EI-Hub Quick Start Guide

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Revision History

Version Number	Release Date	Author	Revision Summary
v.0.1.0	12.13.2022	Lauren Zelinsky	First Draft Release
v.0.2.0	01.04.2023	Lauren Zelinsky	Second Draft Release
v.0.3.0	01.31.2023	Lauren Zelinsky	Third Draft Release
v.0.4.0	04/12/2023	Lauren Zelinsky	Draft version posted to LMS

Section 1: Before Getting Started

1. Quick Start Guide Introduction

The EI-Hub Quick Start Guide is a quick and easy-to-read document that will help prepare new users for the EI-Hub solution. The guide gives users the information they need to set up and use the EI-Hub solution.

2. Required Steps to Access the EI-Hub

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

- ☑ Active HCS account
- ☑ Compatible Web Brower

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. Information on User Roles

At the launch of the EI-Hub, all active users in NYEIS will transition over to the EI-Hub. User roles will be auto-assigned based on a user's equivalent account status in NYEIS.

3.1 Case Management

Each user will be assigned the corresponding user role (1 role) to their previous NYEIS user role.

Please reference the table on the next page to learn which EI-Hub user role matches your NYEIS user role.

NYEIS User Role (old)	EI-Hub User Role (new)
MUNI All (Universal Municipal)	MuniProgAllNY
MUNI All Fiscal	MuniFiscalAllNY
MUNI At-Risk	MuniAtRiskMgtNY
MUNI Contracting	EIO/D NY
MUNI EIO	EIO/D NY
MUNI EIO/D	EIO/D NY
MUNI EIO/D-SC	EIO/D NY
MUNI Fiscal Admin	MuniFiscalAllNY
MUNI Fiscal Manager	MuniFiscalAllNY
MUNI Fiscal Data Entry	MuniDataEntryNY
MUNI Intake Staff	MuniDataEntryNY
MUNI Program Data Entry	MuniDataEntryNY
MUNI Program User Admin	MuniProgAllNY
MUNI QA	MuniViewOnlyNY
MUNI Service Coord	ISC/OSC NY
**No Historic NYEIS Role*	MuniTransferNY
PROV All (Universal Prov.) Program Role: Agency Director / Agency Administrator	UniversalProvNY
PROV All (Universal Prov.) Program Role: Independent Providers	InProviderNY
PROV All Fiscal	ProvFiscalMgrNY
PROV All Program	ProvDataEntryNY
PROV Eval	RenderProvNY
PROV Fiscal Admin	ProvFiscalMgrNY
PROV Fiscal Manager	ProvFiscalMgrNY
PROV Program Data Entry	ProvDataEntryNY
PROV QA	ProvQA NY
PROV Render Prov Staff	RenderProvNY
PROV Render Prov Staff	JrRenderProvNY
PROV Service Coordinator	ISC/OSC NY
PROV Service Director	ProvDataEntryNY
PROV Service Manager	ProvDataEntryNY

3.2 Service Logging

A user's access to the EI-Hub Service Logging component will correspond with the method suited for creating a claim prior to the EI-Hub system launch.

- Utilize manual claims submission in NYEIS to create claims; you will have access to the EI-Hub's Service Logging component.
- Utilize a third-party system or clearinghouse to create claims; you will **not** have access to the EI-Hub's Service Logging component. These users will continue to use their external systems to generate claims.

Please note, users cannot utilize both methods for service logging at the launch of the EI-Hub.

3.3 Billing

Current EI Billing user roles will **NOT** migrate over at the launch of the EI-Hub. Following the launch of the system, EI Billing will be referred to as the Billing module. Role Administrators must grant access to any user requiring the Billing module. Please consult your Role Administrator to determine your access needs.

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 or access to a component.

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

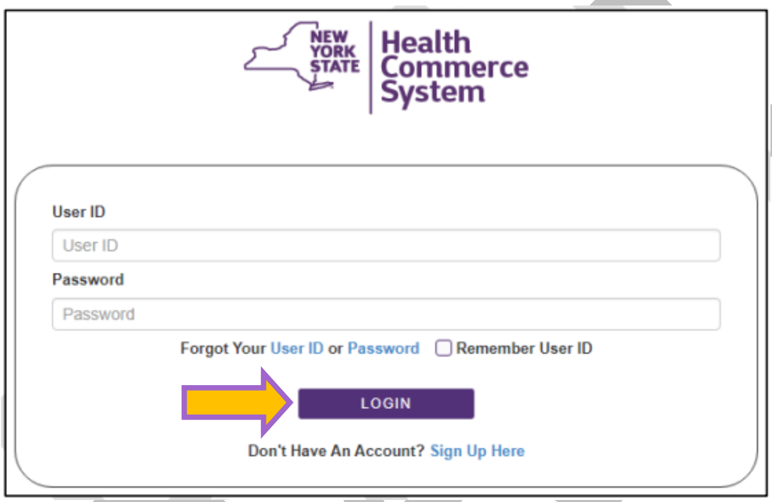
- EI-Hub User Role Crosswalk
- EI-Hub User Roles Job Aid

Section 2: EI-Hub System Information

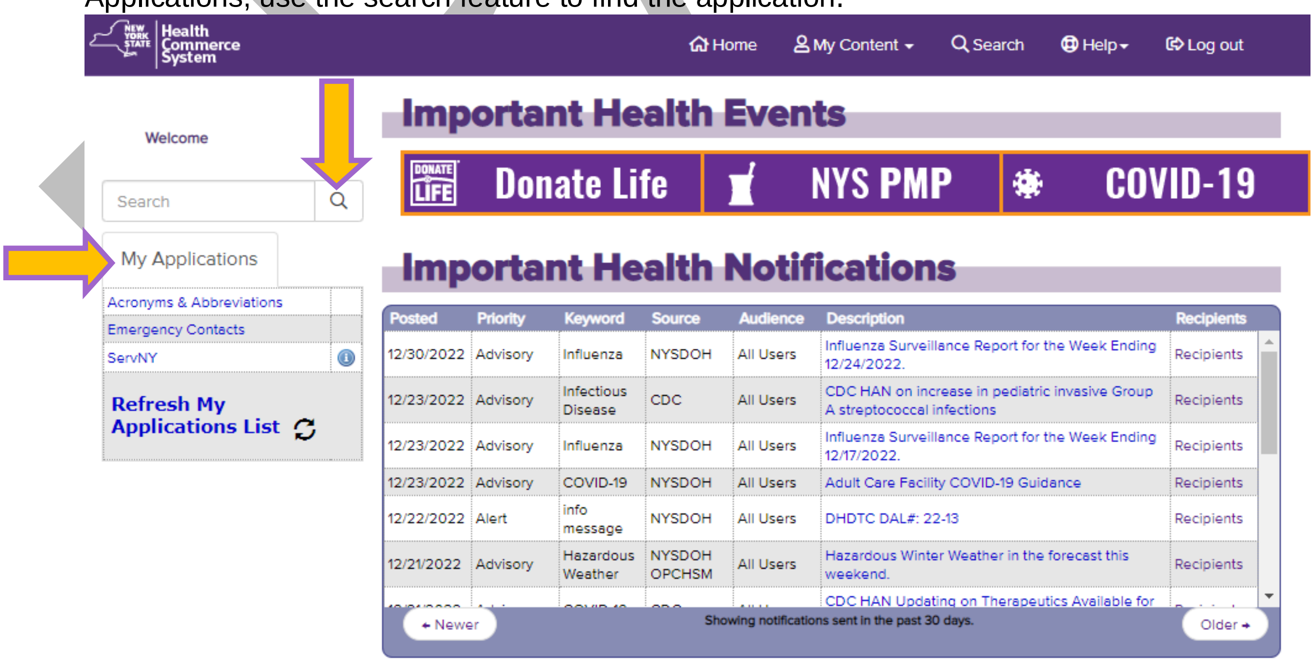
1. How to Log into the EI-Hub

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 through the HCS.

NEED HELP?

You can reach the Health Commerce System Commerce (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 Overview

The EI-Hub solution is your one-stop shop to manage the work you do for children in the Early Intervention Program (EIP). Depending on your role, you will use the EI-Hub to capture and report on child information from referral (intake) to transition and manage provider data, claim creation, billing, and payments.

Module Overview	
Case Management	Manage and report on a child's progression from referral to transition out of the EIP. Track referrals, service authorizations, claims, and child transition. Manage provider data and tasks such as re-approvals, amendments, and provider profiles and rosters.
Billing	Reporting and claims management with direct links to data within the Case Management module.
Service Logging	Log and track EI services provided at the provider site and in the field. Capture visit data and record notes linked to the child's record directly.
Provider Enrollment	Enroll new and returning providers seeking a new agreement using an all-online process.
Learning Management System (LMS)	Your resource for system onboarding, training, and references for the EI-Hub solution.

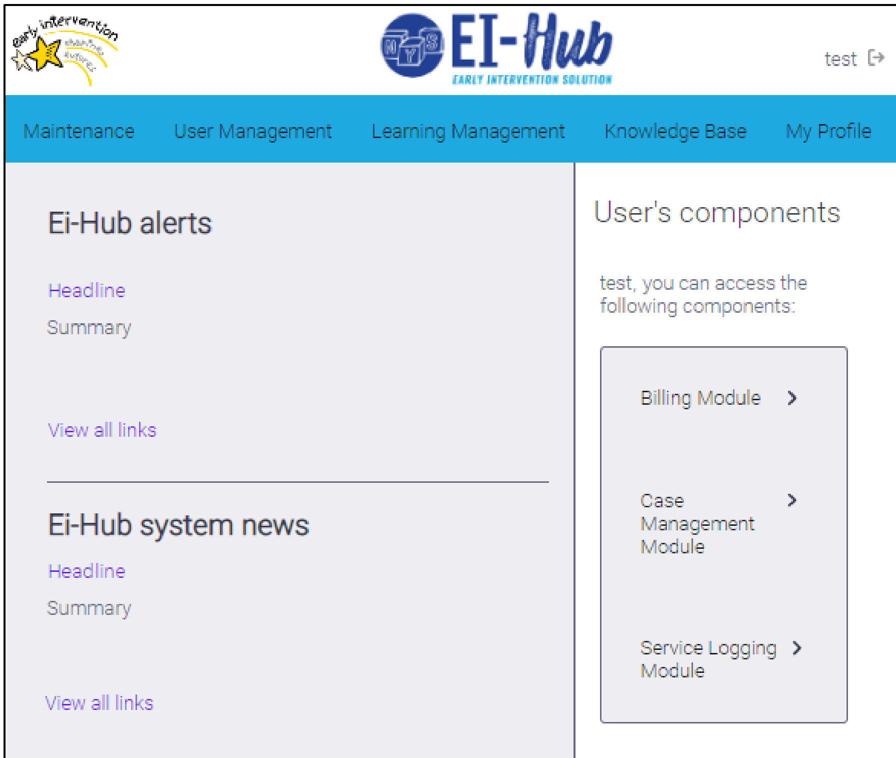
HELPFUL HINT

Looking for more information about the EI-Hub solution, please reference the following job aid:

- [EI-Hub Introduction Job Aid]

2.1 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.



HELPFUL HINTS

- Components are visible based on a user's account access
- 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.

2.2 Case Management Component Overview

In the EI-Hub's Case Management component, users will maintain information on the children and families they serve. Users can access/view their dashboards on the Case Management home page, toggle between user roles, and enter the different areas within the Case Management component. From the Menu pane, users will select which area of the Case Management component they would like to access.

Case Management Menus

- **Child menu**: Access all areas related to a child's record, from creating the record to exiting a child from the EIP.
- **Therapist menu**: Access to view and maintain therapist records.

- **Provider menu**: Access to view and maintain provider records; this includes: View status in the EIP, viewing application and amendment requests, and initiating re-approval and amendment requests.
- **Attendance menu**: Accepts claims into the system and sends claims for payment. It also includes the 837 file loader, used by individuals that use third-party systems or clearinghouses.

Dashboards

Dashboards will help users track a child's movement through the lifecycle of a child (Backwards 'S') within the Case Management component of the EI-Hub. Dashboards will replace the inbox and work queues currently used in NYEIS.

HELPFUL HINT

All users will have dashboards. However, access to the dashboards and types of alerts received will vary based on a user's role.

NEED HELP?

If you are looking for more information on the Case Management module, please reference the *Case Management User Guide* (coming soon).

If you are looking for more information on dashboards and alerts, please reference the following resources:

- *CM User Guide – 7.1 Dashboards & Alerts* (coming soon)
- Dashboards Infographic

2.3 Service Logging Component Overview

In the EI-Hub's Service Logging component, users will enter Evaluation, Visit, Service Coordination, Respite, and Transportation information from the services provided. The information entered into the system will then be used to create a billable claim. Remember, if your entity used manual claims submission in NYEIS for billing and claiming, you will have access to the EI-Hub's Service Logging component at the launch of the EI-Hub. If your entity used a third-party system or clearinghouse for billing and claims, you will not have access to the EI-Hub's Service Logging component.

In Service Logging, sers will access the appropriate portal based on their corresponding role(s) in the Case Management component. Please reference the list below for a summary of each portal:

- **Rendering Portal** allows the rendering provider to see all children assigned to them, enter visits, schedule visits, review billing errors, and make necessary corrections.
- **Service Coordinator Portal** allows the service coordinator to see all children assigned to them, enter notes, schedule visits, review billing errors and make necessary corrections.
- **Billing Provider Portal** allows the billing provider to see all cases assigned to their business. See visit information entered by the rendering provider or service coordinator employed by them. Users can also see visit errors, assign claims to be fixed, and move claims to Case Management for payment.

- **County Portal** allows users to view all cases for children in their county.
- **Provider QA Portal** is a view-only portal that allows users to do quality assurance reviews on cases.
- **Clerical Portal**- allows access to all cases assigned to the billing provider; assists with scheduling, entry, and billing functions.
- **Clinical Supervisor Portal**- is a view-only portal that allows the clinical supervisor associated with a rendering provider to view visit logs but not edit any information.

HELPFUL HINT

Users will access the appropriate portal based on their corresponding role(s) in the Case Management component.

NEED HELP?

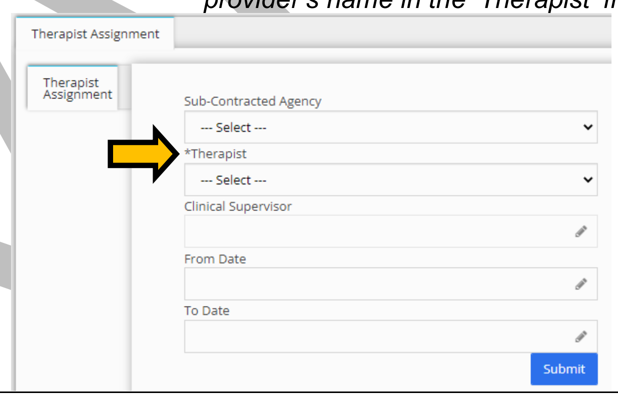
Need access to another portal? Please get in touch with your **EI-Hub Role Administrato**r for assistance.

If you are looking for more information on the Service Logging component, please reference the *Service Logging User Guide* (coming soon).

Section 3: Tips and Tricks

1. Glossary of New Terms

In the EI-Hub, some familiar terms may have changed. Below is a glossary of new terms used in the EI-Hub:

Term	Definition
Company	Agency / Billing Provider
Therapist	Rendering Provider or Therapist **HELPFUL HINT** ▪ The term 'Therapist' when used in the lookup feature, is inclusive of rendering providers, EIO/Ds, and Service Coordinators ▪ The term 'Therapist' when seen within a child's record is referring to the rendering provider only. *i.e. When completing the Therapist assignment panel for IFSP services, users will input the rendering provider's name in the 'Therapist' field.* 
Provider	Provider Agency
Family	Anyone connected with the child, including mother, father, alternate parent, and caregiver
Guardian	Alternate parent / caregiver
Primary Referral	Initial Referral
Dashboards / Alert	EI-Hub's equivalent to work queues and tasks in NYEIS
Enrollments	Claims / Service Authorizations
Voucher	Invoice
Individual Attendance	Claim
Medical DME	Assistive Technology Device
Service Authorizations statuses (SA)	▪ **Active -** Service Authorization has been approved by the EIO/D and reached the start date of the SA ▪ **Approved -** Service Authorization has been approved by the EIO/D but has not reached the start date of the SA

Child statuses	▪ **Active** - If a child is in any phase of the Early Intervention program, they reflect an active status. ▪ **Exited** - a child has left the Early Intervention program ▪ **Closed** - a child that has reached 5 yrs 8 months in which no more edits can be done to the record and all claiming and billing time limits have passed. ▪ **Duplicate** - a child's record is marked as duplicate after the information has been merged (migrated) into the primary (active) record.

NEED HELP?

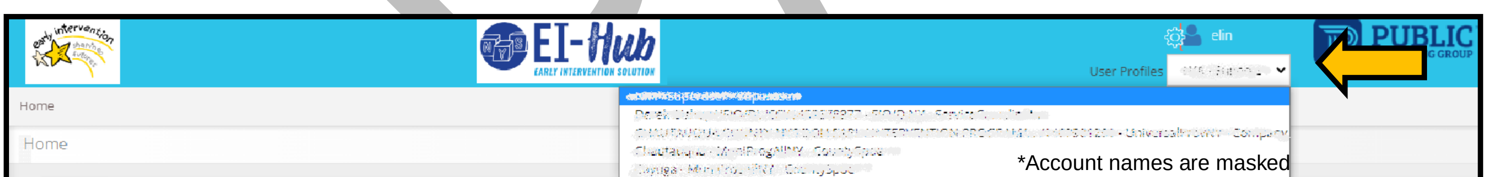
If you are looking for more information on a term or field description, please reference the appropriate user guide:

- *Case Management User Guide* (coming soon)
- *Service Logging User Guide* (coming soon)

2. Tips and Tricks – For all users

Below are some tips that are helpful to know as a new user.

- To return to the EI-Hub Landing Page from the Case Management or Service Logging component, select/click the EI-Hub logo
- From the Case Management homepage, users can switch between user roles from the User Profiles dropdown menu (shown below)



- Most panels will have several fields to complete; however, only fields with an asterisk (*) are required.

HELPFUL HINT

- After the required fields are satisfied, users can re-enter and resume at any panel
- If a panel indicates that a narrative should be entered, users can write the word "n/a" to satisfy the field's requirement.

- In the Case Management component, the 'Submit' button also acts as a 'Save' button.
- To save an address, users will need to manually click "Address Validate" button. If the "Address Validation" button is not selected prior to submitting the address information, the user will receive an error. Addresses cannot be saved without going through the validation process.

- Email addresses have to follow a typical naming convention. (i.e., noname@gmail.com)
- The Case Management component has "type-ahead" functionality. As users start to type in fields with searchable data, a list of matching options will populate. (i.e., diagnosis codes, types of services, etc.)
- Superusers (MuniProgAllNY, UniverisalProvNY, & InProviderNY) will have the most access to the screens within the EI-Hub system and you will be able to view all children assigned to their agency or county. While this role type has the highest level access, there may be areas of the system that are not appropriate for this role to access.
- Users can enter/view comments about the child, that may not be captured in other tab/panels, in the '**Contact Log'** panel - found in the Family Info tab. (i.e. parent concerns that may have been discussed at the initial meeting, but not at the point of referral) This panel is viewable to all users with access to the child's record. This panel can be edited by the following user roles:
    - ProvDataEntryNY
    - ISC/OSC NY
    - RenderProvNY
    - JrRenderProvNY
    - MuniDataEntryNY
    - EOI/D NY
    - MuniProgAllNY
- The '**Therapist look up**' option is used to search for rendering providers, EIO/Ds, and service coordinators.
- Just like with child records, before adding a new therapist record, users should first search to see if the individual is already in the system. Using the lookup feature, found under the Therapist Menu, users can search to see if there is an existing therapist record in the system.

    HELPFUL HINT
    - If a therapist is already in the system, agencies can use the '**Add to Agency**' option to quickly and easily add the therapist's association to their agency.

3. Tips and Tricks – By User Role Type

Below are some tips that apply to specific user roles:

Municipal User Roles

- Access to a child's record is given to EIO/D and ISC/OCS through the Teams tab.
- Roles that can create new child records include: MuniDataEntryNY, EIO/D NY, & MuniProgAllNY.
- The MuniTransferNY role can view children throughout the State.
- For an EIO/D to approve an IFSP, the service authorization(s) for any services tied to the IFSP must be approved prior to approving the entire IFSP.
- System generated waiver requests are accepted or rejected by an EIO/D as part of the approval of the service authorization. For manually generated waiver requests, the approvals for the waiver can be completed by the EIO/D after the date of service, however, the request MUST be submitted prior to or on the date of service

Provider User Roles

- Access to a child's record is granted through the service authorization process.
- Rendering providers must submit their waiver request(s) before or within the same day the service is rendered (by midnight). **Waiver requests after the service date will not be allowed**, and providers will receive an error message when attempting to submit a late waiver request.

Section 4: Training Resources & Support

1. Accessing Training Resources

All training resources are on the Learning Management System (LMS). The LMS is accessible from the EI-Hub Landing Page. Using the 'Login with SSO' option (shown below), users can log into the LMS using single sign-on (SSO) capability. You will not need to re-enter your username and password to access the LMS.

2. LMS Item Index

BEI and 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.

3. Customer Support

Public Consulting Group (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