## **DASHBOARDS**



Dashboards offer a quick 'at-a-glance' view of child information and relevant alerts about a child's record. Similar to the work queues and inboxes utilized in NYEIS, information from the dashboards will inform system users what tasks need to be completed on a daily basis. Dashboards are located on the Home page when logging into the Case Management component of the EI-Hub. All users will have dashboards; however, alerts received will vary based upon a user's role. There are two types of dashboards available to users within Case Management:



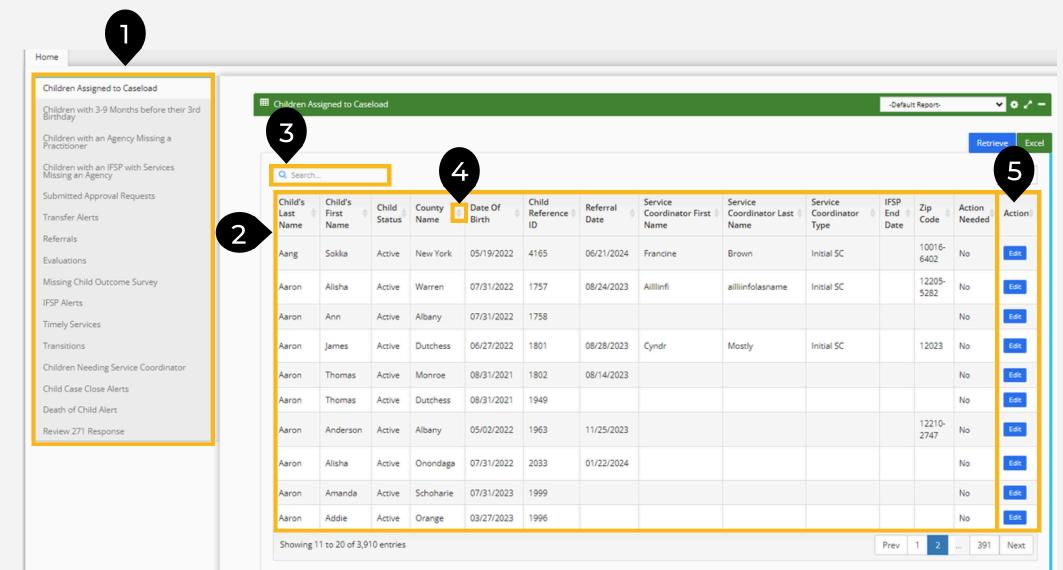
'**Informational Dashboards**' track information based on specific timelines defined by the Early Intervention Program (EIP). Information Dashboards do not provide actionable alerts and are present for information / record keeping purposes. These dashboards are equivalent to the tasks and work queues in NYEIS.



'Alert Dashboards' notify system users of workflow changes and if there is an action required on a child's record. An 'Edit' or 'Edit Child' button will appear, allowing users to navigate to a child's record from the dashboard.

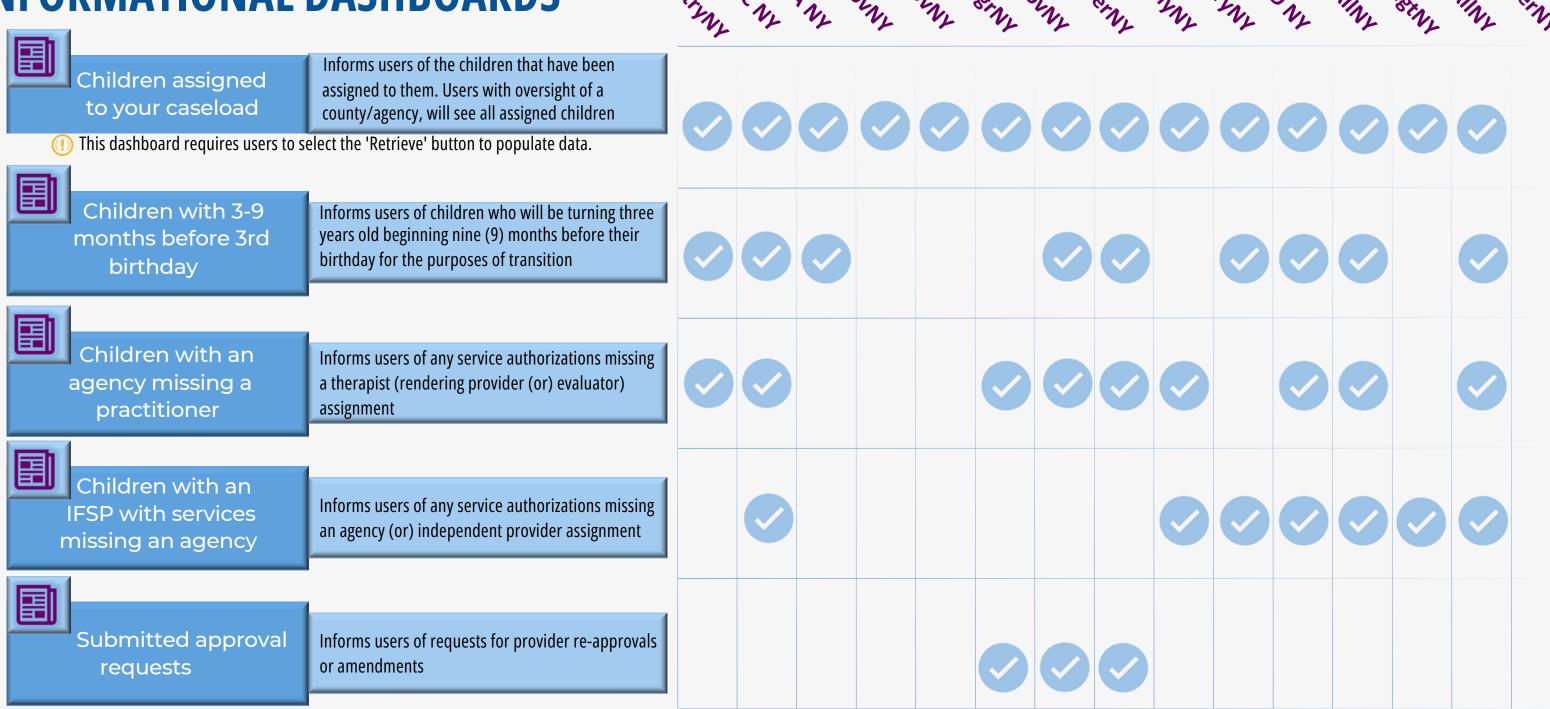
# Navigating the EI-Hub's Case Management Dashboards

- 1. **Dashboards**: houses historical information and specific alerts relating to a child's record
- 2. **Results Grid:** captures information from a child's record based on the dashboard selected
- 3. **Search Field:** allows users to conduct searches from a dashboard's results grid. Search feature is applicable to all columns within the results grid
- 4. **Arrow Icon:** allows users to sort data in columns by ascending (A to Z) or descending (Z to A) alphabetical order
- 5. **Edit/Edit Child Button:** allows users to open a child's record from the dashboard's results grid



Using the grid below, users can identify if they have access to a particular dashboard based on their user role. All Case Management user roles are listed on the top of the grid. Trace down a column to determine the user's accessibility.

### **INFORMATIONAL DASHBOARDS**



### **ALERT DASHBOARDS**

		1/	1/2	1/2	1/	1/2	N	1/	N	N	1/	1/2	N	N	1	N
Transfer Alerts	Informs users of incoming transfer requests, including informing users when a transfer request has been rejected															
Referral Alerts	Informs users of new referrals, resulting in a new child assignment. Includes alerts for social services notifications and developmental surveillance due															
Evaluations Alerts	Informs users of timelines related to evaluations. Includes alerts for eligibility determination, medical history needed, and evaluation rejections															
Missing child outcomes survey alerts	Informs users when entry and exit forms are due				1	Thi	s dash	board	will no	ot be a	vailab	le unti	il 2025			
Child case closed alert	Informs users that a child's record is expected to be closed because child is over 3 years of age															
Insurance Verification Needed (271 Response)	Informs users that a child's insurance information needed to be verified. Occurs once every 3 months, from the start of the child's case															

#### **ALERT DASHBOARDS**

**IFSP Alerts** 

Children needing

service coordinator alert

Informs users of any children requiring a service

coordinator assignment. Includes notice of

service coordinator assignment rejections

MUNIDARAENTANA MUNICIONINA Universalprount Informs users of events related to IFSPs, including submissions, rejections, due dates, and waivers Informs user that services are overdue and a delay Timely Services Alert reason is needed Informs users of approaching transition conference **Transition Alerts** timelines, including potential CPSE eligibility