

Entering Ongoing Service Coordination Service Authorizations (OSC SA)



How To

Create Ongoing Service Coordination Service Authorizations (SAs) in EI-Hub's Case Management module.



Audience

- MuniProgAll
- ISC NY
- OSC NY
- EIO/D NY
- ***For Information on Waivers, please visit the Waivers infographic located on the EI-Hub LMS.**

Topics Covered

1. Overview of the Ongoing Service Coordination Process
2. Entering and Submitting Service Authorizations for Ongoing Service Coordination
3. EIO/D Approval/Rejection of Ongoing Service Coordination Service Authorizations
4. Company (Agency) Acceptance/Rejection of Ongoing Service Coordination Assignments
5. Assigning Ongoing Service Coordinators
6. *Assigning a Therapist
7. *Remaining Service Panel – All Types

*Sub-sections added for additional context only



Overview

Entering Ongoing Service Coordination Service Authorization

Creating Service Authorizations

Job Aid

HOW TO

Creating Service Authorizations for **Ongoing Service Coordination**

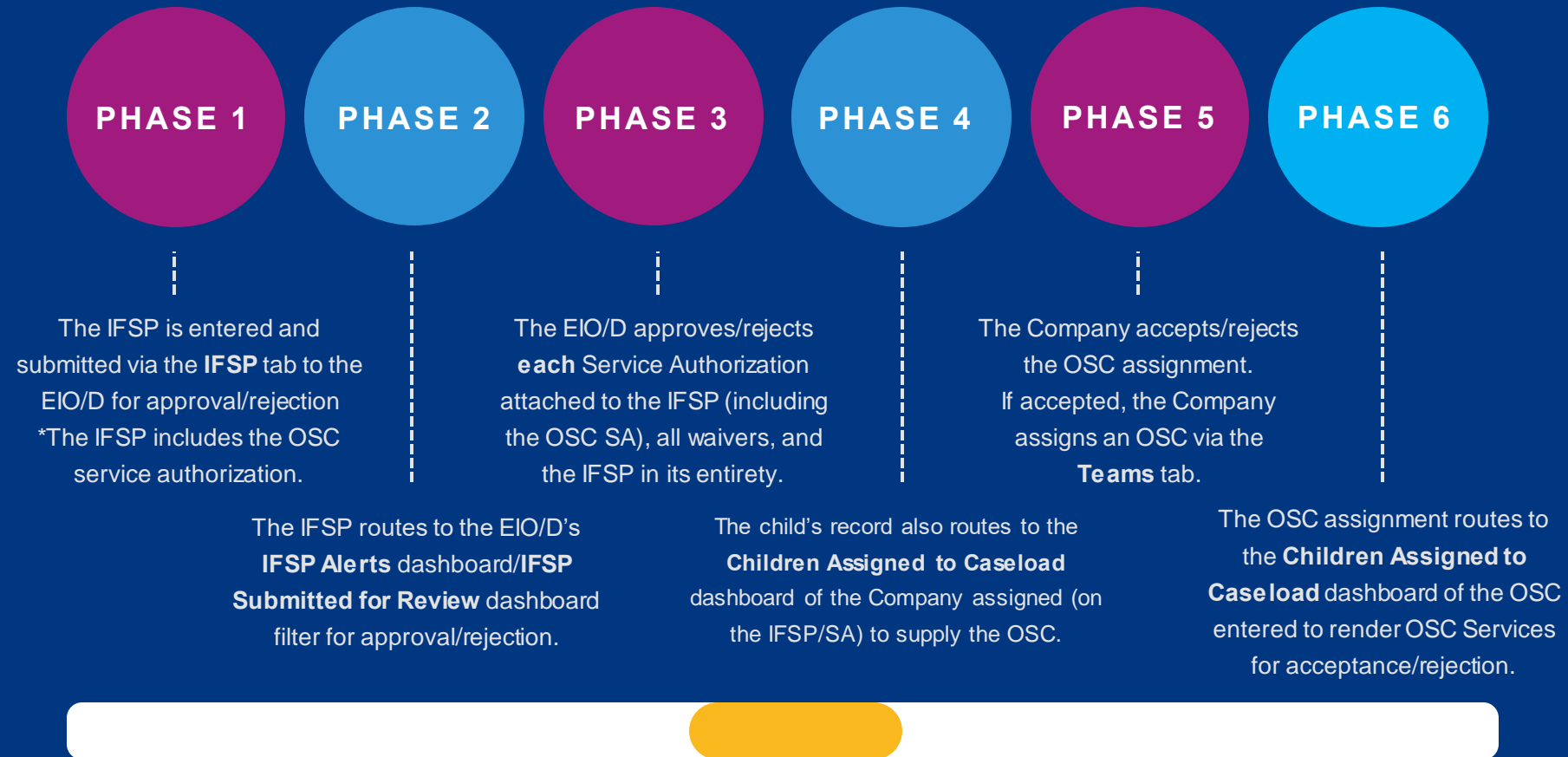
PREFACE

In the EI-Hub, creating service authorizations is not an independent process. Similar to most tasks in the EI-Hub, a series of actions occur *before, during, and after* the creation of service authorizations. The graphics on the next pages highlight these steps.



Overview of the Ongoing Service Coordination Process

In EI-Hub, entering ongoing service coordination service authorizations is not an independent process. Similar to most tasks in EI-Hub, there are a series of actions that occur *before*, *during*, and *after* the creation of service authorizations. The graphic below highlights these steps.



For Information on assigning EIO/Ds and Service Coordinators, please review the linked [Assigning EIO/Ds and Service Coordinators \(SC\) Job Aid](#) located within the LMS.

Creating Service Authorizations for Ongoing Service Coordination

Entering Ongoing Service Coordination Service Authorizations

Creating Service Authorizations

Job Aid



HOW TO

Create a new Service Authorization for **Ongoing Service Coordination**



TRANSITIONING FROM ISC TO OSC

- There may be instances where a requested Ongoing Service Coordinator is unavailable/not identified. In EI-Hub, the initial service coordination service authorization cannot be listed on the Initial IFSP, and their service authorization cannot be extended, so it overlaps the Initial IFSP.
- In the instance where the family's choice for an Ongoing Service Coordinator is **not** available, it is expected that the Initial Service Coordinator assumes the function of the Ongoing Service Coordinator **OR** another Ongoing Service Coordinator is selected until the family's choice becomes available.



Creating Service Authorizations

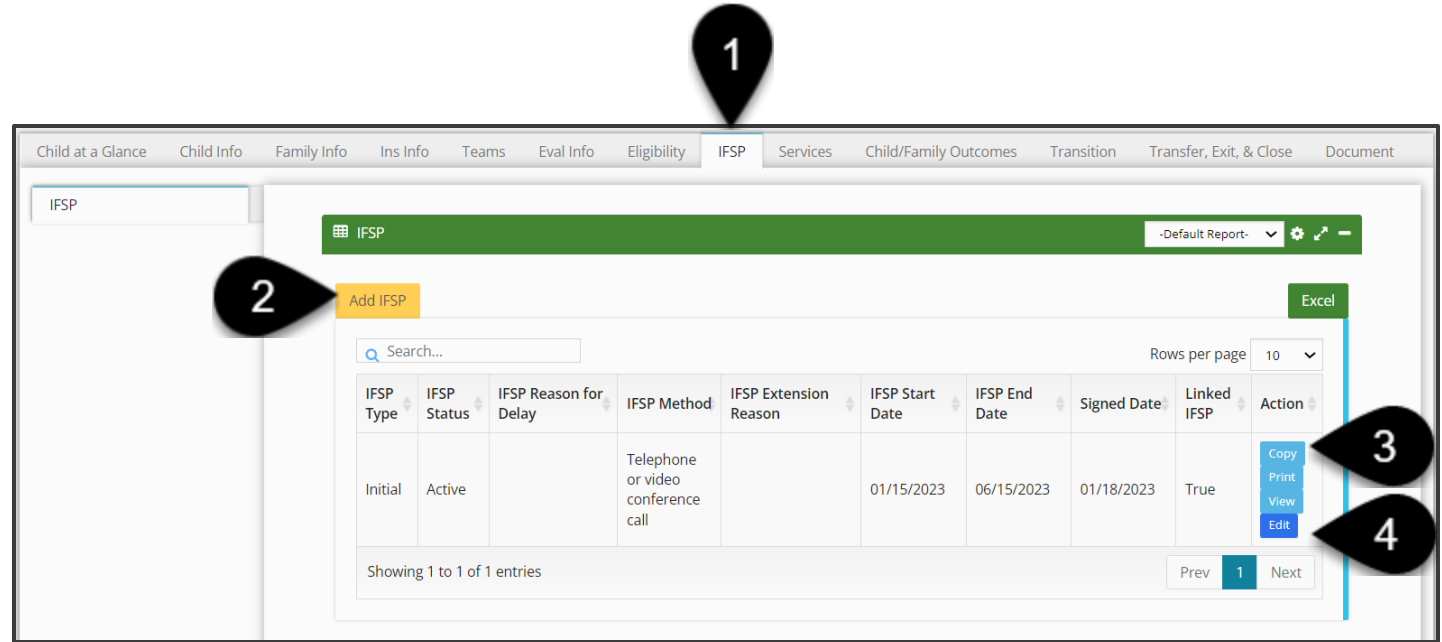
Job Aid

HOW TO

Initiate an IFSP

NOTE

- Ongoing service coordination service authorizations (OSC SAs) are tied to a child's IFSP and are initiated/entered directly into the **IFSP** tab.
- The following roles can enter ongoing service coordination service authorizations: MuniProgAll, ISC/OSC NY, and EIO/D NY.
- When entering OSC SA's, the **Service Information**, **Service Delivery**, and **Service Location** panels must be completed **before** submitting the IFSP and service authorizations for EIO/D approval.
- The **Company Assignment** panel is **not** required to **create** an OSC SA; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for *all* service authorizations to become **Active**.
- An EIO/D must **first** approve each service authorization tied to the IFSP **before** approving the entire IFSP.
- **IFSP Information** panel is a required panel and must be authorized/approved by the EIO/D to submit an IFSP.
- IFSPs can be copied/cloned for future IFSPs. For information on adding a new IFSP or copying/cloning an existing IFSP, please view the IFSP Job Aid located within the LMS.



1: IFSP Tab

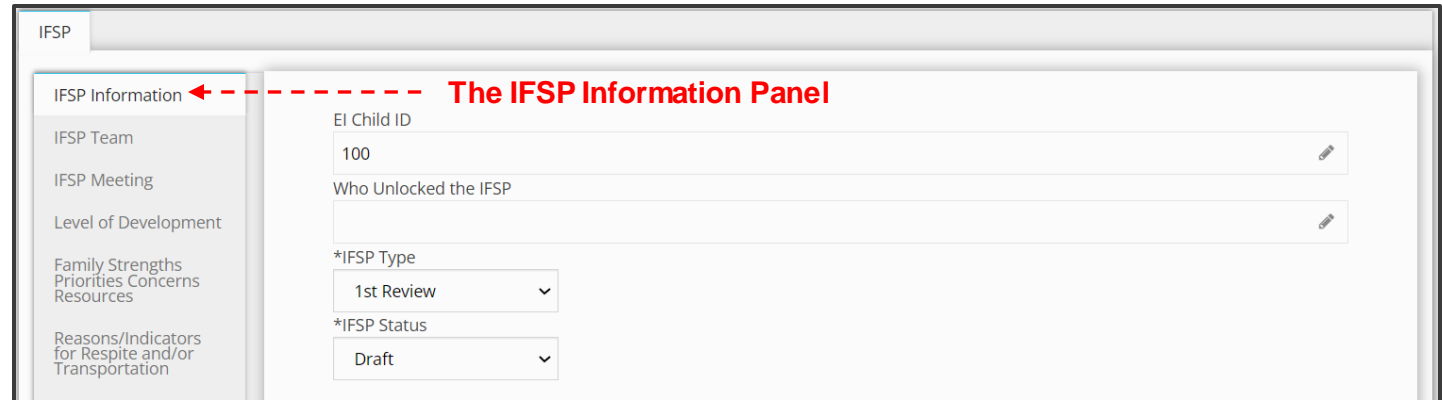
2: Add IFSP Button

3: Action Menu (Copy, Print, View, Edit)

4: Table Columns

IFSP Type	IFSP Status	IFSP Reason for Delay	IFSP Method	IFSP Extension Reason	IFSP Start Date	IFSP End Date	Signed Date	Linked IFSP	Action
Initial	Active		Telephone or video conference call		01/15/2023	06/15/2023	01/18/2023	True	Copy, Print, View, Edit

Showing 1 to 1 of 1 entries



The IFSP Information Panel

IFSP Information

IFSP Team

IFSP Meeting

Level of Development

Family Strengths
Priorities Concerns
Resources

Reasons/Indicators
for Respite and/or
Transportation

EI Child ID
100

Who Unlocked the IFSP

*IFSP Type
1st Review

*IFSP Status
Draft

Creating Service Authorizations

Job Aid

HOW TO

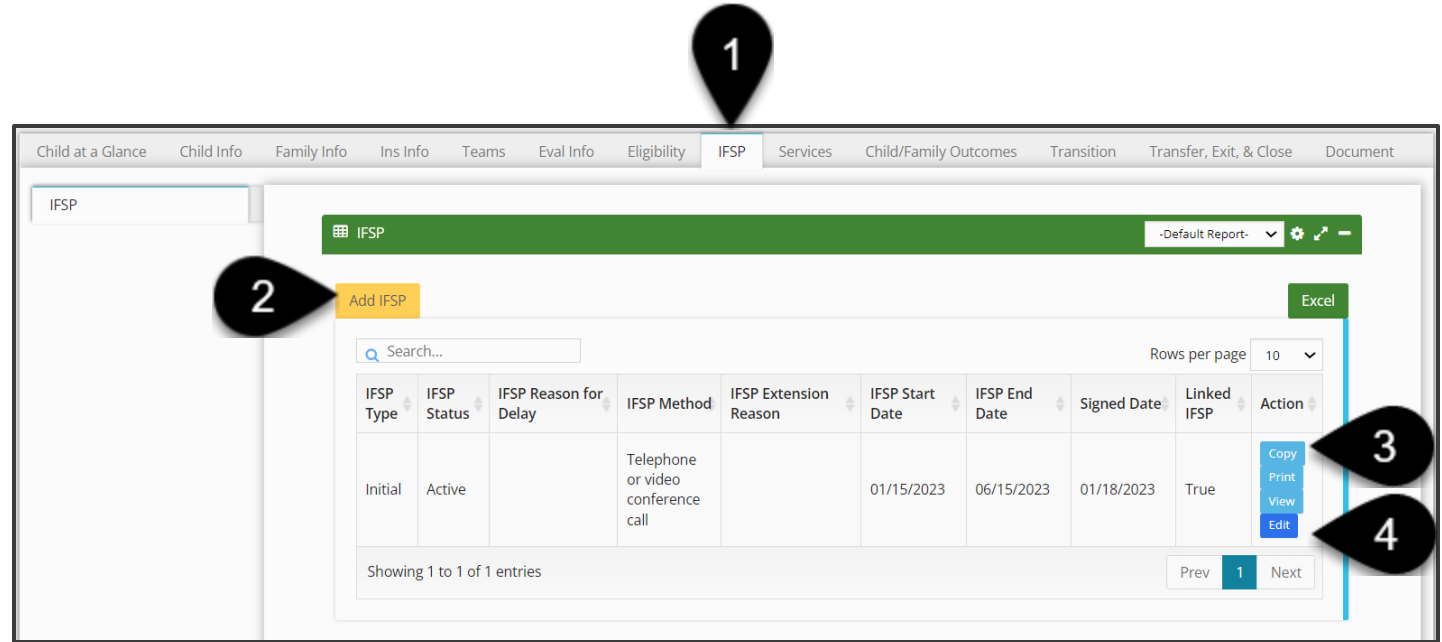
Initiate an IFSP

NOTE

- The following pages cover preliminary steps users would take within the **IFSP** tab before creating an ongoing service coordination service authorization.
- IFSP Information** panel must be authorized/approved by the EIO/D.

Step/Action

- Select the **IFSP** tab from the Child's record.
- To add a new IFSP, select the **Add IFSP** button above the **IFSP** grid. The **IFSP Information** panel populates.
- To edit an existing IFSP in draft status, locate an existing IFSP from the **IFSP** grid and select the **Edit** button next to the existing IFSP. The **IFSP Information** panel populates for updating/editing.
- *To copy/clone information from an existing IFSP to a new IFSP, select the **Copy** button. The newly copied IFSP (including any existing 'Active' service authorizations) populates within the **IFSP Information** panel in 'Draft' status for further updating.



Child at a Glance | Child Info | Family Info | Ins Info | Teams | Eval Info | Eligibility | **IFSP** | Services | Child/Family Outcomes | Transition | Transfer, Exit, & Close | Document

IFSP

IFSP

-Default Report- [Settings] [Refresh] [Close]

2 Add IFSP [Excel]

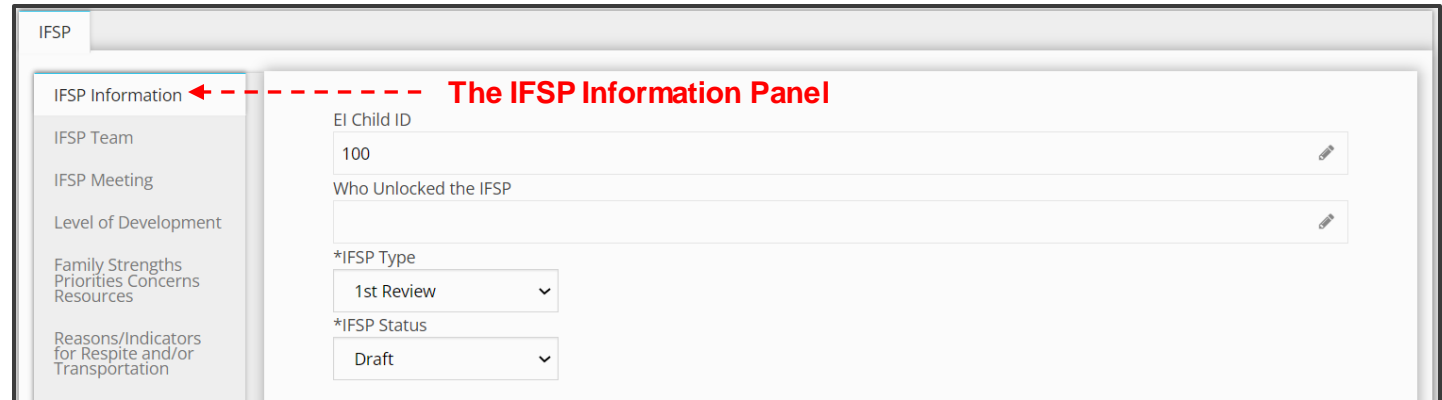
Search...

Rows per page: 10

IFSP Type	IFSP Status	IFSP Reason for Delay	IFSP Method	IFSP Extension Reason	IFSP Start Date	IFSP End Date	Signed Date	Linked IFSP	Action
Initial	Active		Telephone or video conference call		01/15/2023	06/15/2023	01/18/2023	True	Copy Print View Edit

Showing 1 to 1 of 1 entries

Prev 1 Next



IFSP

IFSP Information ← The IFSP Information Panel

EI Child ID

100

Who Unlocked the IFSP

*IFSP Type

1st Review

*IFSP Status

Draft

Creating Service Authorizations

Job Aid

HOW TO

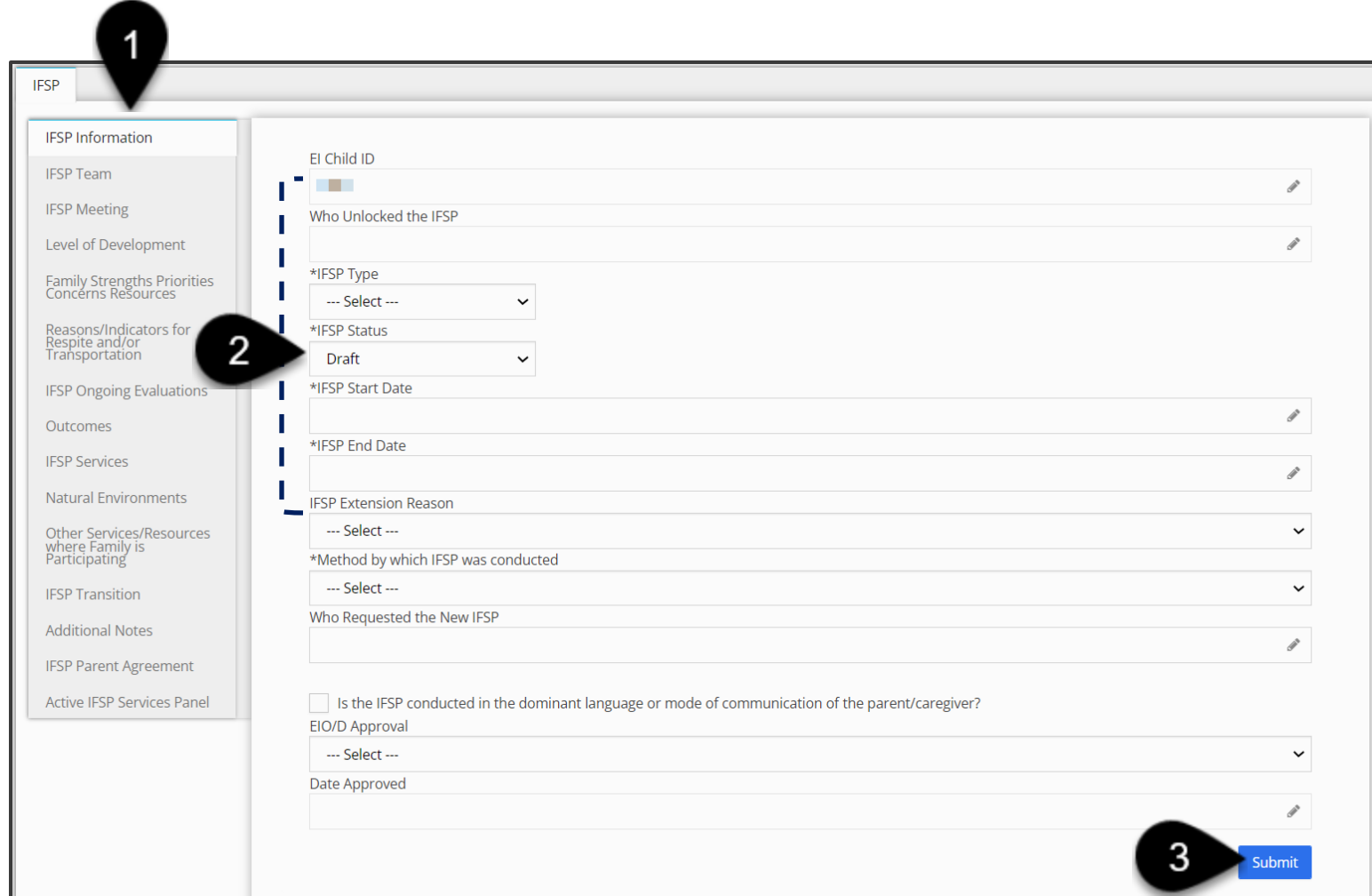
Add Service Authorizations to an IFSP

NOTE

- Fields with an asterisks (*) indicate required fields.
- The **IFSP information** panel must be completed by a Service Coordinator and approved by the EIO/D to add, edit, or copy an IFSP and add services to that IFSP.
- For additional information on completing an IFSP, please refer to the IFSP Job Aid located within the LMS.

Step/Action

1. Select the **IFSP Information** panel.
2. Select the ***IFSP Type**, ***Status**, ***Start Date**, ***End Date** and the ***Method the IFSP** was conducted.
3. Click the **Submit** button to save changes.



The screenshot shows the 'IFSP' tab in the LMS. On the left is a sidebar with a list of panels: IFSP Information, IFSP Team, IFSP Meeting, Level of Development, Family Strengths Priorities Concerns Resources, Reasons/Indicators for Respite and/or Transportation, IFSP Ongoing Evaluations, Outcomes, IFSP Services, Natural Environments, Other Services/Resources where Family is Participating, IFSP Transition, Additional Notes, IFSP Parent Agreement, and Active IFSP Services Panel. Callout 1 points to the 'IFSP' tab. Callout 2 points to the 'IFSP Information' panel in the sidebar. The main content area contains the following fields:

- EI Child ID
- Who Unlocked the IFSP
- *IFSP Type (dropdown menu)
- *IFSP Status (dropdown menu, currently set to 'Draft')
- *IFSP Start Date
- *IFSP End Date
- IFSP Extension Reason (dropdown menu)
- *Method by which IFSP was conducted (dropdown menu)
- Who Requested the New IFSP
- ☐ Is the IFSP conducted in the dominant language or mode of communication of the parent/caregiver?
- EIO/D Approval (dropdown menu)
- Date Approved
- Submit** button (Callout 3 points to this button)

Creating Service Authorizations

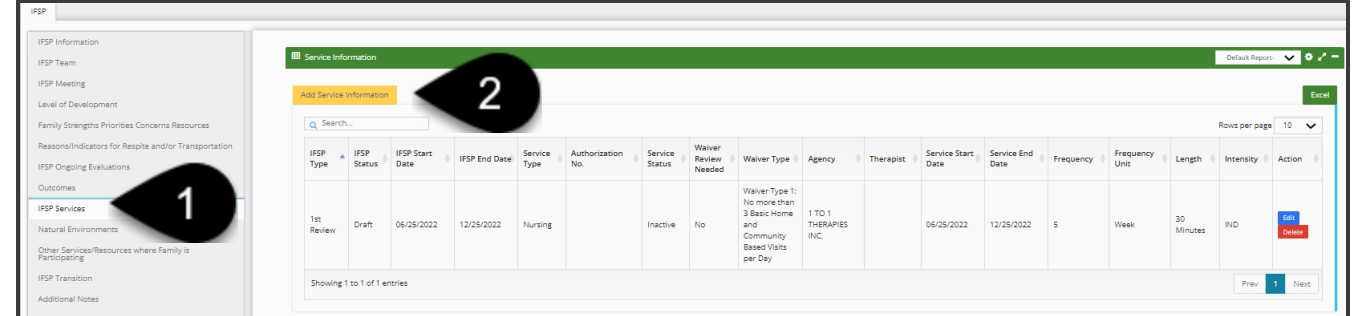
Job Aid

HOW TO

Enter Service Information

Step/Action

1. Proceed to the **IFSP Services** panel.
2. Click the **Add Service Information** button. The Service Information panel populates.



IFSP Information

IFSP Team

IFSP Meeting

Level of Development

Family Strengths/Priorities/Concerns/Resources

Reasons/Indicators for Respite and/or Transportation

IFSP Ongoing Evaluations

Outcomes

IFSP Services

Natural Environments

Other Services/Resources where Family is Participating

IFSP Transition

Additional Notes

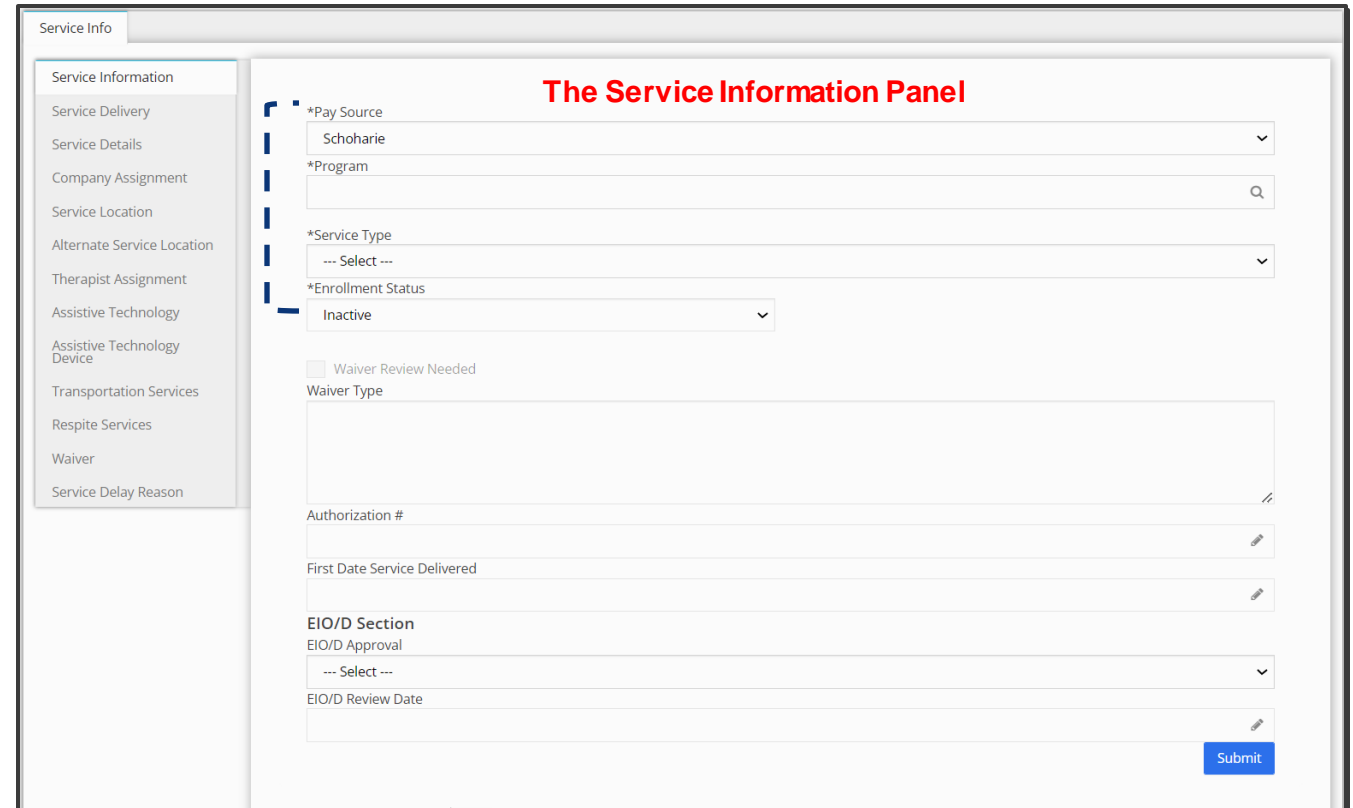
Add Service Information

Search...

IFSP Type	IFSP Status	IFSP Start Date	IFSP End Date	Service Type	Authorization No.	Service Status	Waiver Review Needed	Waiver Type	Agency	Therapist	Service Start Date	Service End Date	Frequency	Frequency Unit	Length	Intensity	Action
1st Review	Draft	06/25/2022	12/25/2022	Nursing		Inactive	No	Waiver Type 1: No more than 3 Basic Home and Community Based Visits per Day	1 TO 1 THERAPIES IYC		06/25/2022	12/25/2022	5	Week	30 Minutes	IND	Edit Delete

Showing 1 to 1 of 1 entries

Prev 1 Next



The Service Information Panel

Service Info

Service Information

Service Delivery

Service Details

Company Assignment

Service Location

Alternate Service Location

Therapist Assignment

Assistive Technology

Assistive Technology Device

Transportation Services

Respite Services

Waiver

Service Delay Reason

*Pay Source

Schoharie

*Program

*Service Type

--- Select ---

*Enrollment Status

Inactive

☐ Waiver Review Needed

Waiver Type

Authorization #

First Date Service Delivered

EIO/D Section

EIO/D Approval

--- Select ---

EIO/D Review Date

Submit

Creating Service Authorizations

Job Aid

HOW TO

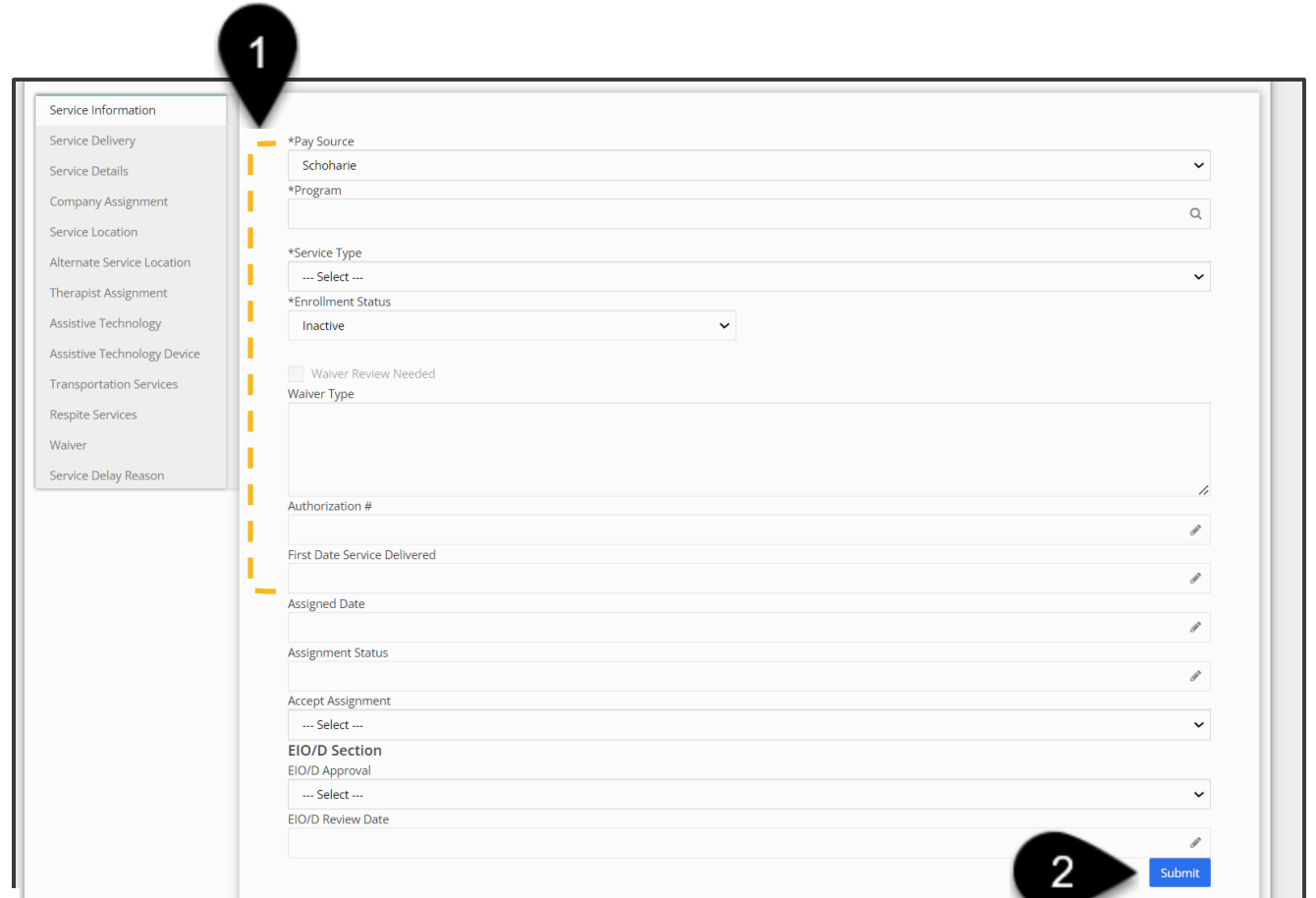
Enter Service Information

NOTE

- Fields with asterisks (*) indicate required fields.
- The **Service Information**, **Service Delivery**, and **Service Location** panels are **required** for approval for services.
- The **Company Assignment** panel is **not** required to **create** an OSC SA; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for **all** service authorizations to become **Active**.

Step/Action

1. Enter the **Service Information**. The **Pay Source** defaults to the Child's county of residence. The **Program** is a type-ahead field and should be entered as "Service Coordination - Ongoing." Once a Program is chosen, the **Service Type** will auto-populate. **Enrollment Status** will default as Inactive.
2. Click the **Submit** button to save the information entered.



Creating Service Authorizations

Job Aid

HOW TO

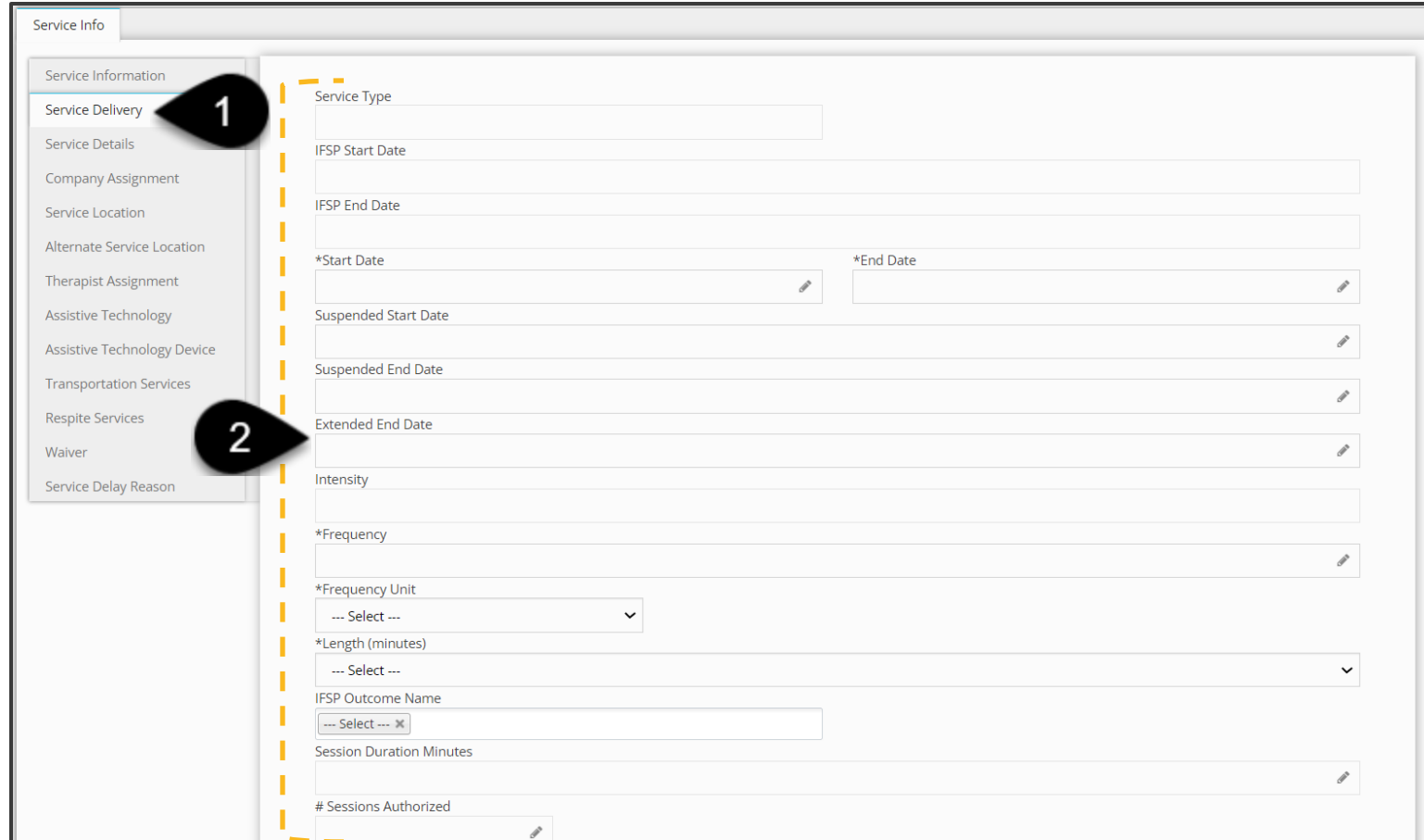
Enter Service Delivery Information

NOTE

- Fields with an asterisks (*) indicate required fields.
- The **Service Information**, **Service Delivery**, and **Service Location** panels are **required** for approval for services.
- The **Company Assignment** panel is **not** required to **create** an OSC SA; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for **all** service authorizations to become **Active**.

Step/Action

1. Select the **Service Delivery** panel.
2. Enter the **Service Delivery** details:
 - **Service Type**: Will auto-populate with **Service Coordinator – Ongoing**.
 - **Services Start/End Date**: Click into the field to choose a date from the calendar picker or the dates may be entered manually.



The screenshot shows the 'Service Info' form with a sidebar on the left containing the following panels: Service Information, Service Delivery (highlighted with a blue bar and a callout '1'), Service Details, Company Assignment, Service Location, Alternate Service Location, Therapist Assignment, Assistive Technology, Assistive Technology Device, Transportation Services, Respite Services, Waiver, and Service Delay Reason. The main form area contains the following fields: Service Type, IFSP Start Date, IFSP End Date, *Start Date (with a calendar icon), *End Date (with a calendar icon), Suspended Start Date, Suspended End Date, Extended End Date, Intensity, *Frequency, *Frequency Unit (dropdown menu), *Length (minutes) (dropdown menu), IFSP Outcome Name (dropdown menu), Session Duration Minutes, and # Sessions Authorized. A callout '2' points to the *Start Date and *End Date fields.

Creating Service Authorizations

Job Aid

HOW TO

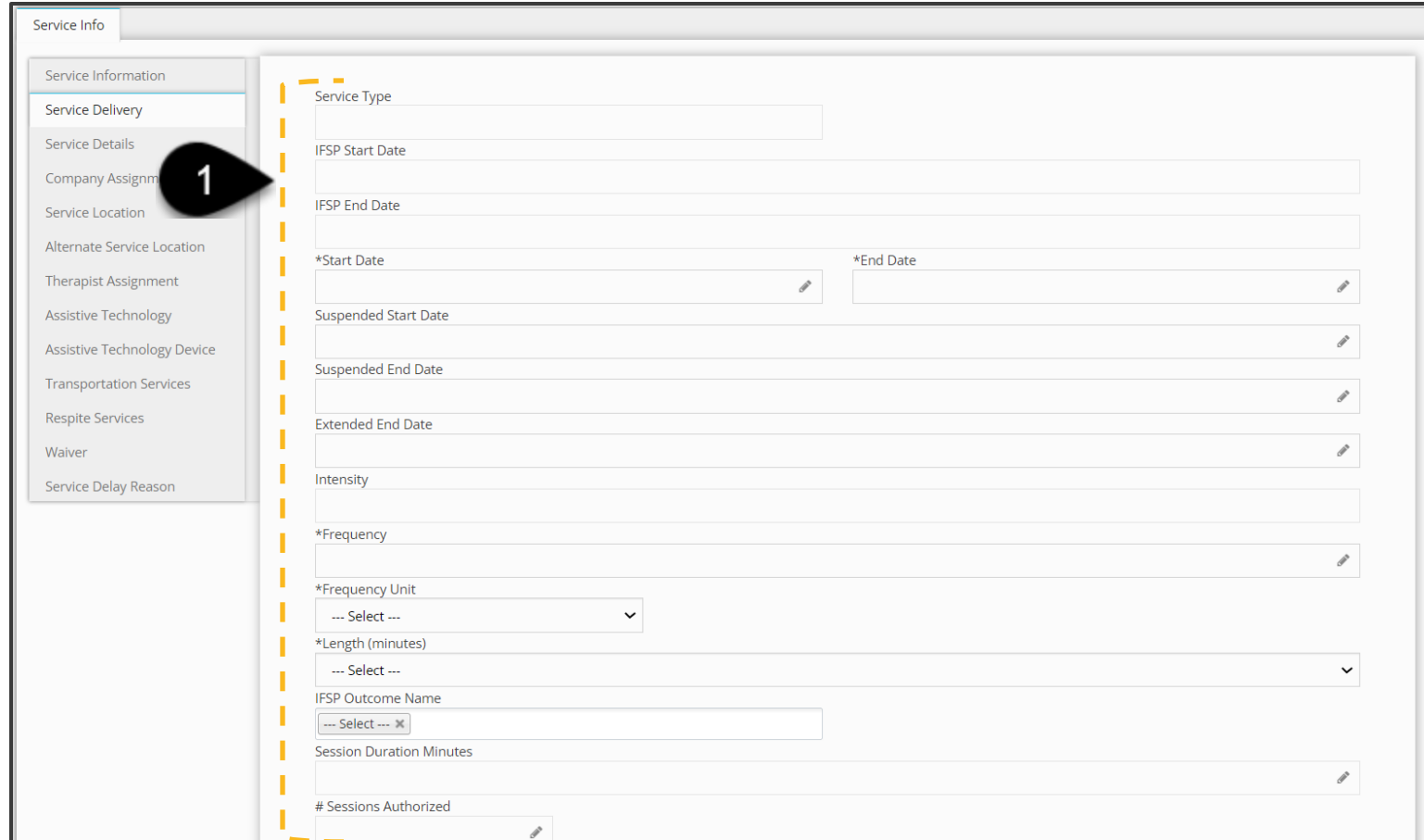
Enter Service Delivery Information

NOTE

- Fields with an asterisks (*) indicate required fields.
- The **Service Information**, **Service Delivery**, and **Service Location** panels are **required** for approval for services.
- The **Company Assignment** panel is **not** required to **create** an OSC SA; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for **all** service authorizations to become **Active**.

Step/Action

1. Enter the **Service Delivery** details:
 - **IFSP Start Date**: This field populates with the IFSP start date entered within the IFSP Information panel.
 - **IFSP End Date**: This field populates with the IFSP end date entered within the IFSP Information panel.



Creating Service Authorizations

Job Aid

HOW TO

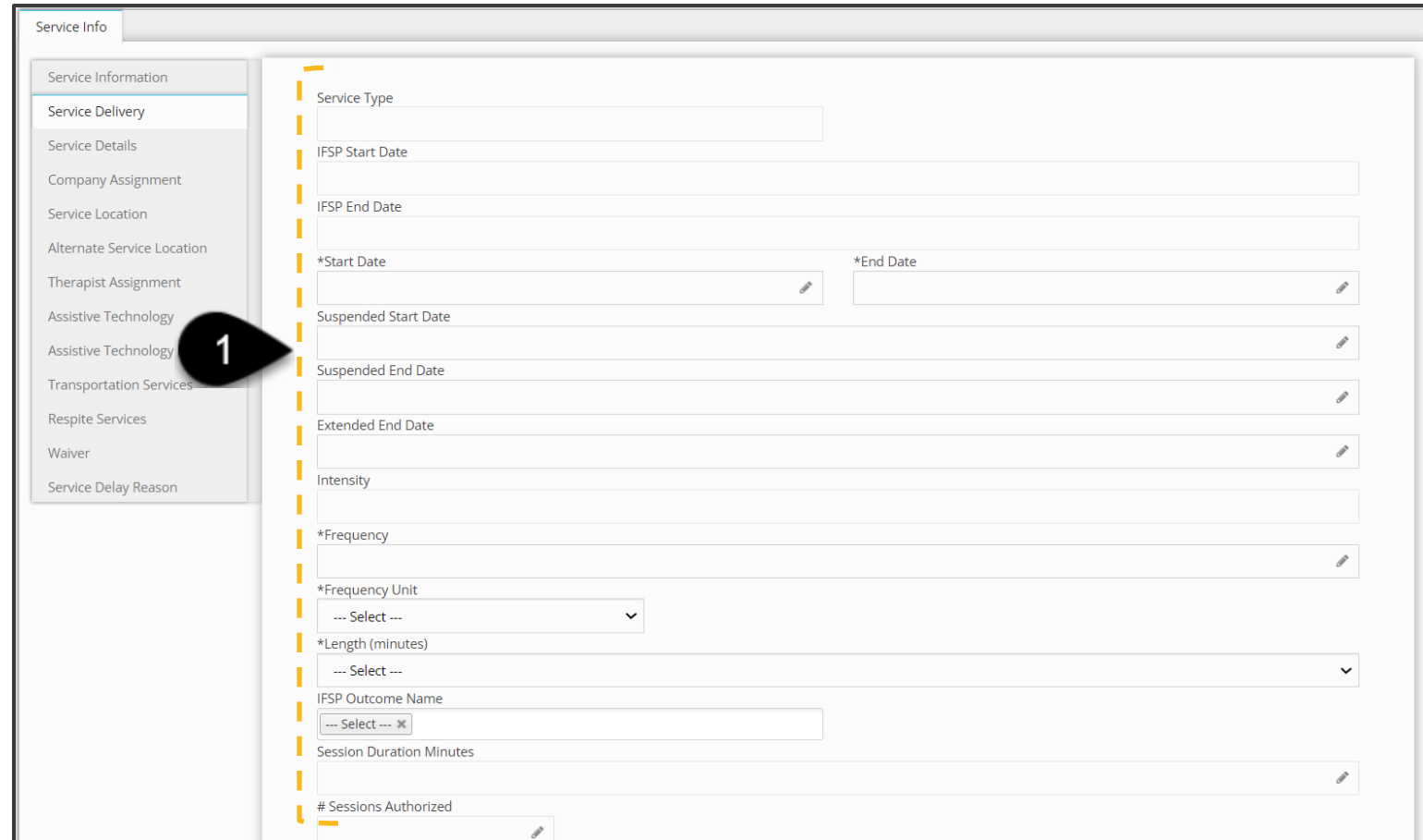
Enter Service Delivery Information

NOTE

- Fields with an asterisks (*) indicate required fields.
- The **Service Information**, **Service Delivery**, **Company Assignment**, and **Service Location** are **required** for the approval of services.

Step/Action

- Continue to enter **Service Delivery** details, please note the following fields:
 - Suspended Services Start/End Dates:** Enter the appropriate suspended start and end dates for services if applicable. Service Authorizations for Service Coordinators are **not** to be suspended.
 - Intensity:** This field is not editable and auto-populates with **IND** for individual services and **GRP** for group services. For Service Coordination, this field auto-populates with IND. Group services do not apply to Service Coordination.



Creating Service Authorizations

Job Aid

HOW TO

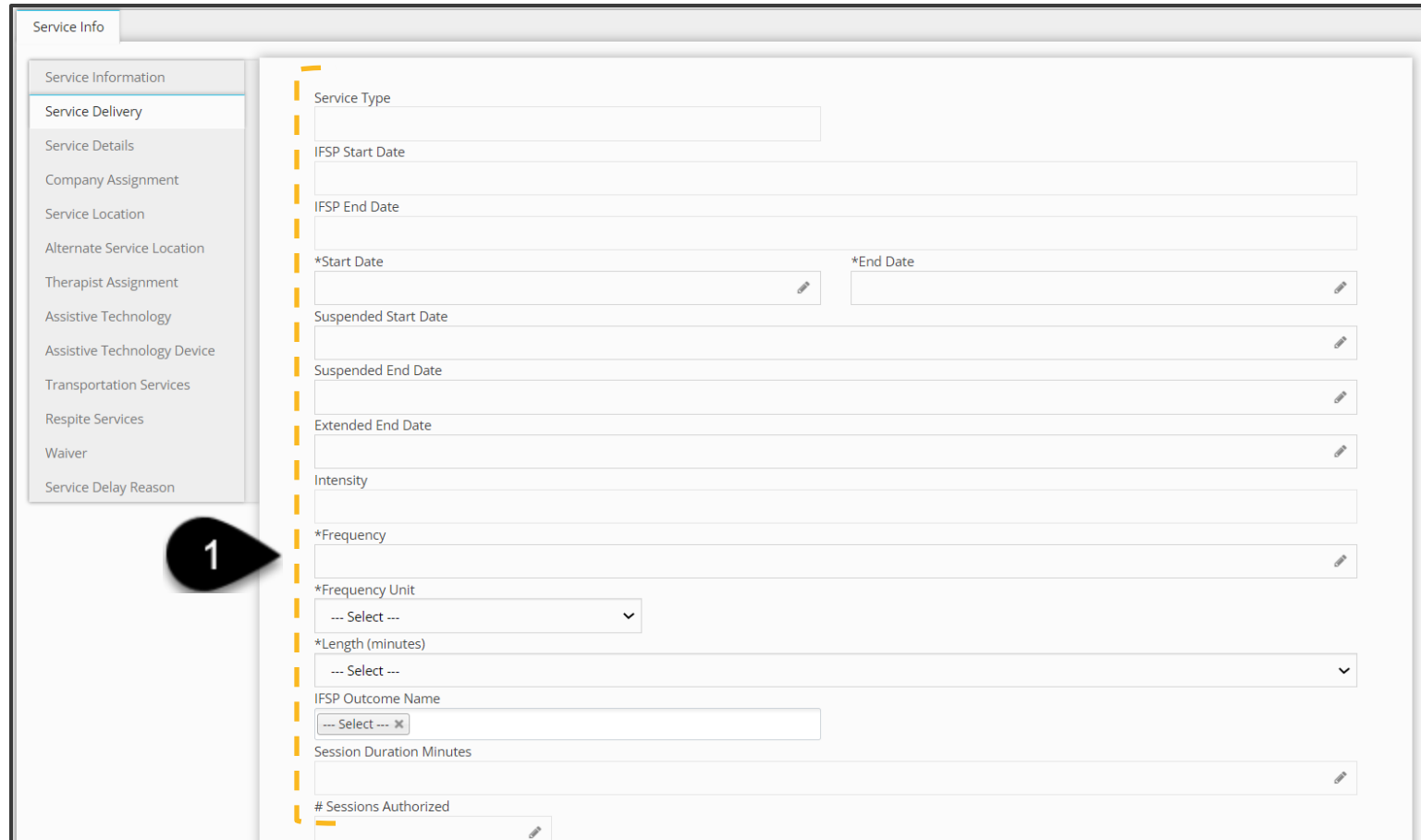
Enter Service Delivery Information

NOTE

- Fields with an asterisks (*) indicate required fields.
- The **Service Information**, **Service Delivery**, and **Service Location** panels are **required** for approval for services.
- The **Company Assignment** panel is **not** required to **create** an OSC SA; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for **all** service authorizations to become **Active**.

Step/Action

1. Continue to enter **Service Delivery** details, please note the following fields:
 - **Frequency:** The number of times per frequency unit that the service is to be delivered. For service coordination, frequency is the number of 15-minute SC units being authorized.
 - **Frequency Unit:** Choose the applicable frequency unit from the dropdown (Day, Week, Month, IFSP Period) SC units may be authorized by any of the available values.
 - **Length:** The duration of the service in minutes. For **ALL** service coordinator service authorizations, please use the dropdown value **"No Time Specified"** for the length.



Creating Service Authorizations

Job Aid

HOW TO

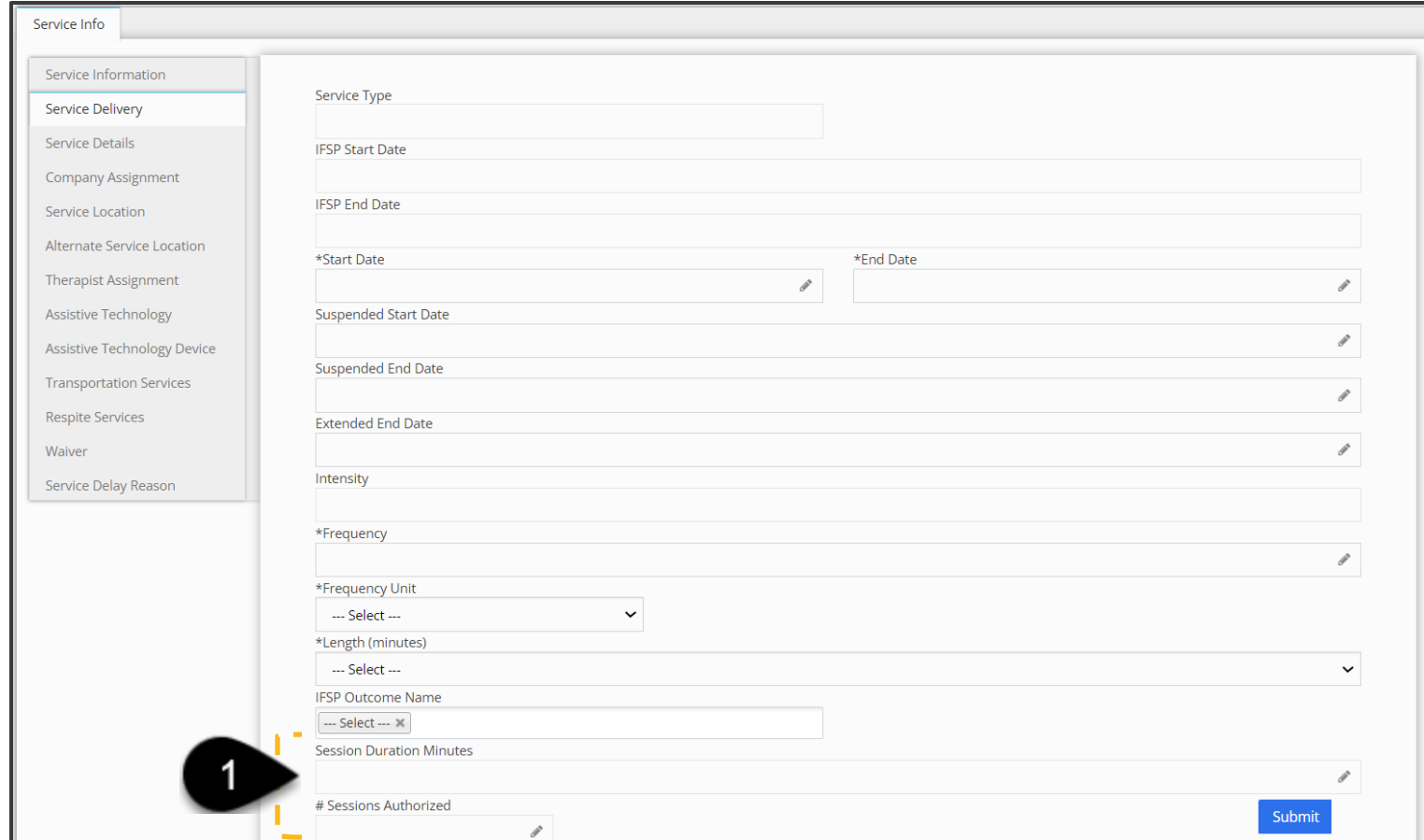
Enter Service Delivery Information

NOTE

- Fields with an asterisks (*) indicate required fields.
- The **Service Information**, **Service Delivery**, and **Service Location** are **required** for the approval of services.
- The **Company Assignment** panel is **not** required to **create** an OSC SA; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for **all** service authorizations to become **Active**.

Step/Action

- Continue to enter **Service Delivery** details, please note the following fields:
 - **Session Duration Minutes:** Auto-populates to the length. This field will auto-populate to "1" if there is no time specified for the length, such as in Service Coordination SAs.
 - **Sessions Authorized:** The number of sessions authorized is auto-populated based on the frequency, frequency units, and service start and end dates.



Creating Service Authorizations

Job Aid

HOW TO

Enter Service Delivery Information

NOTE

- Fields with an asterisks (*) indicate required fields.
- The **Service Information**, **Service Delivery**, and **Service Location** panels are **required** for approval for services.
- The **Company Assignment** panel is **not** required to **create** an OSC SA; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for **all** service authorizations to become **Active**.

Step/Action

- Please note the following fields are typically **not** applicable to service coordination:
 - *Service Group Types:** This field populates **only** if a 'Group' (i.e., Basic Group Developmental, Enhanced Group Developmental) is selected as a Program Type.
 - If the 'With 0% typically developing children' option is selected from the **Service Group Types** drop-down, the accompanying **Comments** section must be completed.
- Select the **Submit** button to save your service delivery information.

Service Info

Service Information

Service Delivery

Service Details

Company Assignment

Service Location

Alternate Service Location

Therapist Assignment

Assistive Technology

Assistive Technology Device

*Pay Source

Schoharie

*Program

*Service Type

--- Select ---

*Enrollment Status

Inactive

Service Info

Service Information

Service Delivery

Service Details

Company Assignment

Service Location

Alternate Service Location

Therapist Assignment

Assistive Technology

Assistive Technology Device

Transportation Services

Respite Services

Waiver

Service Delay Reason

Service Type

IFSP Start Date

IFSP End Date

*Start Date

*End Date

Suspended Start Date

Suspended End Date

Extended End Date

Intensity

*Frequency

*Frequency Unit

--- Select ---

*Length (minutes)

--- Select ---

IFSP Outcome Name

--- Select --- X

Session Duration Minutes

Sessions Authorized

Service Group Type

--- Select ---

If any service is being provided in a group setting without typically developing peers, explain why the IFSP team agrees this is appropriate

Submit

Creating Service Authorizations

Job Aid

HOW TO

Enter Service Details Information

NOTE

- Fields with an asterisks (*) indicate required fields.
- The **Service Details** panel is **not** required for Service Coordination.
- The **Services Details** panel is used for make-up and co-visits.
- The **Service Details** panel can be used for General Services Service Authorization but is not used for Service Coordination.
- In the instance that an EIO/D were to approve Service Coordination with a co-visit type, that service would be rejected by both Service Logging and 837 Claims.

Service Info

Service Information

Service Delivery

Service Details

Company Assignment

Service Location

Alternate Service Location

Therapist Assignment

Assistive Technology

Assistive Technology Device

Transportation Services

Respite Services

Waiver

Service Delay Reason

☐ Makeup visits allowed?
 Makeup Quantity

Makeup Frequency

--- Select ---

Total Makeups Authorized

☐ CoVisits allowed?
 Qualified Personnel List for CoVisit

--- Select ---

CoVisit Quantity

CoVisit Frequency

--- Select ---

Total CoVisits Authorized

Visits Per Day

Submit

Creating Service Authorizations

Job Aid

HOW TO

Add a Company Assignment

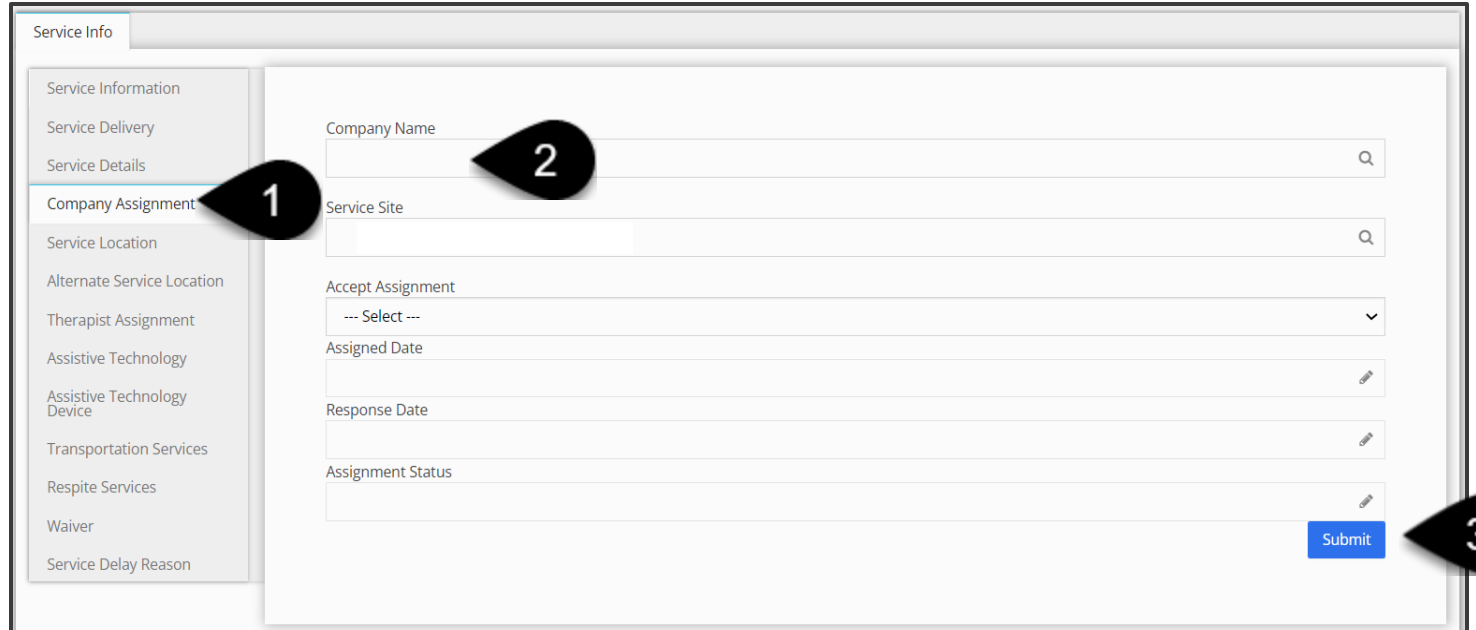


NOTE

- The **Service Information**, **Service Delivery**, and **Service Location** panels are **required** for approval for services.
- The **Company Assignment** panel is **not** required to **create** an OSC SA; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for **all** service authorizations to become **Active**.
- Please note: In the EI-Hub, "Company" and "Agency" may refer to the Agency, Municipality, or Independent Provider chosen to deliver services and assign a rendering provider.

Step/Action

1. To assign a company (Agency/Municipality/Independent Provider) to a Service Authorization, click the **Company Assignment** panel.
2. Begin typing the **Company Name** within the **Company Name** field. Multiple values may populate. Select the appropriate value.
3. Select **Submit** to save the company assignment.



The screenshot shows the 'Service Info' form in the EI-Hub. The left sidebar contains a list of panels: Service Information, Service Delivery, Service Details, Company Assignment (highlighted with callout 1), Service Location, Alternate Service Location, Therapist Assignment, Assistive Technology, Assistive Technology Device, Transportation Services, Respite Services, Waiver, and Service Delay Reason. The main form area contains fields for Company Name (with callout 2), Service Site, Accept Assignment (a dropdown menu), Assigned Date, Response Date, and Assignment Status. A blue 'Submit' button (with callout 3) is located at the bottom right of the form.

Creating Service Authorizations

Job Aid

HOW TO

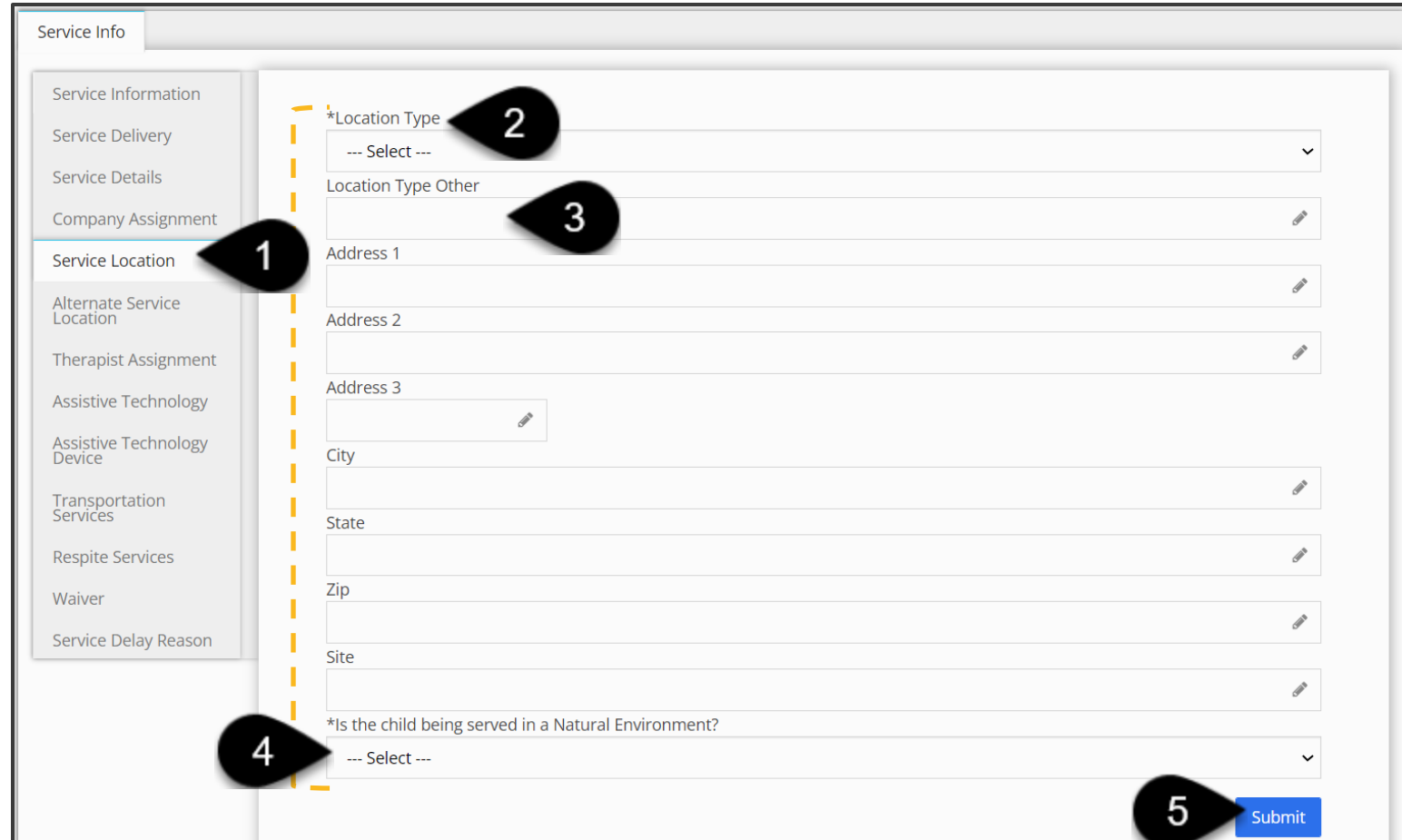
Add a Service Location

NOTE

- Fields with an asterisks (*) indicate required fields.
- The **Service Information**, **Service Delivery**, and **Service Location** are **required** for the approval of services.
- The **Alternative Service Location** panel is **not** required.

Step/Action

1. Click the **Service Location** panel.
2. Select the 'Location Type' from the **Location Type** drop-down. If there is an address associated with the location type, the address information will auto-populate in the subsequent address fields (i.e., Address 1, Address, City, State, Zip, Site). Service Coordinators will select 'Caregiver Home' for the location.
3. If there is an alternate location type, type the location into the **Location Type Other** field.
4. Select whether (**Yes/No**) the **Child is being served in a Natural Environment**. Service Coordinators will select 'Yes'.
5. Click the **Submit** button to save the information entered. For good measure, upon completing all required panels, go back to the **Service Information** panel and select **Submit** again to save.



The screenshot shows the 'Service Location' panel in a web application. A sidebar on the left contains a list of panels: Service Information, Service Delivery, Service Details, Company Assignment, Service Location (highlighted with a blue bar and callout 1), Alternate Service Location, Therapist Assignment, Assistive Technology, Assistive Technology Device, Transportation Services, Respite Services, Waiver, and Service Delay Reason. The main form area contains the following fields:

- *Location Type**: A dropdown menu with '--- Select ---' and a callout 2.
- Location Type Other**: A text input field with a callout 3.
- Address 1**: A text input field.
- Address 2**: A text input field.
- Address 3**: A text input field.
- City**: A text input field.
- State**: A text input field.
- Zip**: A text input field.
- Site**: A text input field.
- *Is the child being served in a Natural Environment?**: A dropdown menu with '--- Select ---' and a callout 4.
- Submit**: A blue button at the bottom right with a callout 5.

 A dashed orange line connects callouts 1, 2, 3, and 4, indicating the flow of the process.

Creating Service Authorizations

Job Aid

HOW TO

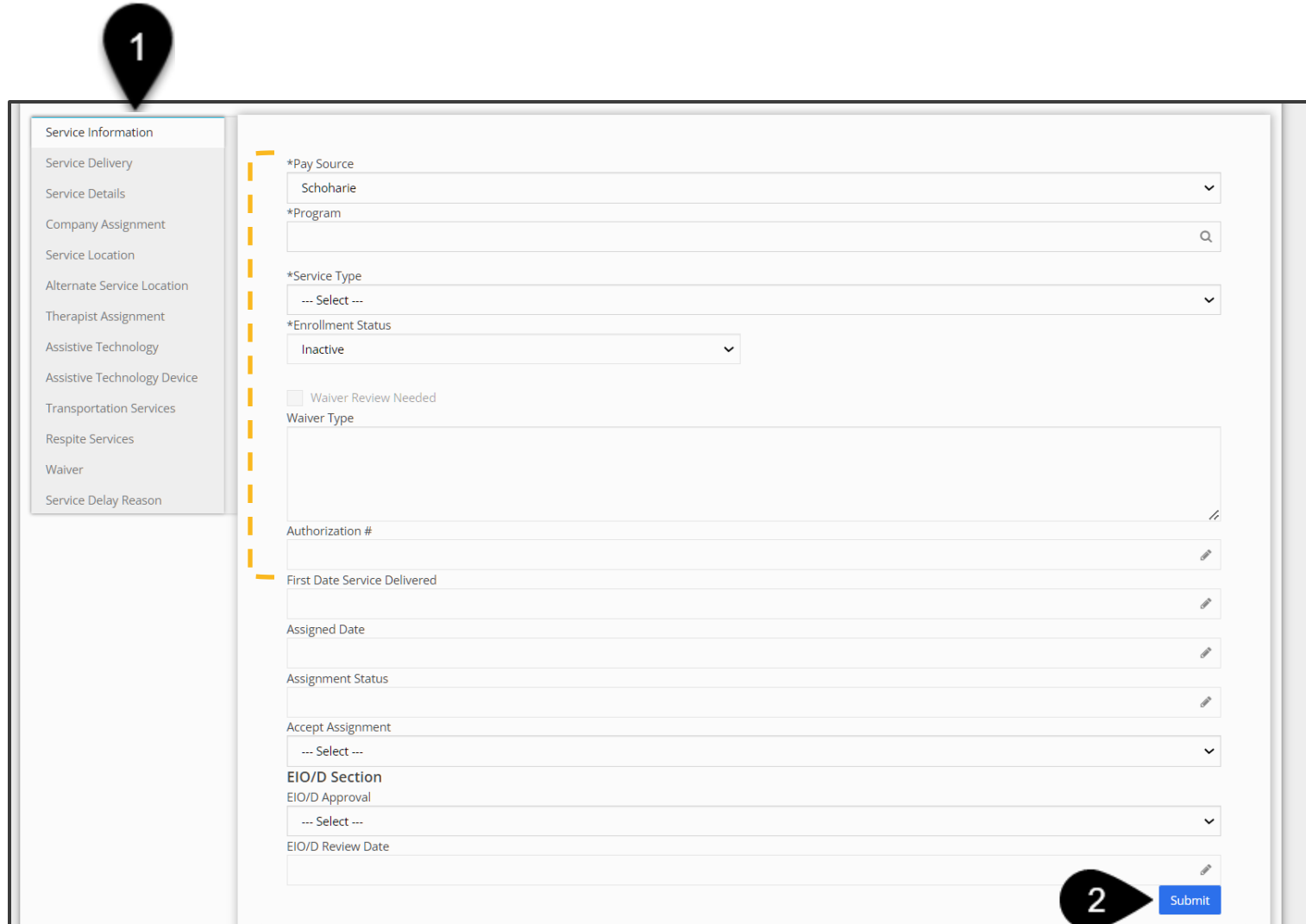
Submit a Service Authorization

NOTE

- Fields with an asterisks (*) indicate required fields.
- The **Service Information**, **Service Delivery**, and **Service Location** panels are **required** for approval for services.
- The **Company Assignment** panel is **not** required to **create** an OSC SA; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for **all** service authorizations to become **Active**.
- The **Alternative Service Location** panel is **not** required.

Step/Action

1. Once all required panels (and any additional panel relevant to the service authorization) are complete, return to the **Service Information** panel
2. Click the **Submit** button once more to submit (not just save!) your completed service authorization. Once the **Submit** button is clicked, the service authorization is included in the IFSP and upon submission of the IFSP, routes to the EIO/D for approval.
3. The IFSP, including all service authorizations, routes to the EIO/D's **IFSP Alerts** dashboard.



1

Service Information

Service Delivery

Service Details

Company Assignment

Service Location

Alternate Service Location

Therapist Assignment

Assistive Technology

Assistive Technology Device

Transportation Services

Respite Services

Waiver

Service Delay Reason

*Pay Source
Schoharie

*Program

*Service Type
--- Select ---

*Enrollment Status
Inactive

☐ Waiver Review Needed

Waiver Type

Authorization #

First Date Service Delivered

Assigned Date

Assignment Status

Accept Assignment
--- Select ---

EIO/D Section

EIO/D Approval
--- Select ---

EIO/D Review Date

2 Submit

EIO/D Approval/Rejection of Ongoing Service Coordination Service Authorizations

Entering Ongoing Service Coordination Service Authorizations

Creating Service Authorizations

Job Aid

HOW TO

Approve/Reject a Service Authorization as an EIO/D



NOTE

The EIO/D can approve an IFSP and therefore ongoing service coordination service authorizations (OSC SA) in the following situations:

- **No Agency Assignment/Acceptance Before Approval:** An OSC SA can still be entered and approved **without** a company assignment. The OSC SA remains **inactive** until a company is **assigned** and **accepts** the OSC SA.
- **Agency Assignment/No Agency Acceptance Before Approval:** An OSC SA can be approved **after** an **assigned** agency, but **before** that assigned agency **accepts** the OSC SA. The OSC SA remains **inactive** until the agency/company assigned accepts the OSC SA.
- **Agency Assignment/Acceptance Before Approval:** The OSC SA can be approved and become **active after** an agency is assigned **and** accepts the OSC SA.



Creating Service Authorizations

Job Aid

HOW TO

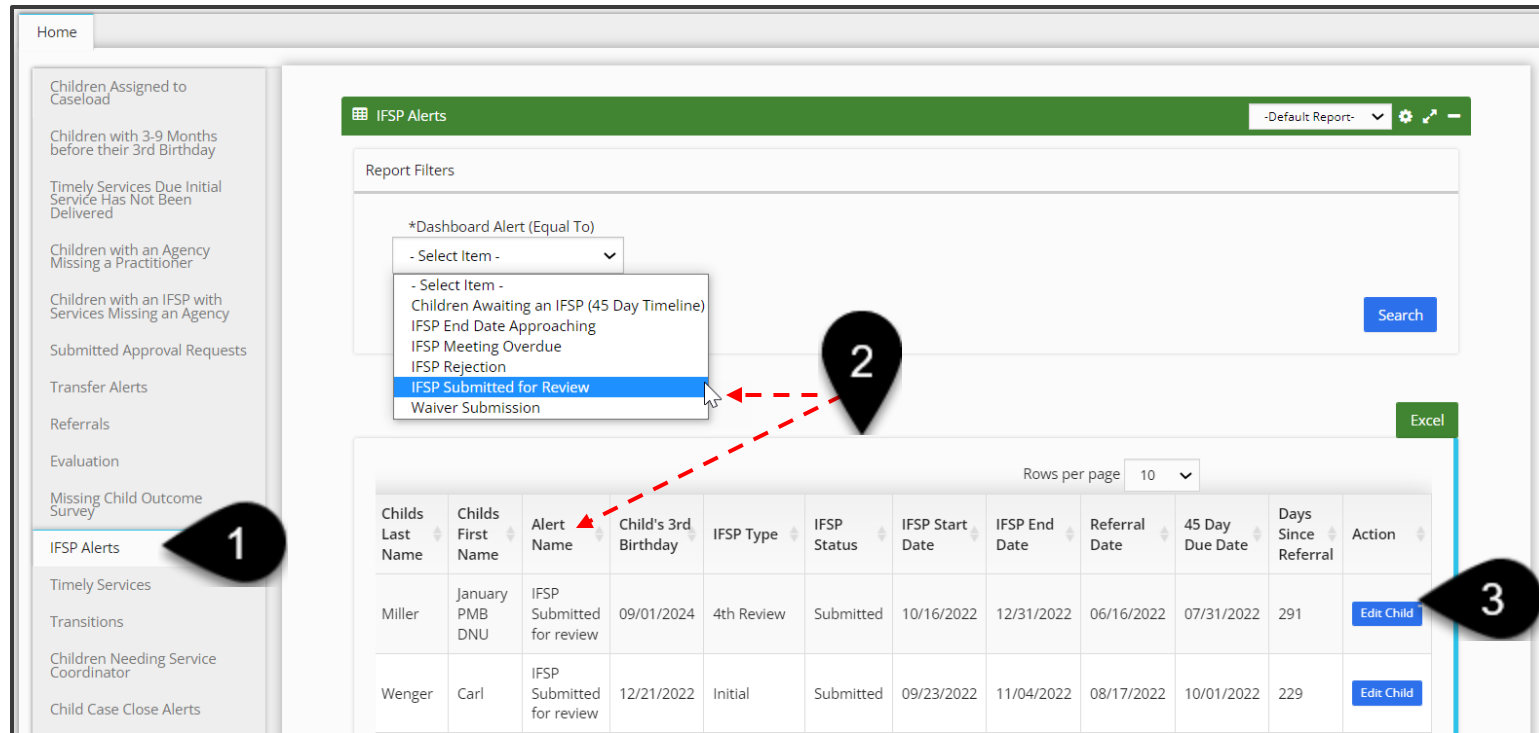
Approve/Reject a Service Authorization as an EIO/D

NOTE

- For an EIO/D to approve an IFSP from the **IFSP Information** panel, they must first approve **each** service authorization tied to the IFSP.
- The following roles may approve an ongoing service coordination service authorization: EIO/D NY.

Step/Action

- Once the Service Authorization for Ongoing Service Coordination is submitted via the IFSP, the IFSP transitions to the EIO/D's **IFSP Alerts** dashboard.
- The EIO/D needs to routinely check the **IFSP Alerts** dashboard/**IFSP Submitted for Review** dashboard filter/alert to approve any IFSPs that contain a Service Authorization for Ongoing Service Coordination.
- After locating the Child on their **IFSP Alerts** dashboard, the EIO/D selects the **Edit Child** button to open the Child's record.



The screenshot shows the 'IFSP Alerts' dashboard. On the left is a sidebar with a list of categories. Callout 1 points to the 'IFSP Alerts' category. The main area has a 'Report Filters' section with a dropdown menu. Callout 2 points to the 'IFSP Submitted for Review' option in the dropdown. Below the filters is a table of alerts. Callout 3 points to the 'Edit Child' button in the 'Action' column of the first row.

Childs Last Name	Childs First Name	Alert Name	Child's 3rd Birthday	IFSP Type	IFSP Status	IFSP Start Date	IFSP End Date	Referral Date	45 Day Due Date	Days Since Referral	Action
Miller	January PMB DNU	IFSP Submitted for review	09/01/2024	4th Review	Submitted	10/16/2022	12/31/2022	06/16/2022	07/31/2022	291	Edit Child
Wenger	Carl	IFSP Submitted for review	12/21/2022	Initial	Submitted	09/23/2022	11/04/2022	08/17/2022	10/01/2022	229	Edit Child

Creating Service Authorizations

Job Aid

HOW TO

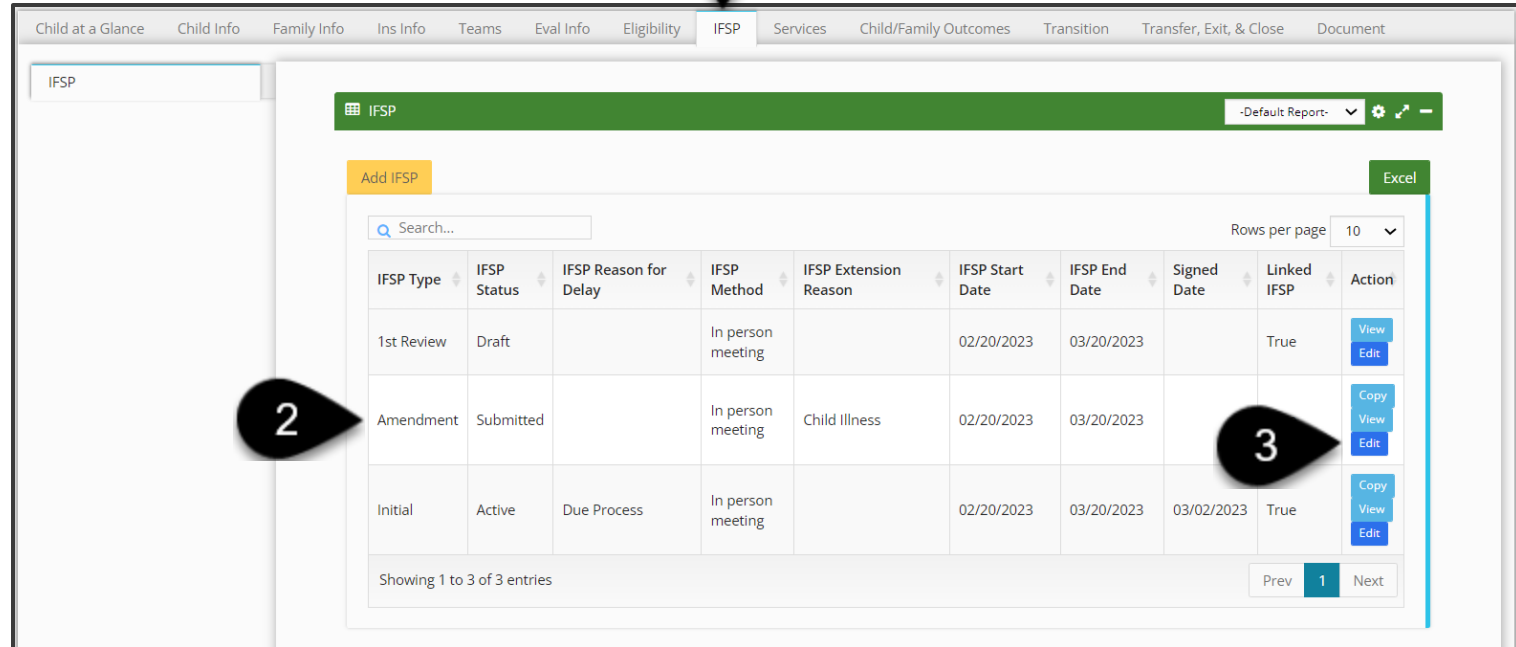
Approve/Reject a Service Authorization as an EIO/D

NOTE

- For an EIO/D to approve an IFSP from the **IFSP Information panel**, they must first approve each service authorization tied to the IFSP.

Step/Action

1. The Child's record opens, and the EIO/D selects the **IFSP** tab.
2. The EIO/D uses the **IFSP** grid/table to locate the IFSP associated with the Service Authorization.
3. The EIO/D selects the **Edit** button to open the IFSP.



The screenshot shows the 'IFSP' tab selected in the top navigation bar. The main content area displays a table of IFSP entries. Callout 1 points to the 'IFSP' tab in the navigation bar. Callout 2 points to the 'IFSP' grid/table. Callout 3 points to the 'Edit' button in the 'Action' column of the 'Initial' row.

IFSP Type	IFSP Status	IFSP Reason for Delay	IFSP Method	IFSP Extension Reason	IFSP Start Date	IFSP End Date	Signed Date	Linked IFSP	Action
1st Review	Draft		In person meeting		02/20/2023	03/20/2023		True	View Edit
Amendment	Submitted		In person meeting	Child Illness	02/20/2023	03/20/2023			Copy View Edit
Initial	Active	Due Process	In person meeting		02/20/2023	03/20/2023	03/02/2023	True	Copy View Edit

Showing 1 to 3 of 3 entries

Prev 1 Next

Creating Service Authorizations

Job Aid



HOW TO

Approve/Reject a Service Authorization as an EIO/D

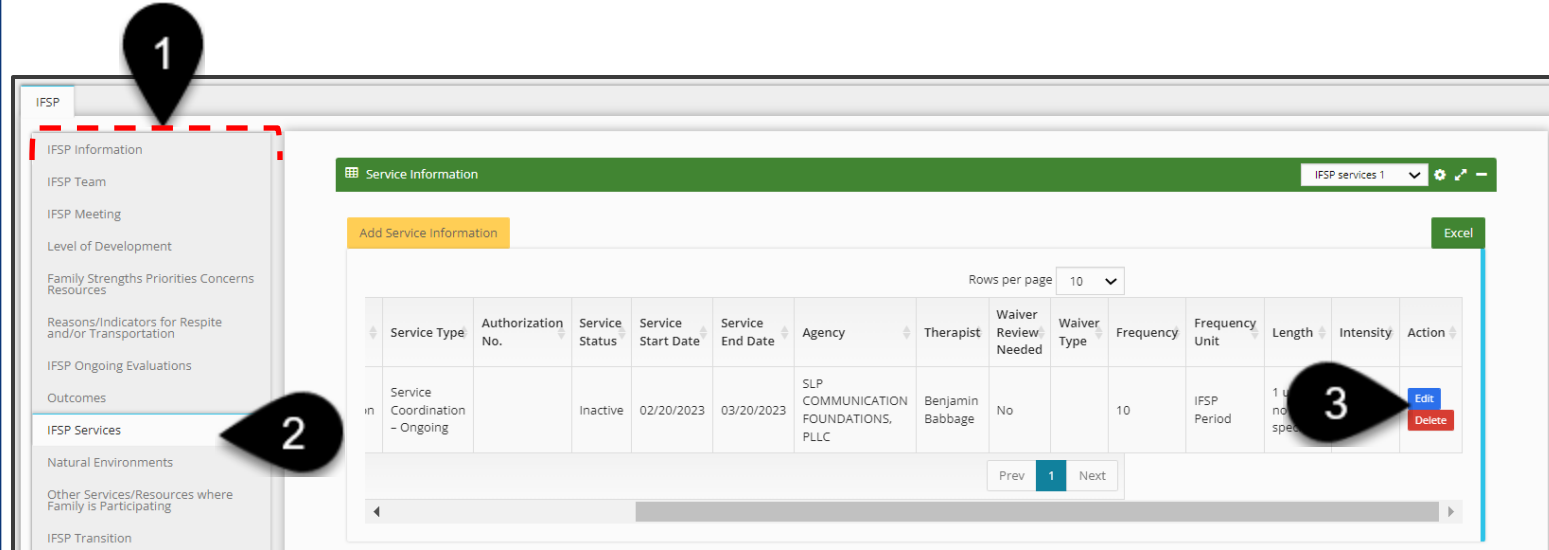


NOTE

- For an EIO/D to approve an IFSP from the **IFSP Information panel**, they must first approve each service authorization tied to the IFSP.

Step/Action

- Upon opening the IFSP, the IFSP screen populates with the IFSP panels.
- The EIO/D selects the **IFSP Services** panel.
- The EIO/D selects the **Edit** button to open the correct Service Authorization.



1

2

3

Service Type	Authorization No.	Service Status	Service Start Date	Service End Date	Agency	Therapist	Waiver Review Needed	Waiver Type	Frequency	Frequency Unit	Length	Intensity	Action
Service Coordination - Ongoing		Inactive	02/20/2023	03/20/2023	SLP COMMUNICATION FOUNDATIONS, PLLC	Benjamin Babbage	No		10	IFSP Period	1 hr	no spec	Edit Delete

Creating Service Authorizations

Job Aid

HOW TO

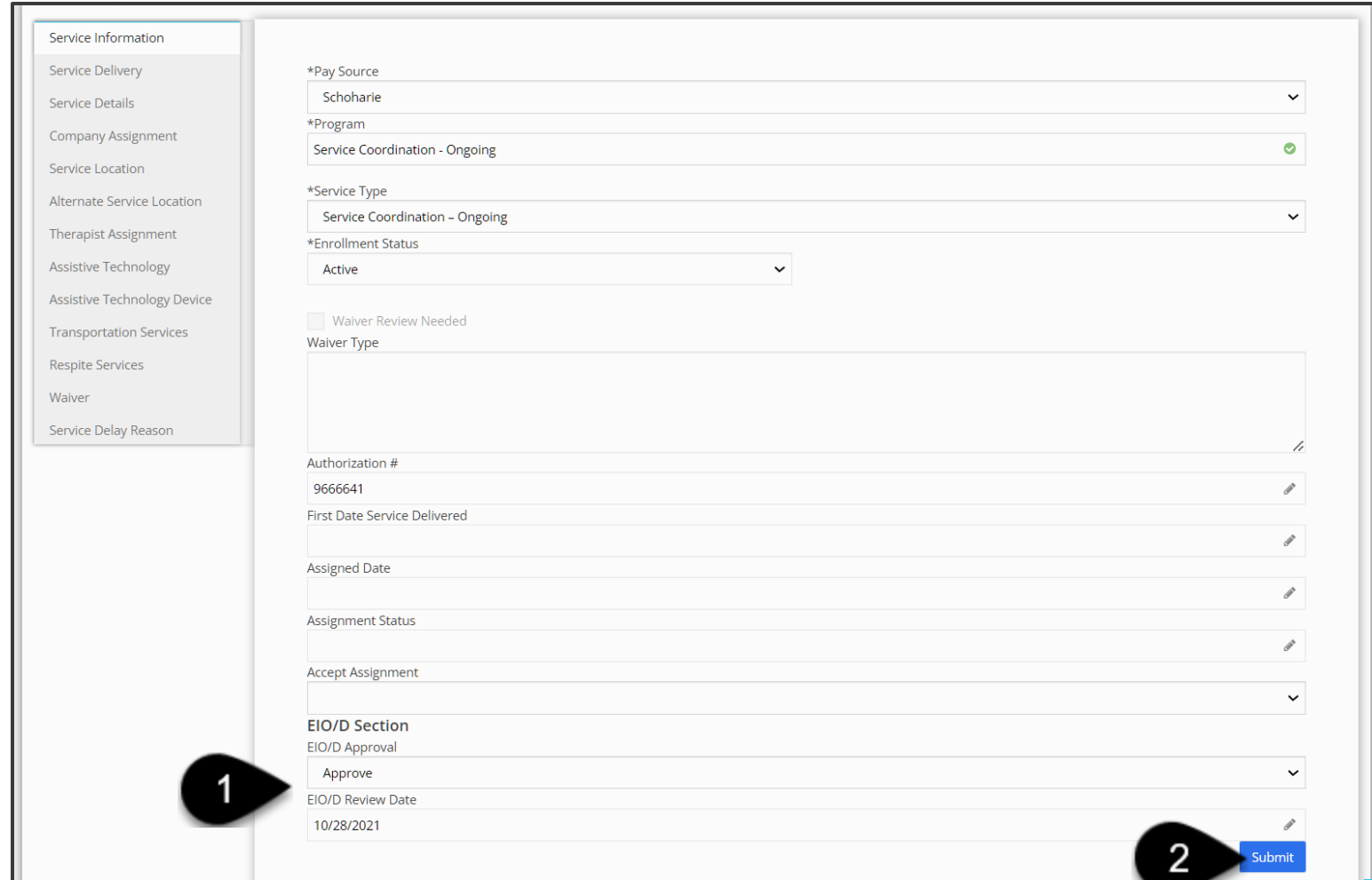
Approve/Reject a Service Authorization as an EIO/D

NOTE

- Fields with an asterisks (*) indicate required fields.
- For an EIO/D to approve an IFSP from the **IFSP Information panel**, they must first approve each service authorization tied to the IFSP.
- The EIO/D must approve, and an agency must accept the service authorization before a service authorization number is generated.

Step/Action

1. The EIO/D reviews and approves the service authorization. The EIO/D Review Date auto-populates.
2. Upon selecting the **Submit** button, the service authorization routes to the approved provider for acceptance or rejection.



Creating Service Authorizations

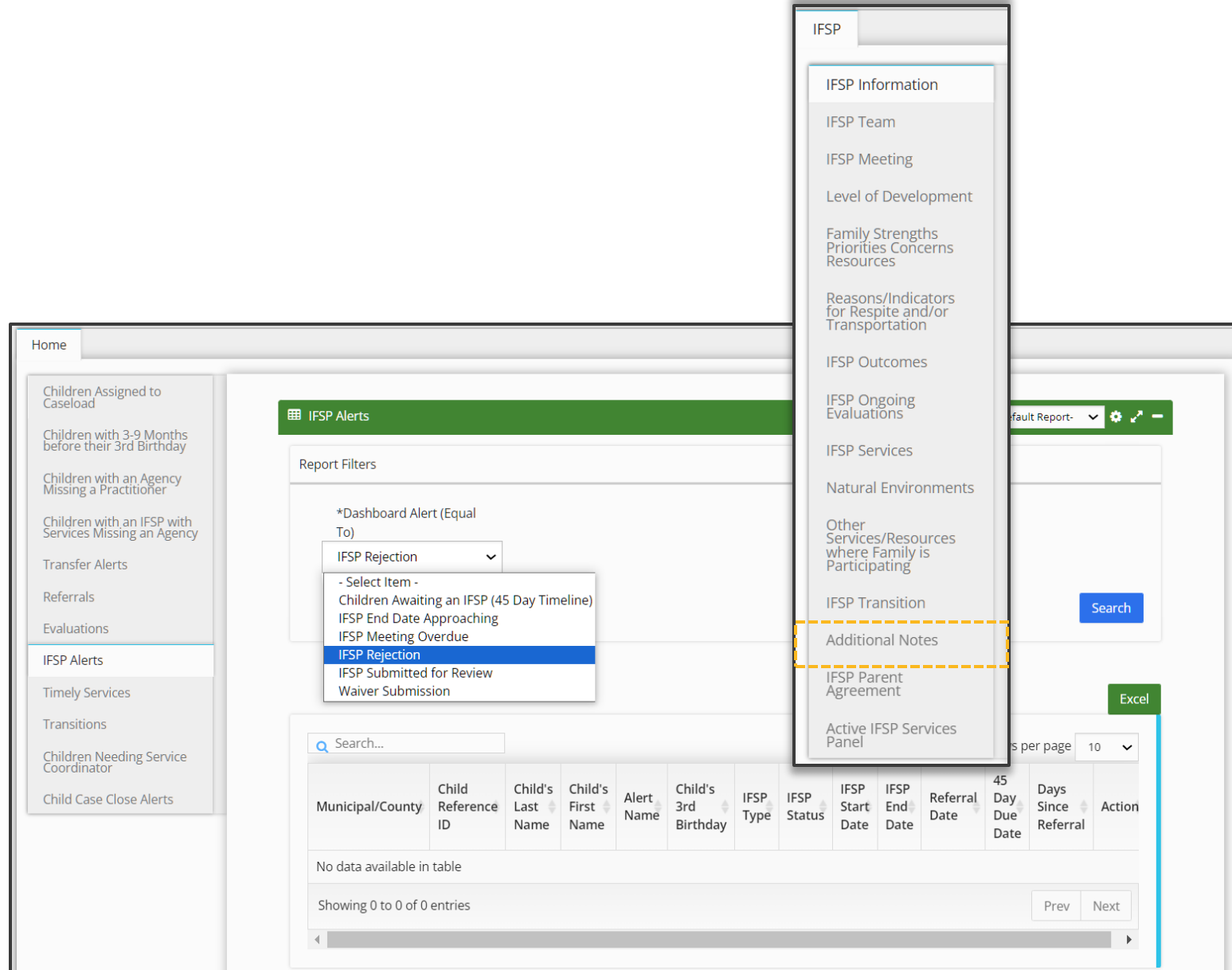
Job Aid

HOW TO

Approve/Reject an IFSP as an EIO/D

NOTE

- **EIO/Ds who reject a service authorization(s) will then need to reject the entire IFSP.** This will change the IFSP Status from "Submitted" to "Draft".
- Upon rejecting the IFSP, the IFSP routes to the Service Coordinator's **IFSP Alerts** dashboard, where the **IFSP Rejection** drop-down should be used to locate the rejected IFSP for further editing and resubmittal. When an IFSP is re-submitted, the EIO/D Approval field will be blank.
- The Service Coordinator is encouraged to document changes made to the IFSP and associated service authorizations in the **Additional Notes** panel located within the **IFSP** tab. Changes may also be communicated to the EIO/D through offline communications.



The screenshot displays the 'IFSP Alerts' dashboard. On the left sidebar, the 'IFSP Alerts' link is highlighted. The main content area features a 'Report Filters' section with a dropdown menu set to 'IFSP Rejection'. Below this, there is a search bar and a table. The table has the following columns: Municipal/County, Child Reference ID, Child's Last Name, Child's First Name, Alert Name, Child's 3rd Birthday, IFSP Type, IFSP Status, IFSP Start Date, IFSP End Date, Referral Date, 45 Day Due Date, Days Since Referral, and Action. The table is currently empty, displaying 'No data available in table' and 'Showing 0 to 0 of 0 entries'. A 'Prev' and 'Next' button are visible at the bottom right of the table. On the right side of the dashboard, there is a vertical menu with various IFSP-related options, including 'IFSP Information', 'IFSP Team', 'IFSP Meeting', 'Level of Development', 'Family Strengths Priorities Concerns Resources', 'Reasons/Indicators for Respite and/or Transportation', 'IFSP Outcomes', 'IFSP Ongoing Evaluations', 'IFSP Services', 'Natural Environments', 'Other Services/Resources where Family is Participating', 'IFSP Transition', 'Additional Notes' (highlighted with a dashed orange box), 'IFSP Parent Agreement', and 'Active IFSP Services Panel'. There is also a 'Search' button and an 'Excel' button on the right side.

Company Acceptance/Rejection of Ongoing Service Coordination Assignments

Entering Ongoing Service Coordination Service Authorizations

Creating Service Authorizations

Job Aid

HOW TO

Accept/Reject an Assignment as a Company



NOTE

- The EIO/D must approve, **and** a company (Municipality/Agency/Independent Provider) must accept the service authorization before a service authorization number is generated.
- Once the EIO/D approves the ongoing service coordination service authorization, the service authorization routes to the company (Municipality/Agency/Independent Provider) assigned to the child and identified on the service authorization.
- The company must '**Accept**' or '**Reject**' the service authorization.
- The following roles are provisioned to accept/reject a service authorization: UniversalProvNY **OR** ProvDataEntryNY.



Creating Service Authorizations

Job Aid

HOW TO

Accept/Reject an Assignment as a Company

NOTE

- After accepting or rejecting a child's service authorization, the child may still appear on your dashboard with an **Accept Assignment** button. This indicates there are multiple service authorizations associated with the child that must be reviewed and responded to.
- Even if multiple service authorizations are being assigned to the agency or provider, a child will only display **once** on the **Children Assigned to Caseload** dashboard.
- The company will not have access to the child's record until all service authorizations have been accepted or rejected.

Childs Last Name	Childs First Name	County Name	Child Status	Date Of Birth	Child Reference ID	Action
Baker	Jim	Albany	Active	10/02/2021	1312	Edit
bLcaLXXcfXbL	CeZaba	Albany	Active	11/01/2021	1003	Edit
Feb23	Ram	Albany	Active	02/01/2022	1432	Edit
Grant	Pet	Albany	Active	07/04/2022	1197	Accept Assignment
Hall	Eric	Queens	Active	06/13/2022	1209	Edit

Agency Accept/Reject Assignment

EIO/D or Coordinator Type

Initial Service Coordinator

*Start Date

01/31/2024

*Agency Accept/Reject Assignment

-- Select --
-- Select --
Accepted
Rejected

Submit

Cancel

Creating Service Authorizations

Job Aid

HOW TO

Accept/Reject an Assignment as a Company

NOTE

- It is best practice to write down the Child Reference ID **before** clicking the 'Accept Assignment' button. Once an assignment is accepted, the child will transition, in alphabetical order **by last name**, to the **Children Assigned to Caseload** dashboard. The child will have an 'Edit' button in the Action column To return to that child's record, you will have to find the child by name or Child Reference ID.

Step/Action

- Upon EIO/D's approval of the IFSP and service authorizations, the service authorization routes to the company's **Children Assigned to Caseload** dashboard
 - Select the **Accept Assignment** button.
 - The **Agency Accepts/Reject Assignment** dialogue box populates. Choose 'Accepted' or 'Rejected' from the **Agency Accept/Reject Assignment** dropdown.
 - Click the **Submit** button to save the selection.
- Upon accepting the assignment, the **Accept Assignment** button changes to an **Edit** button to allow the agency access to the child's record.

Children Assigned to Caseload 1

-Default Report-

Excel

Search...

Rows per page 10

Childs Last Name	Childs First Name	County Name	Child Status	Date Of Birth	Child Reference ID	Action
Baker	Jim	Albany	Active	10/02/2021	1312	Edit
bLcaLXXcfXbL	CeZaba	Albany	Active	11/01/2021	1003	Edit
Feb23	Ram	Albany	Active	02/01/2022	1432	Edit
Grant	Pet	Albany	Active	07/04/2022	1197	Accept Assignment 2
Hall	Eric	Queens	Active	06/13/2022	1209	Edit

Agency Accept/Reject Assignment

EIO/D or Coordinator Type

Initial Service Coordinator

*Start Date

01/31/2024

*Agency Accept/Reject Assignment

-- Select --

-- Select --

Accepted

Rejected

Submit 4

3

Creating Service Authorizations

Job Aid

HOW TO

Accept/Reject an Assignment as a Company

NOTE

- If the agency (inclusive of individual providers) **rejects** the assignment, the child will route to the EIO/D and Service Coordinator's **Children With an IFSP with Services Missing an Agency** Dashboard for another assignment.

Home

Children Assigned to Caseload

Children with 3-9 Months before their 3rd Birthday

Children with an Agency Missing a Practitioner

Children with an IFSP with Services Missing an Agency

Submitted Approval Requests

Transfer Alerts

Evaluations

IFSP Alerts

Timely Services

Transitions

Children Needing Service Coordinator

Child Case Close Alerts

Review 271 Response

Search...

Rows per page 10

Municipal/County	Child Reference ID	Child's Last Name	Child's First Name	Status	Date of Birth	Child's 3rd Birthday	IFSP Type	IFSP Status	IFSP Start Date	Service Type
No data available in table										
Showing 0 to 0 of 0 entries										
<div>Prev</div> <div>Next</div>										

Assigning a Therapist

Entering Ongoing Service Coordination Service Authorizations

Creating Service Authorizations

Job Aid

HOW TO

Assign a Therapist

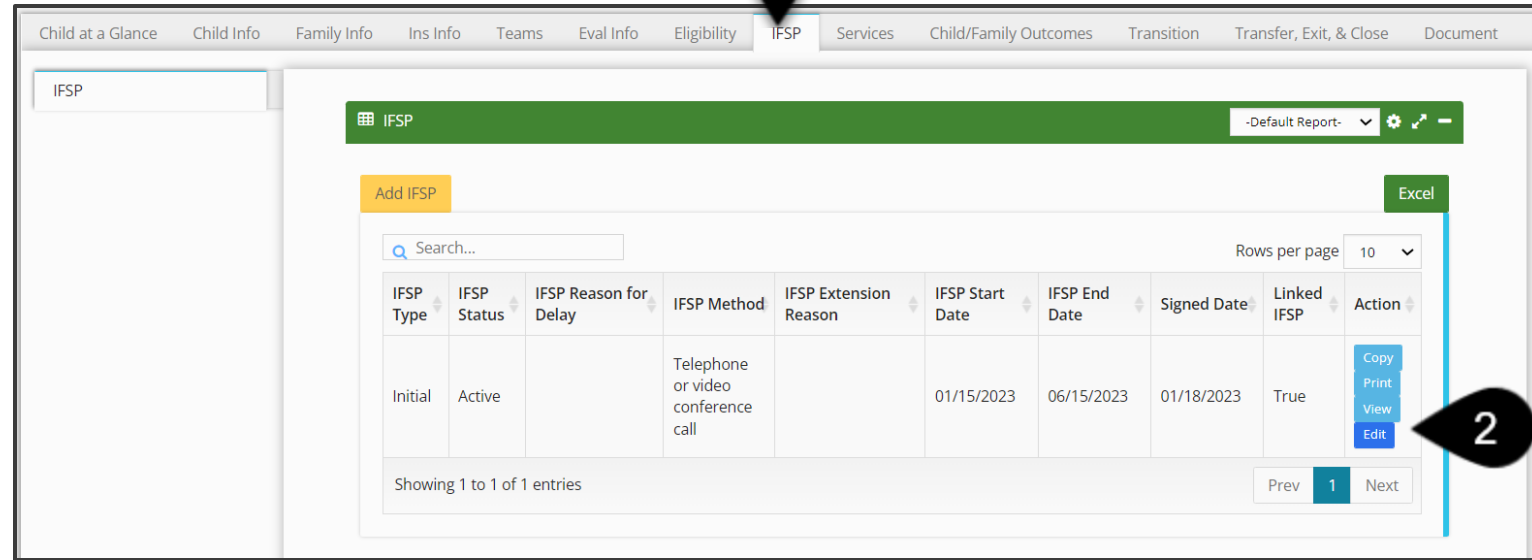
NOTE

Therapist Assignments can only be assigned to service authorizations through the **IFSP** tab, **IFSP Services** panel.

Please keep in mind, **provider** refers to an agency, municipality, or an individual provider acting as their own agency. A **therapist** refers to an individual who may be employed by an agency and is responsible for rendering services (i.e., an occupational therapist, a speech-language pathologist).

Step/Action

1. To add a therapist assignment, open a child's record and select the **IFSP** tab from the Child's record. The page defaults to the **IFSP** grid.
2. From the **IFSP** grid, locate the correct IFSP and select the **Edit** button to open the IFSP. The IFSP sub-tab populates.
3. Locate and select the **IFSP Services** panel.
4. From the **IFSP Services** panel, select the **Edit** button next to the service authorization needing a therapist. Upon selecting **Edit**, the **Service Info** tab/**Service Information** panel populates.



IFSP

IFSP

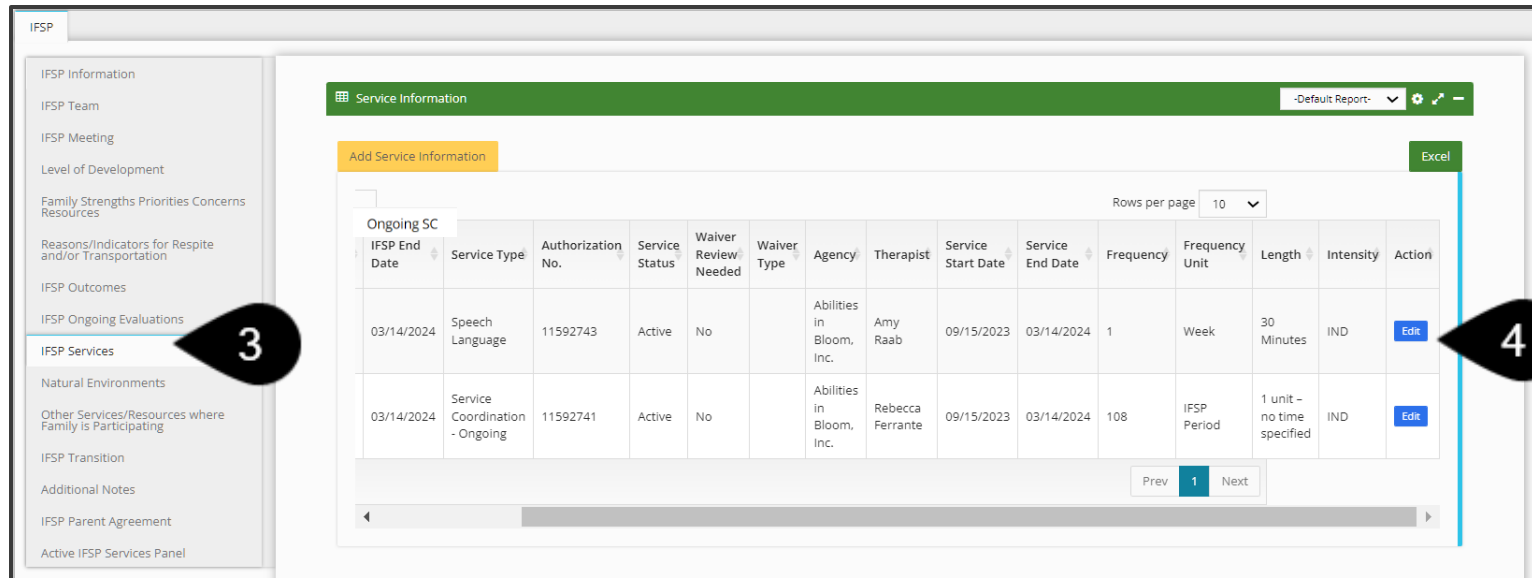
Add IFSP

Search...

IFSP Type	IFSP Status	IFSP Reason for Delay	IFSP Method	IFSP Extension Reason	IFSP Start Date	IFSP End Date	Signed Date	Linked IFSP	Action
Initial	Active		Telephone or video conference call		01/15/2023	06/15/2023	01/18/2023	True	Copy Print View Edit

Showing 1 to 1 of 1 entries

Prev 1 Next



IFSP

IFSP Information

IFSP Team

IFSP Meeting

Level of Development

Family Strengths Priorities Concerns Resources

Reasons/Indicators for Respite and/or Transportation

IFSP Outcomes

IFSP Ongoing Evaluations

IFSP Services

Natural Environments

Other Services/Resources where Family is Participating

IFSP Transition

Additional Notes

IFSP Parent Agreement

Active IFSP Services Panel

Service Information

Add Service Information

Search...

IFSP End Date	Service Type	Authorization No.	Service Status	Waiver Review Needed	Waiver Type	Agency	Therapist	Service Start Date	Service End Date	Frequency	Frequency Unit	Length	Intensity	Action
03/14/2024	Speech Language	11592743	Active	No		Abilities in Bloom, Inc.	Amy Raab	09/15/2023	03/14/2024	1	Week	30 Minutes	IND	Edit
03/14/2024	Service Coordination - Ongoing	11592741	Active	No		Abilities in Bloom, Inc.	Rebecca Ferrante	09/15/2023	03/14/2024	108	IFSP Period	1 unit - no time specified	IND	Edit

Prev 1 Next

Creating Service Authorizations

HOW TO

Job Aid

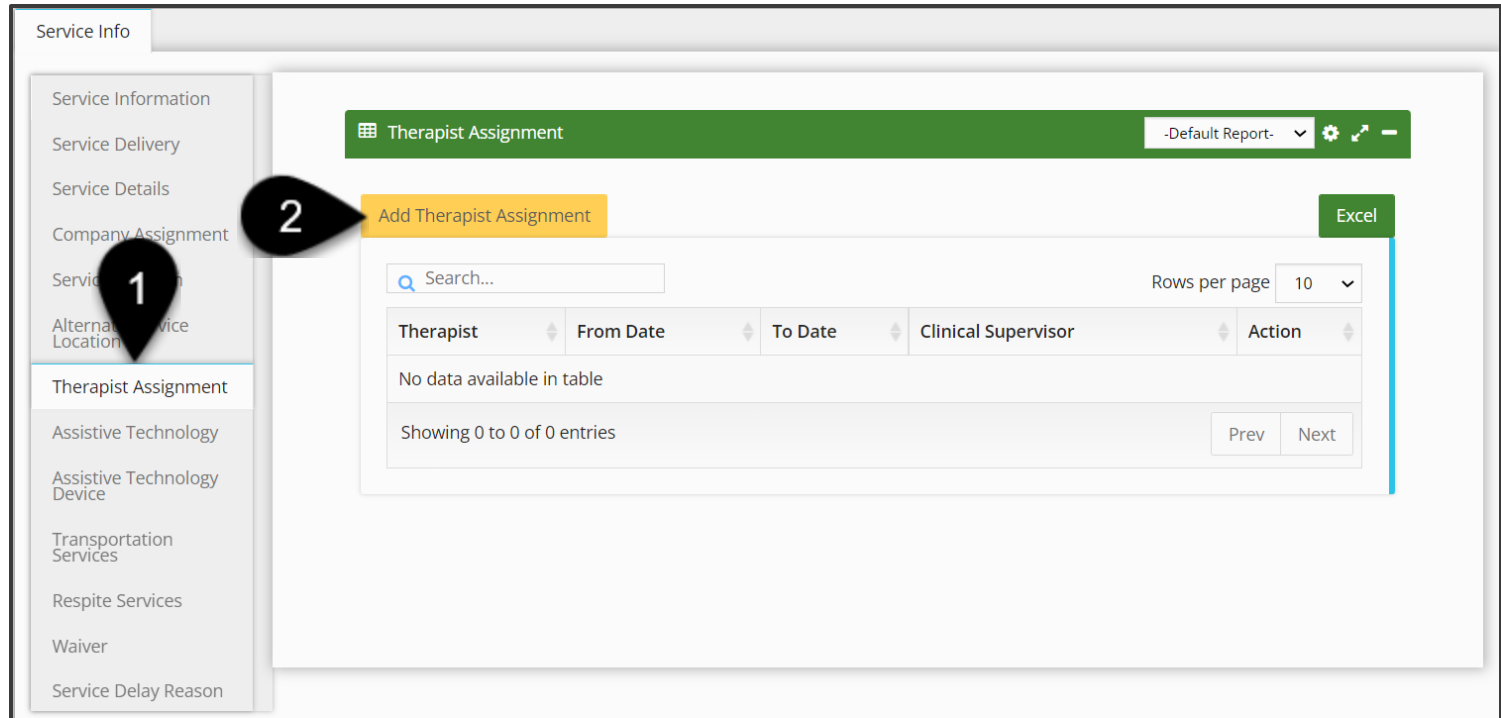
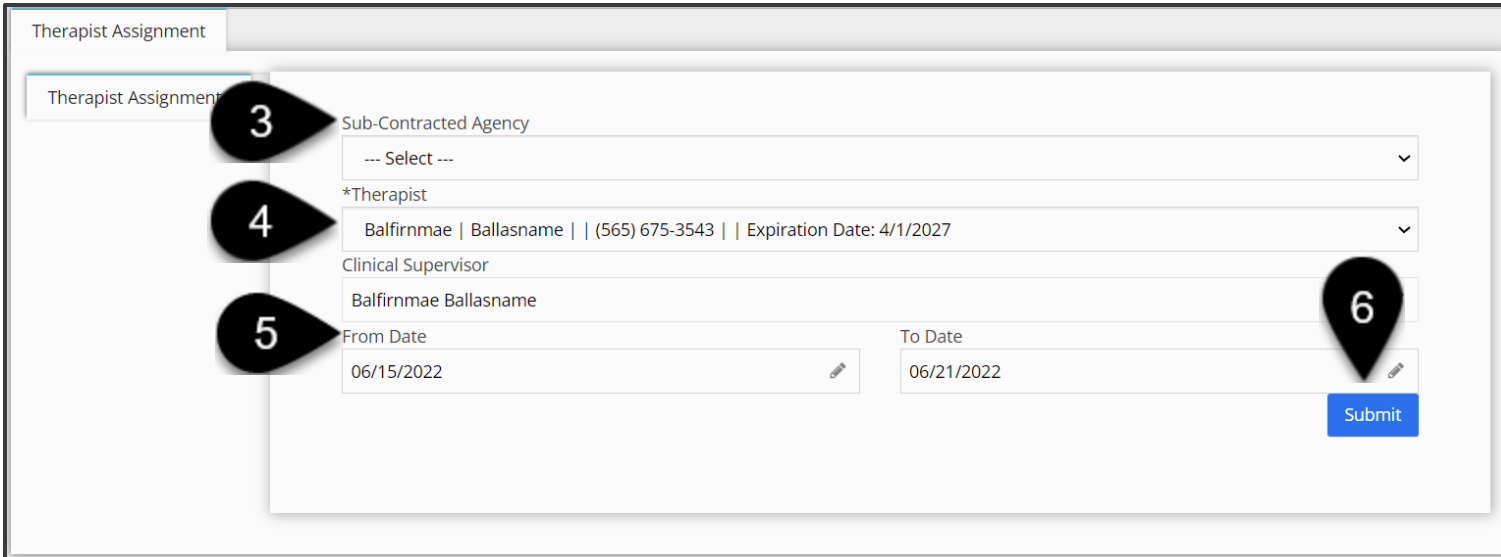
Assign a Therapist

NOTE

- Fields with an asterisk (*) indicate required fields.
- Agencies can assign multiple therapists to a single service authorization by repeating the below steps. This allows therapists to share cases for substitution or replacement of rendering therapists. Therapist assignments should be ended when their access is no longer appropriate. The assignment should end the day before the Service Authorization end date.

Step/Action

- From the **Service Info** sub-tab, Click the **Therapist Assignment** panel.
- Select the **Add Therapist Assignment** button from the **Therapist Assignment** grid/table.
- Select a **Sub-Contracted Agency**, if applicable. Agencies should only select a sub-contracted agency if the 'Company Assigned' has entered a contractual relationship with another agency to supply therapists.
- Select a therapist from the **Therapist** drop-down.
- Manually enter or use the calendar picker to select **From Date** and **To Date** for the therapist.
- Click the **Submit** button to save/submit the information entered. This action prompts the assignment to route to the assigned therapist's **Children Assigned to Caseload** dashboard.

Creating Service Authorizations

Job Aid

HOW TO

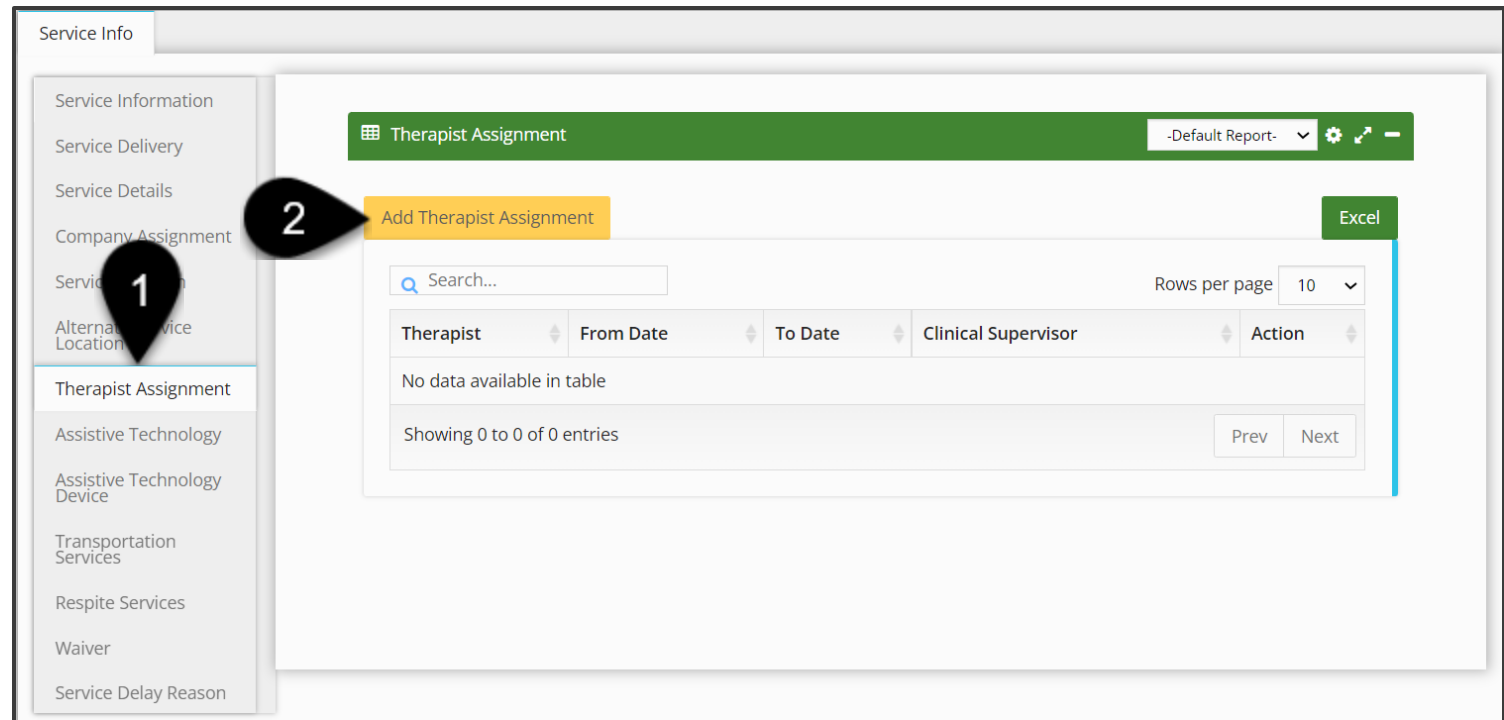
Assign a Therapist



NOTE

What if my therapist (rendering provider) is not populating in the Therapist Assignment panel?

- Therapists available for selection are based on their assigned catchment area and their relationship with the provider of record/billing provider. If the therapist you are attempting to locate does not populate within the Therapist Assignment panel, users (agencies) are encouraged to check and ensure the therapist has assigned catchment areas.
- If it appears a therapist lacks a catchment area, please ensure that roles designated to manage providers (i.e., MuniProgAlINY or UniversalProvNY) check the provider's record to confirm the provider has a county and catchment area added to their profile. For more information on managing providers, please review the NYS DOH - EI-Hub CM Unit 10 [Provider] and the NYS DOH - EI-Hub CM User Guide - Unit 9 [Therapist] user guides.



Service Info

Service Information

Service Delivery

Service Details

Company Assignment

Service Information

Alternative Service Location

Therapist Assignment

Assistive Technology

Assistive Technology Device

Transportation Services

Respite Services

Waiver

Service Delay Reason

Therapist Assignment -Default Report-

Add Therapist Assignment

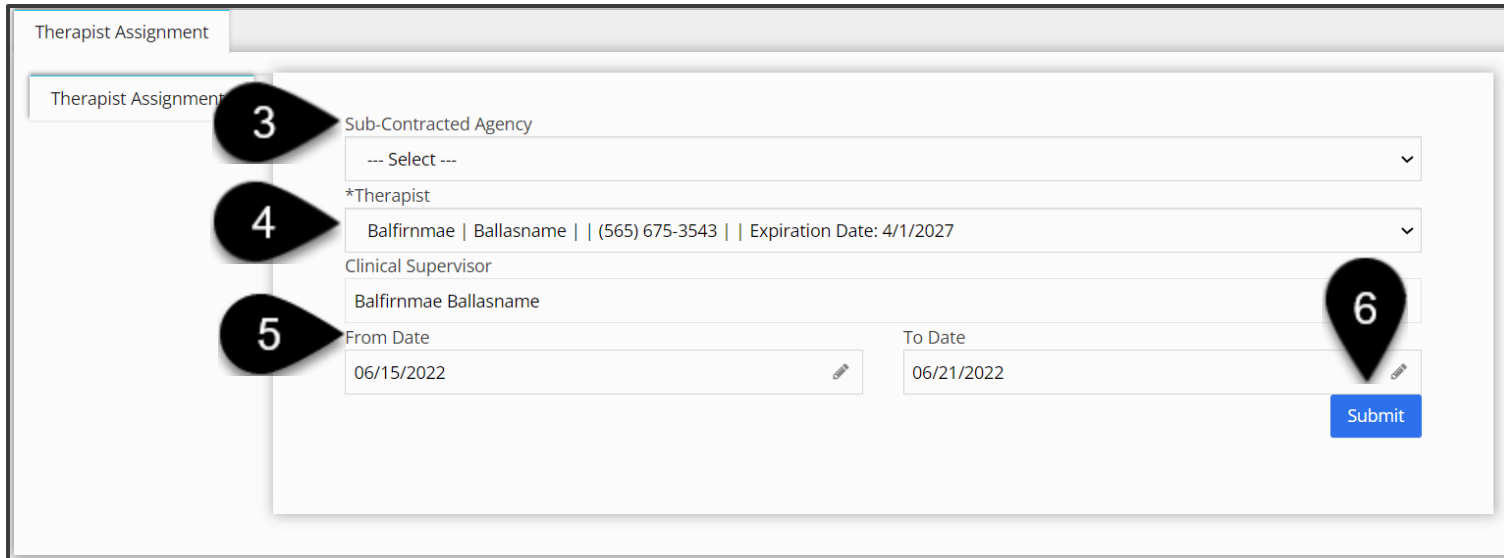
Excel

Search...

Rows per page 10

Therapist	From Date	To Date	Clinical Supervisor	Action
No data available in table				
Showing 0 to 0 of 0 entries				

Prev Next



Therapist Assignment

Therapist Assignment

Sub-Contracted Agency

--- Select ---

*Therapist

Balfirnae | Ballasname | | (565) 675-3543 | | Expiration Date: 4/1/2027

Clinical Supervisor

Balfirnae Ballasname

From Date

06/15/2022

To Date

06/21/2022

Submit

Remaining Service Panels – All Types

Entering Service Authorizations for Ongoing Service Coordination Job Aid

Creating Service Authorizations

Job Aid

HOW TO

Use the Remaining Service Panels



NOTE

- Fields with an asterisks (*) indicate required fields
- **Assistive Technology, Assistive Technology Device, Transportation Services, Respite Services, and Waivers** will be addressed in more detail in subsequent job aids
- Please note, **only one** service **Delay Reason** should be selected from the available options.
- The **Delay Reason Comment** field (not shown in screenshot) is a system required field if a Delay Reason is chosen. Please enter "N/A" when appropriate.

Step/Action

1. The remaining Service Information panels (i.e., **Assistive Technology, Assistive Technology Device, Transportation Services, Respite Services, Waiver**) are only necessary for specific types of Service Authorizations (i.e., Assistive Technology Service Authorizations).
2. The **Service Delay Reason panel/grid** is also applicable if Service Coordination and newly authorized general services cannot start within 30 days of a Child's IFSP start date or start date of the SA.

