Assigning EIO/Ds and Service Coordinators

🔍 How To

Assign an EIO/D, Initial Service Coordinator (ISC), and Ongoing Service Coordinator (OSC) from within a Child record via EI-Hub's Case Management Module.

🔍 Audience

- Early Intervention Official Designee - EIO/D
- Initial Service Coordinator - ISC (Municipality Data Entry Clerk)
- Ongoing Service Coordinator – OSC (Provider/All Data Entry Clerk)
- Service Coordinators - SC (General)
- Various Provider Roles such as ProvDataEntryNY and ISC/OSC NY

PUBLIC CONSULTING GROUP

Solutions that Matter

Topics Covered

1. An Overview of Assigning Early Intervention Official Designees (EIO/D) and Service Coordinators
2. Assigning Early Intervention Official Designees (EIO/D)
3. Assigning Initial Service Coordinators (ISC) (Municipal & Agency)
4. Assigning Ongoing Service Coordinators (OSC) (Municipal & Agency)

Overview

Assigning EIO/Ds and Service Coordinators Job Aid

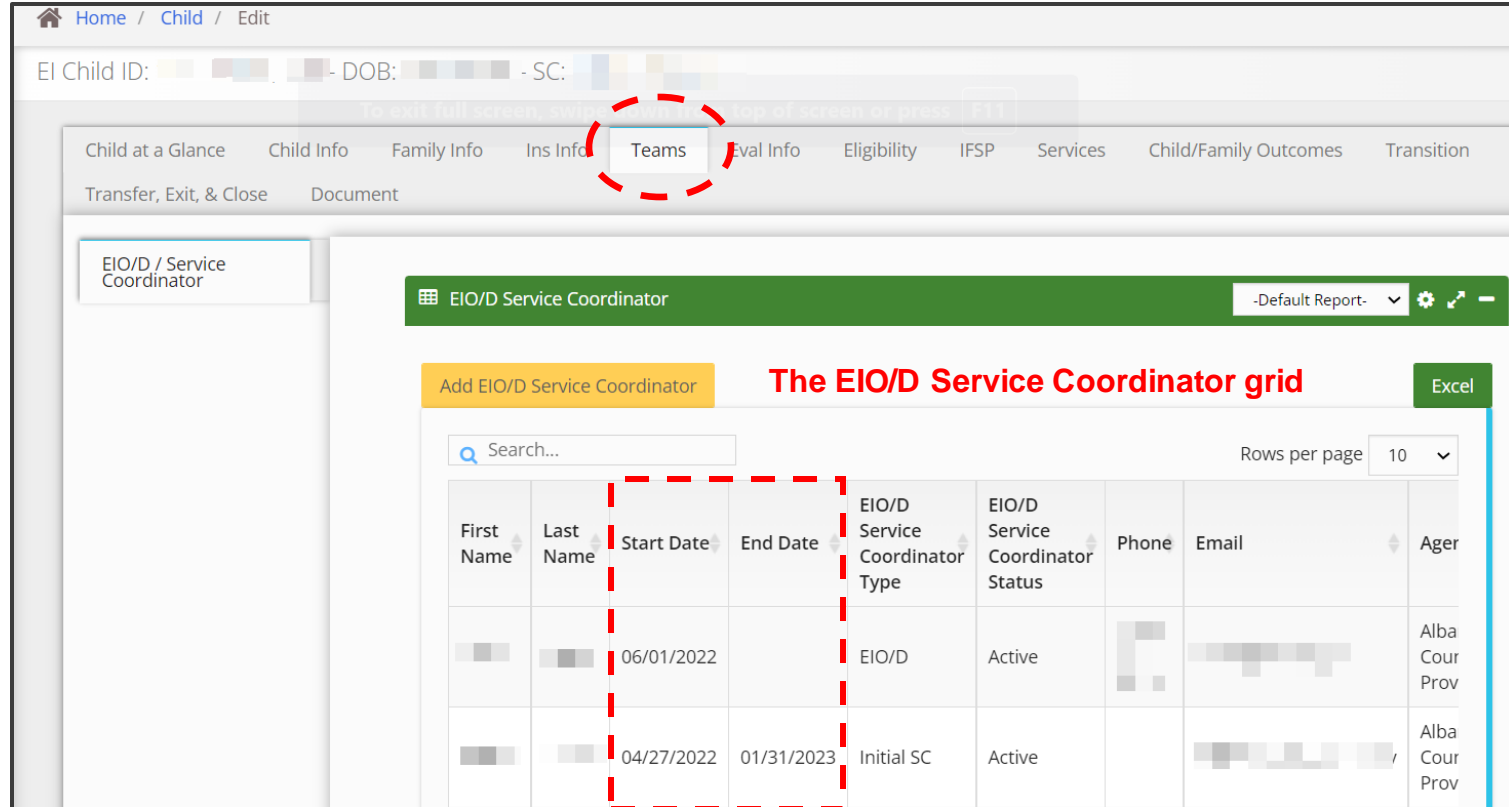# Assigning EIO/D's and Service Coordinators (SCs)
Job Aid

HOW TO

Describe the process for assigning EIO/Ds and Service Coordinators

IMPORTANT NOTES

- EIO/Ds, Initial, and Ongoing Service Coordinators are assigned through the **Teams** tab (located within a Child's record which we'll touch on the next page), this action authorizes EIO/D's and Service Coordinators to access the Child's record.
- The **EIO/D Service Coordinator** grid houses all the EIO/D's and Service Coordinators (ISC/OSC) assigned to a Child's record throughout the Child's stay in Early Intervention.

The EIO/D Service Coordinator grid

Assigning EIO/Ds

Assigning EIO/Ds and Service Coordinators Job Aid

Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

HOW TO

Assign an EIO/D

ABOUT ASSIGNMENTS

- Once Child data has been entered through the EIP Referral process, an EIO/D will need to be assigned.
- The EIO/D and Service Coordinator lookup uses the Child's County of Residence to locate EIO/Ds and Service Coordinators for the service area/county.
- EIO/D's can be assigned by the Municipal EI Manager and Municipal Data Entry Clerk. The steps below walkthrough how to assign an EIO/D.

Step/Action

1. From within the Child's record , Select the **Teams** tab from the Child's record.

2. Click the **Add EIO/D Service Coordinator** button from the **EIO/D Service Coordinator** grid.

3. **EIO/D/Coordinator Team** tab populates housing the **EIO/D or Coordinator Entry** panel/screen; this screen will not contain any information as this is a new assignment.

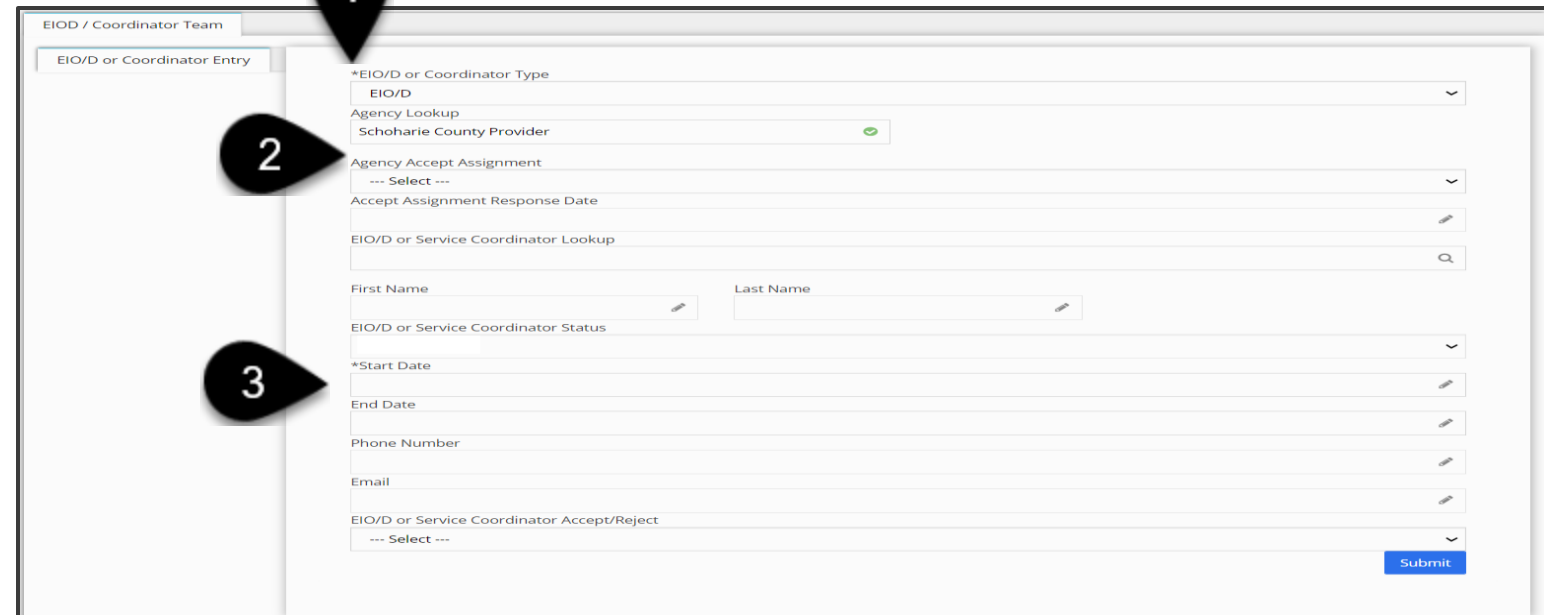# Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

HOW TO
Assign an EIO/D

NOTE
- Fields with asterisks (*) indicate required fields.
- For the purposes of this function, please keep in mind that a municipality is considered an "Agency".

Step/Action

1. Select **EIO/D** from the **EIO/D or Coordinator Type** drop-down.

2. Use the **Agency Lookup** type-ahead field to search for and select a municipality or county as agency.

3. Enter the EIO/D's **start date (Today's Date manually or use the calendar picker invoked by clicking the field) to select a date** and submit the assignment.

4. Click the submit button to submit the assignment.

5. The municipality/agency will now be able to accept the assignment from their 'Children assigned to Caseload' dashboard. The child needing the EIO/D assignment will have the box, '**Agency Assignment**.'

Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

HOW TO

Assign an EIO/D

NOTE

- Fields with asterisks (*) indicate required fields.
- The Initial EIO/D assignment start date **cannot** be backdated (set to an earlier date). The first EIO/D start date should be **no sooner** than referral date.
- Once the EIO/D accepts or rejects the assignment, which we'll cover in upcoming slides, the **Agency Accept Assignment** field populates with 'Accept' or 'Reject'. The **Accept Assignment Response** field populates with the date the EIO/D accepts the assignment.

Step/Action

1. The assignment is accepted from the **Agency Accept/Reject Assignment box**,

2. The municipality/agency will be able to edit from the **Teams Tab** to add the EIO/D assignment to an individual.

3. Use the **EIO/D Service Coordinator Lookup** field to search for and select the desired EIO/D. The EIO/D's information (i.e., First and Last Name, email) pre-populates in subsequent fields.

4. Click the **Submit** button to submit the assignment.

Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

HOW TO
Assign an EIO/D

Step/Action

1. Once submitted, the new EIO/D assignment populates in the **EIO/D Service Coordinator** grid/table.

2. The new EIO/D assignment routes to the selected EIO/D's **Children Assigned to Caseload** dashboard.

3. The EIO/D is responsible for reviewing their dashboards routinely to identify new Children assigned to them. The **'Accept/Reject'** button indicates the Child is newly assigned and needs to be accepted or rejected by the EIO/D. The EIO/D selects the **'Accept/Reject'** button to 'Accept' or 'Reject' a Child's case.

EIO/D Service Coordinator Grid

Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

HOW TO

Assign an EIO/D

Step/Action

1. Upon selecting the **'Accept/Reject'** button, the **Accept Assignment** dialogue box populates.

2. All fields within the **Accept Assignment** dialogue box pre-populates.

3. The EIO/D selects **'Accept'** or **'Reject'** from the **'Accept/Reject'** drop-down and clicks the **Submit** button.

1 Accept Assignment

EIO/D or Coordinator Entry

*Start Date
3/15/2023

*EIO/D or Service Coordinator Status
Active

First Name
Benjamin

Last Name
Babbage

EIO/D or Service Coordinator Accept/Reject

2

Submit   Cancel

Accept Assignment

EIO/D or Coordinator Entry

*Start Date
3/15/2023

*EIO/D or Service Coordinator Status
Active

First Name
Benjamin

Last Name
Babbage

EIO/D or Service Coordinator Accept/Reject

Accepted
Rejected

3

Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

HOW TO

Assign an EIO/D

Step/Action

1. If the EIO/D **accepts** the Child, the **'Accept/Reject'** button changes to an '**Edit**' button within the **Children Assigned to Caseload** dashboard; this indicates the Child's record can be edited and information added.

2. If the EIO/D **rejects** the assignment, the assignment routes back to the **Children Needing Service Coordinator** dashboard/dashboard alert filter for the Municipal Data Entry Staff to reassign another EIO/D to the Child's Case.

Children Assigned to Caseload

-Default Report-

Excel

Search...

Rows per page 10

Childs Last Name	Childs First Name	County Name	Child Status	Date Of Birth	Child Reference ID	Action
Bloom	Sheldon	Schoharie	Active	11/04/2021	119	Edit
Bott	Susanna	Schoharie	Active	06/06/2020	211	Edit
dsgsfdhfd	sdgdsg	Albany	Active	05/02/2021	1335	Accept/Reject
Gowler	Amy	Schoharie	Active	04/01/2021	118	Edit
Hoffmann	John	Albany	Active	01/01/2021	112	Edit

Children Needing Service Coordinator

-Default Report-

Report Filters

Dashboard Alert (Equal To)

EIOD Assignment is Neede

Search

Excel

Search...

Rows per page 10

Municipal/County	Child Reference ID	Childs Last Name	Childs First Name	Alert Name	Child's 3rd Birthday	EIOD Name	SC Agency Name	Service Coordinator	Action
	53	Aziz	Amna	EIOD Assignment is Needed	01/01/2023				Edit Child
	60	Brady	TOM	EIOD Assignment is Needed	03/29/2024				Edit Child

Assigning Initial Service Coordinators (Municipal and Agency)

Assigning EIO/Ds and Service Coordinators Job Aid

Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

HOW TO

Assign an **Initial Service Coordinator (ISC)**

ABOUT ASSIGNMENTS

- Once an EIO/D has been assigned, an Initial Service Coordinator can be assigned by the EIO/D or an Agency.

- Assignment dates should **not** overlap. Users are encouraged to end date assignments a day before new assignments begin. Users complete this action via the **Start Date/End Date** fields on the **EIO/D or Coordinator Entry panel/screen.**

- The **EIO/D or Coordinator Entry panel/screen** is covered in upcoming slides.

Step/Action

1. From within the Child's record, Select the **Teams** tab from the Child's record.

2. Click the **Add EIO/D Service Coordinator** button from the **EIO/D Service Coordinator** grid.

3. **EIO/D/Coordinator Team** tab populates housing the **EIO/D or Coordinator Entry** panel/screen; this screen will not contain any information as this is a new assignment.

Home / Child / Edit

EI Child ID: ___ , ___ - DOB: ___ - SC: ___

| Child at a Glance | Child Info | Family Info | Ins Info | **Teams** ① | Eval Info | Eligibility | IFSP | Services | Child/Family Outcomes | Transition |
| Transfer, Exit, & Close | Document |

EIO/D / Service Coordinator

▦ EIO/D Service Coordinator — -Default Report- ⚙ ⤢ ━

② **Add EIO/D Service Coordinator** — Excel

🔍 Search... — Rows per page 10

First Name	Last Name	Start Date	End Date	EIO/D Service Coordinator Type	EIO/D Service Coordinator Status	Phone	Email	Ager
▨	▨	06/01/2022		EIO/D	Active	▨	▨	Alba Cour Prov
▨	▨	04/27/2022	01/31/2023	Initial SC	Active		▨	Alba Cour Prov

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EIOD / Coordinator Team

EIO/D or Coordinator Entry ③

*EIO/D or Coordinator Type

--- Select ---

Agency Lookup

🔍

Agency Accept Assignment

--- Select ---

Accept Assignment Response Date

EIO/D or Service Coordinator Lookup
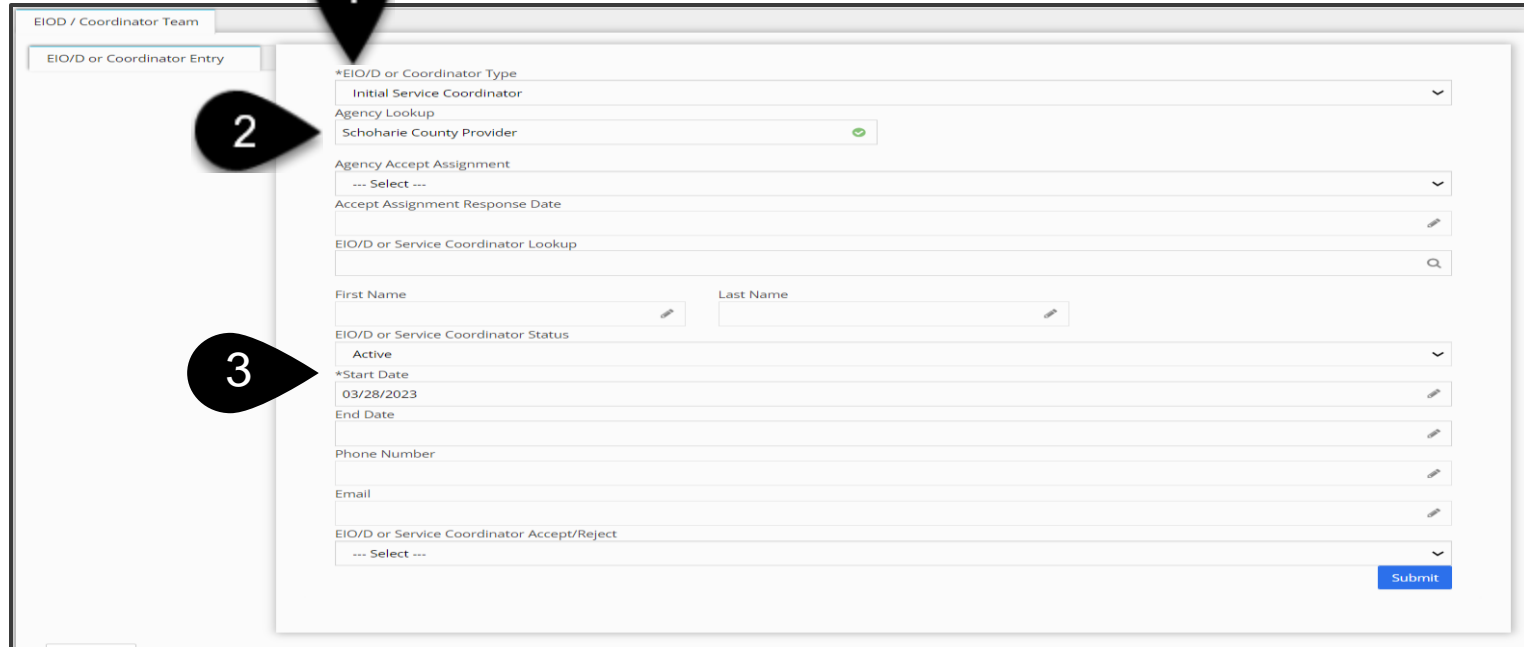
Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

HOW TO
Assign an **Initial Service Coordinator (ISC)**

NOTE
- Fields with asterisks (*) indicate required fields.
- The EIO/D and Service Coordinator lookup uses the Child's County of Residence to locate EIO/Ds and Service Coordinators for the service area/county.
- Please keep in mind that a municipality can also be considered an "Agency".
- If you are an **NYC Municipal user** or **assigning an Independent Agency** (Approved Independent Provider) to supply an ISC, the **EIO/D Service Coordinator Lookup** field is **not** a required field and can be left blank for the assigned Agency to complete later. Proceed to enter only the Agency name in the **Agency Lookup** field.
- **Counties outside of NYC** should enter an individual rendering Service Coordinator's name.

![EI-Hub NYS Early Intervention Solution logo]

Assigning EIO/Ds and Service Coordinators (SC)
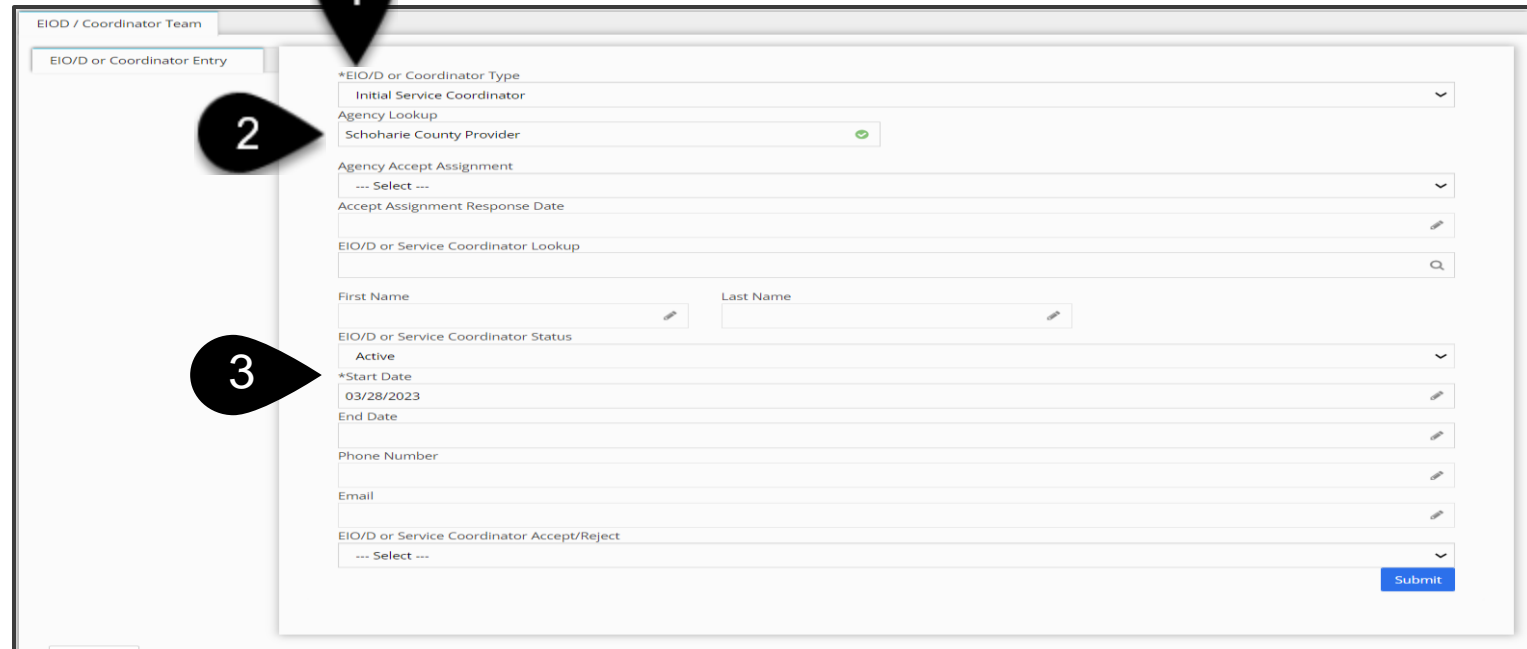## *Job Aid*

HOW TO
Assign an **Initial Service Coordinator (ISC)**

NOTE
- Fields with asterisks (*) indicate required fields..

Step/Action

1. Select **Initial Service Coordinator** from the **EIO/D or Coordinator Type** drop-down.

2. Use the **Agency Lookup** type-ahead field to search for and select a **municipality** or **agency (including approved independent/individual providers**.)

3. Enter the **start date** and submit.

4. The municipality/agency will now be able to accept the assignment from their 'Children assigned to Caseload' dashboard. The child needing the EIO/D assignment will have the box, '**Agency Assignment**.'

Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

HOW TO

Assign an **Initial Service Coordinator (ISC)**

NOTE

- Fields with asterisks (*) indicate required fields.
- The **Agency Accept Assignment** field populates with 'Accept' or 'Reject'. The **Accept Assignment Response Date** field populates with the date the assignment is accepted.

Step/Action

1. The assignment is accepted from the **Agency Accept/Reject Assignment box**,

2. The municipality/agency will be able to edit from the **Teams Tab** to add the ISC assignment to an individual.

3. Use the **EIO/D Service Coordinator Lookup** field to search for and select the desired ISC. The ISC's information (i.e., First and Last Name, email) pre-populates in subsequent fields reducing the amount of information requiring entry.

4. Click the **Submit** button to submit the assignment.

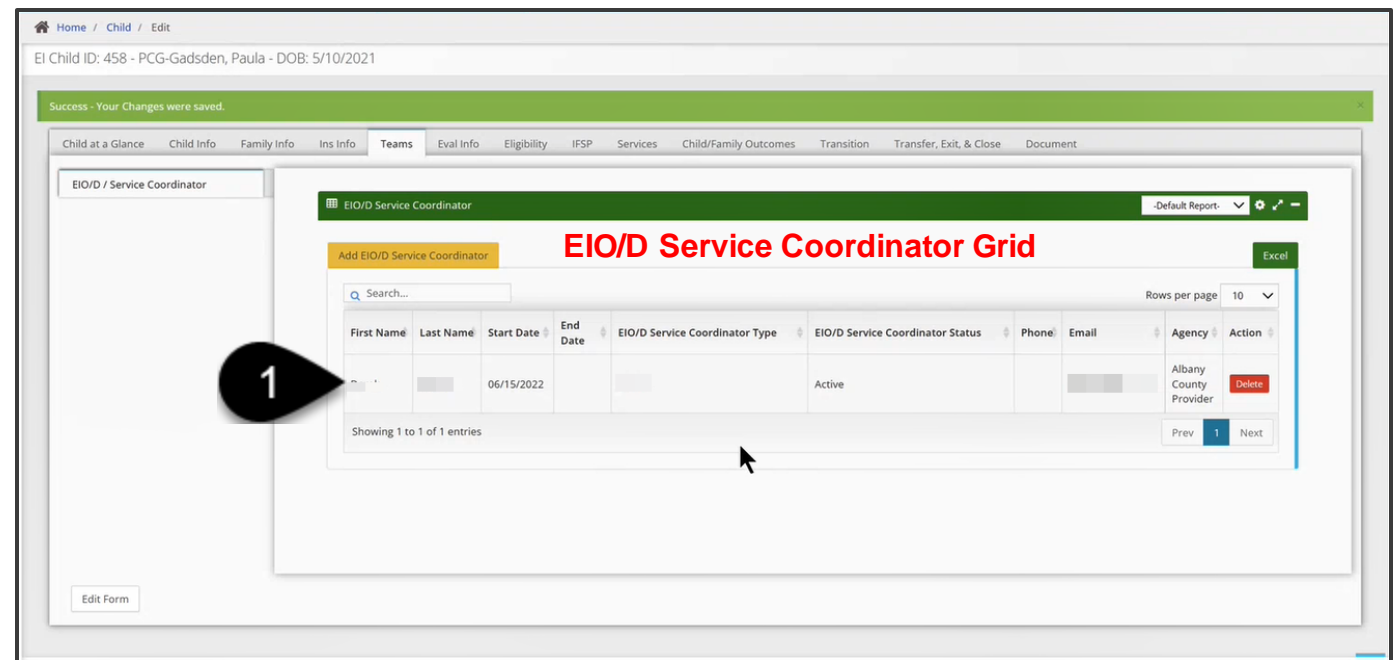# Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

HOW TO

Assign a **Municipal Initial Service Coordinator (ISC)**

NOTE

- Fields with asterisks (*) indicate required fields.

- EIO/Ds can accept individual ISC assignments on behalf of ISCs. This **does not** alert the ISC that they have a new child on their caseload. EIO/Ds and ISCs should coordinate if the EIO/D will be accepting cases on behalf of ISCs in their county.

Step/Action

1. Once submitted, the new Service Coordinator assignment populates in the **EIO/D Service Coordinator** grid.

2. If the EIO/D assigns a Municipal ISC, the County first accepts the assignment to provide ISC services to the child; the assignment then routes to the selected Municipal ISC's **Children Assigned to Caseload** dashboard.

3. Municipal ISCs are responsible for reviewing their dashboards routinely to identify new children assigned to them. The **'Accept Assignment'** button indicates the child is newly assigned and needs to be accepted or rejected by the ISC.

4. If the ISC **rejects** the assignment, the assignment routes back to the EIO/D's **Children Needing Service Coordinator** dashboard for the EIO/D to assign another ISC to the child's case.

Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

HOW TO
Assign an **Agency Initial Service Coordinator (ISC)**

Step/Action

1. EIO/Ds should review their **Children Needing Service Coordinator** Dashboard/Dashboard alert filter routinely in order to track pending/outstanding Service Coordination assignments.

2. The **Children Needing Service Coordinator** Dashboard contains many informational columns including the 'Agency' and 'Service Coordinator' columns. If an Agency **is** listed in the 'Agency' column, but the 'Service Coordinator' column remains blank, this indicates to the EIO/D that an Agency has been assigned to supply the Service Coordinator, has accepted the Child into their caseload, but has **not** appointed a Service Coordinator from their staff. If both fields are blank, this indicates that neither an Agency or Service Coordinator has been assigned, and action is required on the part of the EIO/D.

Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

HOW TO

Assign an **Agency Initial Service Coordinator (ISC)**

Step/Action

1. Upon the EIO/D assigning an Agency to appoint an ISC via the **Teams** tab (as noted in previous slide), the new Child assignment appears on the agency's **Children Assigned to Caseload** dashboard for the agency to 'Accept' or 'Reject' the child's case into their caseload. Agencies should review their **Children Assigned to Caseload** Dashboard routinely to track pending assignments.

2. The **'Accept Assignment'** button indicates the Child is newly assigned and needs to be accepted or rejected by the Agency.

Home / Child / Edit

EI Child ID: ___ - DOB: ___ - SC: ___

| Child at a Glance | Child Info | Family Info | Ins Info | Teams | Eval Info | Eligibility | IFSP | Services | Child/Family Outcomes | Transition |

Transfer, Exit, & Close   Document
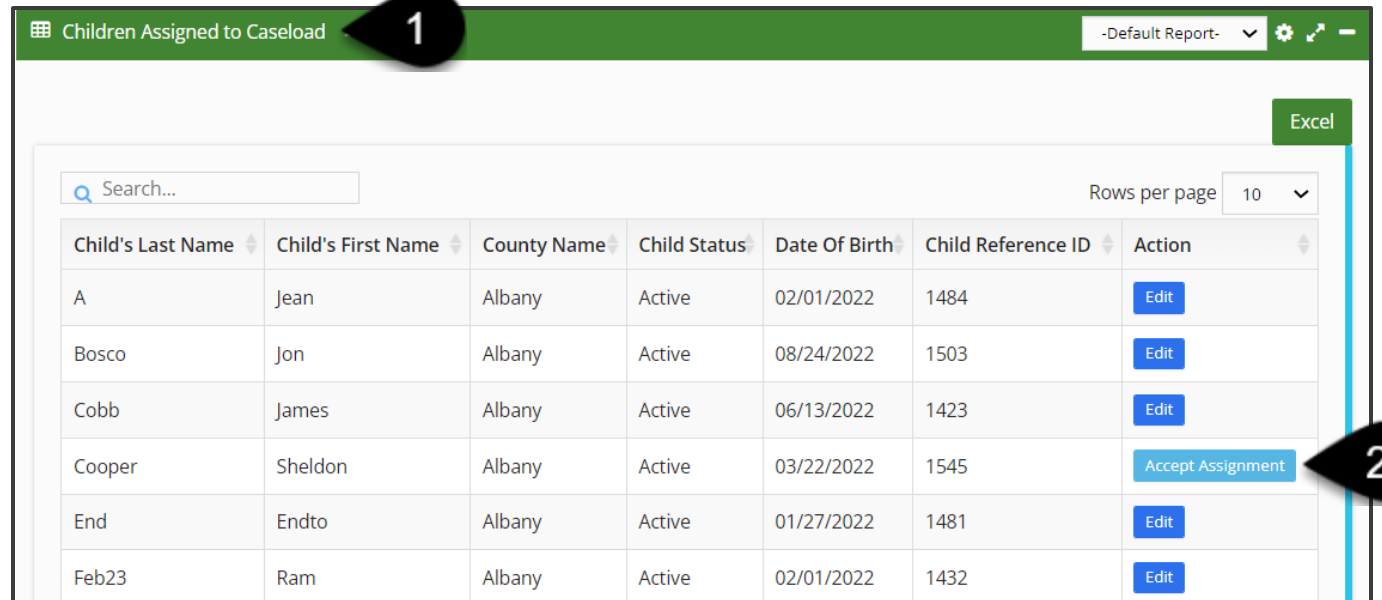
EIO/D / Service Coordinator

EIO/D Service Coordinator   -Default Report-

EIO/D Service Coordinator Grid

Add EIO/D Service Coordinator   Excel

Search...   Rows per page 10

First Name	Last Name	Start Date	End Date	EIO/D Service Coordinator Type	EIO/D Service Coordinator Status	Phone	Email	Ager
▓▓	▓▓	06/01/2022		EIO/D	Active	▓	▓▓	Alba Cour Prov
▓▓	▓▓	04/27/2022	01/31/2023	Initial SC	Active		▓▓	Alba Cour Prov

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Children Assigned to Caseload   **1**   -Default Report-

Excel

Search...   Rows per page 10

Child's Last Name	Child's First Name	County Name	Child Status	Date Of Birth	Child Reference ID	Action
A	Jean	Albany	Active	02/01/2022	1484	Edit
Bosco	Jon	Albany	Active	08/24/2022	1503	Edit
Cobb	James	Albany	Active	06/13/2022	1423	Edit
Cooper	Sheldon	Albany	Active	03/22/2022	1545	Accept Assignment **2**
End	Endto	Albany	Active	01/27/2022	1481	Edit
Feb23	Ram	Albany	Active	02/01/2022	1432	Edit

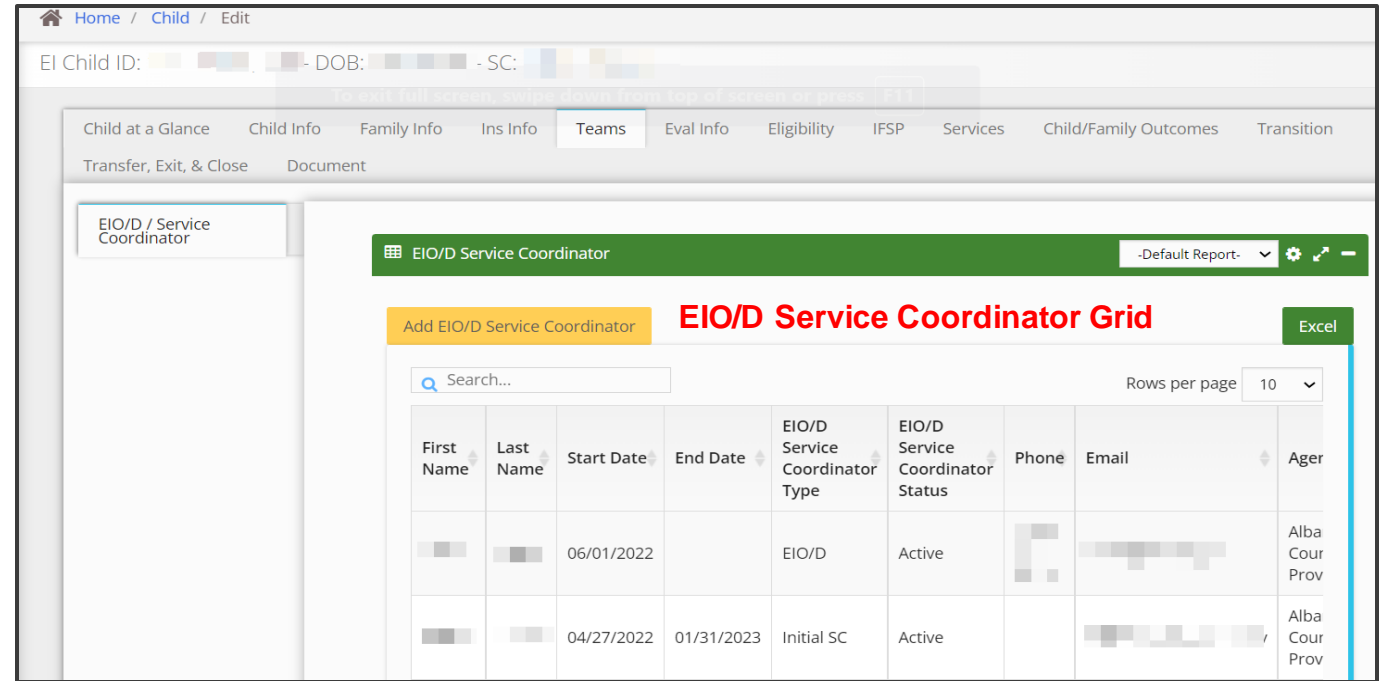# Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

HOW TO

Assign an **Agency Initial Service Coordinator (ISC)**

Step/Action

1. Upon the Agency selecting the **'Accept Assignment'** button, the **Accept Assignment** dialogue box populates.

2. All fields within the **Accept Assignment** dialogue box pre-populates.

3. The Agency selects **'Accepted'** or **'Rejected'** from the **'Accept/Reject'** drop-down and clicks the Submit button to confirm the 'Acceptance' or 'Rejection' of the Child's case.
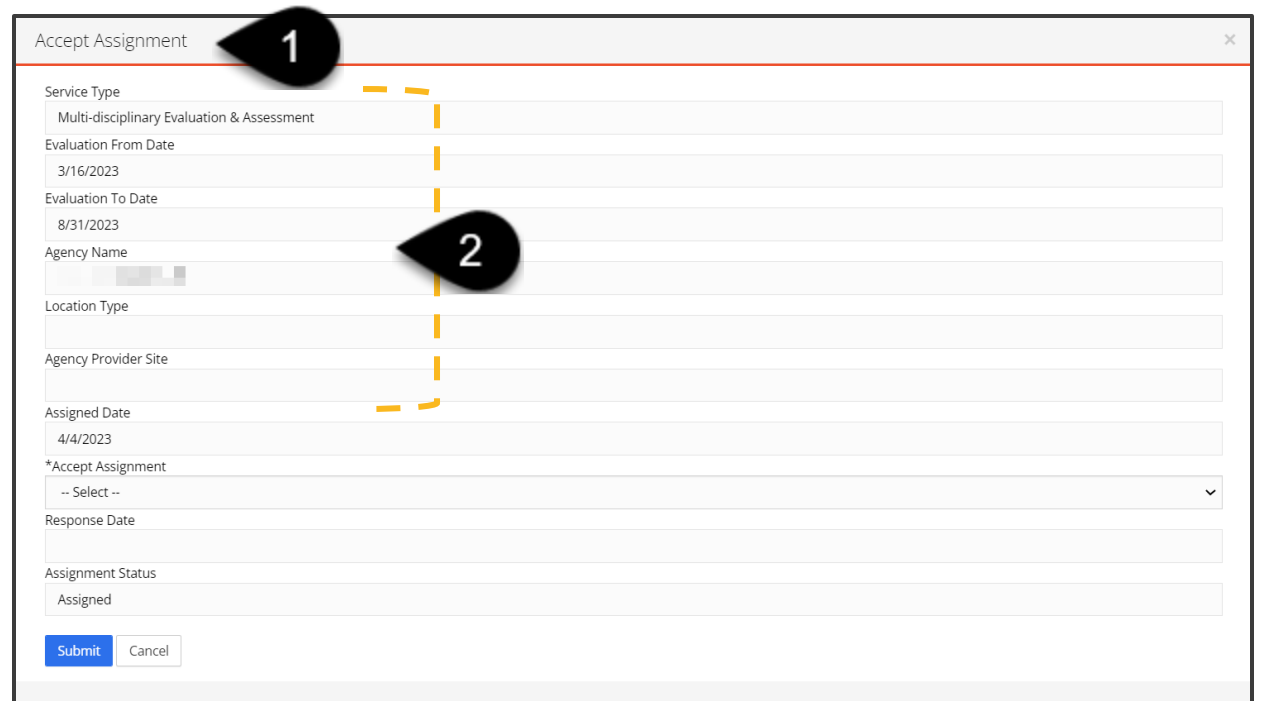
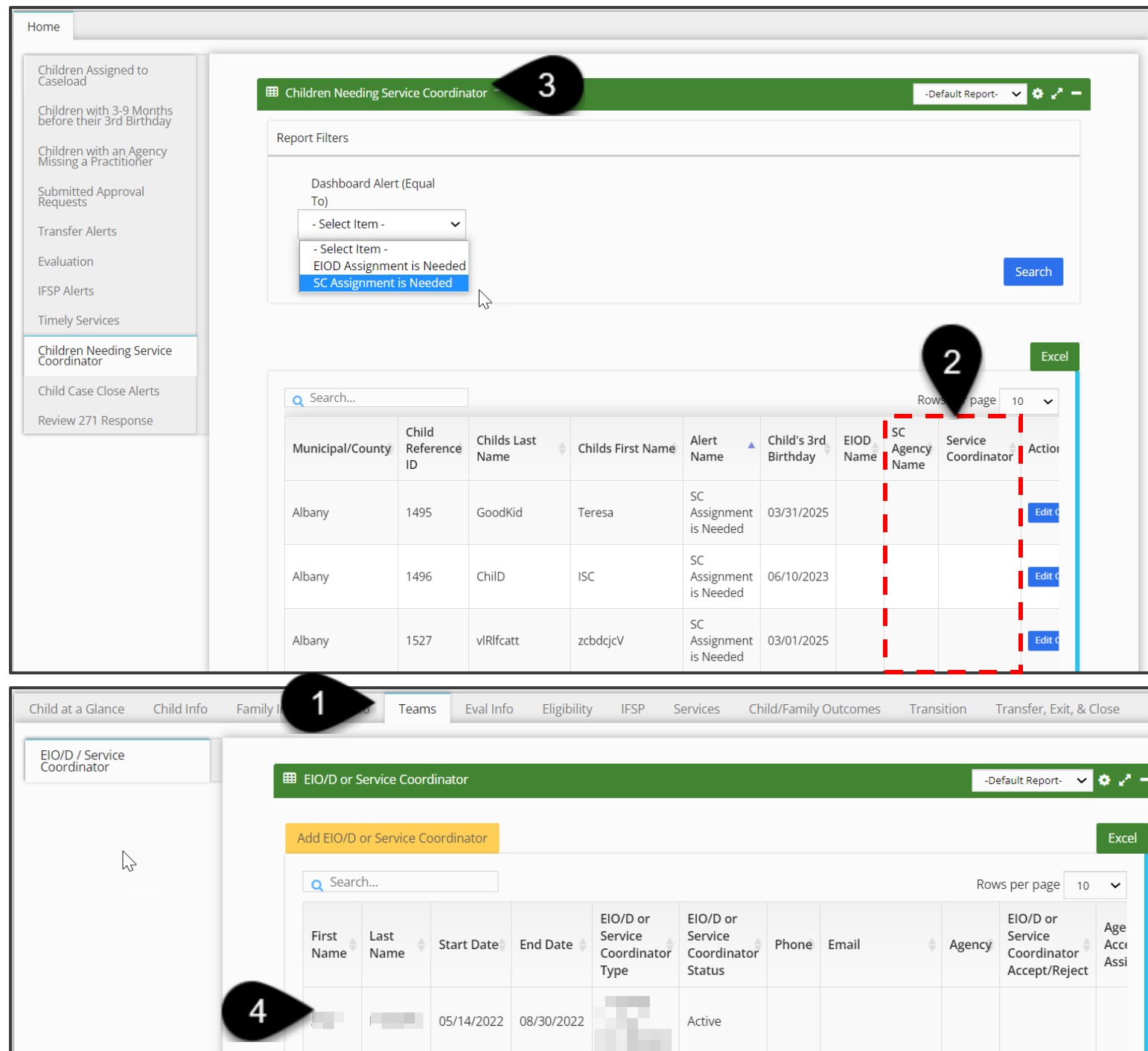# Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

🔍 HOW TO

Assign an **Agency Initial Service Coordinator (ISC)**

Step/Action

1. Upon the Agency accepting the assignment, the Agency now has access to the Child's record. At this time, the Agency assigns the ISC via the **Teams** tab. The assignment routes to the ISC's **Children Assigned to Caseload** Dashboard for acceptance/rejection.

2. If the Agency, does not immediately assign an ISC, that Child's record defaults to the **Children Needing a Service Coordinator** dashboard. Agencies should routinely visit their **Children Needing a Service Coordinator** dashboard to track outstanding ISC assignments.

3. **The Children Needing Service Coordinator** Dashboard contains many informational columns including the 'Agency' and 'Service Coordinator' columns. If the Agency's name is listed in the 'Agency' column, but the 'Service Coordinator' column remains blank, this indicates to the Agency that it has been assigned /accepted the SC assignment but has yet to assign a Service Coordinator from their staff.

4. Once the Agency assigns an ISC from their staff, the new Service Coordinator assignment populates in the EIO/D Service Coordinator grid.

Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

🔍 **HOW TO**

Assign an **Agency Initial Service Coordinator (ISC)**

Step/Action

1. Agency ISCs are responsible for reviewing their dashboards routinely to identify new Children assigned to them. The **'Accept Assignment'** button indicates the Child is newly assigned and needs to be 'Accepted' or 'Rejected' by the ISC.

2. If the ISC **accepts** the Child, the **'Accept/Reject'** button changes to an **'Edit'** button within the **Children Assigned to Caseload** dashboard, this indicates the Child's record can be edited and information added.

3. If the ISC **rejects** the assignment, the assignment routes back to the Agency's **Children Needing Service Coordinator** dashboard for the agency to reassign another ISC to the Child's case.

Child's Last Name	Child's First Name	County Name	Child Status	Date Of Birth	Child Reference ID	Action
A	Jean	Albany	Active	02/01/2022	1484	Edit
Bosco	Jon	Albany	Active	08/24/2022	1503	Edit
Cobb	James	Albany	Active	06/13/2022	1423	Edit
Cooper	Sheldon	Albany	Active	03/22/2022	1545	Accept Assignment
End	Endto	Albany	Active	01/27/2022	1481	Edit
Feb23	Ram	Albany	Active	02/01/2022	1432	Edit

Children Assigned to Caseload — -Default Report-

Assigning Ongoing Service Coordinators

Assigning EIO/Ds and Service Coordinators Job Aid

Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

🔍 HOW TO

Assign an **Ongoing Service Coordinator**

ℹ️ TRANSITIONING FROM ISC TO OSC

Ongoing Service Coordinators are assigned **after** the completion of an IFSP and are first identified in the Service Authorization for Ongoing Service Coordination. Please visit the Creating Service Authorizations Job Aid for more information.

There maybe instances where a requested Ongoing Service Coordinator is unavailable/identified.

In the instance, where the family's choice for an Ongoing Service Coordinator is **not** available, it is expected that the Initial Service Coordinator assumes the function of the Ongoing Service Coordinator **OR** another Ongoing Service Coordinator is selected until the family's choice becomes available.

The OSC assignment is created to reflect the above. Users can end-date and add new assignments to reflect any future change in Service Coordination.

For information on Service Coordination Assignments and their impact on Service Authorizations, please view the Creating Service Authorizations Job Aid.

Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

🔍 HOW TO

Assign a **Municipal Ongoing Service Coordinator (OSC)**

ℹ️ ABOUT ASSIGNMENT

- The steps below walkthrough how to assign an OSC.

Step/Action

1. From within the Child's record , Select the **Teams** tab from the Child's record.

2. Click the **Add EIO/D Service Coordinator** button from the **EIO/D Service Coordinator** grid.

3. **EIO/D/Coordinator Team** tab populates housing the **EIO/D or Coordinator Entry** panel/screen; this screen will not contain any information as this is a new assignment.

🏠 Home / Child / Edit

EI Child ID: ▮▮▮ , ▮▮ - DOB: ▮▮▮▮▮ - SC: ▮▮

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

①

EIO/D / Service Coordinator

⊞ EIO/D Service Coordinator -Default Report- ⚙ ⤢ −

② Add EIO/D Service Coordinator Excel

🔍 Search...   Rows per page 10 ∨

First Name	Last Name	Start Date	End Date	EIO/D Service Coordinator Type	EIO/D Service Coordinator Status	Phone	Email	Ager
▮▮	▮▮	06/01/2022		EIO/D	Active	▮	▮▮	Alba Cour Prov
▮▮	▮▮	04/27/2022	01/31/2023	Initial SC	Active		▮▮	Alba Cour Prov

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EIOD / Coordinator Team

EIO/D or Coordinator Entry **③**

*EIO/D or Coordinator Type

--- Select --- ∨

Agency Lookup

🔍

Agency Accept Assignment

--- Select --- ∨

Accept Assignment Response Date

✎

EIO/D or Service Coordinator Lookup

Assigning EIO/Ds and Service Coordinators (SC)
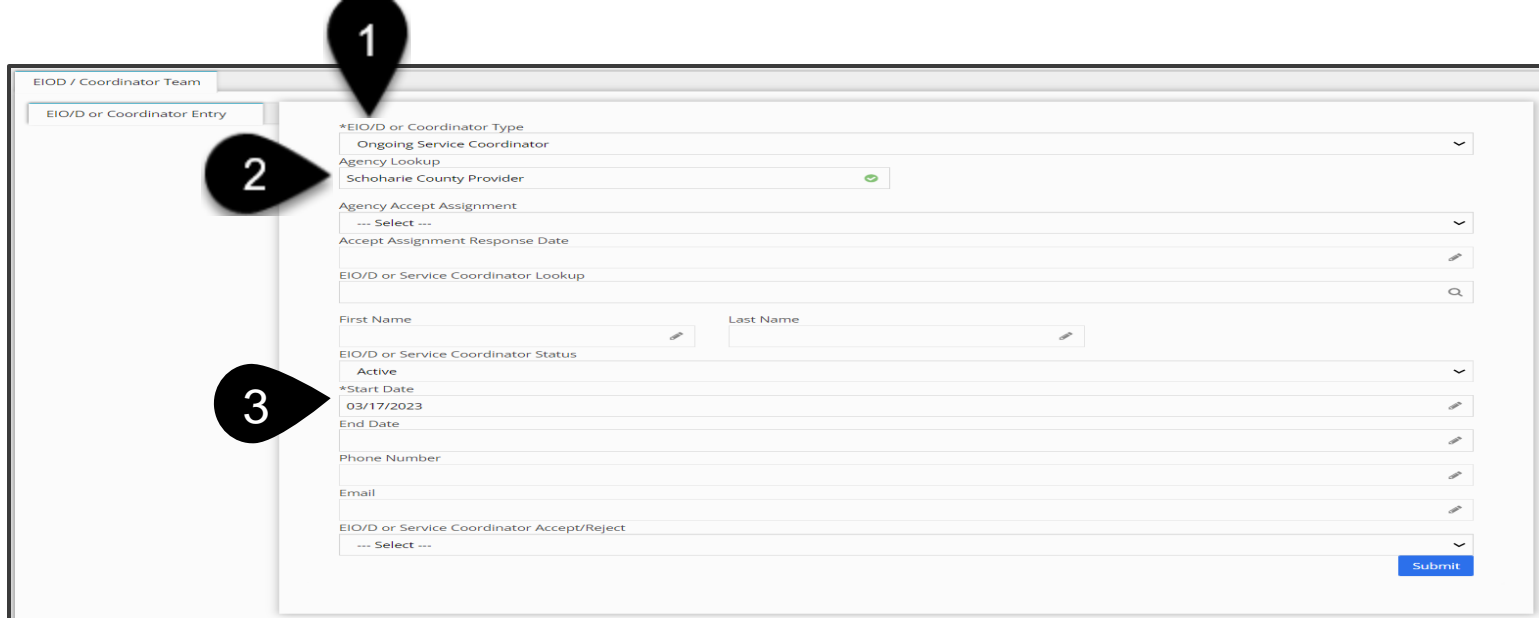## *Job Aid*

HOW TO

Assign a **Municipal Ongoing Service Coordinator (OSC)**

NOTE

- Fields with asterisks (*) indicate required fields.

- For the purposes of this function, please keep in mind that a municipality is considered an "Agency".

- If you are an assigning OSC, you may not know who the OSC is at this point, therefore, the Service Coordinator Lookup field maybe left blank for the assigned Agency to enter later

Step/Action

1. Select OSC from the **EIO/D or Coordinator Type** drop-down.

2. Use the **Agency Lookup** type-ahead field to search for and select a municipality/agency.

3. Enter the **start date** and submit. The system auto end dates for ISC based on start date for OSC. The ISC will no longer have child assigned to their caseload based on the begin date for OSC unless the ISC and OSC will be the same person.

4. The municipality/agency will now be able to accept the assignment from their 'Children assigned to Caseload' dashboard. The child needing the OSC assignment will have the box, '**Agency Assignment**.'

EIOD / Coordinator Team

EIO/D or Coordinator Entry

*EIO/D or Coordinator Type
Ongoing Service Coordinator

Agency Lookup
Schoharie County Provider ✓

Agency Accept Assignment
--- Select ---

Accept Assignment Response Date

EIO/D or Service Coordinator Lookup

First Name | **Last Name**

EIO/D or Service Coordinator Status
Active

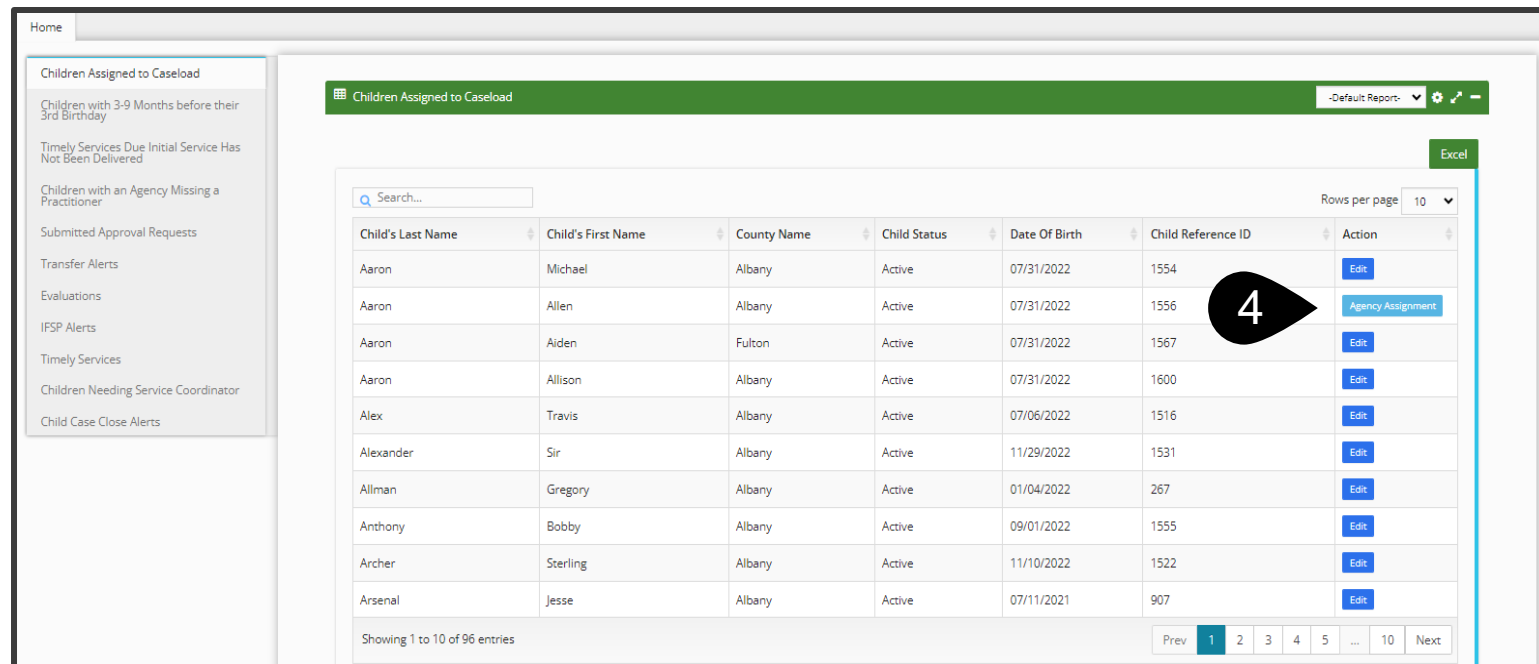***Start Date**
03/17/2023

End Date

Phone Number

Email

EIO/D or Service Coordinator Accept/Reject
--- Select ---

Submit

Home

Children Assigned to Caseload
Children with 3-9 Months before their 3rd Birthday
Timely Services Due Initial Service Has Not Been Delivered
Children with an Agency Missing a Practitioner
Submitted Approval Requests
Transfer Alerts
Evaluations
IFSP Alerts
Timely Services
Children Needing Service Coordinator
Child Case Close Alerts

Children Assigned to Caseload -Default Report- Excel

Search... Rows per page 10

Child's Last Name	Child's First Name	County Name	Child Status	Date Of Birth	Child Reference ID	Action
Aaron	Michael	Albany	Active	07/31/2022	1554	Edit
Aaron	Allen	Albany	Active	07/31/2022	1556	Agency Assignment
Aaron	Aiden	Fulton	Active	07/31/2022	1567	Edit
Aaron	Allison	Albany	Active	07/31/2022	1600	Edit
Alex	Travis	Albany	Active	07/06/2022	1516	Edit
Alexander	Sir	Albany	Active	11/29/2022	1531	Edit
Allman	Gregory	Albany	Active	01/04/2022	267	Edit
Anthony	Bobby	Albany	Active	09/01/2022	1555	Edit
Archer	Sterling	Albany	Active	11/10/2022	1522	Edit
Arsenal	Jesse	Albany	Active	07/11/2021	907	Edit

Showing 1 to 10 of 96 entries   Prev 1 2 3 4 5 ... 10 Next

Assigning EIO/Ds and Service Coordinators (SC)
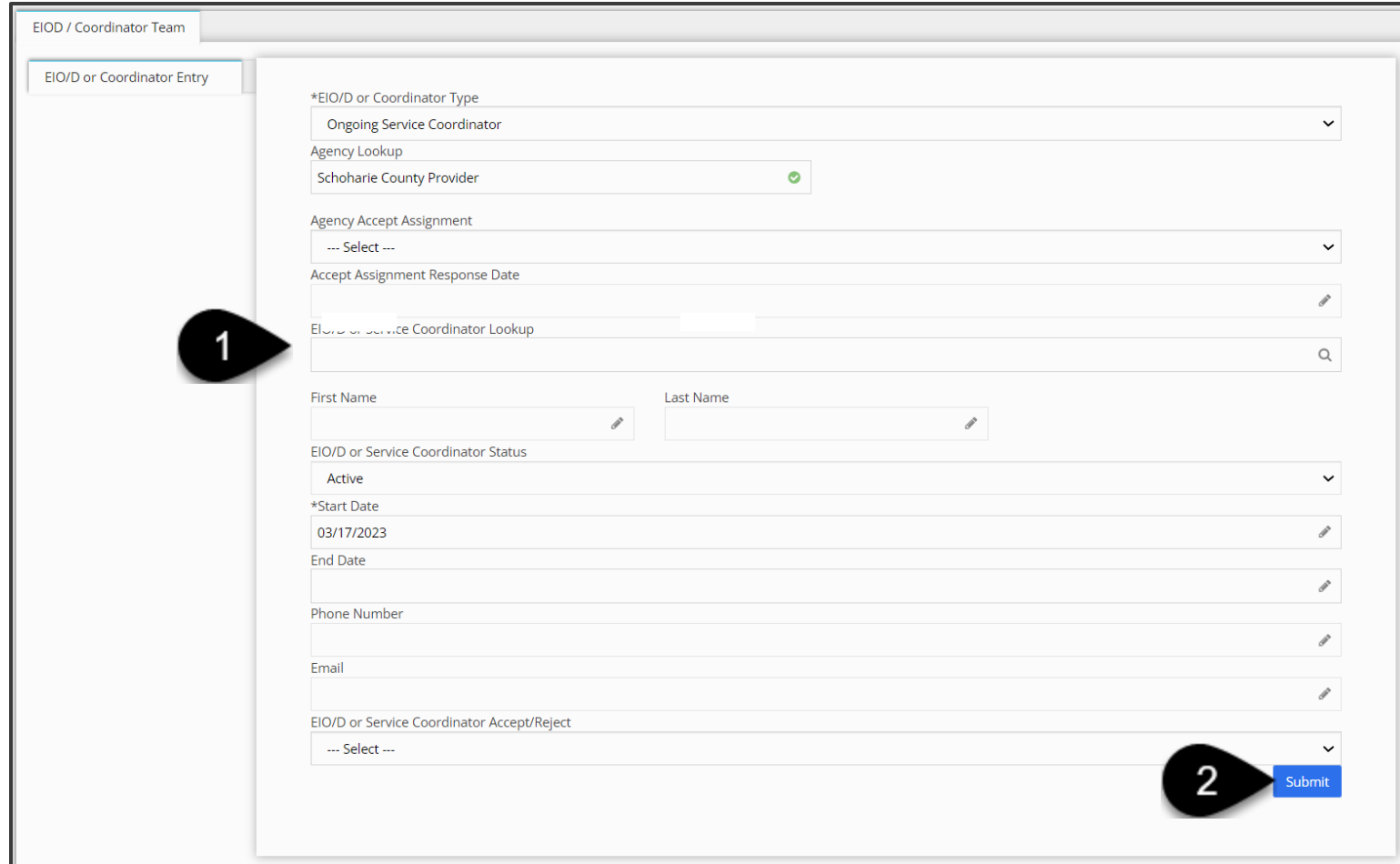*Job Aid*

HOW TO

Assign a **Municipal Ongoing Service Coordinator (OSC)**

NOTE

- Fields with asterisks (*) indicate required fields.

Step/Action

1. Use the EIO/D Service Coordinator Lookup field to search for and select the desired OSC. The OSC's information (i.e.., First and Last Name, phone number) pre-populates in subsequent fields.

2. Click the submit button.
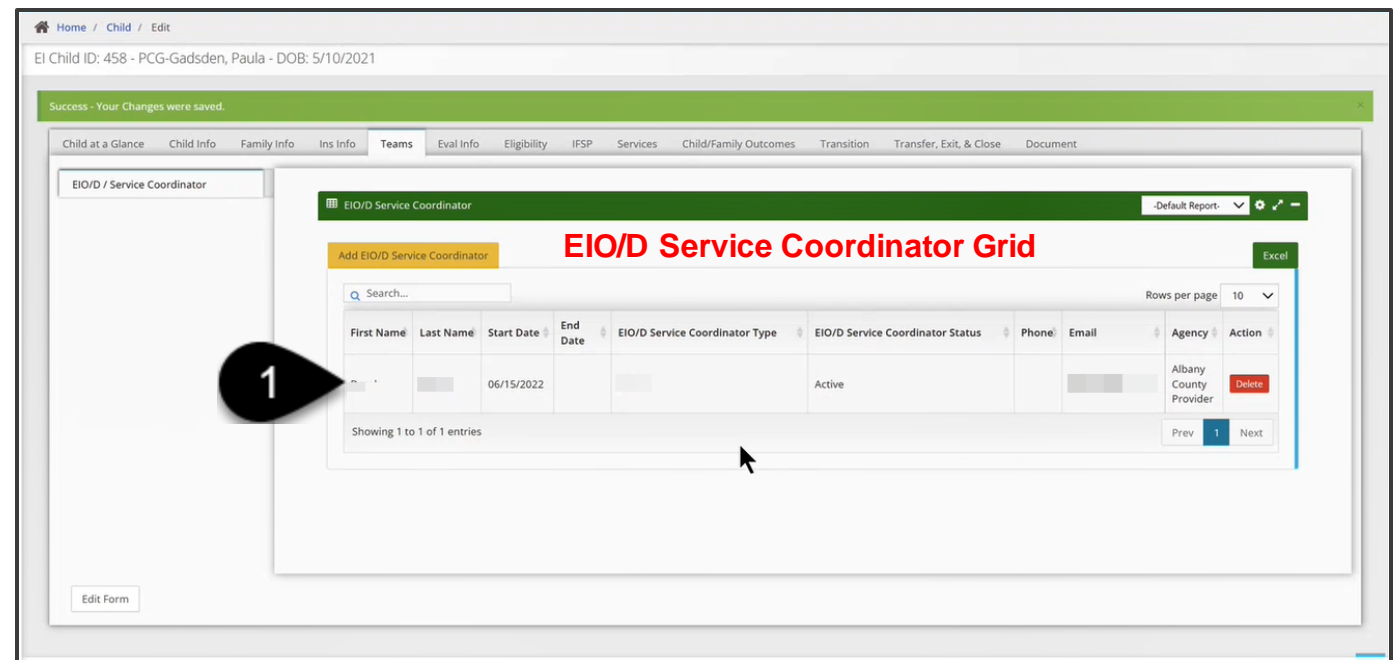
Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

HOW TO

Assign a **Municipal Ongoing Service Coordinator (OSC)**

Step/Action

1. Once the OSC assignment is submitted, the assignment populates on the EIO/D Service Coordinator grid.

2. The assignment routes to the selected Municipal OSC's **Children Assigned to Caseload** dashboard.

3. The Municipal OSC is responsible for reviewing their dashboards routinely to identify new Children assigned to them. The **'Accept/Reject'** button indicates the Child is newly assigned and needs to be accepted or rejected by the OSC. The OSC selects the **'Accept/Reject'** button to 'Accept' or 'Reject' a Child's case.

EIO/D Service Coordinator Grid

Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

🔍 HOW TO

Assign an **Agency Ongoing Service Coordinator (OSC)**

Step/Action

1. If an ISC from an **Approved Agency** is appointing an OSC, as mentioned in previous slides, Ongoing Service Coordinators are assigned **after** the completion of an IFSP and are first identified in the Service Authorization for Ongoing Service Coordination. Please visit the Creating Service Authorizations Job Aid for more information.

Service Info

- Service Information
- Service Delivery
- Service Details
- Company Assignment
- Service Location
- Alternate Service Location
- Therapist Assignment
- Assistive Technology
- Assistive Technology Device
- Transportation Services
- Respite Services
- Waiver
- Service Delay Reason

*Pay Source
Albany

1 *Program
Service Coordination - Ongoing

*Service Type
Service Coordination – Ongoing

*Enrollment Status
Inactive

☑ Waiver Review Needed
Waiver Type
Waiver Type 1: No more than 3 Basic Home and Community Based Visits per Day, Waiver Type 5: No more than 3 Basic and Extended Home and Community Based Visits per Day

Authorization #

First Date Service Delivered

EIO/D Section
EIO/D Approval

EIO/D Review Date

Submit

Assigning EIO/Ds and Service Coordinators (SC)
Job Aid
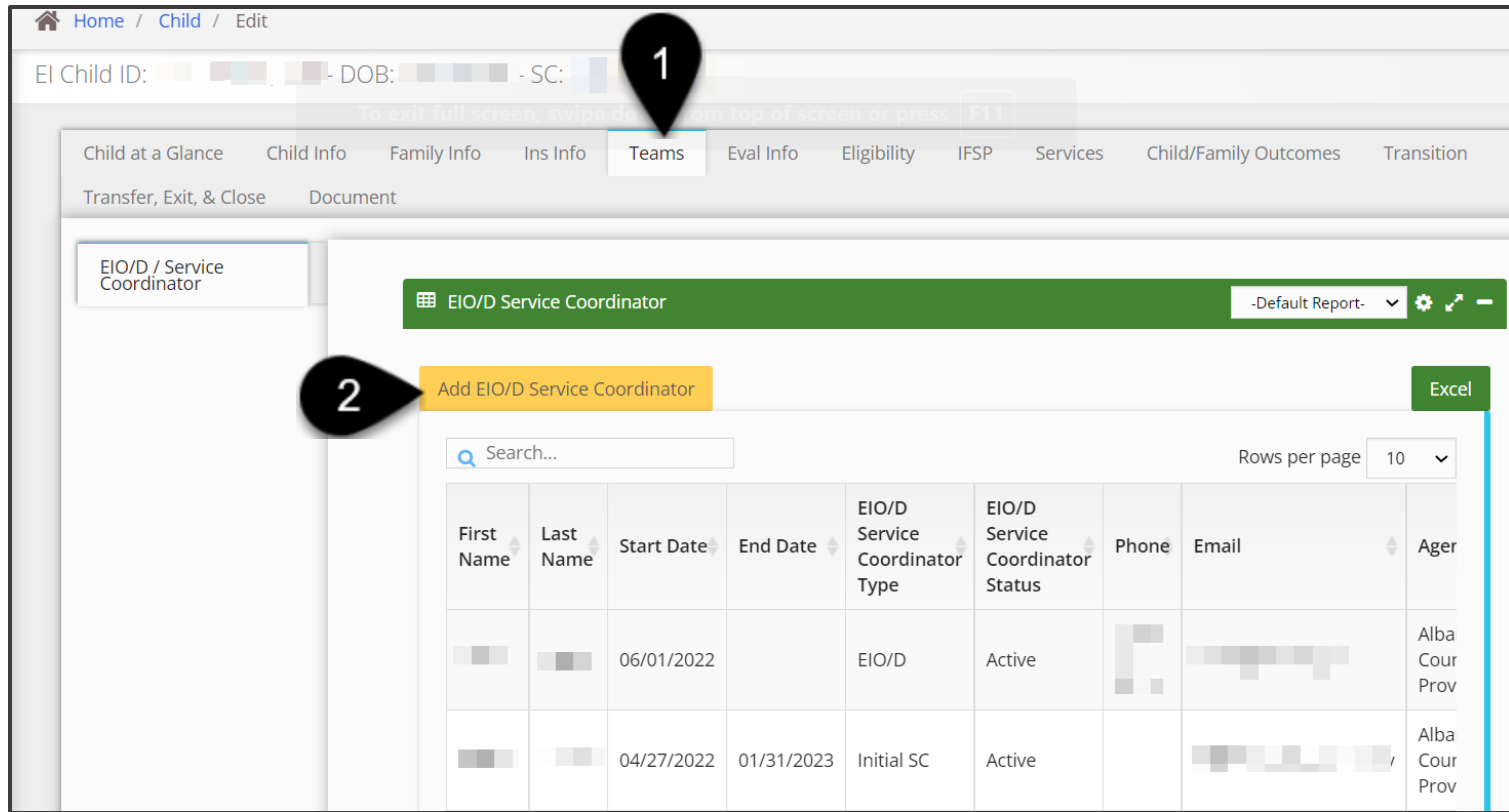
🔍 HOW TO

Assign an **Agency Ongoing Service Coordinator (OSC)**

ℹ️ ABOUT ASSIGNMENT

- The steps below walkthrough how to assign an OSC.

Step/Action

1. From within the Child's record , Select the **Teams** tab from the Child's record.

2. Click the **Add EIO/D Service Coordinator** button from the **EIO/D Service Coordinator** grid.

3. The **EIO/D or Coordinator Entry** panel populates.

4. **EIO/D/Coordinator Team** tab populates housing the **EIO/D or Coordinator Entry** panel/screen; this screen will not contain any information as this is a new assignment.

Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

HOW TO

Assign an **Agency Ongoing Service Coordinator (OSC)**

NOTE

- Fields with asterisks (*) indicate required fields.

- For the purposes of this function, please keep in mind that a municipality is considered an "Agency".

- If you are an assigning an OSC, you may not know who the OSC is at this point, therefore, the Service Coordinator Lookup field maybe left blank for the assigned Agency to enter the OSC information later

Step/Action

1. Select OSC from the **EIO/D or Coordinator Type** drop-down.

2. Use the **Agency Lookup** type-ahead field to search for and select a municipality.

3. Enter the start date and submit.

4. The municipality/agency will now be able to accept the assignment from their 'Children assigned to Caseload' dashboard. The child needing the OSC assignment will have the box, '**Agency Assignment**.'

Assigning EIO/Ds and Service Coordinators (SC)
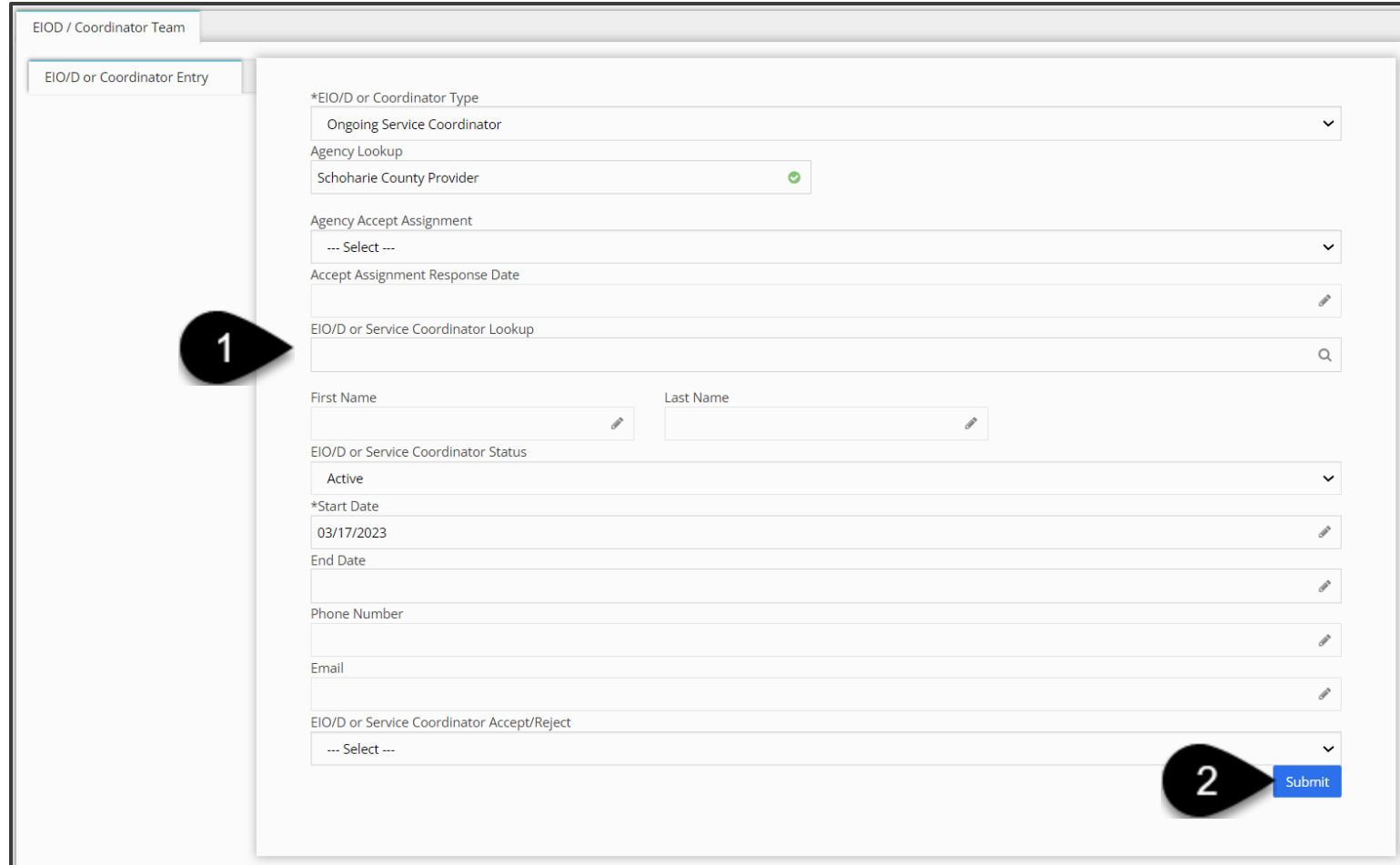## *Job Aid*

HOW TO
Assign an **Agency Ongoing Service Coordinator (OSC)**

NOTE
- Fields with asterisks (*) indicate required fields.
- OSC start dates should align to the start date identified in the Service Authorization for OSC Services.

Step/Action

1. Use the EIO/D Service Coordinator Lookup field to search for and select the desired OSC. The OSC's information (i.e.., First and Last Name, phone number) pre-populates in subsequent fields.

2. Click the submit button.

Assigning EIO/Ds and Service Coordinators (SC)
Job Aid

HOW TO

Assign an **Agency Ongoing Service Coordinator (OSC)**

Step/Action

1. Once the OSC assignment is submitted, the assignment populates on the **EIO/D Service Coordinator** grid.

2. The assignment routes to the selected Agency OSC's **Children Assigned to Caseload** dashboard.

3. The Agency OSC is responsible for reviewing their dashboards routinely to identify new Children assigned to them. The **'Accept/Reject'** button indicates the Child is newly assigned and needs to be accepted or rejected by the OSC. The OSC selects the **'Accept/Reject'** button to 'Accept' or 'Reject' a Child's case.

Thank you!