

El-Hub User Management Admin Guide



PUBLIC
CONSULTING GROUP

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Revision History

| Version Number | Release Date | Author | Revision Summary |
|----------------|--------------|--|---|
| v0.1.0 | 12.30.2021 | Paul Michael Ross | First Draft Internal Review |
| v0.2.0 | 1.10.2022 | Paul Michael Ross | Second Draft Internal Review |
| v0.3.0 | 3.31.2022 | Lauren Zelinsky Ryan White Paul Michael Ross | The third Draft Release; combines multiple authors, Internal Review, and Release to BEI for review. |
| v0.4.0 | 4.26.2022 | Lauren Zelinsky Paul Michael Ross | Made edits per BEI's review |
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| v0.7.0 | 08.15.2023 | Lauren Zelinsky | Made edits based on updates to user role configurations |
| v0.7.1 | 09.15.2023 | Lauren Zelinsky | Made edits based on updates to user role configurations |

Unit 1. Introduction



The El-Hub Landing Page houses the components of the system; this includes:

- Case Management module
- Service Logging module
- Billing module (formerly El Billing)
- Learning Management System (LMS)
- Knowledge Base
- User Management

User roles determine user access to the El-Hub and its components.

This document introduces the El-Hub user roles, compares them to NYEIS user roles, and provides detailed descriptions of El-Hub Case Management component roles.

Unit 2. About El-Hub User Roles



There are some essential features of El-Hub user roles:

- Each El-Hub component has a unique set of user roles.
- The Case Management Role serves as the Master role for a user; access to other components is tied to the Case Management Role.
- Users can have multiple roles for a component, if appropriate.
- Users will easily access all components and roles assigned to them through the El-Hub Landing Page.
- Provider Agencies and Municipalities will manage their staff's user roles and access through the El-Hub Landing Page.

Unit 3. NYEIS and El-Hub User Roles Diagram


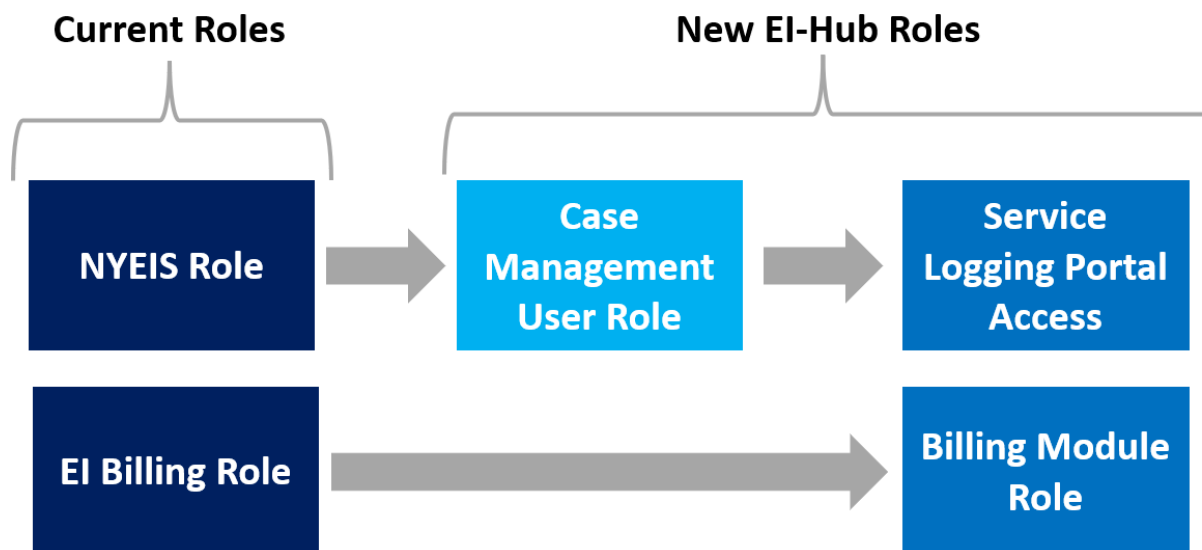
 The diagram shows a high-level overview of how the user roles compare in this guide. The NYEIS and El Billing roles are current; all other roles are new for El-Hub.

Diagram Color Key:

- Current Roles: 
- New El-Hub Roles: 
- New El-Hub Master Roles: 



Because the El-Hub solution has several components (and roles), the Case Management role is the deciding role user. Meaning, that access to the Service Logging is tied to the Case Management Role, and users will gain access to these El-Hub components based on their Case Management user role. For example, if granted access to Service Logging, a rendering provider with a Rendering Provider Case Management role will see the Rendering Provider Portal in Service Logging.

El Billing Roles will not change in the El-Hub. Access is determined at the county or provider level, and is not determined by a user's Case Management user role.

Please note, there is no access restriction for the Learning Management System (LMS); however, upon a user's initial login, they will reach a separate landing page where they will be asked to indicate their Case Management user role(s).

Unit 4. NYEIS to El-Hub Provider User Roles Crosswalk



The table below shows the NYEIS Provider User Roles and how they compare to the El-Hub Provider User Roles:

| Current Role | New (El-Hub) Roles | |
|---|---------------------------------|---|
| NYEIS Role | Case Management Role | Service Logging Portal Access |
| PROV All (Universal Provider) | UniversalProvNY (Super User) | Billing Provider |
| PROV Service Director | ProvDataEntryNY | Billing Provider |
| PROV Service Manager (Provider Services Manager) | ProvDataEntryNY | Billing Provider |
| PROV All Fiscal (Provider All Fiscal) | ProvFiscalMgrNY | Billing Provider |
| PROV Fiscal Admin (Provider Fiscal Administrator) | ProvFiscalMgrNY | Billing Provider |
| PROV Fiscal Manager (Provider Fiscal Manager) | ProvFiscalMgrNY | Billing Provider |
| PROV All Program (Provider All Program) | ProvDataEntryNY | Provider QA |
| PROV QA (Provider Quality Assurance) | ProvQA NY | Provider QA |
| PROV Eval (Provider Evaluator) | RenderProvNY | Rendering |
| PROV Render Prov Staff (Provider Rendering Provider) | RenderProvNY and JrRenderProvNY | Rendering |
| PROV Program Data Entry (Provider Data Entry) | ProvDataEntryNY | Clerical |
| PROV Service Coordinator (Provider Service Coordinator) | ISC/OSC NY | Service Coordinator |
| PROV All (Universal Provider) | InProviderNY | Billing Provider, <i>*Independent providers will also need a RenderProvNY Case Management user role to access the Rendering portal</i> |

Unit 5. NYEIS to EI-Hub Municipality User Roles Crosswalk



The table below shows the NYEIS Municipality User Roles and how they compare to the EI-Hub Municipality User Roles:

| Current Role | New (EI-Hub) Roles | |
|--|---------------------------------|---------------------------------|
| NYEIS Role | Case Management Role | Service Logging Portal Access |
| MUNI All (Universal Municipal) | MuniProgAllNY (Superuser) | County |
| MUNI Program User Admin | MuniProgAllNY (Superuser) | County |
| MUNI All Program | MuniProgAllNY (Superuser) | County |
| MUNI All Fiscal (Municipal All Fiscal) | MuniFiscalAllNY | County |
| MUNI Fiscal Admin | MuniFiscalAllNY | County |
| MUNI Fiscal Manager | MuniFiscalAllNY | County |
| MUNI EIOD (EIO/D) | EIO/D NY | County |
| Muni EIO/D – SC | EIO/D NY | County |
| MUNI EIO | EIO/D NY | County |
| MUNI Fiscal Data Entry | MuniDataEntryNY | County |
| MUNI Program Data Entry | MuniDataEntryNY | County |
| MUNI Intake Staff | MuniDataEntryNY | County |
| MUNI Service Coord | ISC/OSC NY | Service Coordinator |
| MUNI QA | MuniViewOnlyNY | County |
| MUNI At-Risk | MuniAtRiskMgtNY | County |
| N/A | <i>MuniTransferNY</i> | N/A - No Access |
| <i>MUNI IT System Admin</i> | <i>N/A - this is a Hub Role</i> | <i>N/A - this is a Hub Role</i> |

Unit 6. Complete EI-Hub User Roles Crosswalk



The table below shows the complete list of EI-Hub user roles, including EI Billing:

| Case Management Role | Service Logging Portal Access | EI Billing Role |
|--|---|--|
| EIO/D NY | County | County |
| InProviderNY | Billing Provider <i>*Independent providers will also need a RenderProvNY Case Management user role to access the Rendering portal</i> | Provider |
| ISC/OSC NY <i>**This user may be a municipal or agency employee</i> | Service Coordinator | No Access |
| JrRenderProvNY | Rendering | No Access |
| MuniAtRiskMgtNY | County | No Access or County |
| MuniDataEntryNY | County | No Access or County |
| MuniFiscalAllNY | County | County |
| MuniProgAllNY (Superuser) | County <i>*View service log for children and release claims for billing. Access does not mean users will need to access this component</i> | County <i>*Not all users with the ability to access EI-Billing will use the component</i> |
| MuniTransferNY | No Access | No Access |
| MuniViewOnlyNY | County | County |
| ProvDataEntryNY | Clerical <i>*Perform data entry tasks for providers and view reports on services</i> | No Access |
| ProvFiscalMgrNY | Billing Provider | Provider |
| ProvQA NY | Provider QA <i>*View service log for children and release claims to billing</i> | Provider |
| RenderProvNY | Rendering | No Access |

| Case Management Role | Service Logging Portal Access | El Billing Role |
|----------------------|---|---|
| | <i>*Add log for services, edit calendar, and view reports</i> | |
| UniversalProvNY | Billing Provider <i>*View service log for children and release claims to billing</i> | Provider <i>*Not all users with the ability to access El-Billing will use the module</i> |

Unit 7. Case Management Roles and Descriptions



The table below shows all El-Hub Case Management Roles and descriptions. Case Management roles are the Master roles that determine access to other El-Hub components.

| Case Management Role Name | General Description | Detailed Activities/Access Description |
|---------------------------|---|---|
| EIO/D NY | Individual(s) designated by the Early Intervention Official (EIO) is responsible for the regulatory tasks of the EIO. | <p>This user can perform all other responsibilities of an EIO/D, including:</p> <ul style="list-style-type: none"> • Create referrals, including referrals to At-Risk • View a child's insurance information • Designate the ISC/OSC assignment • Approve Eligibility determination • Approve service authorizations, including waivers: <ul style="list-style-type: none"> • Evaluations • EI Services, including Transportation and Respite • Approve submitted and amended IFSPs • Exit a child from the Early Intervention Program (EIP) • Initiate a transfer to another county • View limited Provider (<i>Agency & Independent Providers</i>) information • View limited Therapist information • View reports under the Child menu |
| InProviderNY | The role is for individual providers. This user can perform all provider programs, services, and fiscal activities. | <p>This user can:</p> <ul style="list-style-type: none"> • Accept/Reject assignments and/or designate Therapist assignments for: <ul style="list-style-type: none"> ○ Evaluations ○ EI Services • Enter Evaluation outcomes |

| Case Management Role Name | General Description | Detailed Activities/Access Description |
|--|--|---|
| | | <ul style="list-style-type: none"> • Enter Eligibility determination for EIO/D approval • Review/Resubmit Evaluations and/or Eligibility determinations that were rejected as incomplete and/or need additional information • Submit waiver requests • View the child's insurance coverage information • Add and view attachments • Can update limited information, including license and credentials, within the Provider and Therapist records • Submit amendments and re-approval requests • View Child, Provider, and Therapist reports • Access to the 837-file loader, if designated as a third-party biller • Access to the Billing to State menu, if designated as an EI-Hub Service Logging user |
| ISC/OSC NY (Initial Service Coordinator/Ongoing Service Coordinator) <i>**This user may be a municipal or agency employee</i> | Individual(s) who deliver EI service coordination services. | This user can: <ul style="list-style-type: none"> • View/Edit entire child record for children assigned to caseload • Create SAs for EIO/D approval • May assign: <ul style="list-style-type: none"> • Evaluation Agency of family choice • Agency of family choice for delivery of EI services • May request: <ul style="list-style-type: none"> • Transportation or Respite services • Waivers for evaluations or EI services • Create interim IFSPs for EIO/D for approval • Copy / Amend IFSPs for EIO/D approval • Create transition information • Exit the child from the EIP • Initiate transfer to another county • View Child, Provider, and Therapist reports |
| JrRenderProvNY / RenderProvNY | Individual(s) who deliver authorized EI services to an eligible child. | This user can: <ul style="list-style-type: none"> • View information about the children assigned to their caseload • Accept/reject assignments for: <ul style="list-style-type: none"> • Evaluations • EI services • Enter evaluations outcomes • Enter Eligibility determination for EIO/D approval |

| Case Management Role Name | General Description | Detailed Activities/Access Description |
|----------------------------------|---|--|
| | | <ul style="list-style-type: none"> • Upload attachments for children assigned to their caseload • Request waiver(s) for Evaluations and EI services • View their personal information (<i>Therapist information</i>) |
| MuniAtRiskMgtNY | The role of this user is to enter and maintain child records for children identified at risk for developmental delay. | <p>This user can:</p> <ul style="list-style-type: none"> • Monitor child status in at-risk track • Access children's information, limited edit rights • Exit/Close children from at-risk track |
| MuniDataEntryNY | Individual(s) responsible for the intake and management of children birth to age 3. | <p>This user can:</p> <ul style="list-style-type: none"> • Create new child records • Enter referral information into the system • View/Edit most panels in a child's record, except the Eligibility tab (view only) • Designate the EIO/D assignment • Upload attachments • View Child, Provider, and Therapist reports |
| MuniFiscalAIINY | <p>The individual is responsible for high-level oversight of the local Early Intervention Program's (EIP) fiscal activities.</p> <p>The individual is responsible for the day-to-day implementation of the fiscal activities and ensuring fiscal policies are followed.</p> | <p>This user can:</p> <ul style="list-style-type: none"> • View child records within the county • View fiscal reports: <ul style="list-style-type: none"> • Billing Rejection • Unbilled Attendance • Child Info and Auth • 271 Response reports • View Provider and Therapist reports |
| MuniProgAIINY (Superuser) | The individual responsible for oversight of the local Early Intervention Program (EIP), including programmatic and fiscal activities (e.g., policies are in place and utilized). It is the highest level of | <p>This user can:</p> <ul style="list-style-type: none"> • View/Edit all child records within the county • May assume actions of EIO/D and/or ISC/OSC users, with some limitations within the Evaluations and Eligibility tabs. • Create new child records • Designate EIO/D • View Child, Provider, and Therapist reports |

| Case Management Role Name | General Description | Detailed Activities/Access Description |
|---------------------------|---|---|
| | access for a municipality. Individual(s) designated by the Early Intervention Official (EIO) is responsible for the regulatory tasks of the EIO. | |
| MuniTransferNY | This role has statewide view access to the child records to initiate transfer requests to receive. | <p>This user can:</p> <ul style="list-style-type: none"> • Request transfer of a child from another county • Approve transfer of children to other counties • Accept transfer children from other counties • View limited child information <p>NOTE: A State Administrator must assign this role. For more information,</p> <p>In addition, the user assigned the transfer role cannot be a Role Administrator.</p> |
| MuniViewOnlyNY | This role is for users who require view-only access to municipal information. | <p>This user has view-only rights. This user can:</p> <ul style="list-style-type: none"> • View all child records at the county level • View Provider and Billing reports |
| ProvDataEntryNY | This individual is responsible for all data entry for their employer. This user enters data from a hard copy as directed by the Fiscal Manager or Universal Provider. | <p>This user can:</p> <ul style="list-style-type: none"> • View entire child record for children assigned to agency/county • Edit limited child and family information • Create SAs for EIO/D approval • May assign: <ul style="list-style-type: none"> • ISC for initial service coordination • Rendering provider for delivery of EI services • May request: <ul style="list-style-type: none"> • Transportation or Respite services • Waivers for evaluations or EI services • Enter Evaluation and Eligibility information from a rendering or evaluating provider • Enter IFSP information from a rendering or evaluating provider • View Child, Provider, and Therapist reports • Can update limited information, including license and credentials, within the Provider and Therapist records |

| Case Management Role Name | General Description | Detailed Activities/Access Description |
|---------------------------------------|--|--|
| | | <ul style="list-style-type: none"> Access to the 837-file loader, if designated as a third-party biller Access to the Billing to State menu, if designed as an El-Hub Service Logging user Upload attachments |
| ProvFiscalMgrNY | The individual is responsible for the day-to-day implementation of the local EIP's fiscal activities (e.g., following specific fiscal policies, invoices and claims processed, providers paid, etc.). | <p>This user can:</p> <ul style="list-style-type: none"> View entire child records for children assigned to an agency Access to the 837-file loader, if designated as a third-party biller Access to the Billing to State menu, if designed as an El-Hub Service Logging user View Provider and Therapist reports |
| ProvQA NY | This role is for users that require view-only access to provider information. | <p>This user can:</p> <ul style="list-style-type: none"> View entire child records for children assigned to an agency View Provider and Therapist reports |
| UniversalProvNY (Superuser) | <p>This role can complete every function for the provider. Therefore, it is the highest level of access for the organization.</p> <p>**More than one individual in the same agency can be assigned this user role</p> | <p>This user can:</p> <ul style="list-style-type: none"> View entire child record for children assigned to agency/county Accept/Reject assignments and/or designate Therapist assignments (rendering provider) for: <ul style="list-style-type: none"> Initial Service Coordination Evaluations EI Services Enter Evaluation outcomes Enter Eligibility determination for EIO/D approval Review/Resubmit Evaluations and/or Eligibility determinations that were rejected as incomplete and/or need additional information Submit waiver requests Add and view attachments Can update limited information, including license and credentials, within the Provider and Therapist records Submit amendments and re-approval requests View Child, Provider, and Therapist reports Access to the 837-file loader, if designated as a third-party biller |

| Case Management Role Name | General Description | Detailed Activities/Access Description |
|---------------------------|---------------------|--|
| | | <ul style="list-style-type: none"> Access to the Billing to State menu, if designed as an El-Hub Service Logging user |

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Unit 8. User Account Types



The EI-Hub has two **User Account types**, User or Role Administrator. Account Type differs from a User Role as it determines whether an individual has administrative rights to edit other users' access to the EI-Hub modules.

Users with a Role Administrator account type have administrative rights and are responsible for setting up and maintaining all the individual user role accounts for their entity. This role is typically held by an individual(s) in administrative leadership for a county/agency or by an independent provider.


To view your account type, visit the '**My Profile**' section on the EI-Hub Landing Page. Your designated account type will be highlighted in purple under the '**Type**' section (shown below). You do not have a Role Administrator designation if 'User' is highlighted in purple. If you are a Role Administrator, one of the two types will be highlighted in purple:

- County Role Administrators (**AdminCounty**)
- Agency Role Administrators (**AdminAgency**)

| EI-HUB ACCOUNT TYPE | DESCRIPTION | ADDITIONAL DETAILS |
|---------------------|--|---|
| User | User – Given to general user no ability to access Maintenance, User Management | Initially, all user ids have an EI-Hub type of user. |
| AdminCounty | Given to County – Access to User Management <ul style="list-style-type: none"> • A county admin is only able to | Assigned to an individual in the county that will be the Administrator of all users within their county. Each county will have an AdminCounty user. This user can configure |

| El-HUB ACCOUNT TYPE | DESCRIPTION | ADDITIONAL DETAILS |
|---------------------|---|---|
| | manage and see their users. | user roles for the Case Management, El Billing, and Service Logging components. |
| AdminAgency | <p>Given to Agency – Access to User Management</p> <ul style="list-style-type: none"> An agency admin is only able to manage and see their users. | Assigned to an individual in the agency who will be the Administrator of all users within their agency. You can configure user roles for the case management, El billing, and service logging components. |
| AdminState | <p>Given to State – Access to User Management</p> <ul style="list-style-type: none"> A state admin can manage and see all users throughout the State. | Assigned to an individual at a state level who will be the Administrator of all users at the state level. You can configure user roles for the Case Management, El Billing, and Service Logging components. |
| AcctAdmin | <p>Given PCG Employees Access to view and edit all screens</p> <ul style="list-style-type: none"> Acct Admin/PCG users can see the roles/modules without editing them to work on an issue. | PCG has overall administrative rights over all administrators/users. |


Unit 9. User Login (El-Hub)

 The El-Hub application resides in the Health Commerce System (HCS) behind the HCS firewall, providing an additional security level. This unit explains how to log in to the HCS system and access the El-Hub Landing Page.

9.1 Add New User

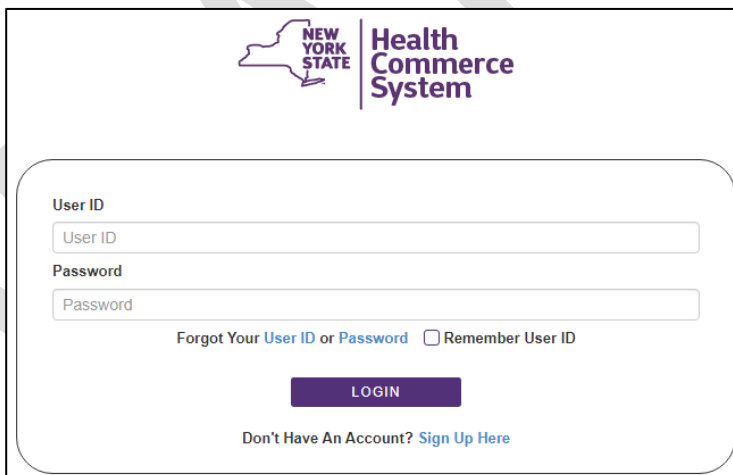
When adding a new user, the individual must first obtain a Health Commerce System (HCS) account. For instructions on how to obtain an HCS account, please reference [Appendix 1](#).

9.2 Signing in with an HCS Account

 To log onto the HCS system, users must have an active HCS account. However, an individual only needs one HCS account (even if they work for multiple agencies). To create and register an HCS account, please see Appendix 1.

Step / Action

1. Access (HCS).
2. Next, log in with your HCS **User ID** and **Password** and select/click the **LOGIN** button (shown below).



NEW YORK STATE | Health Commerce System

User ID

Password

Forgot Your [User ID](#) or [Password](#) ☐ Remember User ID

LOGIN

Don't Have An Account? [Sign Up Here](#)

3. Select the **El-Hub application** hyperlink (currently not shown in the image below) under the **My Applications** in the left pane.

The screenshot shows the Health Commerce System (HCS) interface. The top navigation bar includes links for Home, My Content, Search, Help, and Log out. The main content area is divided into sections: "Important Health Events" with buttons for "Donate Life", "NYS PMP", and "COVID-19"; "Important Health Notifications" with a table of alerts; and a "My Applications" sidebar on the left. The sidebar lists various applications like "Acronyms & Abbreviations", "Emergency Contacts", "NYSIS - Production", "Secure File Transfer 2.0", and "ServNY", along with a "Refresh My Applications List" button.

| Posted | Priority | Keyword | Source | Audience | Description | Recipients |
|------------|----------|--------------------|--------|-----------|---|------------|
| 06/17/2022 | Advisory | Infectious Disease | NYSDOH | All Users | Health Advisory: Monkeypox Outbreak, United States | Recipients |
| 06/17/2022 | Advisory | Influenza | NYSDOH | All Users | Influenza Surveillance Report for the Week Ending 06/11/2022. | Recipients |
| 06/10/2022 | Advisory | Influenza | NYSDOH | All Users | Influenza Surveillance Report for the Week Ending 06/04/2022. | Recipients |
| 06/03/2022 | Alert | Facility Guidance | NYSDOH | All Users | A28 Webinar on OMH's Involuntary & Emergency Admissions Interpretative Guidance | Recipients |

4. The El-Hub Landing Page appears after successfully logging into the HCS (below).

The screenshot shows the El-Hub Landing Page. The top navigation bar includes links for Maintenance, User Management, Learning Management, Knowledge Base, and My Profile. The main content area is divided into sections: "El-Hub alerts" with a link to "Use of Emergency COVID-19 Teaching Certificates in the Early Intervention Program"; "El-Hub system news" with a link to "UPDATED Medicaid Payment Cycle Calendar"; and "User's components" on the right, which lists "Billing Module", "Case Management Module", and "Service Logging Module".

9.3 First time accessing the El-Hub Portal



The first time you access the El-Hub portal landing page, you must agree to the New York State Department of Health Bureau of Early Intervention Data System Terms of Use and User Agreement. After reading the terms and conditions, select/click the **checkmark** (radio button) and **Confirm** buttons.

pm007

Maintenance
User Management
Learning Management
Knowledge Base
My Profile

New York State Department of Health
Bureau of Early Intervention
Data System Terms of Use and User Agreement

Section 1: Introduction/Purpose

This Data System Terms of Use and User Agreement (Agreement) is between the New York State Department of Health (Department) Bureau of Early Intervention (BEI), and all users of the Early Intervention Program (EIP) Data System known as the El-Hub, including municipalities, approved providers, and their employees/contractors. Use of the El-Hub constitutes consent to the Terms of Use set forth in this Agreement.

BEI, in conjunction with the Department contractor, Public Consulting Group (PCG), have created the El-Hub in order to provide municipalities, approved providers and their employees/contractors, and Department users with a centralized, web-based system that electronically manages EIP administrative tasks and provides for information exchanges. This system is designed to support the EIP's provider enrollment, provider management, case management (including referrals, evaluations, Individualized Family Service Plan development and service delivery) and financial management (including administration, third party claiming and recording reimbursement) activities at both the local and State levels.

Data contained in the El-Hub (hereinafter referred to as "data") includes personally identifying information (PII) and protected health information (PHI) for children enrolled in the EIP as well as State-approved billing providers, rendering providers and municipalities. The sensitivity of data contained in the El-Hub cannot be overemphasized.

Section 2: Access/Security

Prior to accessing the El-Hub, all users must have received an individualized Health Commerce System (HCS) User ID and Password. Upon receiving an HCS account, users agree to all "Terms of Use" of the HCS. All HCS Terms of Use continue to apply to all authorized users of the El-Hub. Authorized users include Early Intervention State approved providers, rendering providers, evaluators, service coordinators, municipalities and their staff performing local administration of the EIP, State EIP staff and their contractors. User IDs and Passwords are unique and confidential and shall not be shared with others. The HCS serves as the portal to the El-Hub; users initially log into the HCS and login credentials are passed to the El-Hub to permit entry based on user roles maintained in the El-Hub. Authorized users shall not share El-Hub links with unauthorized users.

User administrators for entities utilizing the El-Hub (i.e., municipalities, providers and State staff) must ensure the user account being created is for a valid staff member (i.e., employee, contractor or subcontractor), and are responsible for ensuring user members comply with all federal and State laws and regulations regarding the privacy, protection, and security of data, and must deactivate El-Hub user accounts within 5 calendar days for a user who will no longer need access to the El-Hub.

At the end of each user's session, they must "Log Out" of the El-Hub and the HCS, especially those users on a shared computer station. This is essential to maintain proper security.

All system users are responsible to:

1. Ensure the accurate and timely completion of data entry in the El-Hub
2. Preserve the privacy and security of any data users may possess or access in utilizing the EIP data system
3. Users must develop policies and procedures to ensure only authorized persons have access to El-Hub data, including procedures to ensure persons no longer requiring access to El-Hub data have permissions revoked
4. Protect data in a manner that does not permit personal identification of individuals by anyone other than the intended user
5. Report to the El-Hub call center any unintended data received or viewed within 24 hours after data breach is discovered or reasonably suspected and as applicable per confidentiality regulations referenced below.

Section 3: Confidentiality and Disclosure of Data

All authorized users of the El-Hub are subject to confidentiality requirements pertaining to early intervention records in accordance with each of the following:

- New York State Public Health Law Section 2549(8) and regulations at 10 NYCRR § 69-4.17(c);
- Federal Family Educational Rights and Privacy Act (FERPA) and its regulations at Title 34 of the Code of Federal Regulations (CFR) Part 99;
- Health Insurance Portability and Accountability Act of 1996 (HIPAA), Public Law 104-191 (where applicable); and
- Individuals with Disabilities Education Act (IDEA) and regulations (34 CFR Part 303; 34 CFR 300.610 through 300.627).

Authorized users shall not use, disclose or re-disclose any personally identifiable data, information or records revealed during or after the use of the El-Hub other than as expressly permitted by the Department for the sole purpose of administration of the EIP.

All users must affirm that they will not engage in any uses of El-Hub that are inconsistent with the terms of Section 4 of this Agreement, including:

1. Providing their User ID and Password to any other person or use any other Authorized User's ID and/or Password;
2. Knowingly falsify or knowingly enter inaccurate data;
3. Copy any material (data, confidential data, system data, database design, etc.) for any use not authorized by the Department;
4. Use material or transmit information to threaten, discriminate, or intimidate a person or persons (child, parent, user, provider etc.);
5. Intentionally create, upload, attach, link, damage, or alter any of the various software components of the system; and
6. Access information on a child or parent they are not authorized to view, either because of termination of service delivery to such child or parent, or for any other reason.

The foregoing items 1-6 include conduct that would constitute inappropriate use, it is not an exhaustive list. Section 4 of this Agreement sets forth authorized uses of the El-Hub; any use which is inconsistent with the terms of Section 4 are considered unauthorized uses by the Department.

Any questions on proper use should be directed to the El-Hub call center. Any ambiguity in any term or condition of this Agreement shall be resolved in favor of a meaning that permits the parties to comply with NYS Public Health Law, FERPA, HIPAA and IDEA.

In the event that there is any inappropriate use, unauthorized use, disclosure or loss of data by authorized user, authorized user shall expediently and without unreasonable delay upon discovery that an unauthorized disclosure or loss has occurred, notify the El-Hub call center in writing. Such notice shall clearly describe the scope of data affected by the unauthorized use, disclosure or loss, shall list all persons who may have gained access to the data as a result of the unauthorized disclosure, and shall describe how the unauthorized use, disclosure or loss occurred. Authorized user shall provide the El-Hub call center with any additional information that either the El-Hub call center or the Department reasonably requests relating to the unauthorized disclosure or loss. The Department and the El-Hub call center reserve any rights they may have under State and federal laws to take any appropriate remedial action in the event of unauthorized disclosure or loss of data.

Section 4: Use of Data

Authorized users agree to utilize the El-Hub for recording/reviewing accurate and timely data in accordance with the level of access (role) permitted to such users by the Department. Specific purposes for accessing and using data in the El-Hub include:

1. To support the EIP including the administration, monitoring, and management of the Program;
2. To establish appropriate administrative, technical, and physical safeguards to protect the confidentiality, integrity and availability of the data by complying with the terms of this Agreement, State and federal law and NYS Information Security Policies;
3. To enter, manage and oversee as applicable Provider Enrollment/Management Data including identifiers such as licenses/certifications, NPI, etc. and roster of available employees/contractor, which must be updated at least every 30 days;
4. To enter, manage and oversee as applicable Child Case Management Data, such as referrals within five (5) days of receipt at the municipality, multidisciplinary evaluation results within 10 days of the evaluation being completed, Individualized Family Service Plan (IFSP) information and services authorized no later than 15 days after IFSP approval, transition plan details within 15 days of any transition events and child program exit details within 30 days of a child exiting the EIP
5. To enter, manage and oversee as applicable Financial Management Data including valid service logs and invoices/claims for services provided, which must be submitted within 90 days of the date of service, reimbursement received from third party payers including private health insurance and Medicaid, and reimbursement received from the Department;
6. To enter, manage and oversee as applicable other data as appropriate/required during the child's involvement in the EIP and in accordance with federal and State laws and regulations and policies governing the administration of the EIP.

Authorized users further agree to the following terms and conditions relating to data use and permissible data disclosure:

1. Users entering into this Agreement agree to be legally responsible for safeguarding the data and thus must take appropriate safeguards when utilizing data to prevent the use or disclosure of the information, other than as provided for within this Agreement;
2. Data retrieved from the El-Hub must be protected in a manner that does not permit disclosure or re-disclosure of personal identification of individuals enrolled in the EIP and their families by anyone other than authorized users;
3. Authorized users retrieving data must take all necessary precautions as per privacy rules and laws mentioned herein to ensure that any data exported, extracted, or downloaded is stored securely, only accessible to authorized entities within the user's organization as related to their need to access these data, and destroyed as appropriate when data is no longer needed;
4. Any reports generated using El-Hub data, which will be shared with non-authorized users, including the general public, shall ensure that all private health information is redacted and that such private health information would not be inadvertently disclosed, in accordance with all State and federal privacy laws;
5. Authorized users shall notify the Department of any reports that are generated outside of usual El program operations, and the Department shall have an opportunity to review, approve, and ensure data accuracy of such reports. For the purposes of Department review, reports generated within usual El program operations mean data reports that support service delivery and operation of the El program, including but not limited to legally-mandated reports to the local legislature and expense reports; reports that are considered outside of usual El program operations shall include, but not be limited to, journal publications or responses to press inquiries.

Section 5: Revocation of Access and Termination of Agreement

The Department reserves the right to revoke or suspend the level of access, including changing a user's role (security access) or system access for any reason, including but not limited to a user's unlawful disclosure of information, abuse of system, fraudulent use, or other unapproved/unauthorized purpose regardless of the user's intent.


This Agreement shall remain in effect until such time that the user no longer has access to the EIP data system(s), terms of use are updated by the Department, or at such time the Department determines necessary.

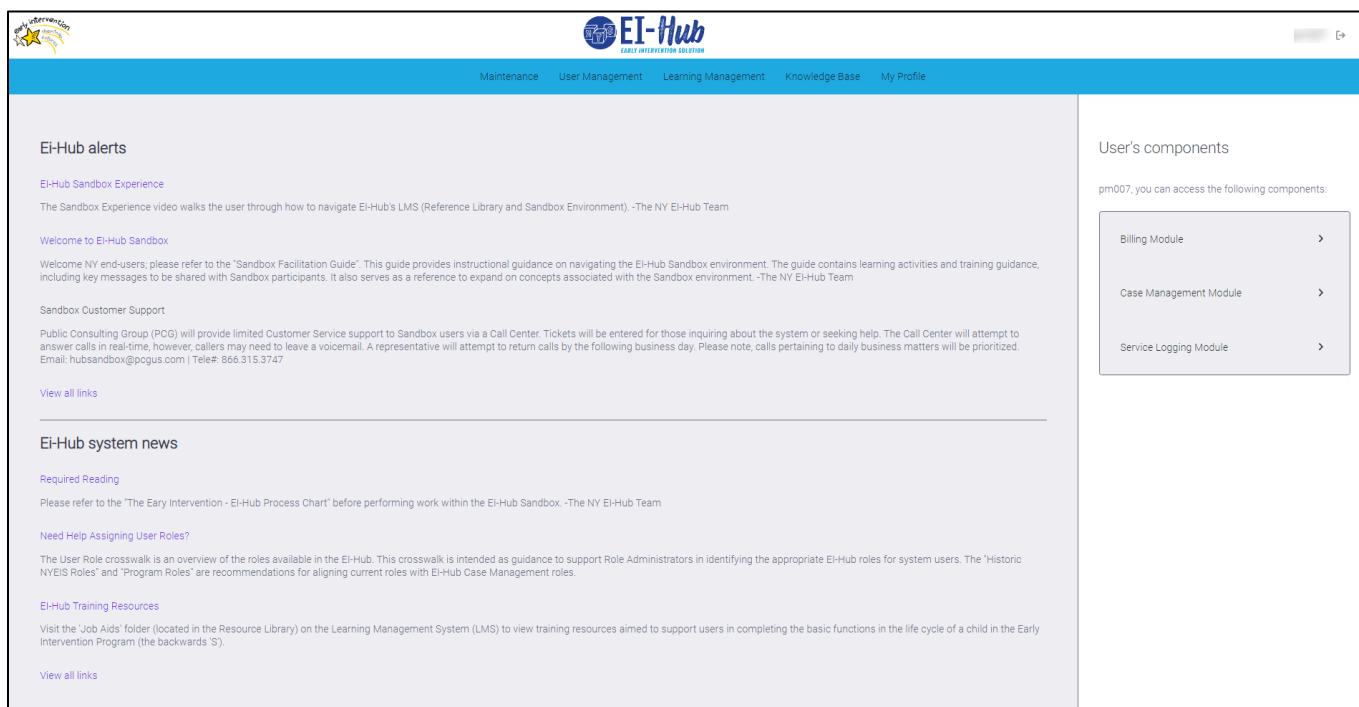
Section 6: Attestation

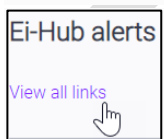
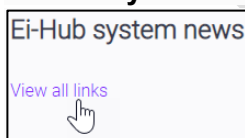
By checking this box, I attest under penalty of perjury that I have read, understand, agree, and will abide by all Terms of Use contained herein. I also understand that any misuse or violations may result in termination of access and such other action as may be available.

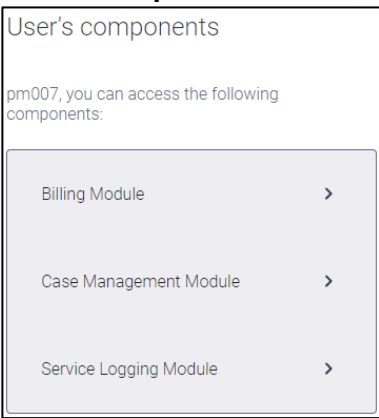
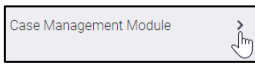
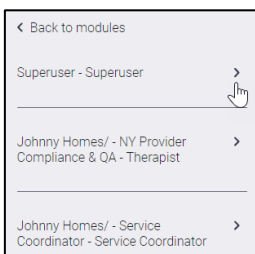
Unit 10. Navigation

10.1 El-Hub Landing Page (Homepage)

 The El-Hub Landing page is the introductory page of the El-Hub and serves as a table of contents for the site. From the El-Hub Landing page, users can access the El-Hub components, view system alerts and news, and update account information.






| ITEM | DESCRIPTION |
|--|--|
| El-Hub Alerts  | To access El-Hub Alerts, Select/click the View all links . When clicked/selected, the Alerts page appears. |
| El-Hub System News  | Select/click the View all links to access El-Hub System News. When clicked/selected, the News page appears. |

| ITEM | DESCRIPTION |
|---|--|
| <p>User" Components Menu</p>  <p>User's components</p> <p>pm007, you can access the following components:</p> | <p>Select/click the appropriate application module to access El-Hub User's Components. For example, if you want to access the Case Management Module, the steps are as follows:</p>  <p>Select Case Management Module.</p>  <p>Select the appropriate user role.</p> <p>i You can set up a user with multiple roles for the same agency. For example, a "Superuser" role reflects permissions within the El-Hub Case Management module.</p> |


10.1.1 Web Site Header Section

 The Header section is the top part of this website containing the logo. The header is the region at the top of the page that stays constant and visible to users.

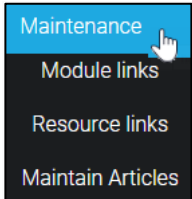
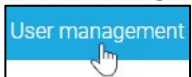
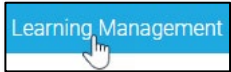

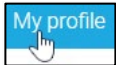


| MENU ITEM | DESCRIPTION |
|---|--|
| <p>El-Hub Icon</p>  | <p>Clicking/selecting returns you to the El-Hub Home/landing page.</p> |
|  | <p>El-Hub system logo; this logo is for visual purposes only.</p> |
| <p>Sign Out Icon</p>  | <p>Clicking/selecting this icon signs you out of the El-Hub.</p> |


10.1.2 Menu Bar

 Links in the Menu Bar navigate users to a specific section of the EI-Hub. What appears in the menu bar will vary based on the user's EI-Hub account type.

Maintenance User Management Learning Management Knowledge Base My Profile

| MENU ITEM | DESCRIPTION |
|---|--|
| Maintenance (Main menu)  | <p>The 'Maintenance' main menu has three (3) sub-menu items: Module Links, Resource Links, and Maintain Articles. We will discuss these individual sub-menus items in this document.</p> <p><i>i</i> This option is only visible to Role Administrators. Only Role Administrators with an 'AdminAcct' or 'AdminState' account type can access the links.</p> <p>For more information on this menu option, please see Appendix 2.</p> |
| User Management  | <p>The User Management section permits users with administrative credentials to view and edit user permissions within the EI-Hub and any connected modules.</p> <p><i>i</i> This option is only visible and accessible to Role Administrators.</p> <p>For more information on this menu option, please see Section 11.1 – User Management.</p> |
| Learning Management  | <p>The Learning Management System (LMS) is accessible to all EI Hub users. The LMS contains EI-Hub-specific training resources to support users in completing the steps of the 'backward S' and other functions in the EI-Hub. Most training resources are housed in the Resource Library on the LMS. Users may repeat the training as needed.</p> <p>For more information on this menu option, please see Section 11.2 Learning Management.</p> |
| Knowledge Base  | <p>The EI Billing Knowledge Base (KB) Portal provides access to Knowledge Base Articles and allows users to find answers to common questions related specifically to billing matters.</p> <p>For more information on this menu option, please see Section 11.3 Knowledge Base.</p> |
| My Profile  | <p>The My Profile page allows site users to view/modify their EI-Hub user profile.</p> <p>For more information on this menu option, please see Section 11.4, My Profile.</p> |


10.1.3 Web Page Footer Section

 The footer is at the bottom of the El-Hub Landing Page, consistent from page to page. This area links the Terms & Conditions, Privacy Policy, and Cookies Policy.



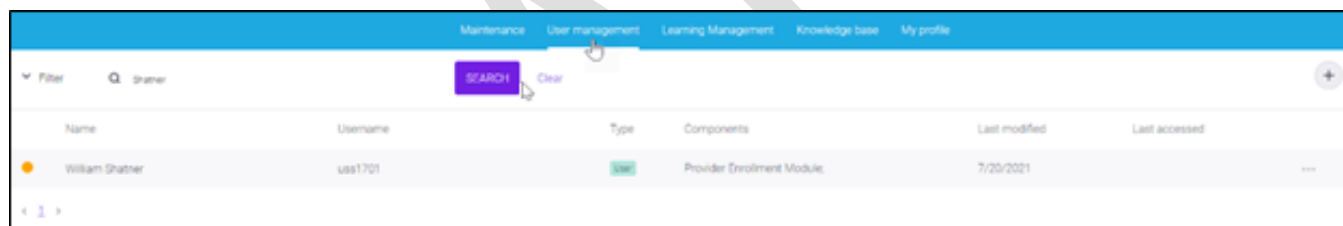
Unit 11. Menu Items

11.1 User Management

 Users with **Role Administrator** account types (AdminCounty, AdminAgency, and AdminState) access this screen to view and edit user permissions within the El-Hub and any connected modules. Uses for this menu option include assigning and/or changing user roles and user access.


11.1.1 Search Field

Use the search text field ("Input phrase for search..") to enter a username and click the **Search button** to search for a user's name (example below).



| COLUMN | DESCRIPTION |
|----------------------|---|
| Name | This column displays the user's first and last name. |
| Username | This column displays the person's username (HCS ID) for accessing the El-Hub Landing Page. |
| Type | This column displays the user (person) access type (User, AdminCounty, AdminAgency, AdminState, and AdminAcct). |
| Components | This column displays the user (person) modules within the El-Hub. |
| Last Modified | This column displays the date the user's account/role was last modified. |
| Last Accessed | This column displays the date the user's account/role was last accessed. |

11.1.1.1 Search Filter Options

 Filter Options allow administrators to apply sets of applied filters to narrow their search. You can categorize multiple applied filters with varying configurations. The available filter options will appear after clicking/selecting the filter button.

Filter


Type:


User


Component

Role

Status:

| FILTER / STATUS / DROP-DOWN SELECTION | DESCRIPTION |
|--|---|
| Filter  | Select/click the Filter drop-down arrow to search for specific statewide users. When clicked/selected, the following criteria appear Type, Component, Role, and Status (shown above). |
| Type | Select/click one or all three (6) label buttons that apply to your criteria. An example below shows two choices; when clicked/selected, the label buttons turn color (purple). <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Type : <input type="button" value="User"/> <input type="button" value="AcctAdmin"/> <input type="button" value="AdminAgency"/> <input type="button" value="AdminCounty"/> <input type="button" value="AdminState"/> <input type="button" value="Admin"/> </div> |
| Component | Select/click the drop-down and select one of the four (4) components/modules from the list. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Component <input type="button" value="Billing Module"/> <input type="button" value="Case Management Module"/> <input type="button" value="Service Logging Module"/> </div> |

| FILTER / STATUS / DROP-DOWN SELECTION | DESCRIPTION |
|---------------------------------------|---|
| Account Type | <p>Select/click the drop-down and choose one or more appropriate types from the list.</p> <p> Please note that the following 'Type' selections are available based on the 'Component' selection (examples below)</p> <div data-bbox="594 527 1328 884"> <p>Component: Billing Module</p> <p>Type: Select option</p> <ul style="list-style-type: none"> Agency/Provi <small>Press enter to select</small> County/SPOE Office PCG State </div> <div data-bbox="594 926 1328 1377"> <p>Component: Case Management Module</p> <p>Type: Select option</p> <ul style="list-style-type: none"> Agency/Provi <small>Press enter to select</small> County/SPOE Office Service Coordinator State Superuser Therapist </div> <div data-bbox="594 1419 1328 1556"> <p>Component: Service Logging Module</p> <p>Type: Select option</p> <ul style="list-style-type: none"> Type <small>Press enter to select</small> </div> |

| FILTER / STATUS / DROP-DOWN SELECTION | DESCRIPTION |
|---------------------------------------|---|
| Role | <p>Select/click the drop-down and choose one or more appropriate roles from the list.</p> <p> Please note that the following 'Role' selections are available based on the 'Component' and 'Type' selections (examples below). The User must select an account type first, and then the available roles will be available for selection.</p> <div data-bbox="435 594 1485 1423"> <div> <div>Component</div> <div>Billing Module</div> </div> <div> <div>Type</div> <div>Agency/Provider</div> </div> <div> <div>Role</div> <div>Select option</div> <div>PROVIDER</div> <div>Press enter to select</div> </div> </div> <div> <div>Component</div> <div>Billing Module</div> </div> <div> <div>Type</div> <div>County/SPOE</div> </div> <div> <div>Role</div> <div>Select option</div> <div>COUNTY</div> <div>Press enter to select</div> </div> |

Component

Billing Module

Type

Office

Role

Select option

PROVIDER-EM

Press enter to select

Component

Billing Module

Type

PCG

Role

Select option

OFFICE

Press enter to select

Component

Billing Module

Type

State

Role

Select option

NYSDOH

Press enter to select

| FILTER / STATUS / DROP-DOWN SELECTION | DESCRIPTION |
|---------------------------------------|---|
| | <div> <div>Component</div> <div>Case Management Module</div> </div> <div> <div>Type</div> <div>Agency/Provider</div> </div> <div> <div>Role</div> <div>Select option</div> <div>Albany county Progra Press enter</div> <div>Albany county Security Administ</div> <div>Company</div> <div>Help Children Inc. Program Adm</div> <div>Help Children Inc. Security Admini</div> <div>ProvDataEntryNY</div> <div>ProvFiscalMgrNY</div> </div> |
| | <div> <div>Component</div> <div>Case Management Module</div> </div> <div> <div>Type</div> <div>County/SPOE</div> </div> <div> <div>Role</div> <div>Select option</div> <div>EIO NY Press enter to select</div> <div>MuniAtRiskMgtNY</div> <div>MuniDataEntryNY</div> <div>MuniFiscalAllNY</div> <div>MuniProgAllNY</div> <div>MuniViewOnlyNY</div> </div> |
| | <div> <div>Component</div> <div>Case Management Module</div> </div> <div> <div>Type</div> <div>Office</div> </div> <div> <div>Role</div> <div>Select option</div> <div>Office Press enter to select</div> </div> |
| | <div> <div>Component</div> <div>Case Management Module</div> </div> <div> <div>Type</div> <div>Service Coordinator</div> </div> <div> <div>Role</div> <div>Select option</div> <div>EIO/D NY Press enter to select</div> <div>ISC/OSC NY</div> <div>Service Coordinator</div> </div> |

| FILTER / STATUS / DROP-DOWN SELECTION | DESCRIPTION |
|---------------------------------------|---|
| | <div data-bbox="435 321 1485 793"> <div> <div>Component</div> <div>Case Management Module</div> </div> <div> <div>Type</div> <div>State</div> </div> <div> <div>Role</div> <div>Select option</div> <div> <div>AAA - AAA Press enter to select</div> <div>ATDCoordNY</div> <div>Basic Company User</div> <div>BEIAdminNY</div> <div>BEIAuditNY</div> <div>BEIProvApprovNY</div> <div>BEIProvEntryNY</div> <div>BEISuperuserNY</div> </div> </div> </div> <div data-bbox="435 831 1485 1073"> <div> <div>Component</div> <div>Case Management Module</div> </div> <div> <div>Type</div> <div>Superuser</div> </div> <div> <div>Role</div> <div>Select option</div> <div> <div>NY EXT TEST Press enter to select</div> <div>NY UAT TESTER</div> <div>Superuser</div> </div> </div> </div> <div data-bbox="435 1110 1485 1402"> <div> <div>Component</div> <div>Case Management Module</div> </div> <div> <div>Type</div> <div>Therapist</div> </div> <div> <div>Role</div> <div>Select option</div> <div> <div>JrRenderProv Press enter to select</div> <div>QA EIOD</div> <div>QATherapist</div> <div>RenderProvNY</div> </div> </div> </div> <div data-bbox="435 1440 1485 1640"> <div> <div>Component</div> <div>Service Logging Module</div> </div> <div> <div>Type</div> <div>Type</div> </div> <div> <div>Role</div> <div>Select option</div> <div> <div>Admin Press enter to select</div> <div>User</div> </div> </div> </div> |


| FILTER / STATUS / DROP-DOWN SELECTION | DESCRIPTION |
|---|---|
| Status | <p>Select/click one or all three (3) Status label buttons that apply to your criteria to search users by status.</p> <p>i Active, Disabled, and Deleted are the only viewable options for account admins.</p> <p>Status :</p> <p>Active Disabled Deleted</p> <ul style="list-style-type: none"> Indicated by a green dot to the left of the user's name. ● <p>Status :</p> <p>Active Disabled Deleted</p> <ul style="list-style-type: none"> Indicated by an orange dot to the left of the user's name. ● <p>Status :</p> <p>Active Disabled Deleted</p> <ul style="list-style-type: none"> Indicated by a black dot to the left of the user's name. ● |
| Input phrase for search Search Clear <div> <input type="text" value="Input phrase for search..."/> </div> <div> SEARCH </div> <div> Clear </div> | Step / Action <ol style="list-style-type: none"> Select/click in this text search field to narrow your search, such as typing in a user's name. Select/click the Search button. When clicked/selected, the application lists the results. To clear results (retrieved data), select/click the Clear button. |

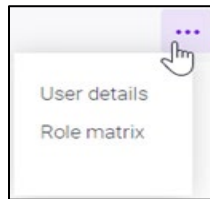
11.1.2 User Management Menu Options (Ellipse button)

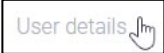









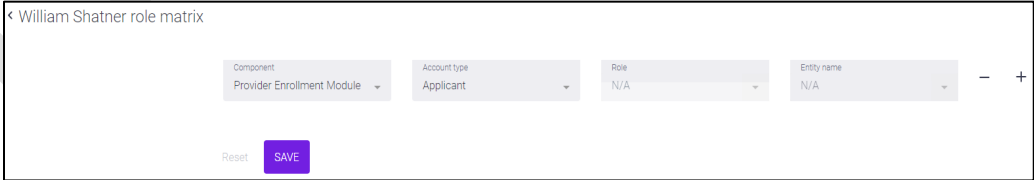
Users with a **Role Administrative** account type (AdminCounty, AdminAgency, and AdminState) will access the **User details** option or **Role matrix** option to edit various parts of a user's account.

- Edit a user's name, email address, and phone is under **User details**.
- Edit a user's access to the El-Hub components under **Role Matrix**.


Select/click the Ellipse () button to access these menu options, as shown below.



| MENU OPTION | DESCRIPTION |
|--|---|
| <p>User Details</p>  | <p>To view/edit (limited) an existing user's detail, Select/click the ellipsis (...) button adjacent far-right to a user record/row and select User details from the drop-down list. When clicked/selected, the Edit page appears (example below).</p> <div data-bbox="620 1001 1308 1852"> <p>Username uss1701</p> <p>First Name William</p> <p>Last Name Shatner</p> <p>Email shat@ussenterprise.com</p> <p>Phone Number undefined</p> <p>Type:</p> <p> <input checked="" type="radio"/> User <input type="radio"/> AcctAdmin <input type="radio"/> Admin <input type="radio"/> AdminAgency <input type="radio"/> AdminCounty <input type="radio"/> AdminState </p> <p>Last Modified Date 10/17/2021 11:10:36 PM</p> <p>Reason Of Disabling</p> <p> <input type="button" value="Reset"/> <input type="button" value="SAVE"/> </p> </div> |

| MENU OPTION | DESCRIPTION | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--|-------|-------------|-----------------|---|-------------------|---|------------------|--|--------------|--|---------------------|---|-------------|--|----------------------|---|-----------------------------|---|--------|-------------|---|--|--|--|
| | <table border="1"> <thead> <tr> <th data-bbox="467 239 786 273">FIELD</th><th data-bbox="786 239 1479 273">DESCRIPTION</th></tr> </thead> <tbody> <tr> <td data-bbox="467 273 786 373">Username</td><td data-bbox="786 273 1479 373">This read-only field displays the username; this information will come from Health Commerce System (HCS).</td></tr> <tr> <td data-bbox="467 373 786 443">First Name</td><td data-bbox="786 373 1479 443">This field is editable and displays the user's first name; this information will initially come from HCS.</td></tr> <tr> <td data-bbox="467 443 786 512">Last Name</td><td data-bbox="786 443 1479 512">This field is editable and displays the user's last name; this information will initially come from HCS.</td></tr> <tr> <td data-bbox="467 512 786 613">Email</td><td data-bbox="786 512 1479 613">This field is editable and displays the user's email address; this information will initially come from HCS.</td></tr> <tr> <td data-bbox="467 613 786 714">Phone Number</td><td data-bbox="786 613 1479 714">This field is editable and displays the user's telephone number; this information will initially come from HCS.</td></tr> <tr> <td data-bbox="467 714 786 783">Type</td><td data-bbox="786 714 1479 783">Editable field and determines a user's EI-Hub type (User or Role Administrator).</td></tr> <tr> <td data-bbox="467 783 786 852">Last Modified</td><td data-bbox="786 783 1479 852">This read-only field displays the date the user's account/role was last modified.</td></tr> <tr> <td data-bbox="467 852 786 989">Reason for Disabling</td><td data-bbox="786 852 1479 989">This read-only field displays the reason a system user's account was disabled. To populate this field, an agency or county administrator (AdminAgency or AdminCounty) to contact BEI.</td></tr> </tbody> </table> <table border="1"> <thead> <tr> <th data-bbox="467 1024 786 1058">BUTTON</th><th data-bbox="786 1024 1479 1058">DESCRIPTION</th></tr> </thead> <tbody> <tr> <td data-bbox="467 1058 786 1171"> Reset  </td><td data-bbox="786 1058 1479 1171">To cancel any edits made, Select/click this button. When clicked/selected, the Edit page restores the original data.</td></tr> <tr> <td data-bbox="467 1171 786 1270"> Save  </td><td data-bbox="786 1171 1479 1270">Select/click this button to save your edits on the Edit page. When clicked/selected, the User Management page appears.</td></tr> </tbody> </table> | FIELD | DESCRIPTION | Username | This read-only field displays the username; this information will come from Health Commerce System (HCS). | First Name | This field is editable and displays the user's first name; this information will initially come from HCS. | Last Name | This field is editable and displays the user's last name; this information will initially come from HCS. | Email | This field is editable and displays the user's email address; this information will initially come from HCS. | Phone Number | This field is editable and displays the user's telephone number; this information will initially come from HCS. | Type | Editable field and determines a user's EI-Hub type (User or Role Administrator). | Last Modified | This read-only field displays the date the user's account/role was last modified. | Reason for Disabling | This read-only field displays the reason a system user's account was disabled. To populate this field, an agency or county administrator (AdminAgency or AdminCounty) to contact BEI. | BUTTON | DESCRIPTION | Reset  | To cancel any edits made, Select/click this button. When clicked/selected, the Edit page restores the original data. | Save  | Select/click this button to save your edits on the Edit page. When clicked/selected, the User Management page appears. |
| FIELD | DESCRIPTION | | | | | | | | | | | | | | | | | | | | | | | | |
| Username | This read-only field displays the username; this information will come from Health Commerce System (HCS). | | | | | | | | | | | | | | | | | | | | | | | | |
| First Name | This field is editable and displays the user's first name; this information will initially come from HCS. | | | | | | | | | | | | | | | | | | | | | | | | |
| Last Name | This field is editable and displays the user's last name; this information will initially come from HCS. | | | | | | | | | | | | | | | | | | | | | | | | |
| Email | This field is editable and displays the user's email address; this information will initially come from HCS. | | | | | | | | | | | | | | | | | | | | | | | | |
| Phone Number | This field is editable and displays the user's telephone number; this information will initially come from HCS. | | | | | | | | | | | | | | | | | | | | | | | | |
| Type | Editable field and determines a user's EI-Hub type (User or Role Administrator). | | | | | | | | | | | | | | | | | | | | | | | | |
| Last Modified | This read-only field displays the date the user's account/role was last modified. | | | | | | | | | | | | | | | | | | | | | | | | |
| Reason for Disabling | This read-only field displays the reason a system user's account was disabled. To populate this field, an agency or county administrator (AdminAgency or AdminCounty) to contact BEI. | | | | | | | | | | | | | | | | | | | | | | | | |
| BUTTON | DESCRIPTION | | | | | | | | | | | | | | | | | | | | | | | | |
| Reset  | To cancel any edits made, Select/click this button. When clicked/selected, the Edit page restores the original data. | | | | | | | | | | | | | | | | | | | | | | | | |
| Save  | Select/click this button to save your edits on the Edit page. When clicked/selected, the User Management page appears. | | | | | | | | | | | | | | | | | | | | | | | | |
| Role Matrix  | <p>To view/edit an existing user's role matrix, Select/click the ellipsis (...) button adjacent far-right to a user record/row and select Role matrix from the drop-down list. When clicked/selected, the matrix page appears (example below).</p> <div data-bbox="451 1413 1479 1591">  </div> <p>For information on how to use the Role Matrix to configure a user's access, please reference section <u>11.1.3 - Configuring User's Access in the Role Matrix</u>.</p> | | | | | | | | | | | | | | | | | | | | | | | | |

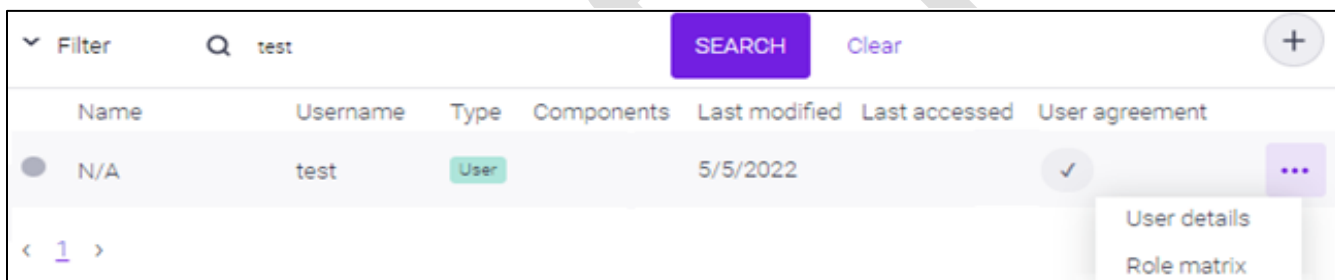
11.1.3 Configuring User's Access in the Role Matrix

 Users with a **Role Administrative** account type will use the Role Matrix to view/edit an existing user's El-Hub account.

 **Individuals that can update an existing user's El-Hub account must have the following El-Hub account type and Case Management user role:**

- AdminCounty/MuniProgAllNY/UniversalProvNY
- AdminAgency/UniversalProvNY
- AdminAgency/InProviderNY
- AdminState/BEIAdminNY

After searching and locating the appropriate user, select/click the ellipsis (three dots) to the right of the user's account information and select the Role Matrix option from the drop-down menu.



| Name | Username | Type | Components | Last modified | Last accessed | User agreement |
|------|----------|------|------------|---------------|---------------|----------------|
| N/A | test | User | | 5/5/2022 | | ✓ |

< 1 >

User details
Role matrix

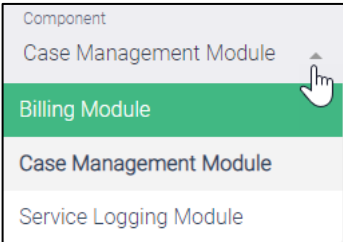

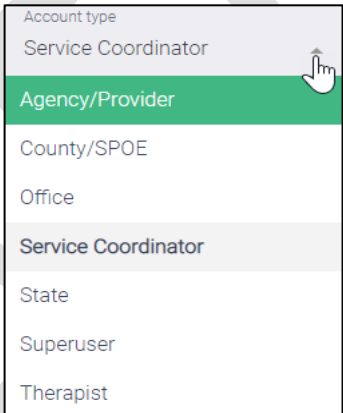
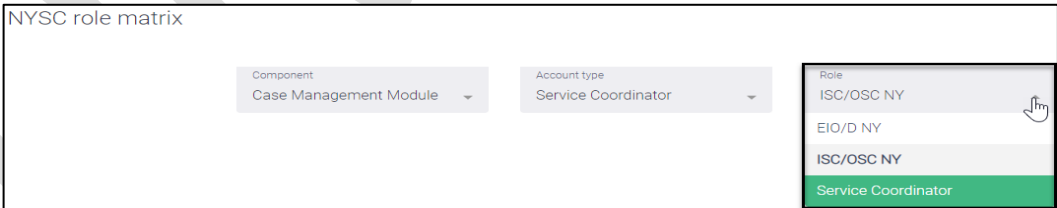
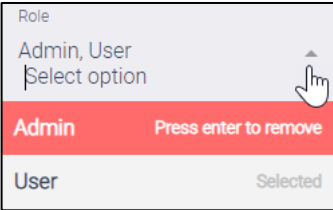

The Role Administrator selects the component(s) and appropriate role(s) for the user using the drop-down menus. Next, select/click the '+' sign beside a user's role to add additional roles. Selecting the '-' sign will remove that role for the user. After adding all the appropriate component(s) and role(s), then select/click **Save**.

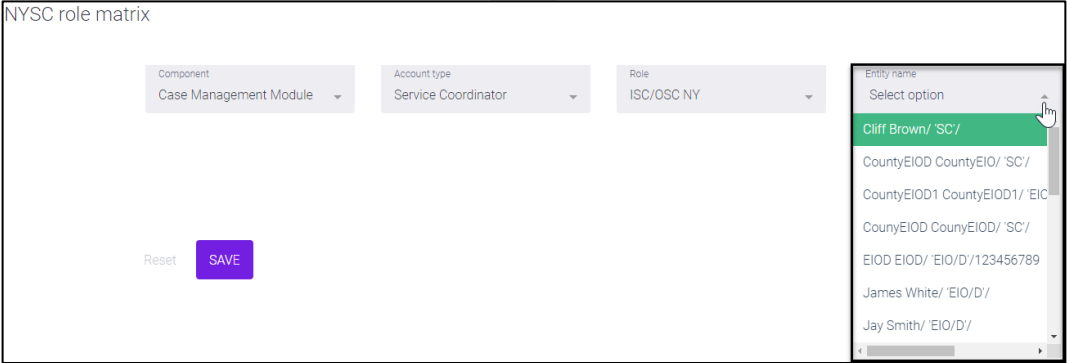






 **When a Role Administrator chooses a role to assign an individual for each component, they can only assign roles for an 'Entity' they are associated with. For example, a Role Administrator for 'ABC agency' cannot assign user roles for 'YXY agency.'**




| | | | | |
|-------------------------------------|-------------------------------------|--------------------|---|-----|
| Component Case Management Module | Account type Service Coordinator | Role ISC/OSC NY | Entity name Jeff Brown/ 'EIO/D', 'SC'/1234567899 | - + |
| Component | Account type | Role | Entity name | - + |

Reset SAVE

| DROP-DOWN | DESCRIPTION |
|---------------------|---|
| Component | <p>Select/click this drop-down and select/assign the appropriate module the new user can access.</p>  <p> Users must have a Case Management Module role to access the Service Logging Module.</p> |
| Account Type | <p>Select/click this drop-down and select/assign the appropriate account type for the new user.</p>  |
| Role | <p>Select/click this drop-down and select/assign the new user's appropriate role. You can have multiple roles for the user. When hovering over a selection, green indicates 'add' a role (example below):</p>  <p>When hovering over a selection, red indicates 'remove' a role; clicking/selecting your mouse pointer can do this.</p>  <p> The User must select an account type first, and then the available roles will be available for selection.</p> |

| DROP-DOWN | DESCRIPTION |
|--|--|
| Entity Name | <p>Select/click this drop-down and select/assign the appropriate entity name for the new user. The data in this list appears based on selecting the four drop-down fields. Role Administrators will only be able to configure accounts for users within their county/agency.</p> <p>For example:</p> <ul style="list-style-type: none"> • Component = Case Management Module • Account Type = Service Coordinator • Role = ICS/OSC NY • Entity name = Cliff Brown/' SC'/'  |
| Add  | <p>Select/click the Add (+) button to add a row (Components, Account Type, Role, and Entity Name). When clicked/selected, a second row appears beneath your first role (example below).</p>  |
| Remove  | <p>Select/click the Minus (-) button to remove a row (Component, Account Type, Role, and Entity Name).</p>  |
| Back  | <p>To return to the previous page (e.g., make changes), select/click this button. When clicked/selected, the first section of the Add Use page appears.</p> |
| Save  | <p>To save your new user configuration on the Add User pages' first and second sections, select/click this button. When clicked/selected, the User Management page appears.</p> |


11.2 Learning Management

 The Learning Management System (LMS) is accessible to **all users**.

To access the LMS website, hover your mouse pointer over 'Learning Management' (shown below).



11.3 Knowledge Base

 The EI Billing Knowledge Base (KB) Portal is accessible to **all users** to access KB Articles and find answers to frequent questions related to billing matters.

Step / Action

1. Located on the EI-Hub Access Portal menu bar, select/click Knowledge Base (shown below).



2. The EI Billing landing page appears (shown below)

Portal

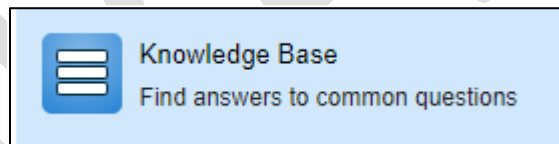
- Knowledge Base**
Find answers to common questions
- News**
View latest news items
- View Tickets**
Examine the history of your tickets

Home
Welcome to El-Hub Support! For help call our Customer Service Center at 1 866 315 3747 from 7 a.m. – 7 p.m.

| Popular KB Articles (Last 90 Days) | Views | Rating |
|---|-------|--------|
| eMedNY ETIN Certification Forms (Provider) | 481 | ☆☆☆☆☆ |
| Feedback on the El-Hub System Log (El-Hub) | 348 | ☆☆☆☆☆ |
| Medicaid Payment Cycle Calendar (Provider > Medicaid Claims) | 215 | ☆☆☆☆☆ |
| United Healthcare Overpayment/Recoupment Notification Change (Provider > Insurance Claims) | 197 | ☆☆☆☆☆ |
| Untimed Speech Therapy CPT Codes (Provider > Insurance Claims) | 169 | ☆☆☆☆☆ |

| Newest KB Articles | Date Added |
|--|------------|
| Medicaid Submission Types (Provider > Medicaid Claims) | 06/05/2023 |
| Use of Delay Reason Codes and Medicaid Timely Filing (Provider > Medicaid Claims) | 06/05/2023 |
| Upcoming Change to El Billing (General) | 05/01/2023 |
| Use of invalid or incorrect diagnosis codes (Provider > Medicaid Claims) | 04/14/2023 |
| Feedback on the El-Hub System Log (El-Hub) | 03/24/2023 |

- To search in the knowledge base, select/click the **Knowledge Base** text or icon (shown below)



- When selected/clicked (Knowledge Base text/icon), the Knowledge Base search feature appears (shown below). Enter text into the search bar and select/click the Search button. Returns will appear under the Search Results section.

[Home](#) / [Knowledge Base](#)

Knowledge Base Actions ▾

Use this view to search the knowledge base for a specific topic. You can also [browse the knowledge base](#) by folder.

Search


Folder - All Folders - ▾

Search Type Article Content ▾

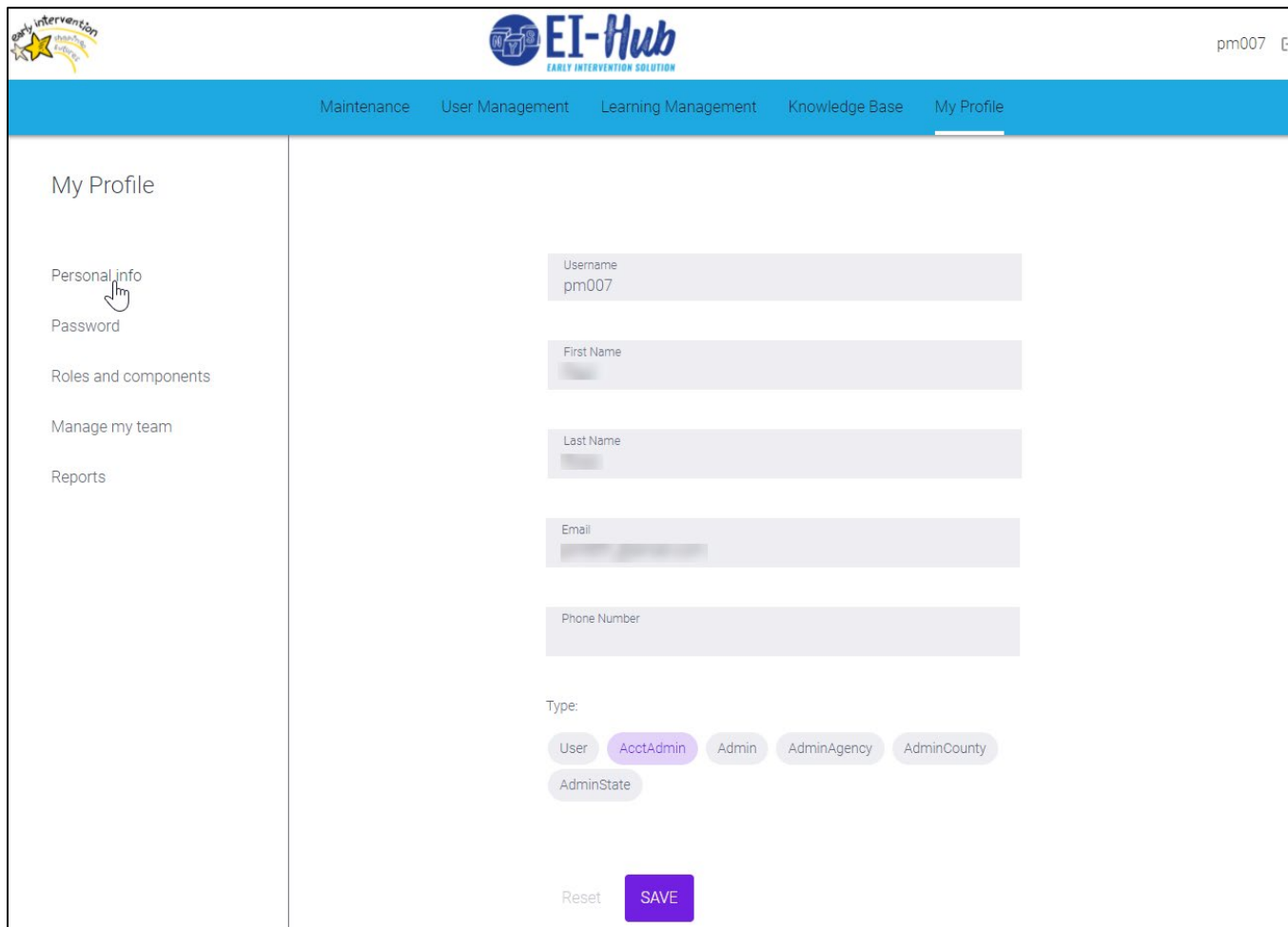
Search Clear

Search Results

11.4 My Profile

 The My Profile page allows **all users** to modify their EI Hub user profiles. Under 'Personal Info,' users can update their First Name, Last Name, Email, and Phone Number.





11.4.1 Personal Info Page




The screenshot displays the 'My Profile' page in the EI-Hub system. The top navigation bar includes links for Maintenance, User Management, Learning Management, Knowledge Base, and My Profile. The left sidebar lists options: My Profile, Personal info (highlighted with a hand icon), Password, Roles and components, Manage my team, and Reports. The main content area contains the following fields and options:

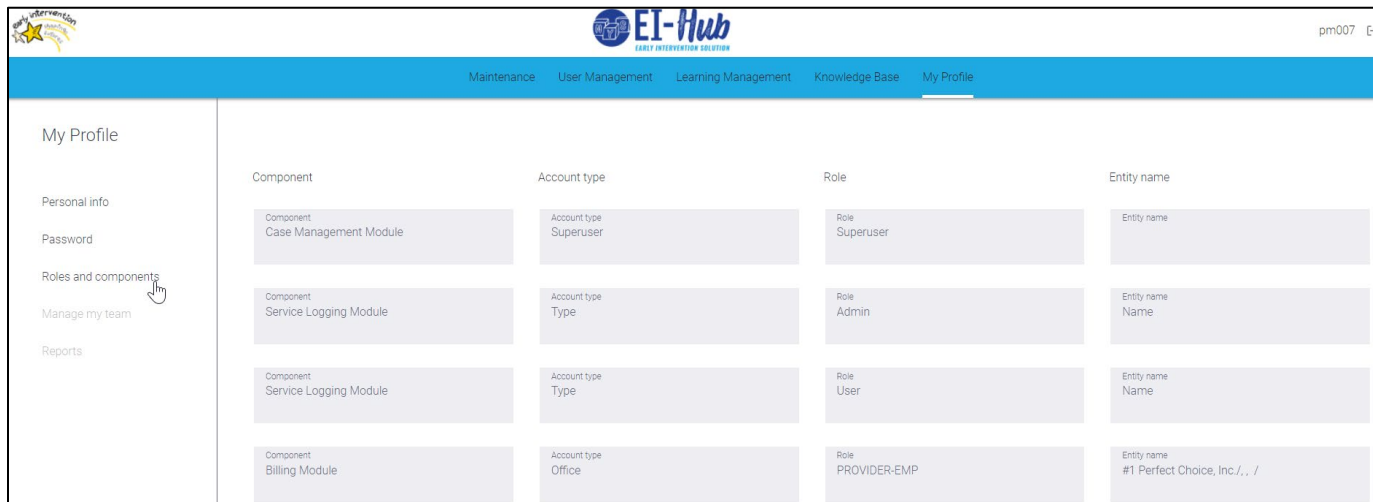
- Username:** A read-only field displaying 'pm007'.
- First Name:** An empty text input field.
- Last Name:** An empty text input field.
- Email:** An empty text input field.
- Phone Number:** An empty text input field.
- Type:** A group of radio buttons with the following options: User, AcotAdmin (selected), Admin, AdminAgency, AdminCounty, and AdminState.
- Buttons:** 'Reset' and a purple 'SAVE' button.

| FIELD | DESCRIPTION |
|-------------------|--|
| Username | This field (read-only) displays the person's username for accessing the EI-Hub Landing Page. |
| First Name | Edit/enter the new user's first name. |
| Last Name | Edit/enter the new user's first name. |
| Email | Edit/enter the new user's email address. |
| Phone | Edit/enter the new user's phone number. |

| FIELD | DESCRIPTION |
|---|--|
| Type | <p>Depending on the user's role: Edit/enter the new user access type (User, AcctAdmin, or Admin). The end-user roles are as follows:</p> <ul style="list-style-type: none"> • User • AcctAdmin • Admin • AdminAgency • AdminCounty • AdminState <p> Only individuals with a Role Administrator status can update this section.</p> <p> For user role descriptions, please see section 7, <u>Case Management Roles and Descriptions</u>, above.</p> |
| Reset  | To cancel any edits made, select/click this button. When clicked/selected, the fields on the 'Personal info' page restore the original data. |
| Save  | To save your edits on the 'Personal info' page, select/click this button. |

11.4.2 Roles and Components Page

 All users can view their account access under the **Roles and Components** section. However, only users with sufficient administrative credentials (i.e., **AdminCounty** or **AdminAgency**) can adjust a user's access.



| Component | Account type | Role | Entity name |
|-------------------------------------|---------------------------|----------------------|--|
| Component Case Management Module | Account type Superuser | Role Superuser | Entity name |
| Component Service Logging Module | Account type Type | Role Admin | Entity name Name |
| Component Service Logging Module | Account type Type | Role User | Entity name Name |
| Component Billing Module | Account type Office | Role PROVIDER-EMP | Entity name #1 Perfect Choice, Inc./, / |

| COLUMN | DESCRIPTION |
|---------------------|--|
| Component | This column displays the modules within the El-Hub Landing Page. |
| Account Type | This column displays the account type associated with their user role within a particular component of the El-Hub. |
| Role | This column displays the user role with a particular El-Hub component (i.e., MuniProgAIINY.). |
| Entity Name | This column displays the entity's name with which the user is associated. |

 **'Manage my Team' and 'Reports' are disabled.**

Appendix 1: Health Commerce System (HCS) Instructions



Please select (**bold** text hyperlinked to LMS) the appropriate HCS instructions; there's one for professionals with a license and the other for professionals without a license.



Please note that you must log into the LMS before accessing the hyperlinks below.

11.1 Paperless Health Commerce System (HCS) Professions Account Instructions for:

- EIP Professionals with a Healthcare License Issued by the NYS Education Department Office of Professions.
- Includes PT, OT, SLP, Psychologist, Nurse, etc.

11.2 New Health Commerce System (HCS) Account Instructions for:

- EIP Professionals Who Do Not Hold a License Issued by the NYS Education Department Office of Professions.
- New HCS Account Instructions also pertain to Other Agency Staff needing access to the EI Hub (Certified Teachers, SCs, EIODs, data entry staff, etc.).

Appendix 2: Maintenance menu

11.3 Module links



This page is restricted to the **PCG administrator** assigning URLs to the Billing Module, Case Management Module, and Service Logging Module.




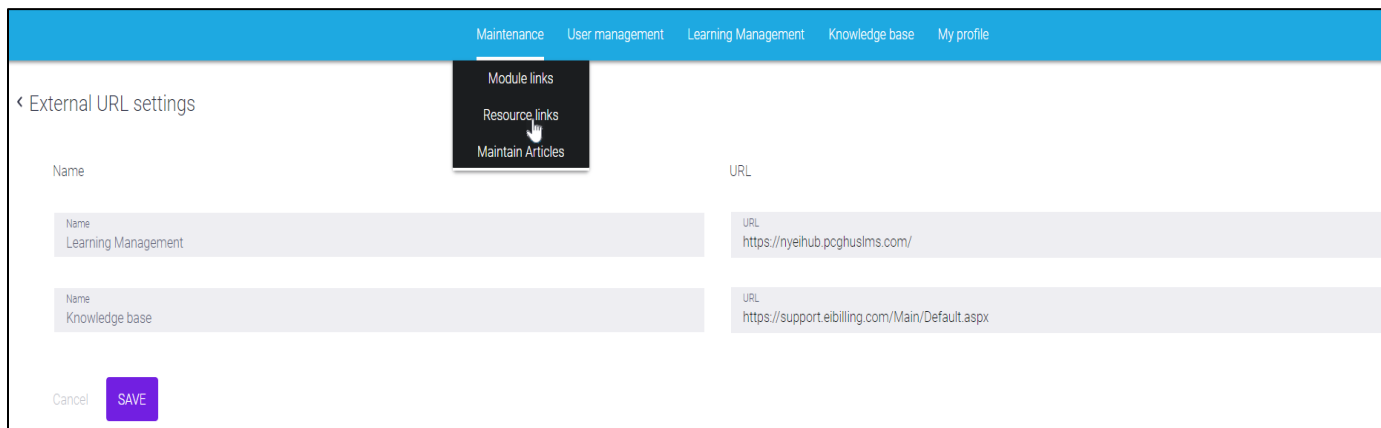
You will only see Learning Management, Knowledge Base, and My Profile for menu bar selections with 'User' rights.

| FIELD NAME (Read-Only) | URL FIELD (Editable w/PCG Administrator) |
|-------------------------------|---|
| Billing Module | Enter the appropriate URL address where the Billing Module resides. |
| Case Management Module | Enter the appropriate URL address where the Case Management Module resides. |
| Service Logging Module | Enter the appropriate URL address where the Service Logging Module resides. |




| BUTTON | DESCRIPTION |
|-------------------|---|
| Cancel | To cancel any edits made to the URLs mentioned above, select/click this button. Click/selecting the '< URL settings' breadcrumb (top left of your screen) acts the same as canceling edits made to the page. |
| Save | To save any edits made to the URLs mentioned above, select/click this button. |

11.4 Resource links


 Users with sufficient administrative credentials (**PCG administrator / BEI administrator**) can access the links for the following resources and edit as needed. Examples include the Learning Management System (LMS) and informational libraries like the Knowledge Base.



| FIELD NAME (Read-Only) | URL FIELD (Editable w/PCG Administrator) |
|----------------------------|---|
| Learning Management | Enter the appropriate URL address where the Learning Management System (LMS) resides. |
| Knowledge Base | Enter the appropriate URL address where the Knowledge Base resides. |

| BUTTON | DESCRIPTION |
|--|--|
| Cancel  | To cancel any edits made to the URLs mentioned above, select/click this button.  Click/selecting the '< External URL settings' breadcrumb (top left of your screen) acts the same as canceling edits made to the page. |
| Save  | To save any edits made to the URLs mentioned above, select/click this button. |


11.5 Maintain Articles

 Users with sufficient administrative credentials (**PCG administrator / BEI administrator**) can access this menu to manage information content available for viewing on the El-Hub Landing Page.

- This information content includes short announcements, called 'Alerts,' or longer entries, called 'News.'
- Alerts include system maintenance notice or an office closing due to a holiday.
- Examples of News include a change in procedure, tips & tricks, or any piece of information that would impact the client's day-to-day operations and their users.

| Maintenance User management Learning Management Knowledge base My profile | | | | |
|---|--|-----------|-----|-----|
| <div>Maintain Articles</div> <div> <div>Type:</div> <div>News Alerts</div> </div> <div> <div>Module links</div> <div>Resource links</div> <div>Maintain Articles</div> </div> | | | | |
| Sequence | Title | Begin | End | |
| 3 | UPDATED Medicaid Payment Cycle Calendar | 5/30/2021 | | ... |
| 5 | Added and Deleted CPT codes effective January 1... | 4/14/2021 | | ... |
| < 1 > | | | | |

| COLUMN | DESCRIPTION |
|-----------------|--|
| Sequence | This column displays the chronological order of news and alert articles. |
| Title | This column displays the title of news and alert articles. |
| Begin | This column displays the start date for news and alert articles. |
| End | This column displays the end date for news and alert articles. |

| BUTTON | DESCRIPTION |
|---|---|
| Add  | To create an article, Select/click this button. When clicked/selected, the Create Article page appears (see below). |

11.5.1 Create Article Page

 Use this page to link an appropriate article relevant to the EI-Hub portal.

< Create Article

Type:

News

Alerts

Sequence
1

Title

Summary


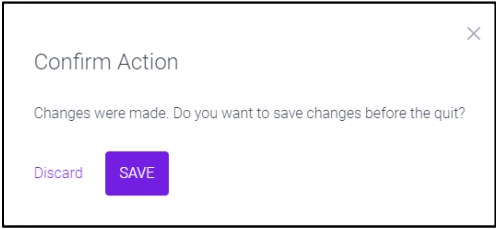
URL



Start date
07/20/2021



End date
mm/dd/yyyy





Cancel

SAVE


| LABEL BUTTON | DESCRIPTION |
|---|--|
| <p>Create Article (Exit)</p>  | <p>If selected, a dialog popup appears (shown below).</p>  <ul style="list-style-type: none"> • Disregard: Select/click this button; no changes are saved. • Save: Select/click this button to save changes. |

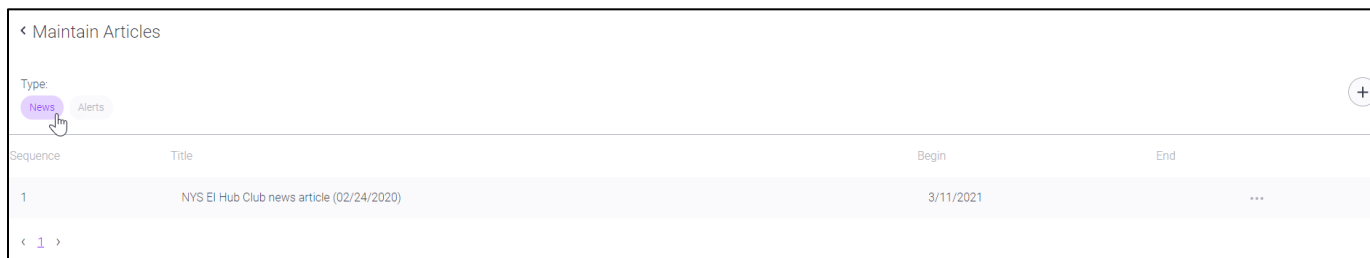
| LABEL BUTTON | DESCRIPTION |
|--|--|
| News  | Select/click this label to assign your article as a 'News' type. |
| Alerts  | Select/click this label to assign your article to the 'Alerts' type. |



| FIELD | DESCRIPTION |
|-------------------|--|
| Sequence | This user property configures a sequence field to create a chronological order for your news or alert articles. Enter this field's appropriate sequence number (e.g., 1, 2, 3). |
| Title | Enter the name/title of the news/alerts article linked. |
| Summary | Enter a summary of the news/alerts article. |
| URL | Use this URL field to enter a URL (Uniform Resource Locator) - the link to a website or web page. Then, enter/paste the correct URL into this field. |
| Start date | <p>Manually enter the start date (or use the calendar picker button), and select/click to activate) when you want the article to appear.</p> <p> The application defaults to the current date that the user (you) logged in to the El-Hub Landing Page</p> |
| End date | <p>Manually enter the end date (or use the calendar picker button), and select/click to activate) when you want the article to no longer appear.</p> <p> Leaving the End date, your news/alerts will remain indefinitely.</p> |

| BUTTON | DESCRIPTION |
|---|---|
| Calendar Icon  | <p>To use a calendar picker for selecting dates, Select/click this button. When clicked/selected, the Calendar Picker appears (see below).</p> <div data-bbox="724 1266 1239 1589" data-label="Image"> </div> |
| Cancel  | <p>To cancel your entries to the Create Article page mentioned above, Select/click this button.</p> <p> Click/selecting the '< Create Article' breadcrumb (top left of your screen) acts the same as canceling edits made to the page.</p> |
| Save  | To save your entries to the Create Article page mentioned above, select/click this button. When clicked/selected, the Maintain Articles page appears (shown below). |

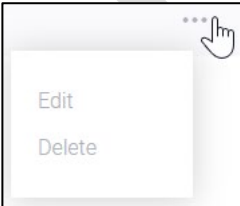
11.5.2 Maintain Articles Page

 This page shows 'News' articles (displayed by default, pictured below) and 'Alerts' (Click/select the 'Alerts') labels. Use this page to add additional **News** or **Alerts** articles and edit existing articles.




| LABEL TYPE / BUTTON | DESCRIPTION |
|--|--|
| News  | Select/click this label to view 'News' articles. |
| Alerts  | Select/click this label to view 'Alerts' articles. |

| COLUMN | DESCRIPTION |
|-----------------|--|
| Sequence | This column displays the chronological order of news and alert articles. |
| Title | This column displays the title of news and alert articles. |
| Begin | This column displays the start date for news and alert articles. |
| End | This column displays the end date for news and alert articles. |

| BUTTON | DESCRIPTION |
|--|---|
| Ellipsis  | To Edit or Delete a News or Alerts article(s), select/click the ellipsis button (...) adjacent to the appropriate News or Alerts record/row. A drop-down menu appears when clicked/selected; select the appropriate action (Edit or Delete). For the Edit and Delete functionality, please see below. |

11.5.3 Edit Article Page

 This page appears after clicking/selecting the ellipse button and selecting 'Edit' from the drop-down menu. An example below shows a **News** article.

< Edit Article

Type:

News Alerts

Sequence
4

Title
UPDATED Medicaid Payment Cycle Calendar

Summary
Please click the link for the Medicaid Payment Cycle Calendar, updated as of March 25, 2021.

URL
https://support.eibilling.com/KB/a177/medicaid-payment-cycle-

Start date
05/30/2021



End date
mm/dd/yyyy





Cancel SAVE





March 2022

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| 27 | 28 | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 31 | 1 | 2 |
| 3 | 4 | 5 | 6 | 7 | 8 | 9 |

Clear Today

| LABEL BUTTON | DESCRIPTION |
|--|--|
| News  | To edit, select/click this label to assign your article as a 'News' type. |
| Alerts  | To edit, select/click this label to assign your article as an 'Alerts' type. |

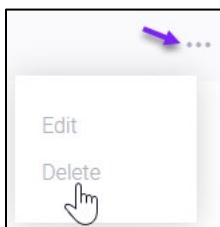
| FIELD | DESCRIPTION |
|-------------------|--|
| Sequence | In this field, edit/enter the appropriate sequence number (e.g., 1, 2, 3, etc.). |
| Title | Edit/enter the name/title of the news/alerts article name/title. |
| Summary | Edit/enter a summary of the news/alerts article. |
| URL | Edit/enter/paste the URL (Uniform Resource Locator) link to a website or web page in this field. |
| Start date | <p>When you want the article to appear, manually edit/enter the start date (or use the calendar picker button to select/click to activate).</p> <p> To use a calendar picker for selecting dates, select/click this button. When clicked/selected, the Calendar Picker appears.</p> <p> The application defaults to the date the user (you) logged in to the EI-Hub Landing Page.</p> |
| End date | <p>Manually edit/enter the end date (or use the calendar picker button - Select/click to activate) when you want the article to no longer appear.</p> <p> To use a calendar picker for selecting dates, select/click this button. When clicked/selected, the Calendar Picker appears.</p> <p> By leaving the end date, your news/alerts will remain indefinite.</p> |

| BUTTON | DESCRIPTION |
|--|---|
| Cancel  | <p>To cancel your edits to the Create Article page mentioned above, select/click this button.</p> <p> Click/selecting the '< Create Article' breadcrumb (top left of your screen) acts the same as canceling edits made to the page.</p> |
| Save  | <p>To save your edits to the Create Article page mentioned above, select/click this button. When clicked/selected, the Maintain Articles page appears.</p> <p> If you did not click Save after an edit or go to exit Edit Article or Alert, the system prompts a message as follows:</p> <div data-bbox="654 1419 1317 1682"> <p>Confirm Action</p> <p>Changes were made. Do you want to save changes before the quit?</p> <p>Discard SAVE</p> </div> |

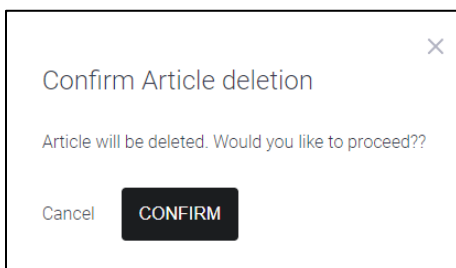
11.5.4 Delete an Article


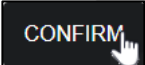
Step / Action

1. Delete a News or Alerts article(s), and select/click the ellipsis button (...) adjacent to the appropriate News or Alerts record/row. A drop-down menu appears when clicked/selected; select/Select/click **delete** (shown below).



2. The 'Confirmation Article deletion' message pad appears (shown below).



| BUTTON | DESCRIPTION |
|---|---|
| Cancel  | To cancel the deletion of a News or Alerts article, select/click this button. |
| Confirm  | To confirm the deletion of a News or Alerts article, select/click this button. When clicked/selected, the system removes the record/row from the Maintain Articles page. |

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