Post Go-Live
Transition Resource List

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v.0.1.0	9.13.2024	PCG/ BEI	First release

PCG Call Center Contact Information

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EI-Hub Post Go-Live Transition Resource List

	General Items to do	✓
1	Check with Role Administrators to ensure they are updating user account access accordingly: • Adding additional user roles (as needed) • Granting access to the Billing module (formerly EI Billing) • Granting access to the Service Logging module (as needed) **NOTE**: If you have multiple roles within the Early Intervention Program (EIP), remember that you will be assigned only one (1) role at the system launch. Your Role Administrator can assign you additional user roles based on your specific responsibilities. This includes additional user roles and access to the Service Logging and/or Billing modules. It's important to note, a user's relationship to the child will transition. Meaning once you are assigned the appropriate user roles, you'll gain access to manage the child's record. **Resources**: Role Administrator Quick Start Guide, User Role Configuration Infographic, User Role Crosswalk, Add a User Role Micro-eLearning module, EI-Hub User Management Admin User Guide	☐
2	**For municipalities only**, please note that those counties who have staff that hold the role of both EIO/D and SC (In NYEIS: MUNI EIO/D-SC user role) will transfer over with the EIO/D NY user role only. The county's Role Administrator will need to add the ISC/OSC NY user role for these staff to gain access to children assigned under their Service Coordinator role. **Resources**: Role Administrator Quick Start Guide, User Role Configuration Infographic, Add a User Role Micro-eLearning module, User Role Crosswalk, EI-Hub User Management Admin User Guide	☐
3	Check with users (direct employees or other staff that require access to the system) to see if they were able to log into the EI-Hub successfully. • If users are unable to log in, ensure they have an active Health Commerce System (HCS) account. **Resources**: Health Commerce System Instructions, General User Quick Start Guide	☐
4	Check to see that users have a Learning Management System (LMS) account. • The LMS <u>will not</u> be behind the HCS and a separate login is needed for this application. **Resources**: LMS Sign-up Instructions	☐

	Caseload Verification	✓▪
5	be added by the municipality. It may take time for municipalities to enter the backlog of new children and corresponding assignments into the system at launch. During this period, maintain communications with: • Billing providers (Agencies and Independent providers) go to Service Coordinators • Service Coordinators go to EIO/D • EIO/Ds go to EIO/EIM Once entered, new assignment requests will display for EIO/D NY, ISC/OSC NY, InProviderNY, and UniversalProvNY as 'Accept Assignment' on the **Children Assigned to Caseload** dashboard. Rendering providers working for an agency will not accept/reject assignments from their caseload dashboard. Child will appear on a rendering provider's caseload dashboard once their agency has accepted the assignment and assigned them as the rendering therapist. **Resources**: Case Management User Guide: Dashboards Unit, Assigning EIO/D and Service Coordinators job aid, Creating Service Authorizations - ISC, Workflow Resource Guide	☐
6	**For municipalities only**, make sure staff that manage At-Risk children (MuniAtRiskMgtNY user role) are aware that the Children Assigned to Caseload dashboard includes active children in both At-Risk and EIP tracks. To view only At-Risk children, users can utilize the "Child Details" report. This report will generate a list of all children within your county and users can export this report where it can be sorted by At-Risk or EIP. **Resources**: Service Reports job aid, Data User Guide	☐

	Child Record	✓▪
7	(Not required) Upload attachments to the corresponding tab(s) within the child record if needed to support continuity of care. **Resources**: Downloading Attachments in NYEIS (page 77), Record Retention Transition Update article	☐
8	As you open a child's record with migrated data, ensure a family member is listed as the primary contact. This information can be found in the Family tab within the 'Family Information' grid and the following user roles can update this information: - MuniDataEntryNY - ISC/OSC NY - EIO/D NY - MuniProgAllNY - ProvDataEntryNY This information is used in other areas of the system and users can receive an error message if a primary contact is not designated. **Resources**: Family member/Family Base job aid, Workflow Resource Guide	☐

	Therapist Record	✓▪
9	Verify that the appropriate catchment areas are listed for each Therapist (EIO/D, SC, and Rendering provider – independent, contractor, or employee) using the 'Therapist Company Detail' report. If not, update the Therapist's record accordingly. This action can be done by an agency (User roles: UniversalProvAllNY and/or ProvDataEntryNY) or independent provider (User role: InProviderNY). **Resources**: Adding Therapist Information job aid	☐
10	Verify information in the therapist's record (EIO/D, SC, and Rendering provider – independent contractor or employee) is accurate: • Start date • Employment type • Profession • License/certification information • National Provider Identifier (NPI) number • Contact information Note: If the contact information is incorrect in the therapist record, this will reflect in the printed IFSP. If not, update the Therapist's record accordingly. This action can be done by an agency (User roles: UniversalProvAllNY and/or ProvDataEntryNY) or independent provider (User role: InProviderNY). **Resources**: Adding Therapist Information job aid	☐
	Referral	✓▪
11	Make sure users (direct employees or other staff that require access to the system) are aware of the procedure for making all referrals through the Municipality. **Resources**: Referral job aid, Referral Transition Update article, Workflow Resource Guide	☐
12	Enter EIP referrals received during system downtime into the EI-Hub. **Resources**: Referral job aid, Workflow Resource Guide	☐
13	Enter child At-Risk referrals received during system downtime into the EI-Hub. **Resources**: Referral job aid, At-Risk Referral video, Workflow Resource Guide	☐
14	Enter EIO/D and Initial Service Coordinator assignments made during system downtime in the Teams tab. EIO/Ds and ISCs must be added to the Teams tab to gain access to the child's information in the Hub. **Note**: Assignments in the Teams tab cannot be backdated as this is the date that the EIO/D or SC is granted access to the child's record; however, Service Authorizations for initial service coordination can be backdated to allow for billing. **Resource**: Assigning EIO/D and Service Coordinators job aid, Creating Service Authorizations - ISC, Workflow Resource Guide	☐

	Supplemental & Multidisciplinary (MDE) Evaluation	✓▪
15	Enter service authorizations (SA) for evaluations received during system downtime. After the SA is entered, assign the evaluating agency. Once this action has been completed by the municipality, the child will then appear on the provider's Children Assigned to Caseload dashboard. **Resources**: Evaluations job aid, Workflow Resource Guide	☐
16	Enter evaluation results of evaluations completed during or after the system downtime. This includes results that providers didn't enter prior to system downtime. **Resources**: Evaluations job aid, Workflow Resource Guide	☐
17	MDEs/Supplemental Evaluations that do not have a service authorization in NYEIS will migrate over as 'default evaluation program' under the program. **Action for EIO/D / SC**: Check Evaluations dashboard using the "Non-IFSP Enrollment Review Needed" dashboard alert type (Note: this dashboard alert type also includes notifications for ISC SAs) or Evaluation Detail report to identify evaluations in the 'default evaluation program' Program field. Update the Program field from 'default evaluation program' to the correct program based on the type of evaluation conducted. EIO/D or SC will also need to add the evaluating agency assignment and EIO/D approves the MDE. Once the evaluating agency accepts the assignment, the Service Authorization will generate for the MDE. **Note**: You may need to reference NYEIS (read-only) to see if there was an existing evaluating agency assignment. **Resources**: Evaluations job aid, Workflow Resource Guide	☐
18	No Action Required: Be aware that diagnosis codes originating from Supplemental Evaluations migrated from NYEIS, will show the 'Assessment Date' in the 'Diagnosis Date' column on the 'Medical Diagnostics Codes Summary' panel in the EI-Hub. This is a read-only panel.	

	Individualized Family Service Plans	✓▪
19	Assess children with an IFSP end dating within the next few weeks and determine if an extension is needed. **Resources**: IFSP job aid, IFSP eLearning module, Workflow Resource Guide	☐
20	Enter information, including creating any service authorizations, for any IFSP meetings held for children during system downtime. Once this action has been completed by the municipality and approved by the EIO/D, the child will then appear on the provider's Children Assigned to Caseload dashboard. When the provider accepts the assignment, the SAs will become active. **Resources**: Entering Service Authorizations – General Services job aid, IFSP job aid, IFSP eLearning module, Service Authorizations Micro-eLearning, Workflow Resource Guide	☐

21	Once known, add service providers to any inactive service authorizations (SAs approved in NYEIS without an agency and/or rendering provider). Adding a service provider to an approved IFSP does not require an amendment. To update the SA, the EIO/D will unlock the IFSP to add the service provider in the "Company Assignment" panel within the SA. The SA number will remain the same. **Resources**: Adding an Agency to an Approved IFSP Micro-eLearning, Entering Service Authorizations – General Services job aid, IFSP job aid, IFSP eLearning module, Workflow Resource Guide	☐
22	IFSPs submitted but not approved by an EIO/D prior to system downtime, will migrate to the EI-Hub in a 'Submitted' format. Before approving the IFSP, the EIO/D must check: • IFSP Team panel has the child's primary family contact as a team member. • IFSP Parent Agreement panel is completed, including the 'Date signed by parent' field. If these panels are incomplete, the EIO/D has the option to either enter the information and approve after updating the panels (or) reject the IFSP, which will then be sent back to the Service Coordinator for completion. If the Service Coordinator is updating the IFSP, the IFSP will need to be resubmitted to the EIO/D for approval. **Resources**: IFSP job aid, IFSP eLearning module, Workflow Resource Guide	☐
23	Make sure staff that will be entering new IFSPs are aware of all the required fields for submission. Please note, the EI-Hub does allow users to attach a copy of an IFSP to the child's IFSP panel. Copies of IFSPs can be uploaded within the "IFSP Parent Agreement" panel, using the "upload signature page" option. **Resource**: IFSP Required Fields infographic	☐
24	For IFSPs that migrate to the EI-Hub with an active status no immediate attention is required. However, make sure staff understand when making a copy of an IFSP with migrated data for any purpose – amendment, next review, extension - users will be required to confirm: • IFSP Team panel has the child's primary family contact as a team member. • IFSP Parent Agreement panel is completed, including the 'Date signed by parent' field. **Resources**: IFSP job aid, IFSP eLearning module, Workflow Resource Guide	☐
	Transition	✓
25	Enter information from any transition related activities into the EI-Hub that were completed during system downtime in the appropriate panels within the Transitions tab. **Resource**: Transitions job aid, Workflow Resource Guide	☐

	Billing & Claiming	✓▪
26	Make sure therapists and users entering claims are aware of the CPT/HCPCS codes accepted in the EI-Hub. The CPT/HCPCS codes used should pertain to the service provided. **Resource**: CPT/HCPCS Codes Accepted in the EI-Hub, CPT Codes for ABA Service	☐
27	Make sure providers are aware all **new** Service Authorizations (SA) or SAs that have not been previously billed against will require users to complete the 'Scripts, Orders, Recommendations, and Referrals' panel **for all billable services**. This includes Special Instruction, service coordination and evaluations. **This panel does not require an actual physical prescription, but rather the NPI number of the provider (or billing provider/agency) that will provide the service to a child**. The NPI number entered in this panel must match the NPI number of the provider listed on the claim, or the claim will get rejected during edits/validations. **Note:** No action is required in Scripts, Orders, Recommendations, and Referrals panel for active SAs migrated from NYEIS. The active SAs must have been previously billed.wa **Note, for counties only**: This panel is also required for transportation and respite. **Resource**: Best Practice to Reduce Claims Rejections infographic, Workflow Resource Guide, 277CA Rejections Guide	☐
28	Re-enter and resubmit claims in a pending (submitted), rejected (if appropriate), or open status. Claims in these statuses are not workable in the EI-Hub. • Providers using a third-party system, can check the status of claims within their systems • Providers formerly using NYEIS manual claims entry, can check the status of claims while NYEIS is in a read-only format using your Provider Claims search. **Resource**: Service Logging job aid, Create/Edit a Service Log job aid, Service Logging Micro-eLearning, Service Logging eLearning module, 837 File Submission Guide	☐
29	Re-enter and resubmit waivers in a NYEIS status of submitted or request new waivers for previously rejected waivers if appropriate. Waivers in these statuses were not migrated to the EI-Hub; only **approved** waivers were migrated. **Note**: The system's waiver logic will not automatically apply to migrated services that meet the criteria for a waiver. Users must manually enter waivers if required by EIP regulations. The system will apply waiver logic to newly entered EI services. **Resource**: Waivers infographic	☐

30	Providers utilizing a third-party system for billing (837P file) are no longer required to complete claims testing before starting billing activities at go-live. This extends to new providers joining the Early Intervention Program (EIP) on or after April 2024, who were unable to participate in claims testing. In the event of a 999 response file rejection, providers must edit the file based on the rejection reason. If needed, providers can contact the PCG Call Center for assistance. **Resource**: 999 Companion Guide	☐
31	Billing providers will be configured in the EI-Hub with the claiming method that aligned with their primary method used in NYEIS. Billing providers seeking to change their claiming method, switching from the EI-Hub's Service Logging component to a third-party billing system or vice versa, must contact the PCG Call Center. **Resource**: Billing and Claiming job aid	☐
32	**For Municipalities only**, make sure staff are aware that all new transportation claims need to be setup as one-way trips in the EI-Hub. Transportation claims will no longer be submitted through LDSS (Local Department of Social Services) following the launch of the EI-Hub. Transportation Service Authorizations from July 2022 to the go-live date will be migrated automatically; no action is necessary. Transportation Service Authorizations dated before July 2022 will not be migrated. Scripts, Orders, Recommendations, and Referrals panel is required to be completed for Transportation. **Resource**: Entering Service Authorizations for Transportation video	☐
33	**For Agencies using the EI-Hub Service Logging component only,** confirm your rendering provider(s) have a Health Commerce System (HCS) account and an EI-Hub Case Management (CM) user role(s): RenderProvNY, JrRenderProvNY or ISC/OSC NY. To bill on behalf of your rendering providers, they must have both an HCS account and a CM user role. **Note**: If a rendering provider had an active HCS account and NYEIS user role before the transition (10/4) to the EI-Hub, no action is needed. If they did not have an active HCS account and NYEIS user role prior to transition, they must obtain an HCS account and use it to log into the EI-Hub following the system launch (10/15). The agency Role Administrator for the EI-Hub must then configure their account with a rendering provider CM role. Completing these steps will enable the agency to bill on behalf of its rendering providers.	☐

	Provider Credentials, Amendments, and Re-approvals	✓
34	Make sure all providers are aware that at the launch of the EI-Hub (10/15/2024), provider re-approvals and amendments will be processed electronically through the EI-Hub. All approved (individual and agency) providers must have a Health Commerce System (HCS) and an EI-Hub account in order to submit their re-approval and amendment requests. **Resources**: Health Commerce System Instructions	☐
35	If your provider approval expires between September 2024 and December 31, 2024, and you have not completed your re-approval request through the paper process, you must submit your re-approval request in the EI-Hub as soon as possible (ASAP) to ensure no lapse in approval. If a provider's Agreement lapses, the EI-Hub will require a completely new application from the provider. This will result in significant billing issues. All providers must submit their re-approval through the EI-Hub at least 20 business days prior to the end of this agreement extension end date. **Resource**: Provider Amendments, Reapprovals, and Minor Changes job aid	☐
36	Be aware that past paper applications will not be visible in the EI-Hub for migrated providers. If a provider selects the "View" option from the "Submitted Approval Requests" dashboard in an attempt to view a prior application, it will generate a new approval request form. Migrated providers should not use this feature (select view). Following the launch of the EI-Hub, re-approval for all approved providers (migrated and non-migrated) will be completed in the system and those applications moving forward will be viewable from the "Submitted Approval Requests" dashboard. **Resources**: Provider Amendments, Reapprovals, and Minor Changes job aid	☐
37	For the new mental health Qualified Professionals (QPs), licensed behavior analyst and/or certified behavior analyst assistant: • Agencies will need to submit an amendment request to add these QPs and any relevant service types/models. • Approved Independent Providers (Basic or Appendix) who have one of these license types will need to submit an amendment request to add these QPs and any relevant service types/models to their approval in order to deliver these services. **Resource**: Provider Amendments, Reapprovals, and Minor Changes job aid	☐