

El-Hub Case Management User Guide – Unit 5



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Revision History

| Version Number | Release Date | Author | Revision Summary |
|----------------|--------------|-------------------|---|
| v.0.1.0 | | Paul Michael Ross | First Draft |
| v.0.2.0 | | Paul Michael Ross | Edits and additions to the user guide |
| v.0.3.0 | | Paul Michael Ross | Edits and additions to the user guide |
| v.0.4.0 | 8.5.2021 | Paul Michael Ross | Sent to BEI for review |
| v.0.5.0 | 8.20.2021 | Paul Michael Ross | Updated the following: <ol style="list-style-type: none"> 1. Teams tab > renamed panel to "EIO/D / Service Coordinator." 2. From 'Initial/On-going Service Coordinator.' 3. 'Service' panel removed from the Teams tab 4. The 'Add Service Coordinator' button was renamed "EIO/D Add Service Coordinator." 5. I edited the labels and descriptions for the EIO/D Add Service Coordinator panel. 6. Removed the 'Service' panel (screenshot & descriptions) 7. Evaluation Tabs and Panels sections. |
| v.0.6.0 | 8.24.2021 | Paul Michael Ross | Updated the following: <ol style="list-style-type: none"> 1. Eval Tab > Birth/Medical Panel screenshot updated 2. Updated the Therapist sections based on the El-Hub Therapist Navigation Guide for C1 Testing Word document comments. 3. Added 837P Loader section. |
| v.0.7.0 | 9.10.2021 | Paul Michael Ross | Updated the following: <ol style="list-style-type: none"> 1. IFSP Screen captures 2. IFSP panels/sub-panels order |
| v.0.8.0 | 9.22.2021 | Paul Michael Ross | Updated the following: <ul style="list-style-type: none"> • Added Breadcrumb navigation to section 5 • Evaluation panels (screenshots) • Eligibility panels (screenshots) • Added/updated Provider sections |

EI-Hub Case Management v0.21.0

| Version Number | Release Date | Author | Revision Summary |
|-----------------|--------------|-------------------|--|
| v.0.9.0 | 9.27.2021 | Paul Michael Ross | Updated the following: <ul style="list-style-type: none"> • Change "Address Validation panel to "Address message pad." • Added the term "Therapist" within the Therapist sections |
| v.0.10.0 | 9.28.2021 | Paul Michael Ross | Updated the following in section 5.1 Web Page Banner Buttons and Hyperlinks: <ul style="list-style-type: none"> • Added NYEI logo/description • Added User Profile Files drop-down field • Added NY EI-Hub logo/description |
| v.0.11.0 | 10.1.2021 | Paul Michael Ross | Reworded the correlation between Therapist and Therapist |
| v.0.12.0 | 10.6.2021 | Paul Michael Ross | Updated IFSP panel/pane orders and screenshots |
| v.0.13.0 | 10.12.2021 | Paul Michael Ross | Updated the following: <ul style="list-style-type: none"> • For consistency, I did a global change for the 'Search text box as follows: <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; align-items: center;"> <div style="flex-grow: 1;"> Search </div> </div> <div style="margin-top: 5px;"> To search the results grid/table for a specific record, enter a keyword into this field. </div> </div> <ul style="list-style-type: none"> • Updated Transition panels, pane order, and screenshots • Removed the following buttons in section 5: <ul style="list-style-type: none"> ○ Message ○ Tasks • Removed Task board section • Updated system user sign-in • Updated the Evaluation > Screening Tab > Screening Information panel (Screenshot + fields) • Added a 'Checkboxes' description (section 5.7) • Updated Eligibility sections |

| Version Number | Release Date | Author | Revision Summary |
|-----------------|--------------|-------------------|--|
| v.0.14.0 | 11.3.2021 | Paul Michael Ross | <ul style="list-style-type: none"> Updated Screenshots for the Evaluation Tab > Waiver panel added and updated field descriptions. |
| v.0.15.0 | 11.29.2021 | Paul Michael Ross | <ul style="list-style-type: none"> Updated the Document Management Panel. Add a definition for what a "Submit" button means (listed in the Navigation section). I updated the 'Home' tab dashboard section. I removed screenshots, fields, descriptions, and buttons for all tabs and panels and added a New Therapist (Therapist). The purpose is to reduce repetition, hence, decreasing the size of the overall CM User Guide. However, the user is referred to sections 8.3.1.3.1 – 8.3.1.5.1.1. I removed the Entering a Coordinator Menu selection and subsections (panels) from the user guide. Updated Attendance > "Billing to State" - Filter Options section Updated the Transition sections. |
| v.0.16.0 | 12.20.2021 | Paul Michael Ross | <ul style="list-style-type: none"> Updated Transfer, Exit Close panels Updated Provider sections (panels/sub-panels) I have reviewed/edited grammar through the user guide. Please note editing review is not final at this point. |
| v.0.17.0 | 1.6.2022 | Paul Michael Ross | <ul style="list-style-type: none"> Removed the sentence from the Excel button table, "An example of MS Edge browser downloading the excel file and options," which did not have an image. Updated the IFSP Outcome panel. Updated the Therapist Assignment panel. I removed sources referenced in the user guide that provides definitions or links that should be NYS Specific. In addition, reference sites need to be NYS EI approved, not general sites found from searching the internet, i.e., parenting articles. |


| Version Number | Release Date | Author | Revision Summary |
|-----------------|--------------|-------------------|--|
| | | | <ul style="list-style-type: none"> • Section 8.1.4.2.1 Child Outcomes Summary Form (COSF) Tab/Panel, corrected terms with This is NYS narrative taken directly from the COSF Entry and Exit forms explaining these terms (feedback provided by Mike I.) • Updated IFSP Information panel • Updated IFSP Outcome panel • Updated Therapist Assignment panel • Updated Respite Services panel • Updated Transportation panel • Updated Waiver panel • Updated IFSP Service/Link IFSP Service panel • Natural Environments panel • Removed IFSP Meeting panel • Removed Service Information Tab/Panel, which references 'Please refer to section 8.1.2.7.9 IFSP Services Panel above for sub-panels and fields/descriptions. • Added the Caseworker panel |
| v.0.18.0 | 1.28.2022 | Paul Michael Ross | <ul style="list-style-type: none"> • Updated Section 6 (User Login)I includes HCS > El-Hub landing page > CM • Added HCS Sign Up instructions in Appendix 1. • Added the 'Path to Early Intervention Services' (Note: this will eventually have individual links to guide users to their specific roles). • I re-adjusted the Transition panels order. • NOTE: Next revision will have more narratives (e.g., the purpose of panels). |
| v.0.19.0 | 2.18.2022 | Paul Michael Ross | <ul style="list-style-type: none"> • I removed Reopen/Reactivate Child Record panel. • I added narratives Child and the Provider Management panels. • I added back the 'Task Board' section 6.2. • Removed sections 5.3 – 5.4 and added sections 6.5 – 6.7. • Removed IFSP Service Link Tab/IFSP Service Report Panel. • Updated the COSF Panel • Updated the Dashboards section. |

EI-Hub Case Management v0.21.0


| Version Number | Release Date | Author | Revision Summary |
|-----------------|--------------|-------------------|---|
| | | | <ul style="list-style-type: none"> I moved "customized" EI-Hub UI sections to the Appendix section. Update Attendance and Billing Reports. |
| v.0.20.0 | 2.25.2022 | Paul Michael Ross | <ul style="list-style-type: none"> I renamed the Heading 1 Styles to "Unit" <chapter/section number (e.g., Unit 9. Child). I removed the Availability, Service Area, and Compliance Type grids/tables and panels from the Therapist module. I added a Catchment Area Grid/Table and panel. |
| v.0.21.0 | 3.29.2022 | Paul Michael Ross | <ul style="list-style-type: none"> Modify the document styles and footers for a sleeker presentation. Made edits/added BEI's comments from Unit 1 – Unit 8. Added Child Transfer popup panel. Removed 'Program Details Grid/Table section. Updated screenshots and fields (grids/tables & panels).for the IFSP and Transition sections |

| EI-Hub Version | Release Date |
|------------------|--------------|
| 2.163.0.0 | 8.1.2022 |

Unit 5. El-Hub Navigation Anatomy


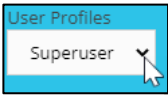


 This unit explains the functionality of various action buttons, hyperlinks, and icon buttons on the application's menus, grids/tables, and panels within the El-Hub. Knowing how to spot and use these features will improve your effectiveness in navigating the El-Hub Case Management component.



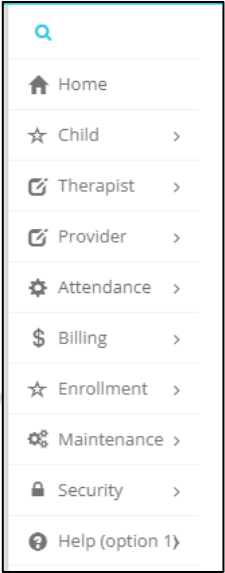


5.1 Web Page Banner Buttons and Hyperlinks


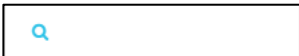



 The image below is the banner at the top of each page within the El-Hub. The table explains the functionality of each of the images/icons shown in the banner.

Web Page Banner Buttons and Hyperlinks


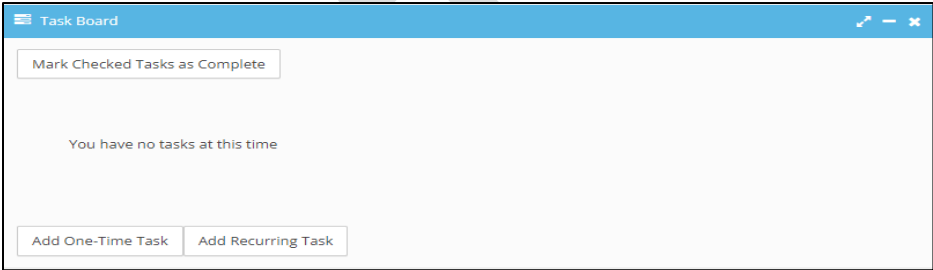




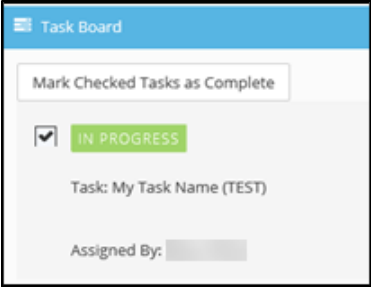



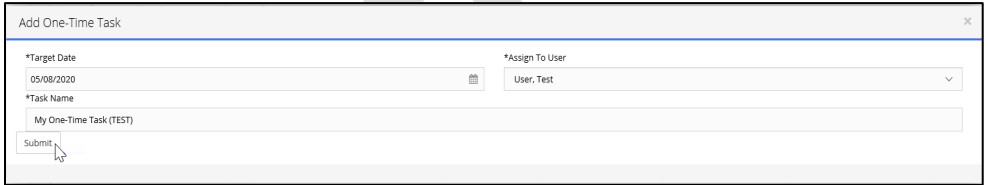


| FIELD / LINK / BUTTON | DESCRIPTION |
|---|--|
| NYEI icon  | Hovering over the image/icon (top-left and right of the El-Hub portal) and clicking returns you to the El-Hub Home page. |
| User Profiles  | This drop-down field displays your current El-Hub user role. If you have multiple roles assigned to you and want to change your user role, click the drop-down and select the appropriate user role. |
| El-HUB Icon  | Hovering over the image/icon on top of the El-Hub page and clicking it returns you to the El-Hub landing page (shown below).  |

| FIELD / LINK / BUTTON | DESCRIPTION |
|--|--|
| <p>Blinds (Unhide/Hide)</p>  | <p>Click the 'Blinds' (a.k.a. Hamburger) button to hide the side vertical pane.</p>  <p>Click the 'Blinds' to unhide the side vertical pane:</p>  |
| <p>View your public profile</p>  | <p>When clicked, a drop-down color palette appears (shown below). To change your El-Hub color theme, select/click a color square.</p>  <p>Select/click Sign out (found bottom of the color palette) to log out of El-Hub Case Management.</p> |

| FIELD / LINK / BUTTON | DESCRIPTION |
|---|---|
| Settings  | <p>Click the Setting button, and the following checkboxes appear:</p> <div data-bbox="673 357 1313 396"> <input type="checkbox"/> Fixed NavBar <input type="checkbox"/> Fixed SideBar <input type="checkbox"/> Fixed BreadCrums <input type="checkbox"/> Fixed Header </div> <ul style="list-style-type: none"> • Fixed NavBar: Select/tick this checkbox, and the Search magnifier disappears. • Fixed SideBar: Select/tick this checkbox; the Search magnifier does not disappear, and the 'Fixed NavBar' checkbox is selected/ticked. • Fixed BreadCrums: Select/tick this checkbox, the Search magnifier does not disappear, and the 'Fixed NavBar' and 'Fixed SideBar' checkboxes are selected/ticked. • Fixed Header: Select/tick this checkbox; the Search magnifier does not disappear, and the 'Fixed NavBar,' 'Fixed SideBar,' and 'Fixed BreadCrums' checkboxes are selected/ticked. <p>To save your selection(s), click the setting button again.</p> |
| Search  | <p>Use this Search box to look up reports, charts, emails, and notifications. Type a keyword into the Search box, select/click the magnifying glass, or hit/select your <enter> key on your keyboard.</p> |
| Full-Screen mode  | <p>To activate full viewing screen mode, click this button. To return to normal viewing mode, click this button again.</p> |
| Refresh  | <p>To refresh the data on your screen, click this button.</p> |
| Remove Side Panel  | <p>To remove the vertical left-side panel, click this button.</p> |


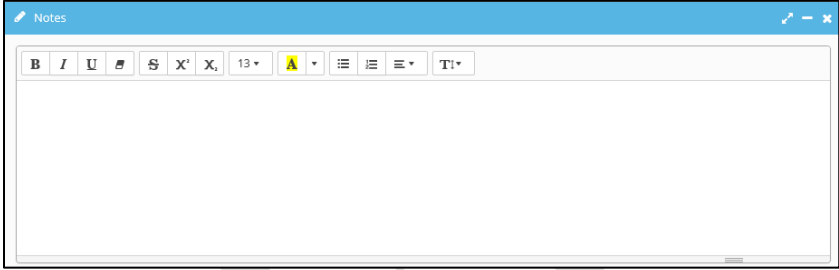




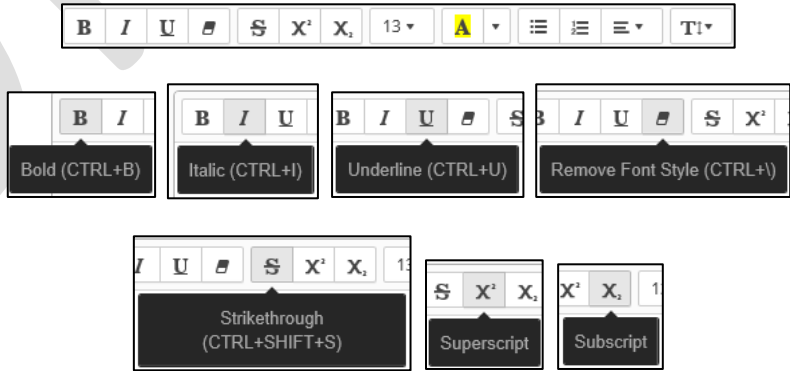
5.2 Task Board

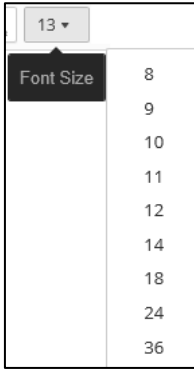
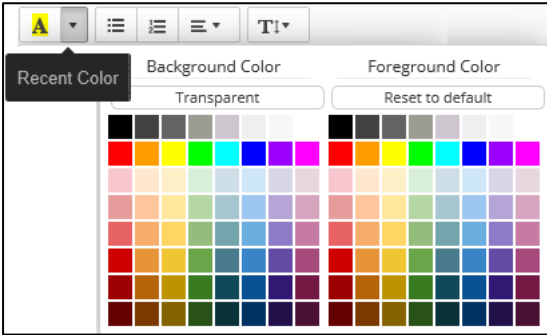
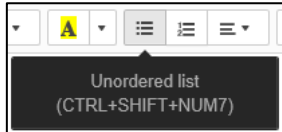
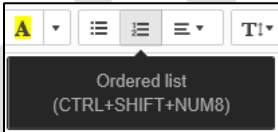


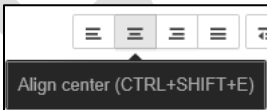
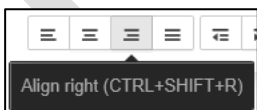
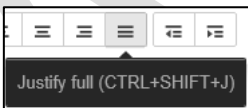
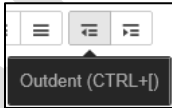


| FIELD / LINK / BUTTON | DESCRIPTION |
|--|--|
| <p>Task Board</p>  | <p>A task board allows users to assign a task to themselves or another (user) in the case management system. The assigned task then appears in the task board panel. Use this task board feature to manage your work process. It also helps manage your steps in completing tasks (assignments). You can also use the task board to show how far along you are toward completing a work task. It takes some discipline to update the progress on your task board in a timely fashion.</p> <p>Task Board Panel</p>  <p>  Expand: To expand the Notes pane into a larger pane, click this button. </p> <p>  Collapse: To collapse the entire Notes Pane, click this button. </p> <p>  Close/Exit: To close/exit the Notes pane, click this button. </p>  <p>The example shown below shows an existing task.</p> <p>Mark Checked Tasks as Complete:</p> <p>Step / Action</p> <ol style="list-style-type: none"> 1. To mark your task as complete, click the checkbox above (example below). 2. Next, click the Mark Checked Tasks as Complete button; the system marks your task internally as complete and removes it from the Task Board.  |

| FIELD / LINK / BUTTON | DESCRIPTION |
|-----------------------|---|
| | <div>Add One-Time Task</div> <p>Add One-Time Task:</p> <p>Use this setting to add a one-time Task within the El-HUB web portal. Note the asterisk (*) meant the fields require data provided by the user.</p> <div>  Cancel/Exit: </div> <p>Click this button to cancel/exit to cancel a task.</p> <p>Add On-Time Task Panel</p> <div>  </div> <p>*Target Date: The date you need the task completed.</p> <p>*Assign To User: You want to assign the task where you choose the user.</p> <p>*Task Name: The name of the task you need to complete. For example: Please complete Progress Report on Child id 12345.</p> <div>Add Recurring Task</div> <p>Add Recurring:</p> <ul style="list-style-type: none"> Recurring tasks might come in handy if you have a task that will happen every couple of days or every month. If you have a repeating task on a regular schedule, you must create a separate task for each occurrence. If a task repeats at set intervals, enter it as a recurring task. For example, attending a monthly project debriefing or generating a quarterly report is a recurring task. <div>  The asterisk (*) meant the fields require data provided by the user. </div> <div>  Cancel/Exit: Click this button to cancel/exit a task before submitting it. </div> <p>Add Recurring Task Panel</p> |

| FIELD / LINK / BUTTON | DESCRIPTION |
|-----------------------|---|
| | <div data-bbox="527 294 1490 552"> <div>Add Recurring Task</div> <div> <div>*Assigned To</div> <div>User, Test</div> </div> <div> <div>*Start Date</div> <div>05/04/2020</div> </div> <div> <div>*Task Frequency</div> <div>Daily</div> </div> <div> <div>End Date (Optional)</div> <div>06/01/2020</div> </div> <div> <div>*Task Description</div> <div>My Daily Task</div> </div> <div> <div>Submit</div> </div> </div> <ul style="list-style-type: none"> • Assigned To: Indicates who the task is assigned to. • *Start Date: Indicates the date the task starts. • *Task Frequency: Indicates how often the task takes to complete. • End Date (Optional): When you want the task to end. For example, if you want it to be monthly for six months, you will put an end date of six months. • *Task Description: Name or description of the task you need to complete. For example: "Please exit children that turned three (3) every week." |

5.3 Note Panel

| FIELD / LINK / BUTTON | DESCRIPTION |
|---|---|
| <p>Notes Panel</p>  | <p>To access/use the Notes panel, scroll down your vertical scroll bar (right side of the El-Hub page), and beneath the 'Task Board' is the 'Notes' panel. Use this to record information (e.g., reminders, work notes, etc.). The Notes you enter only you will see. When typing in the Notes panel, the system automatically saves.</p>  <p>  Expand: To expand the Notes pane into a larger pane, click this button. </p> <p>  Collapse: To collapse the entire Notes Pane, click this button. </p> <p>  Close/Exit: To close/exit the Notes pane, click this button. </p> <p>  Expand & Collapse: Use your mouse-pointer to adjust the Notes pane as follows: <ul style="list-style-type: none"> • Drag upwards and collapse (shrink) the Notes pane. • Drag downwards and expands (enlarges vertically) the Notes pane. </p> <p>The Notes Pane Toolbar buttons are as follows:</p>  |

| FIELD / LINK / BUTTON | DESCRIPTION |
|-----------------------|--|
| |   |
| |    |
| |    |
| |    |
| |  |

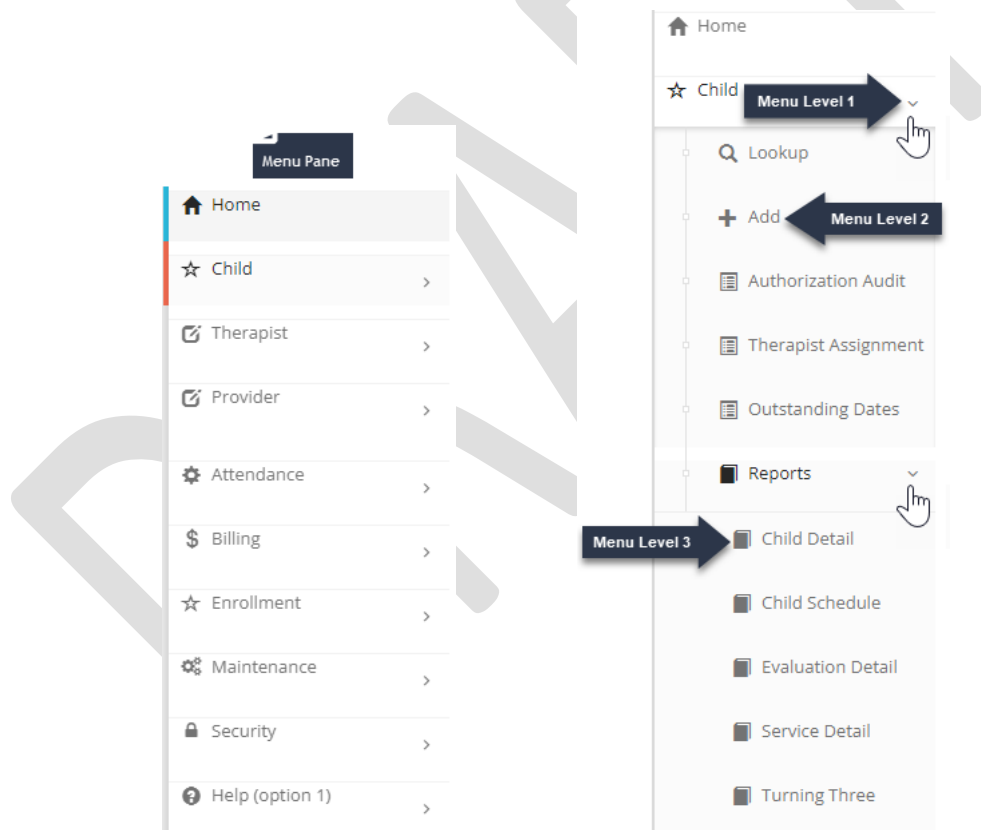
5.4 Tabs

The Tabs appear at the top of your screen and run horizontally (example below) when the user clicks on the Sub-Menu item. Tabs seen by a user are dependent on their role, but what they can see they are always available to click on at any time, so they move to a new screen to conduct other functions.




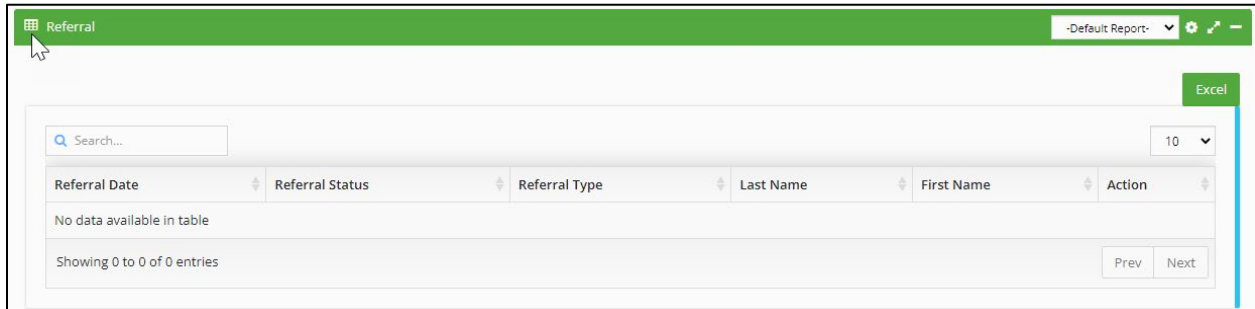
5.5 Menu Pane and Menu Levels

You use the vertical left **Menu Pane** to select Menu Level 1 and Menu (Sub-menu) Level 2 and 3 (shown below) to navigate specific panels throughout the EI-Hub Case Management application.



5.6 Grid/Table

 A grid/table (example below) contains data structured in rows and columns. It allows you to scroll in both directions and view and sort many items in columns.




5.7 Search Box

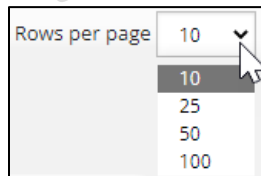
 A search feature (example below) only works if there is information (data) in the grid/table.



| FIELD | DESCRIPTION |
|--|--|
|  Search | To search the results grid/table for a specific record, enter a keyword into this field. |

5.8 Rows Per Page Drop-Down List

 If there are multiple records after your search (ref. Search Box above), you may choose the number of rows you wish displayed by changing the value within the "Rows per page" field to accommodate your search request.



5.9 Panel



A panel (example below) or form is an arrangement of information grouped for presentation in your computer display screen window or popup panel. It allows you to enter and submit data. It contains labels (field names), text (e.g., instructions, etc.), fields (enter data into), and an action button, such as Save or Submit.

| | | |
|---------------------------------------|----------------------|--|
| EI Child ID | <input type="text"/> | |
| Child Status | <input type="text"/> | |
| Child Phase | <input type="text"/> | |
| Child Name | <input type="text"/> | |
| Child Address | <input type="text"/> | |
| Child Phone Number | <input type="text"/> | |
| County of Residence | <input type="text"/> | |
| EI Service Coordinator Name | <input type="text"/> | |
| Select EI Ongoing Service Coordinator | <input type="text"/> | |

5.10 Typeahead

What is Typeahead? Autocomplete or autosuggest is a language-prediction tool search interface that provides suggestions when typing a query into a search field (example shown below).

| Company: | <input type="text" value="a"/> | |
|--------------|--|--|
| Company Name | Address | |
| ABC Company | 1234 ABC Road, New York City, NY 12345 | |
| PCG Therapy | 433 River Street, Troy, NY 12305 | |

5.11 Text Hyperlinks



A text hyperlink is a word, phrase, or image you can click on to jump to a specific section within this document. Text hyperlinks are often blue and underlined, but for Accessibility requirements, the font color is black (**bold**).

5.12 Breadcrumbs Navigation



Breadcrumbs navigation (example below) is a tool used in Web applications that allow users to trace the path (hierarchical manner) back to their original landing point.

| |
|--|
| Home / Child / Test, Test / IFSP |
|--|

5.13 Documents Upload

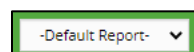


Many sections/panels in EI-Hub Case Management offer an Upload function. Please note that all documents are required to be uploaded. The **Document Management grid/table** is a place to view all uploaded documents within each child's record.

5.14 Report Controller



The Report Controller is a comprehensive feature of the EI-Hub that allows users to either use pre-formatted reports or create customized reports tailored to fit the user's needs.



The "Default Report" is the system's pre-formatted (canned) report. If your agency created a custom report for you to use, select/click the drop-down and select the appropriate report item from the list.

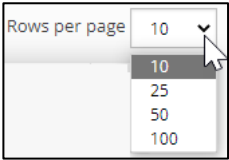


Depending on the chosen custom report, the presentation will look different based on the design; hence, different results will transpire.

5.15 Home Tab Controllers

| ASCENDING / DESCENDING CONTROLLER | DESCRIPTION |
|---|---|
| ↑ Upwards Arrow | Clicking on the down arrow sorts the columns with text ascending (A to Z). Display columns that have numbers ranging from the largest to the smallest number. |
| ↓ Downwards Arrow | Clicking on the down arrow sorts the columns with text descending (Z to A) in alphabetical order. Display columns that have numbers ranging from the smallest to the largest number. |

| PAGINATION DISPLAY CONTROLLER | DESCRIPTION |
|----------------------------------|-------------|
| Prev 1, 2, 3... and Next buttons | |

| PAGINATION DISPLAY CONTROLLER | DESCRIPTION |
|--|--|
| | <p>Pagination allows you to view large amounts of content more accessible to find and break up several entries into multiple pages, allowing you to toggle through content with ease.</p> <ol style="list-style-type: none"> 1. Page one (1) shows up by default. 2. After clicking past page one (1) selection, the Prev button becomes enabled. 3. After clicking on any number/page, the number button highlighted indicates the current page displayed. 4. For example, clicking beyond page 23, the eclipse button (...) to the far right disappears. 5. After clicking beyond page 5, another eclipse button appears after page 1. 6. Clicking the Next button advances one page without clicking on a number page button. |
| <p>Rows per page</p>  | <p>El-Hub provides data results in grids/tables. For example, a grid/table has a "Rows per page" drop-down for you to select how many records/rows of data to display (10, 25, 50, or 100) on one page.</p> |

5.16 Checkboxes




A checkbox (example below) is a graphical widget that allows the user to make a twofold choice, i.e., one of two possible mutually exclusive options. For example, the user may answer 'Yes' (checked/ticked) or 'No' (unchecked/deselected) on a simple yes/no question.

☒
 Parent/Legal Guardian: Was Child's Behavior Optimal/Typical?

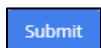
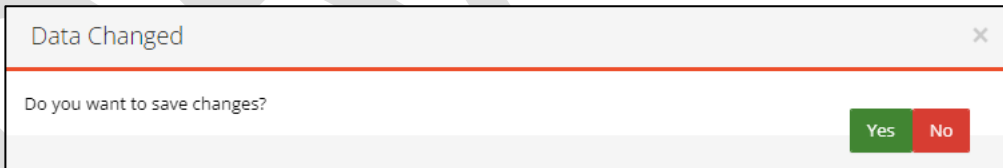
5.17 Required Field

An asterisk (*) adjacent to a field name/label means it is a required field for you to populate.



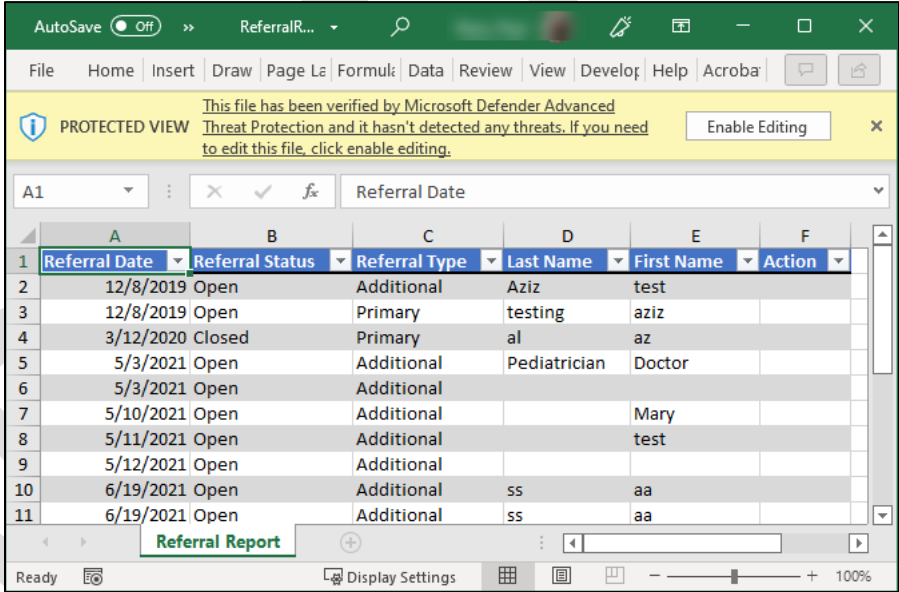
5.18 Edit Button

| BUTTON | DESCRIPTION |
|--|---|
| Edit  | The 'Edit' button allows editing or viewing based on user role permissions. For example, the 'Child at a glance' grid/table is 'view-only,' and you cannot edit it directly. |

5.19 Submit Button

| BUTTON | DESCRIPTION |
|--|--|
| Submit  | <p>Clicking the submit button means saving data entries in panels.</p> <p>i If you attempt to exit a panel without submitting (saving your changes), a message pad prompts (shown below), "Do you want to save changes."</p> <ul style="list-style-type: none"> If you select/click 'Yes,' the message pad closes, and you stay on that specific panel. If you select/click 'No,' the panel closes without saving your information.  |

5.20 Excel Button

| BUTTON | DESCRIPTION |
|---|--|
| <p>Excel</p>  | <p>Click this button to export your results (based on your criteria entered) in an MS Excel spreadsheet. An example of MS Edge browser downloading the excel file and options (shown below):</p>  <p>To see your results in excel, click Open file.</p>  <p>i The Excel export option is helpful if you have a lot of data to examine; this function helps perform data analysis tasks outside the El-Hub system.</p> |

5.21 Error Messages



The EI-Hub Case Management verifies the required data to save/submit. It also ensures that users know an error has occurred by generating error messages. These error messages provide brief information as to the purpose of the error. Error messages are specific to each error, and multiple error messages can occur depending on the scenario. The location of these messages appears in a message bar with alternate background colors (e.g., red or green) at the top of your screen. For example, unsuccessful form submission indicates the fields in error (example below).

The screenshot shows a web application interface with a sidebar on the left containing a menu with the following items: Demographics, Family Information, Phone Numbers, Guardian Address, Guardian Secondary Languages, and Guardian Notes. The 'Demographics' section is currently selected and highlighted. A red error message bar is displayed at the top of the main content area, containing the following text:

- Error saving
- First Name is required.
- Last Name is required.
- The Dominant Language field is required.
- Family Status is required.
- Contact Type is required.
- The Family Member Type field is required.

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