

# Entering Service Authorizations for General Services



## How To

Create General Services Service Authorizations (SAs) in EI-Hub's Case Management module.



## Audience

- Early Intervention Official/Designee (EIO/D)
- County/Municipal/Provider Data Entry Clerks
- Initial Service Coordinator (ISC)
- Ongoing Service Coordinator (OSC)
- **\*For Information on Waivers, please visit the Waivers infographic located on the EI-Hub LMS.**

# Topics Covered

1. Overview of the General Services Process
2. Entering and Submitting Service Authorizations for General Services
3. EIO/D Approval/Rejection of General Services
4. Company (Agency) Acceptance/Rejection of General Services
5. Adding a Therapist
6. \*Remaining Service Panels – All Types

\*Sub-section(s) added for additional context only



# Overview

Entering Service Authorizations for General Services Job Aid

# Creating Service Authorizations

## *Job Aid*

### HOW TO

Creating Service Authorizations for General Services



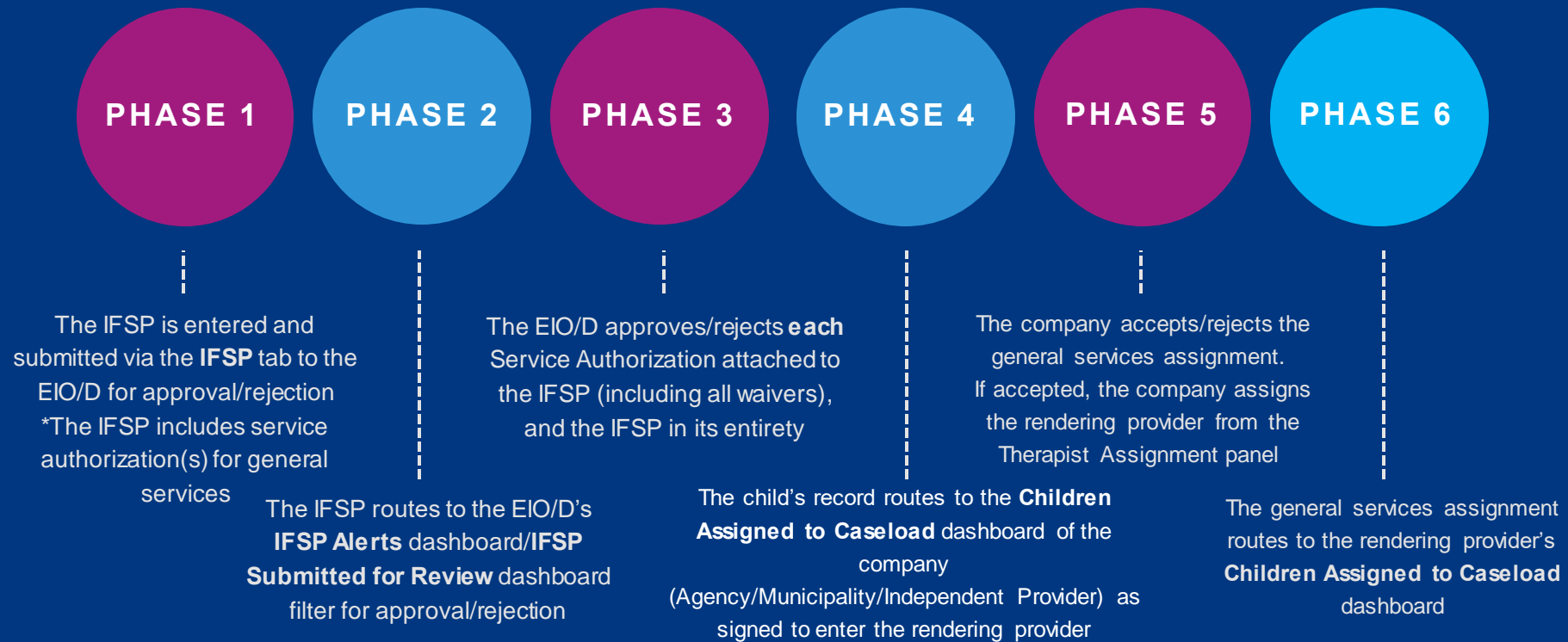
### PREFACE

In the EI-Hub, creating service authorizations is not an independent process. Similar to most tasks in EI-Hub, there are a series of actions that occur *before, during, and after* the creation of service authorizations. The graphics on the next pages highlight these steps.



# Overview of the General Services Process

In EI-Hub, entering a service authorization for general services is not an independent process. Similar to most tasks in EI-Hub, there are a series of actions that occur *before*, *during*, and *after* the creation of service authorizations. This graphic highlights these steps.



# Entering Service Authorizations for General Services

Entering Service Authorizations for General Services Job Aid

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### HOW TO

Enter Services Authorizations for General Services



### NOTE

Service authorizations for general services are tied to a child's IFSP and are initiated/entered directly into the **IFSP** tab.

The following roles can enter service authorizations for general services: MuniProgAll, ISC/OSC NY, and EIO/D NY.

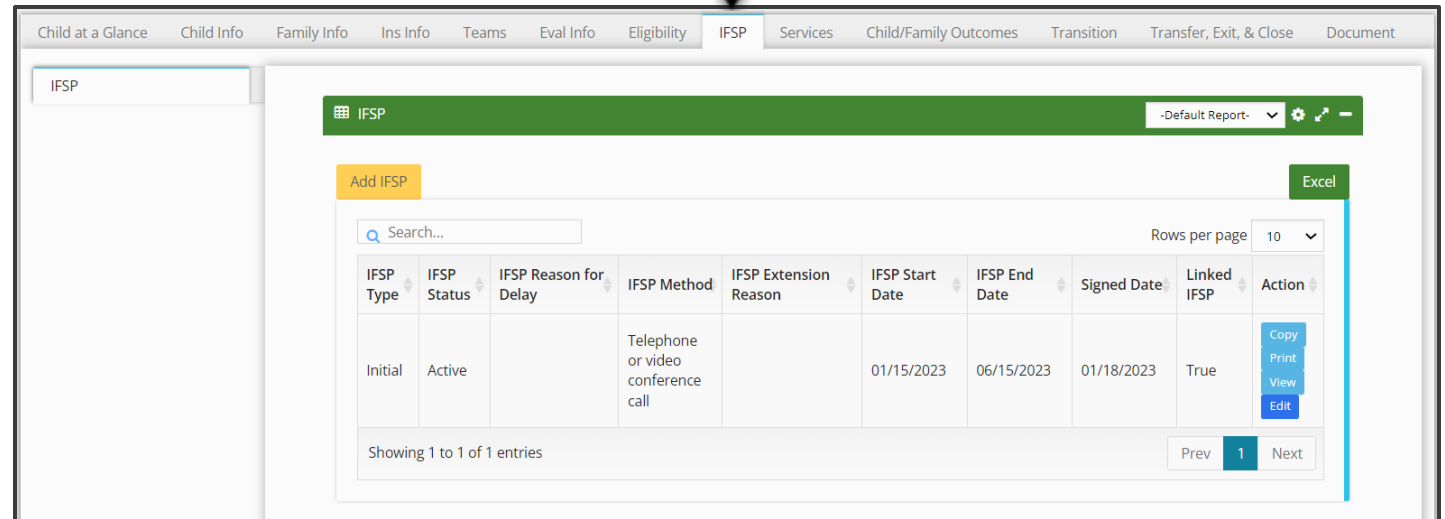
When entering service authorizations, the **Service Information**, **Service Delivery**, and **Service Location** panels must be completed **before** submitting the IFSP and service authorizations for EIO/D approval.

For billing and claiming purposes, users should ensure scripts, orders, recommendations, and referrals (and referring providers) relevant to the child's services are added to the child's record via the **Ins Info** tab. Please visit the [Entering Insurance Job Aid](#) located within the EI-Hub Learning Management System (LMS).

The **Company Assignment** panel is **not** required to **create** a service authorization for general services; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for *all* service authorizations to become **Active**.

An EIO/D must **first** approve each service authorization tied to the IFSP **before** approving the entire IFSP.

1



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

IFSP

IFSP

-Default Report-

Add IFSP Excel

Search...

Rows per page 10

IFSP Type	IFSP Status	IFSP Reason for Delay	IFSP Method	IFSP Extension Reason	IFSP Start Date	IFSP End Date	Signed Date	Linked IFSP	Action
Initial	Active		Telephone or video conference call		01/15/2023	06/15/2023	01/18/2023	True	Copy Print View Edit

Showing 1 to 1 of 1 entries

Prev 1 Next

# Creating Service Authorizations

## Job Aid

### HOW TO

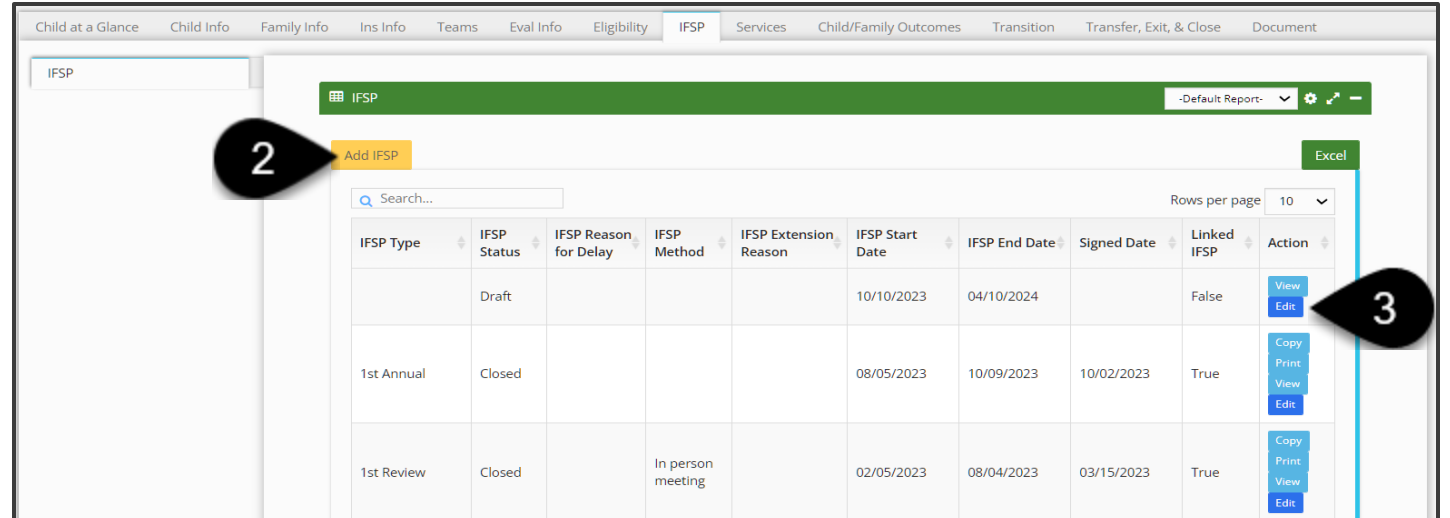
Enter Services Authorizations for General Services

### NOTE

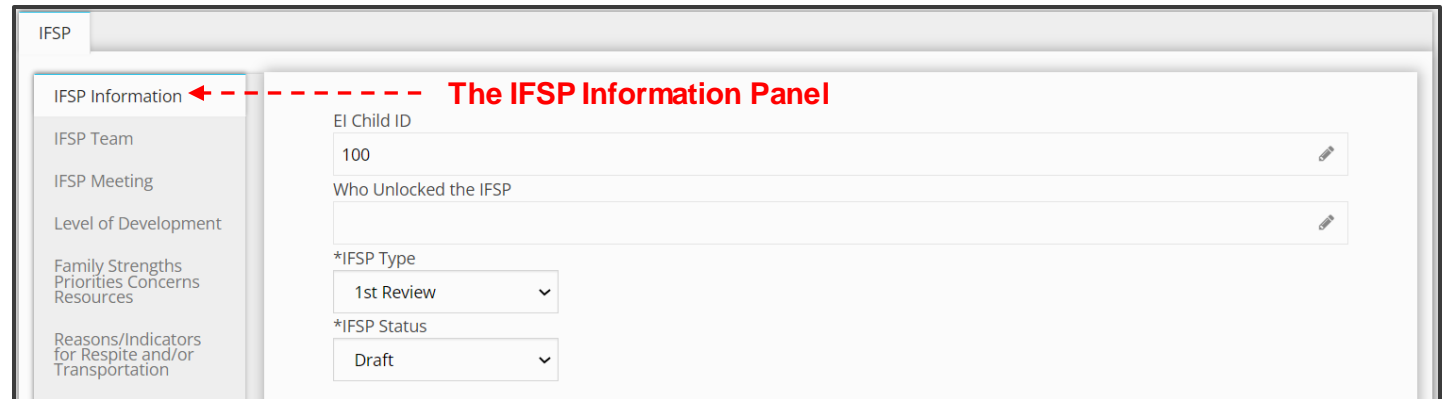
- In the following pages cover preliminary steps users would take within the **IFSP** tab before creating general services service authorizations.
- For additional information on completing an IFSP, please refer to the IFSP Job Aid located within the LMS.

### Step/Action

- Select the **IFSP** tab from the Child's record.
- To add general services to a new IFSP, select the **Add IFSP** button above the **IFSP** grid. The **IFSP Information** panel populates.
- To add general services to a draft IFSP, locate the draft IFSP from the **IFSP** grid and select the **Edit** button. The **IFSP Information** panel populates for updating/editing.



IFSP Type	IFSP Status	IFSP Reason for Delay	IFSP Method	IFSP Extension Reason	IFSP Start Date	IFSP End Date	Signed Date	Linked IFSP	Action
	Draft				10/10/2023	04/10/2024		False	View Edit
1st Annual	Closed				08/05/2023	10/09/2023	10/02/2023	True	Copy Print View Edit
1st Review	Closed		In person meeting		02/05/2023	08/04/2023	03/15/2023	True	Copy Print View Edit



**IFSP**

**IFSP Information** ← The IFSP Information Panel

EI Child ID  
100

Who Unlocked the IFSP

\*IFSP Type  
1st Review

\*IFSP Status  
Draft



# Creating Service Authorizations

## Job Aid

### HOW TO

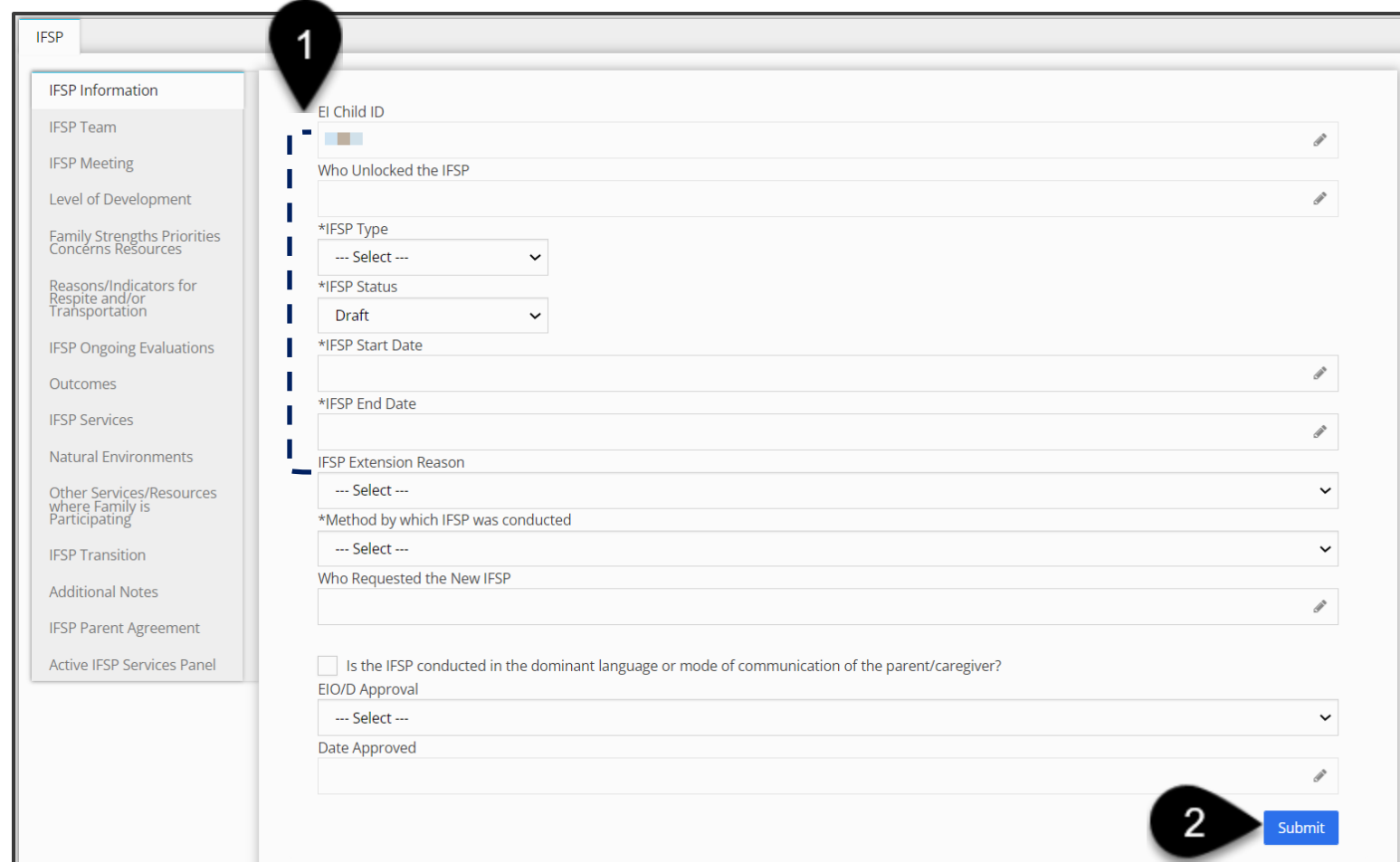
Enter Services Authorizations for General Services

### NOTE

- Fields with an asterisks (\*) indicate required fields.
- If you are adding service authorizations for general services, the **IFSP information** panel must be completed by a Service Coordinator and approved by the EIO/D to add, edit, or copy an IFSP and add services to that IFSP.

### Step/Action

- The **IFSP Information** panel opens.
  - If you are creating a new IFSP, enter the **\*IFSP Type**, **\*IFSP Status**, **\*IFSP Start Date**, **\*IFSP End Date** and the **\*Method by which the IFSP was conducted**.
  - If you are editing a draft IFSP, confirm the **\*IFSP Type**, **\*IFSP Status**, **\*IFSP Start Date**, **\*IFSP End Date** and the **\*Method by which the IFSP was conducted**.
- Click the **Submit** button to save.



**IFSP**

**IFSP Information**

IFSP Team

IFSP Meeting

Level of Development

Family Strengths Priorities Concerns Resources

Reasons/Indicators for Respite and/or Transportation

IFSP Ongoing Evaluations

Outcomes

IFSP Services

Natural Environments

Other Services/Resources where Family is Participating

IFSP Transition

Additional Notes

IFSP Parent Agreement

Active IFSP Services Panel

**1**

EI Child ID

Who Unlocked the IFSP

\*IFSP Type

--- Select ---

\*IFSP Status

Draft

\*IFSP Start Date

\*IFSP End Date

IFSP Extension Reason

--- Select ---

\*Method by which IFSP was conducted

--- Select ---

Who Requested the New IFSP

☐ Is the IFSP conducted in the dominant language or mode of communication of the parent/caregiver?

EIO/D Approval

--- Select ---

Date Approved

**2**

Submit

# Creating Service Authorizations

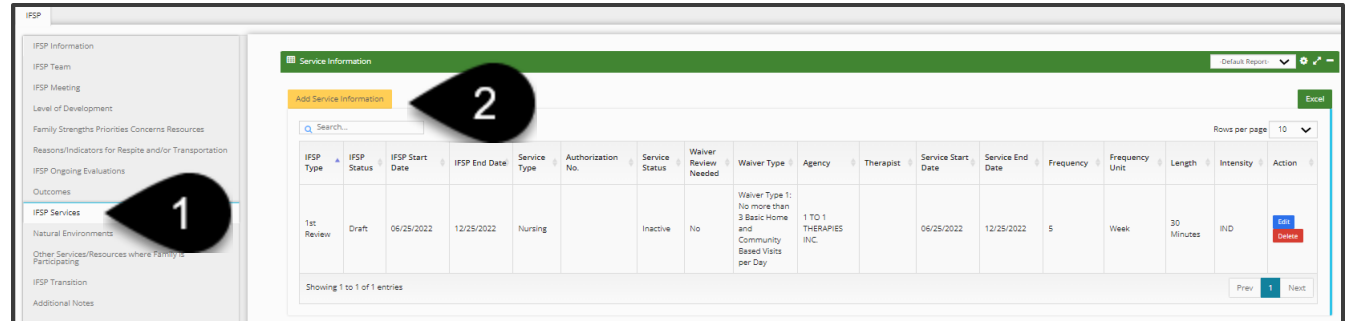
*Job Aid*

## HOW TO

### Enter Service Information

#### Step/Action

1. Proceed to the **IFSP Services** panel.
2. Click the **Add Service Information** button. The Service Information panel populates.



IFSP

IFSP Information  
IFSP Team  
IFSP Meeting  
Level of Development  
Family Strengths/Priorities/Concerns/Resources  
Reasons/Indicators for Respite and/or Transportation  
IFSP Ongoing Evaluations  
Outcomes  
**IFSP Services**  
Natural Environments  
Other Services/Resources where Family is Participating  
IFSP Transition  
Additional Notes

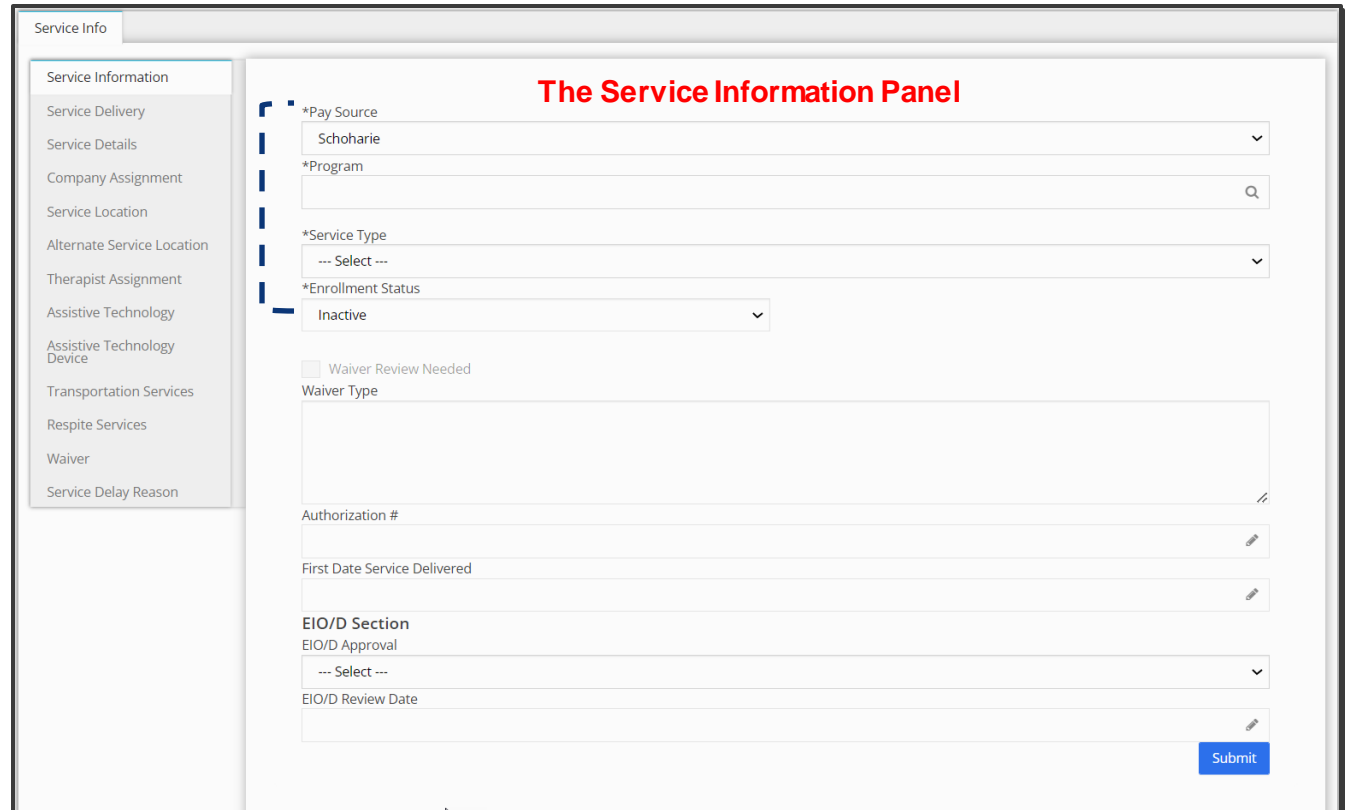
**Add Service Information**

Search...

IFSP Type	IFSP Status	IFSP Start Date	IFSP End Date	Service Type	Authorization No.	Service Status	Waiver Review Needed	Waiver Type	Agency	Therapist	Service Start Date	Service End Date	Frequency	Frequency Unit	Length	Intensity	Action
1st Review	Draft	06/25/2022	12/25/2022	Nursing		Inactive	No	Waiver Type 1: No more than 3 Basic Home and Community Based Visits per Day	1 TO 1 THERAPIES INC.		06/25/2022	12/25/2022	5	Week	30 Minutes	IND	<a href="#">Edit</a> <a href="#">Delete</a>

Showing 1 to 1 of 1 entries

Prev 1 Next



**The Service Information Panel**

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  
Schoharie

\*Program  
---

\*Service Type  
--- Select ---

\*Enrollment Status  
Inactive

☐ Waiver Review Needed

Waiver Type

Authorization #

First Date Service Delivered

EIO/D Section

EIO/D Approval  
--- Select ---

EIO/D Review Date

Submit

# Creating Service Authorizations

## Job Aid

### HOW TO

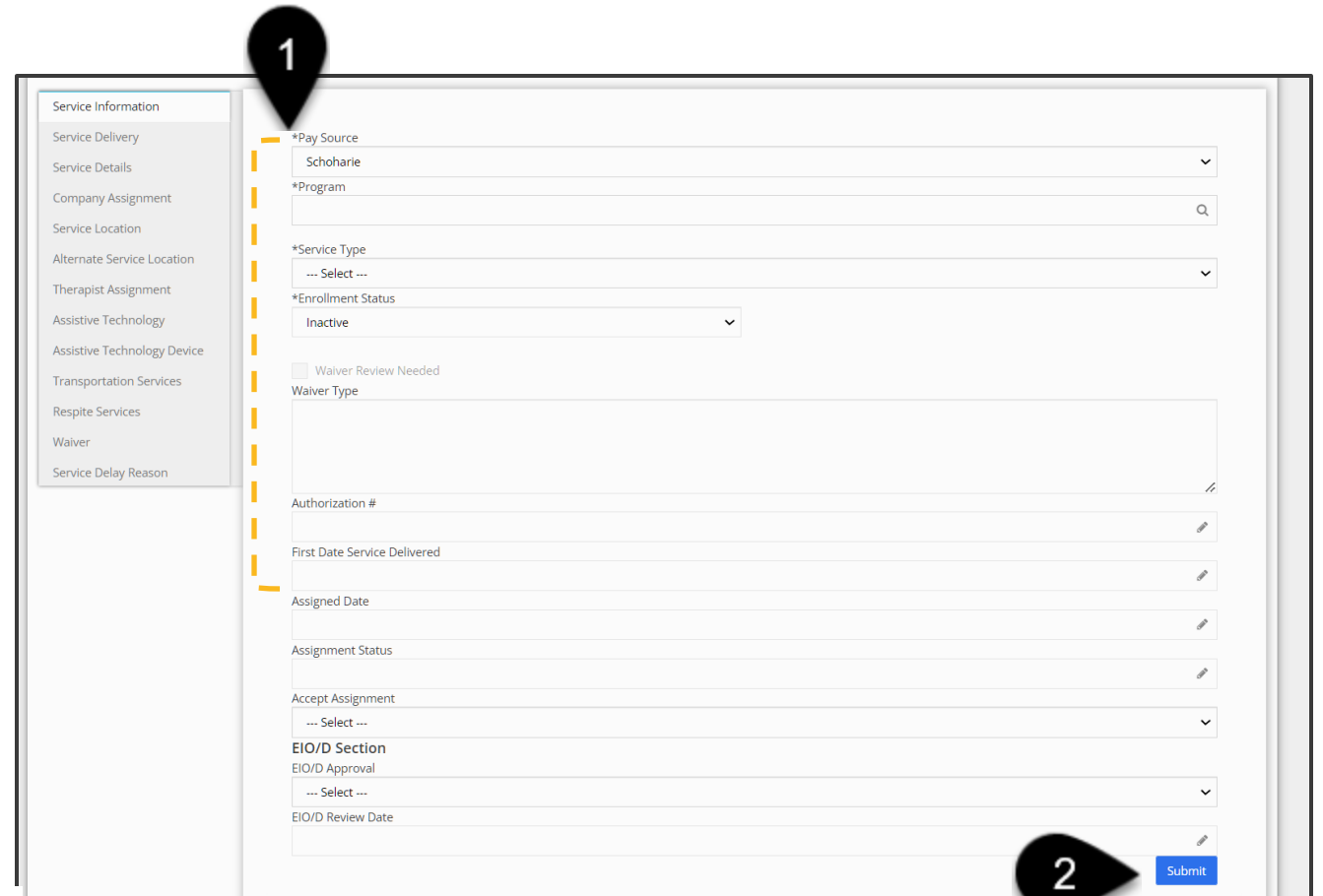
Enter Service Information

### NOTE

- Fields with asterisks (\*) indicate required fields.
- The **Service Information**, **Service Delivery**, and **Service Location** panels are **required** for approval for services.
- The **Company Assignment** panel is **not** required to enter service authorizations for general services; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for *all* service authorizations to become **Active**.

### Step/Action

1. Enter the **Service Information**. The **Pay Source** defaults to the Child's county of residence. The **Program** is a type-ahead field and the service can be entered here (ex: physical therapy). Once a Program is chosen, the **Service Type** will auto-populate. **Enrollment Status** will default to Inactive.
2. Click the **Submit** button to save the information entered.



The screenshot shows a web form titled "Service Information". On the left is a sidebar menu with the following items: Service Information (highlighted), Service Delivery, Service Details, Company Assignment, Service Location, Alternate Service Location, Therapist Assignment, Assistive Technology, Assistive Technology Device, Transportation Services, Respite Services, Waiver, and Service Delay Reason. The main form area contains the following fields:

- \*Pay Source: A dropdown menu with "Schoharie" selected.
- \*Program: A type-ahead search field.
- \*Service Type: A dropdown menu with "... Select ..." selected.
- \*Enrollment Status: A dropdown menu with "Inactive" selected.
- ☐ Waiver Review Needed
- Waiver Type: A large text area.
- Authorization #: A text field with a copy icon.
- First Date Service Delivered: A text field with a copy icon.
- Assigned Date: A text field with a copy icon.
- Assignment Status: A text field with a copy icon.
- Accept Assignment: A dropdown menu with "... Select ..." selected.
- EIO/D Section: A section header.
- EIO/D Approval: A dropdown menu with "... Select ..." selected.
- EIO/D Review Date: A text field with a copy icon.
- Submit: A blue button at the bottom right.

# Creating Service Authorizations

## Job Aid

### HOW TO

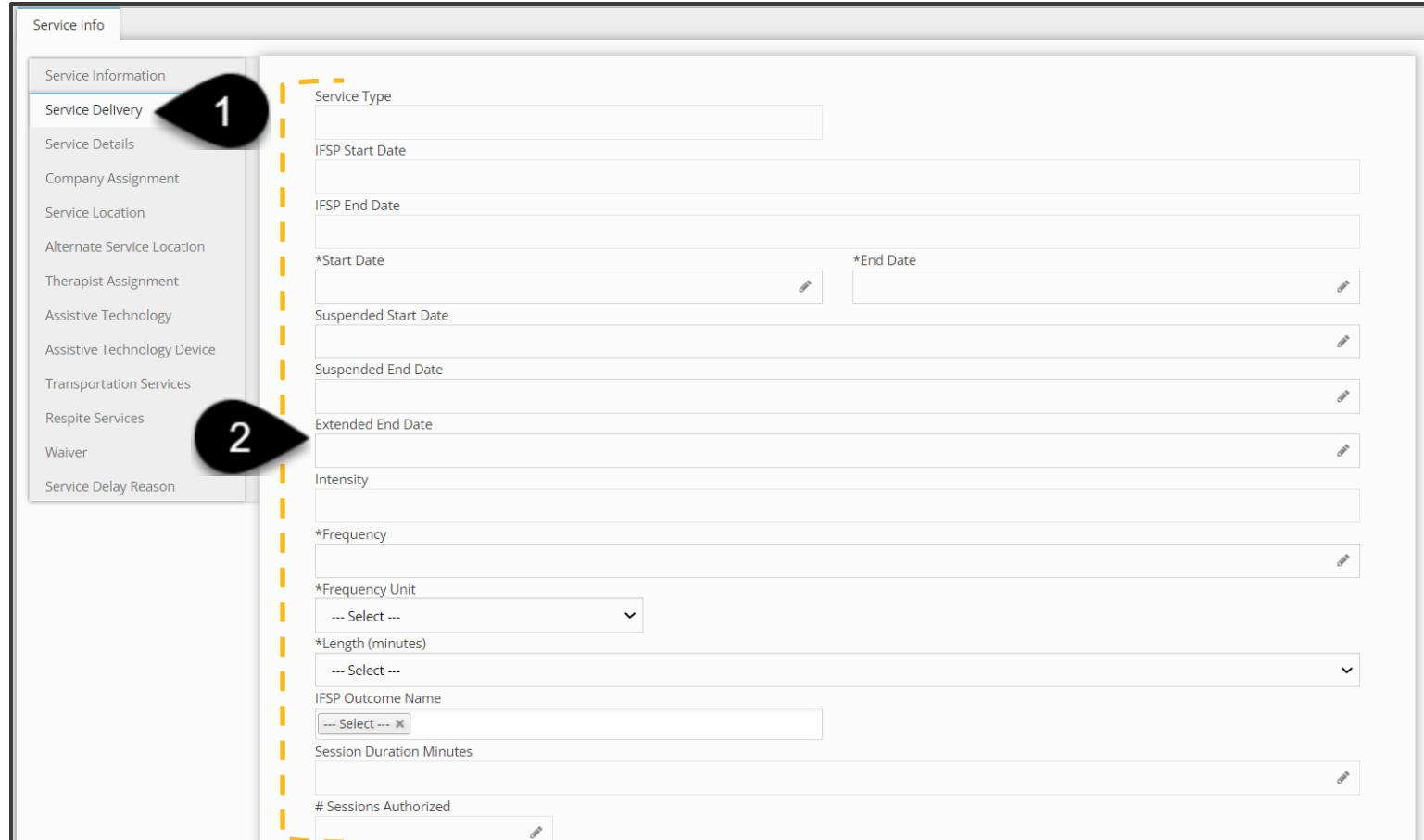
Enter Service Delivery Information

### NOTE

- Fields with an asterisks (\*) indicate required fields.
- The **Service Information**, **Service Delivery**, and **Service Location** panels are **required** for approval for services.
- The **Company Assignment** panel is **not** required to enter service authorizations for general services; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for *all* service authorizations to become **Active**.

### Step/Action

1. Select the **Service Delivery** panel.
2. Enter the **Service Delivery** details:
  - **Service Type:** Will auto-populate with the service entered in the Service Information panel (i.e., Speech Language-Extended, Occupational Therapy- Basic)
  - **Services Start/End Date:** Click into the field to choose a date from the calendar picker or the dates may be entered manually.



The screenshot shows the 'Service Info' form with a sidebar menu on the left and a main form area on the right. A yellow dashed line highlights the 'Service Delivery' section in the sidebar and the corresponding form fields. Two callout boxes are present: Callout 1 points to the 'Service Delivery' menu item, and Callout 2 points to the 'Service Delivery' section in the sidebar. The form fields include:

- Service Type
- IFSP Start Date
- IFSP End Date
- \*Start Date (with calendar icon)
- \*End Date (with calendar icon)
- Suspended Start Date
- Suspended End Date
- Extended End Date
- Intensity
- \*Frequency
- \*Frequency Unit (dropdown menu)
- \*Length (minutes) (dropdown menu)
- IFSP Outcome Name (dropdown menu)
- Session Duration Minutes
- # Sessions Authorized

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### HOW TO

Enter Service Delivery Information



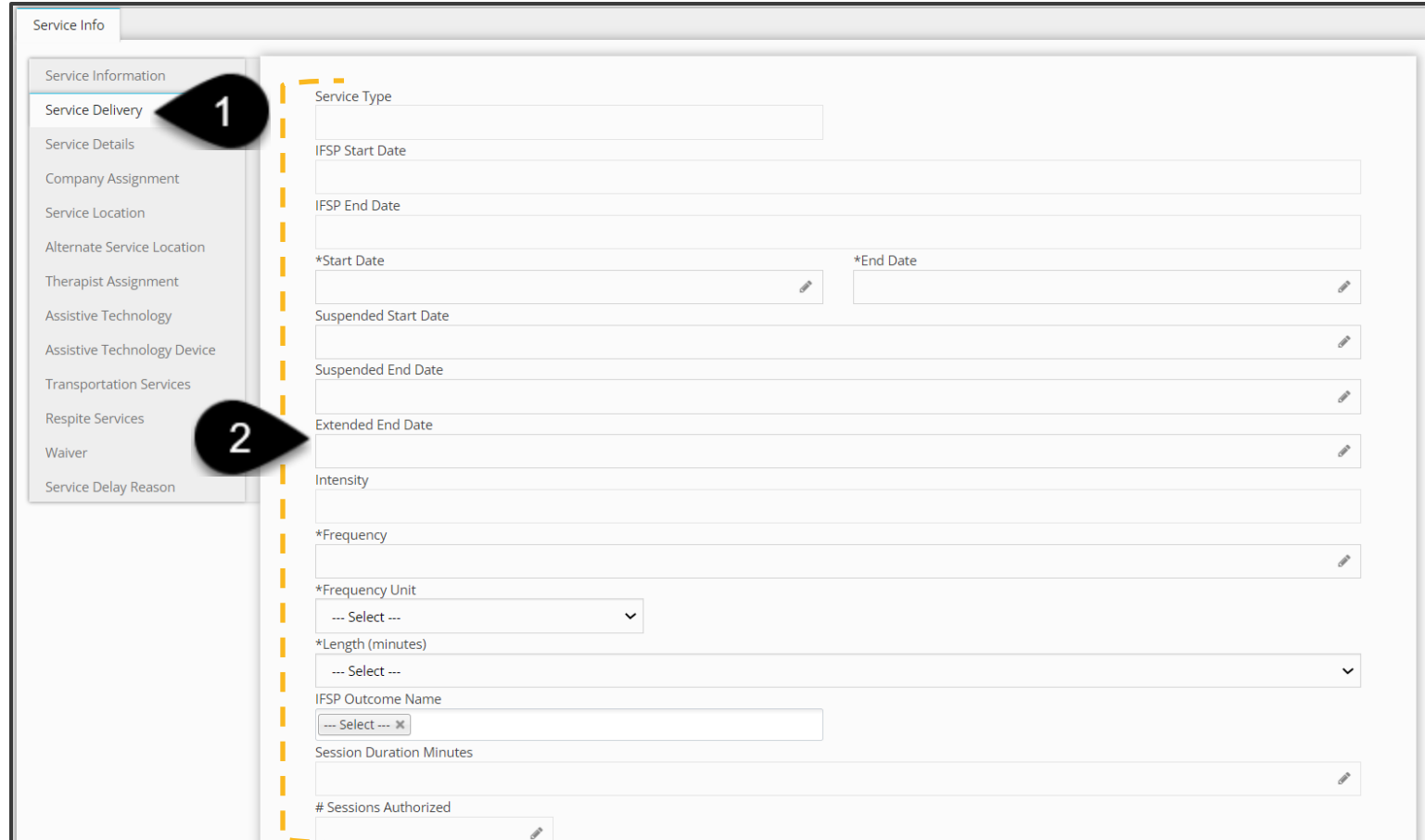
### NOTE

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- The **Service Information**, **Service Delivery**, and **Service Location** panels are **required** for approval for services.
- The **Company Assignment** panel is **not** required to enter service authorizations for general services; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for *all* service authorizations to become **Active**.

### Step/Action

1. Enter the **Service Delivery** details:

- **IFSP Start Date**: This field populates with the IFSP start date entered within the IFSP Information panel.
- **IFSP End Date**: This field populates with the IFSP end date entered within the IFSP Information panel.



The screenshot shows the 'Service Info' form with a sidebar menu on the left and a main form area on the right. A yellow dashed line highlights the 'Service Delivery' section in the sidebar and the corresponding form fields. Two callout boxes are present: Callout 1 points to the 'Service Delivery' menu item, and Callout 2 points to the 'Service Delivery' section in the sidebar. The form fields include:

- Service Type
- IFSP Start Date
- IFSP End Date
- \*Start Date
- \*End Date
- Suspended Start Date
- Suspended End Date
- Extended End Date
- Intensity
- \*Frequency
- \*Frequency Unit
- \*Length (minutes)
- IFSP Outcome Name
- Session Duration Minutes
- # Sessions Authorized

# Creating Service Authorizations

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### HOW TO

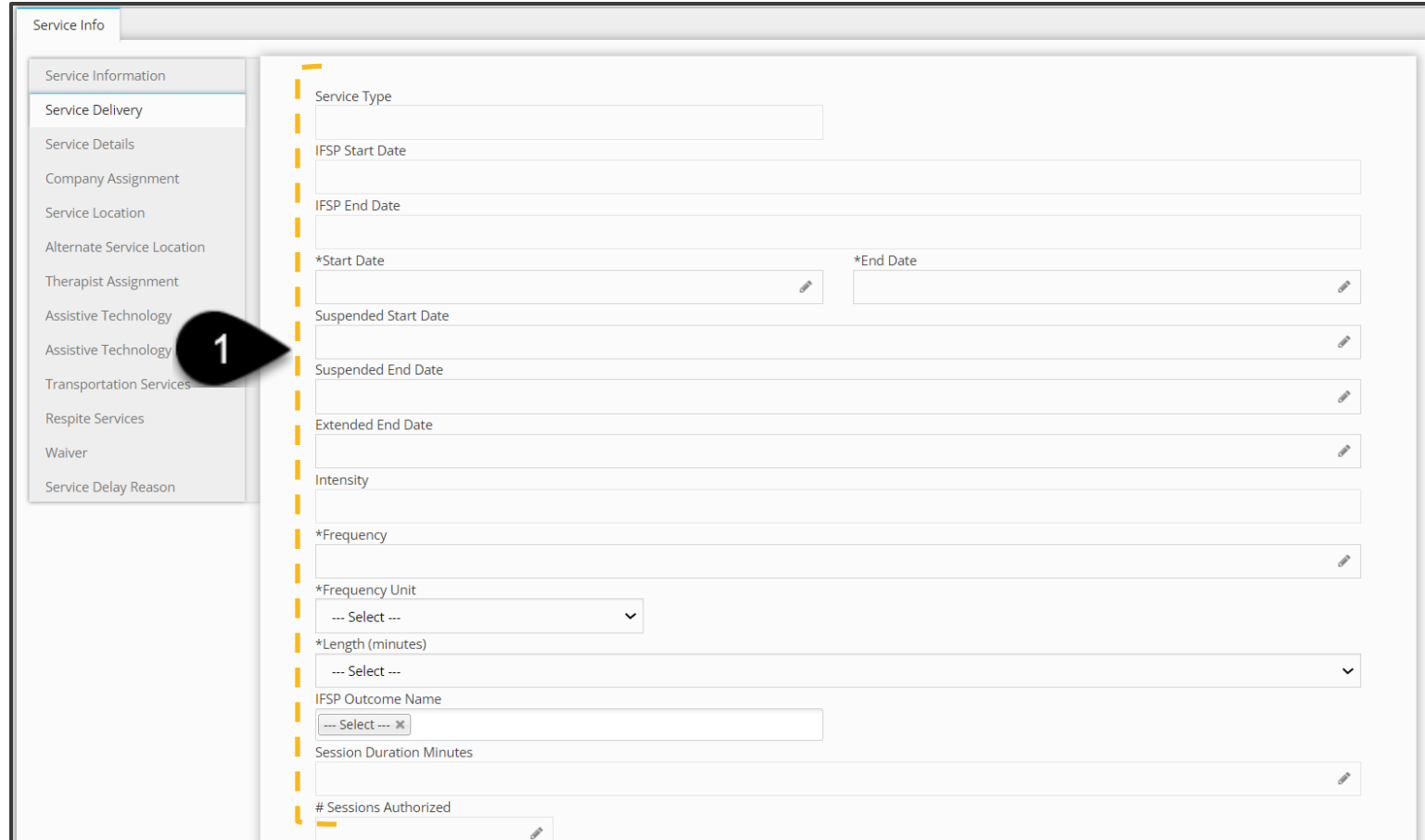
Enter Service Delivery Information

### NOTE

- Fields with an asterisks (\*) indicate required fields.
- The **Service Information**, **Service Delivery**, **Company Assignment**, and **Service Location** are **required** for the approval of services.

### Step/Action

- Continue to enter **Service Delivery** details, please note the following fields:
  - Suspended Services Start/End Dates:** Enter the appropriate suspended start and end dates for services if applicable. Service Authorizations for Service Coordinators are **not** to be suspended.
  - Intensity:** This field is not editable and auto-populates with **IND** for individual services and **GRP** for group services.



# Creating Service Authorizations

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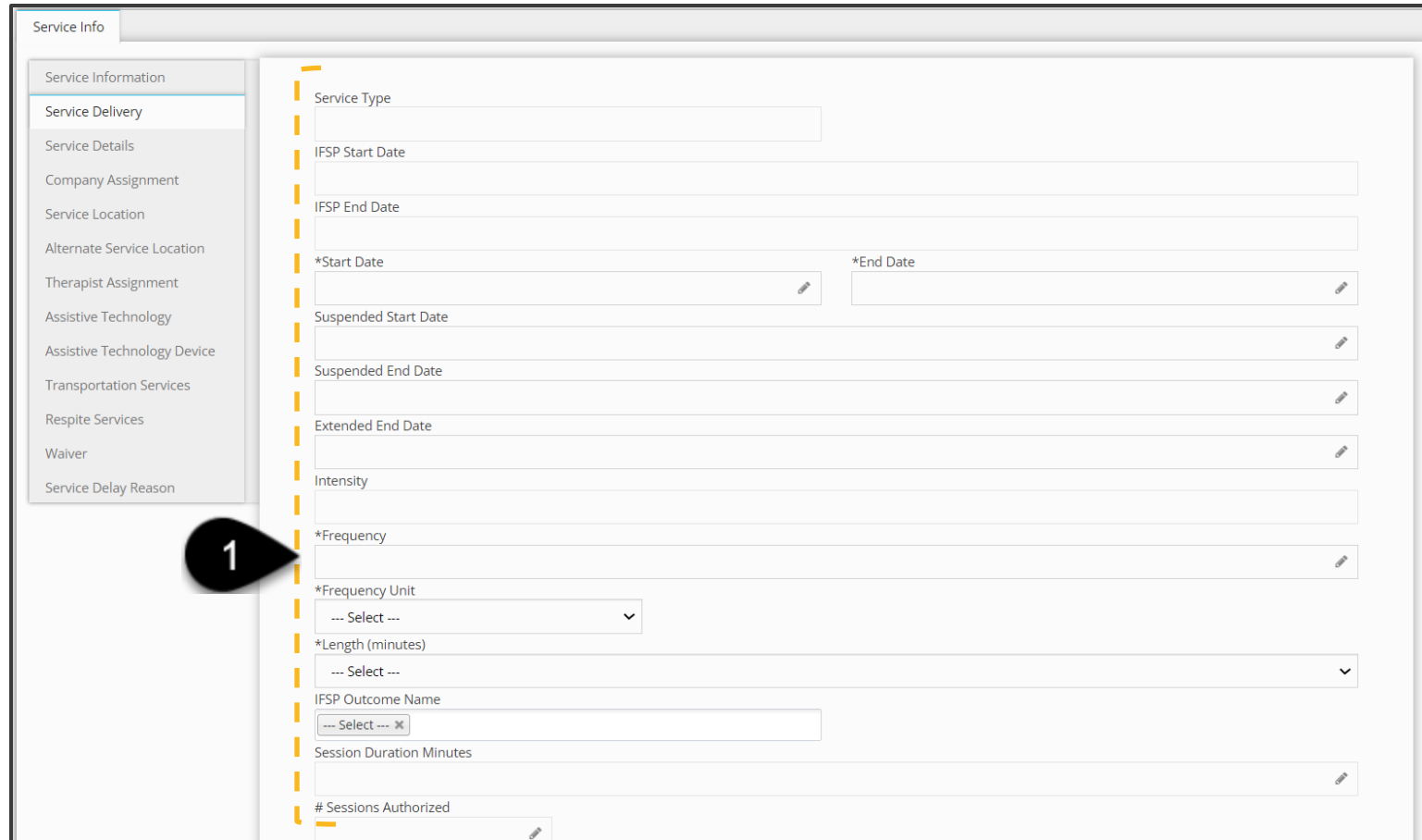
Enter Service Delivery Information

### NOTE

- Fields with an asterisks (\*) indicate required fields.
- The **Service Information**, **Service Delivery**, and **Service Location** panels are **required** for approval for services.
- The **Company Assignment** panel is **not** required to enter service authorizations for general services; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for *all* service authorizations to become **Active**.

### Step/Action

- Continue to enter **Service Delivery** details, please note the following fields:
  - **Frequency:** The number of times per frequency unit that the service is to be delivered.
  - **Frequency Unit:** Choose the applicable frequency unit from the dropdown (Day, Week, Month, IFSP Period).
  - **Length:** The duration of the service in minutes.
    - Basic visits should be no more than 59 minutes in length.
    - Extended visits should be no fewer than 60 minutes in length.



# Creating Service Authorizations

## Job Aid

### HOW TO

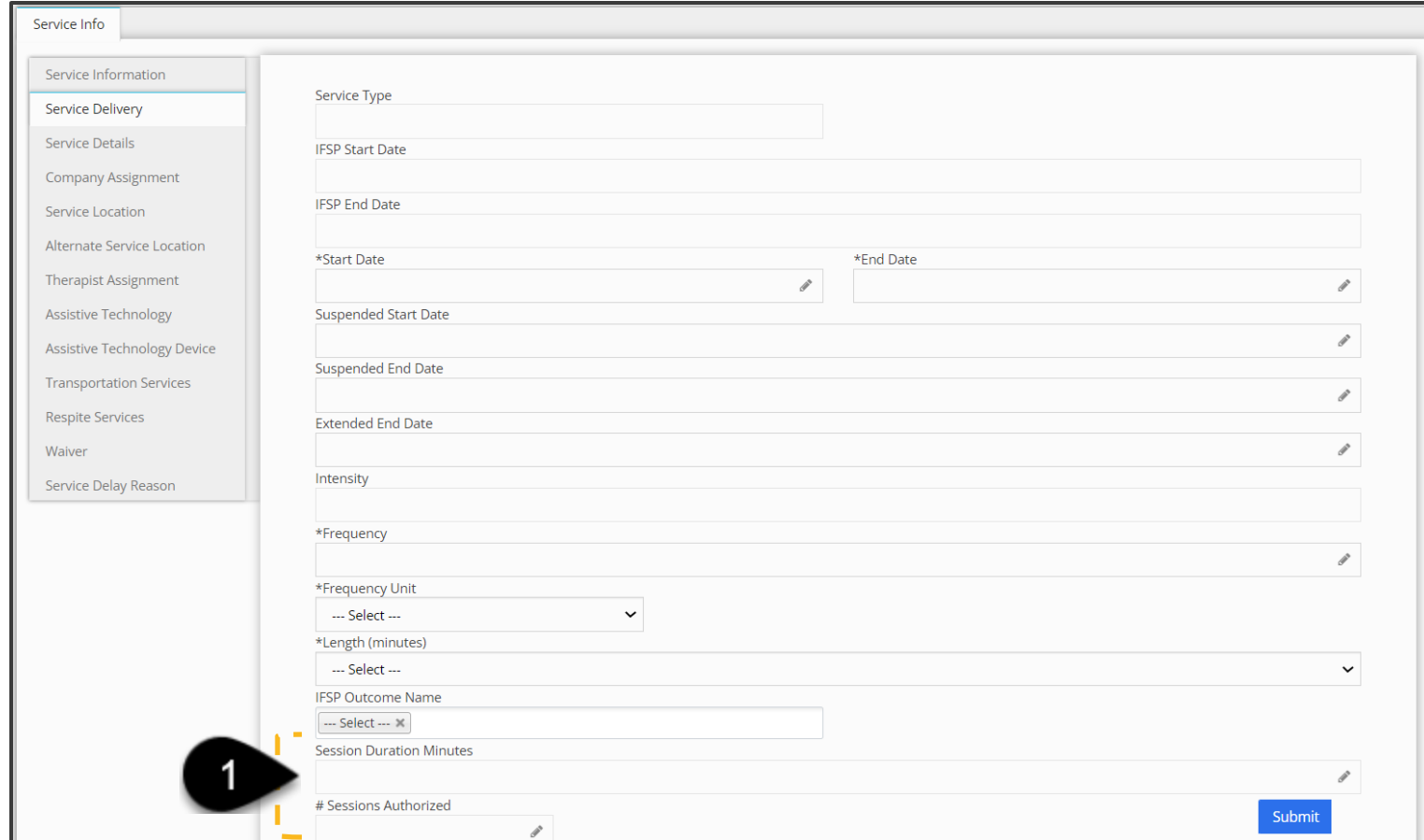
Enter Service Delivery Information

### NOTE

- Fields with an asterisks (\*) indicate required fields.
- The **Service Information**, **Service Delivery**, and **Service Location** are **required** for the approval of services.
- The **Company Assignment** panel is **not** required to enter service authorizations for general services; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for *all* service authorizations to become **Active**.

### Step/Action

1. Continue to enter **Service Delivery** details, please note the following fields:
  - **Session Duration Minutes:** Auto-populates to the length. This field will auto-populate to "1" if there is no time specified for the length, such as in Service Coordination SAs.
  - **Sessions Authorized:** The number of sessions authorized is auto-populated based on the frequency, frequency units, and service start and end dates.





# Creating Service Authorizations

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### HOW TO

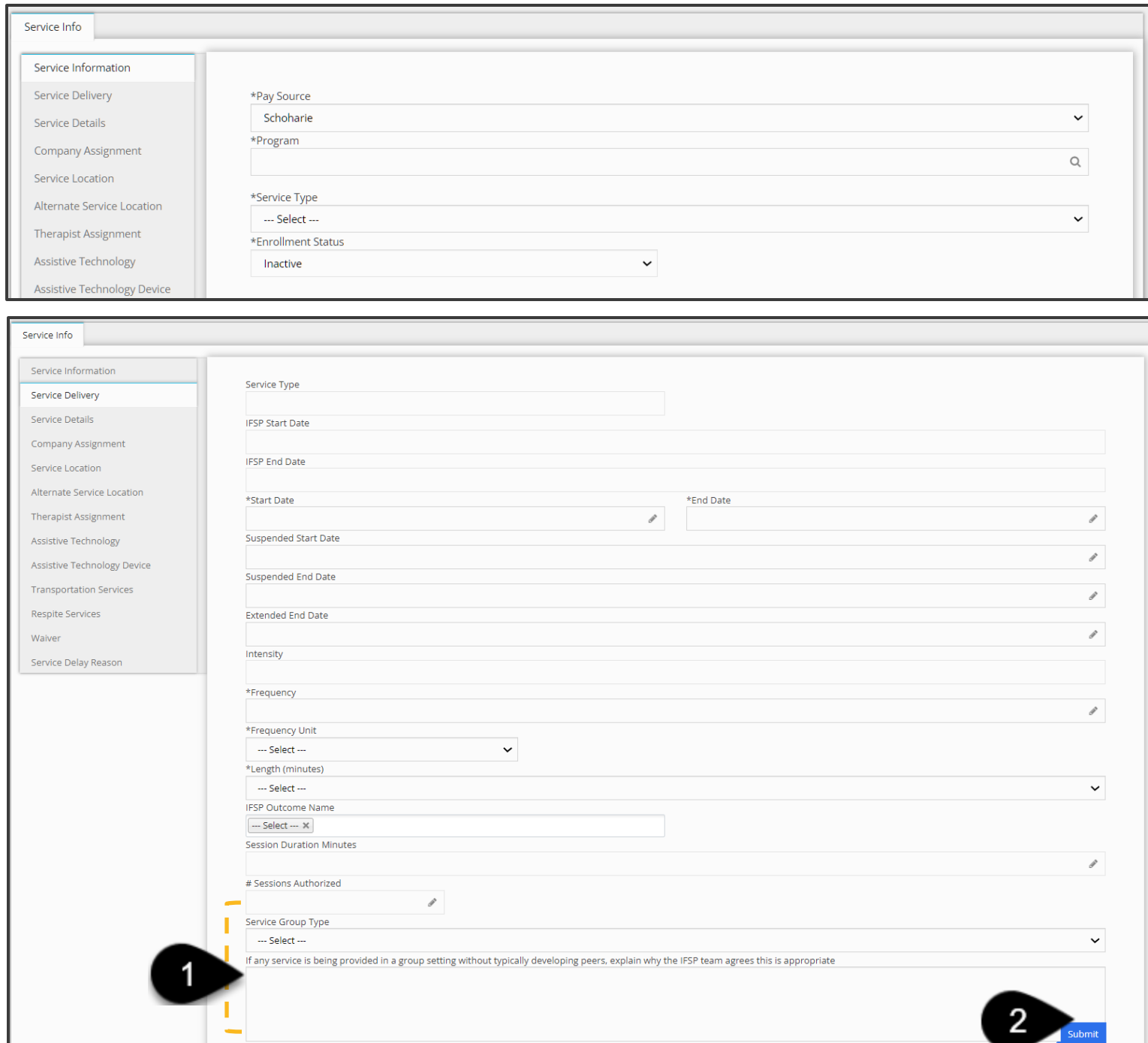
Enter Service Delivery Information

### NOTE

- Fields with an asterisks (\*) indicate required fields.
- The **Service Information**, **Service Delivery**, and **Service Location** panels are **required** for approval for services.
- The **Company Assignment** panel is **not** required to enter service authorizations for general services; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for *all* service authorizations to become **Active**.

### Step/Action

- Please note the following fields are only applicable if a group service is being authorized:
  - \*Service Group Types:** This field populates **only** if a 'Group' (i.e., Basic Group Developmental, Enhanced Group Developmental) is selected as a Program Type.
  - If the 'With 0% typically developing children' option is selected from the **Service Group Types** drop-down, the accompanying **Comments** section must be completed.
- Select the **Submit** button to save your service delivery information.



The screenshot displays the 'Service Info' form in the EI-Hub system. The left sidebar contains a menu with the following items: Service Information, Service Delivery, Service Details, Company Assignment, Service Location, Alternate Service Location, Therapist Assignment, Assistive Technology, and Assistive Technology Device. The 'Service Delivery' section is currently active and highlighted in blue. The main content area shows the following fields:

- \*Pay Source:** A dropdown menu with 'Schoharie' selected.
- \*Program:** A searchable text field.
- \*Service Type:** A dropdown menu with '--- Select ---' selected.
- \*Enrollment Status:** A dropdown menu with 'Inactive' selected.
- Service Type:** A text field.
- IFSP Start Date:** A date field.
- IFSP End Date:** A date field.
- \*Start Date:** A date field with a calendar icon.
- \*End Date:** A date field with a calendar icon.
- Suspended Start Date:** A date field with a calendar icon.
- Suspended End Date:** A date field with a calendar icon.
- Extended End Date:** A date field with a calendar icon.
- Intensity:** A text field.
- \*Frequency:** A text field with a calendar icon.
- \*Frequency Unit:** A dropdown menu with '--- Select ---' selected.
- \*Length (minutes):** A dropdown menu with '--- Select ---' selected.
- IFSP Outcome Name:** A dropdown menu with '--- Select --- X' selected.
- Session Duration Minutes:** A text field with a calendar icon.
- # Sessions Authorized:** A text field with a calendar icon.
- Service Group Type:** A dropdown menu with '--- Select ---' selected.
- Comments:** A text area with a placeholder text: 'If any service is being provided in a group setting without typically developing peers, explain why the IFSP team agrees this is appropriate'.

At the bottom right of the form, there is a blue **Submit** button. A yellow dashed line and a black circle with the number '1' highlight the 'Service Group Type' dropdown menu. Another black circle with the number '2' highlights the **Submit** button.

# Creating Service Authorizations

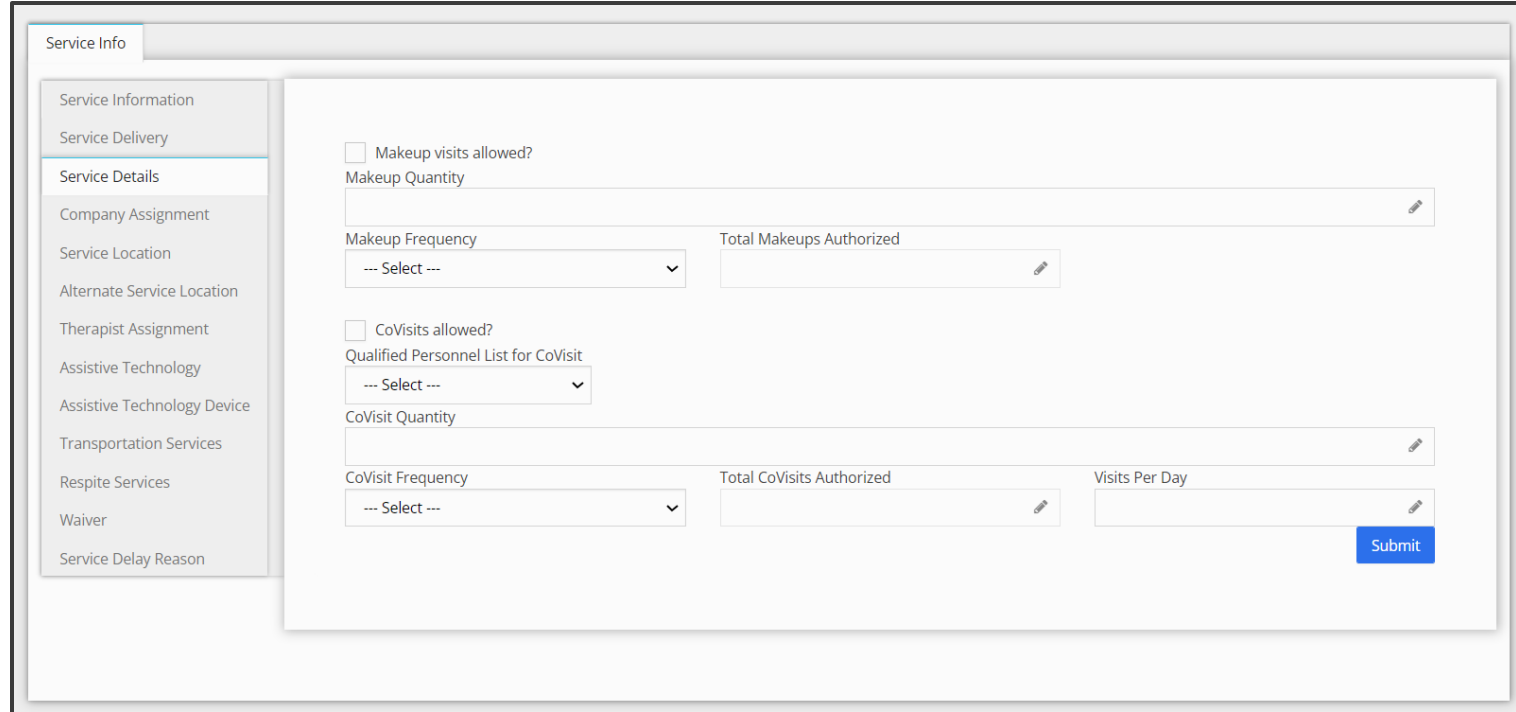
## Job Aid

### HOW TO

Enter Service Details Information

### NOTE

- The **Services Details** panel is used on an as-needed basis, hence, **not required**.
- The purpose of this panel is to reflect any co-visits or makeup visits that may be authorized on the service authorization. For example, a Speech Therapist and Occupational Therapist may need to address a child's feeding issues together; in this case, a co-visit would need to be authorized on each separate service authorization (SLP and OT).
- To complete the **Service Details** panel, select whether you are entering information for a **Makeup visit** and/or **Co-visit**, by clicking the corresponding checkboxes.
- Proceed to enter the quantity of visits, frequency of visits, personnel involved (if an applicable field), and visits per day (if an applicable field). The total number of co-visit or makeup visits auto-populate and are read-only.



The screenshot displays the 'Service Info' panel with the 'Service Details' tab selected. The panel includes a sidebar with various service-related categories and a main content area for entering details.

**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

**Service Details Section:**

- ☐ Makeup visits allowed?
- Makeup Quantity:
- Makeup Frequency:
- Total Makeups Authorized:
- ☐ CoVisits allowed?
- Qualified Personnel List for CoVisit:
- CoVisit Quantity:
- CoVisit Frequency:
- Total CoVisits Authorized:
- Visits Per Day:
- Submit**

# Creating Service Authorizations

## *Job Aid*

### HOW TO

Add a Company Assignment



### NOTE

- The **Company Assignment** panel is **not** required to enter service authorizations for general services; however, the Company Assignment panel, company acceptance, and EIO/D approval are **required** for *all* service authorizations to become **Active**.
- A Company Assignment can be added **before** or **after** a service authorization is approved. All instances (in the graphic) are covered in upcoming pages/sections.
- Please note: In the EI-Hub, "Company" and "Agency" may refer to the Agency, Municipality, or Independent Provider chosen to deliver services and assign a rendering provider.



# Creating Service Authorizations

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### HOW TO

Add a Company Assignment

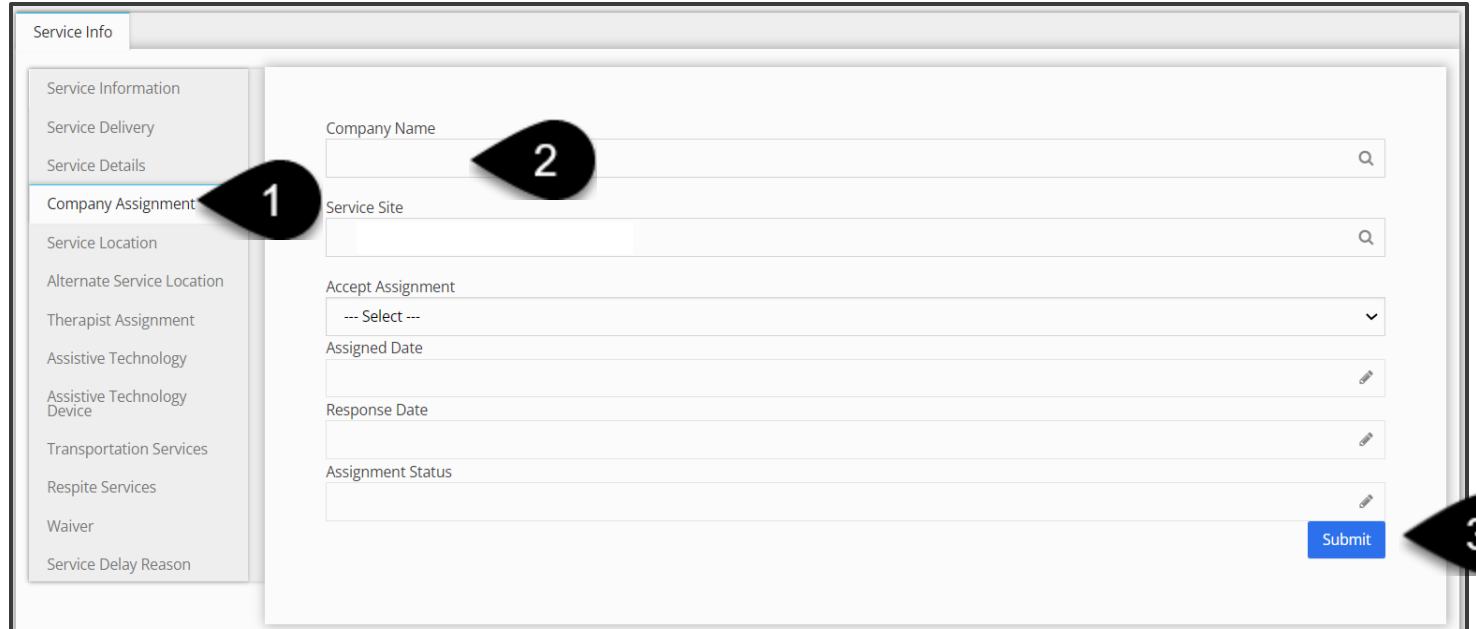


### NOTE

- The **Service Information**, **Service Delivery**, and **Service Location** panels are **required** for approval for services.
- The **Company Assignment** panel is **not** required to enter service authorizations for general services; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for *all* service authorizations to become **Active**.

### Step/Action

1. To assign a company (Agency/Municipality/Independent Provider) to a Service Authorization, click the **Company Assignment** panel.
2. Begin typing the **Company Name** within the **Company Name** field. Multiple values may populate. Select the appropriate value.
3. Select **Submit** to save the company assignment.



The screenshot shows the 'Service Info' form with a sidebar menu on the left and a main form area on the right. The sidebar menu includes the following items: Service Information, Service Delivery, Service Details, Company Assignment (highlighted with callout 1), Service Location, Alternate Service Location, Therapist Assignment, Assistive Technology, Assistive Technology Device, Transportation Services, Respite Services, Waiver, and Service Delay Reason. The main form area contains the following fields: Company Name (with callout 2), Service Site, Accept Assignment (dropdown menu), Assigned Date, Response Date, and Assignment Status. A blue 'Submit' button is located at the bottom right of the form (with callout 3).

# Creating Service Authorizations

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### HOW TO

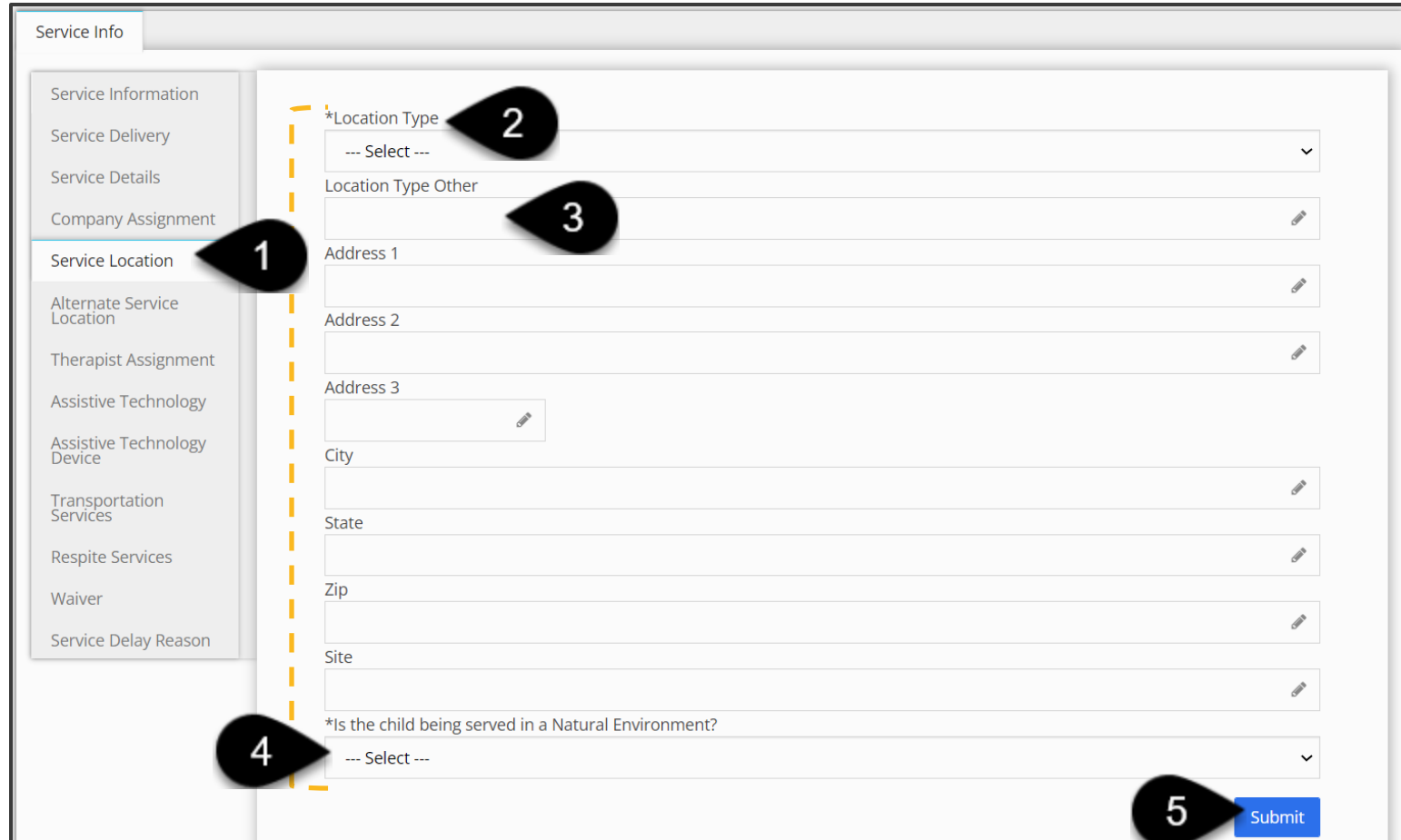
#### Add a Service Location

### NOTE

- Fields with an asterisks (\*) indicate required fields.
- The **Service Information**, **Service Delivery**, and **Service Location** are **required** for the approval of services.
- The **Alternative Service Location** panel is **not** required.

### Step/Action

1. Click the **Service Location** panel.
2. Select the 'Location Type' from the **Location Type** drop-down. If there is an address associated with the location type, the address information will auto-populate in the subsequent address fields (i.e., Address 1, Address, City, State, Zip, Site).
3. If there is an alternate location type, type the location into the **Location Type Other** field.
4. Select whether (**Yes/No**) the **Child is being served in a Natural Environment**.
5. Click the **Submit** button to save the information entered. For good measure, upon completing all required panels, go back to the **Service Information** panel and select **Submit** again to save.



The screenshot shows the 'Service Info' form with a sidebar on the left containing the following panels: Service Information, Service Delivery, Service Details, Company Assignment, Service Location (highlighted with a yellow dashed line and callout 1), Alternate Service Location, Therapist Assignment, Assistive Technology, Assistive Technology Device, Transportation Services, Respite Services, Waiver, and Service Delay Reason.

The main form area contains the following fields:

- \*Location Type**: A dropdown menu with '--- Select ---' (callout 2).
- Location Type Other**: A text input field with a pencil icon (callout 3).
- Address 1**: A text input field with a pencil icon.
- Address 2**: A text input field with a pencil icon.
- Address 3**: A text input field with a pencil icon.
- City**: A text input field with a pencil icon.
- State**: A text input field with a pencil icon.
- Zip**: A text input field with a pencil icon.
- Site**: A text input field with a pencil icon.
- \*Is the child being served in a Natural Environment?**: A dropdown menu with '--- Select ---' (callout 4).
- Submit**: A blue button at the bottom right (callout 5).

# Creating Service Authorizations

## Job Aid

### HOW TO

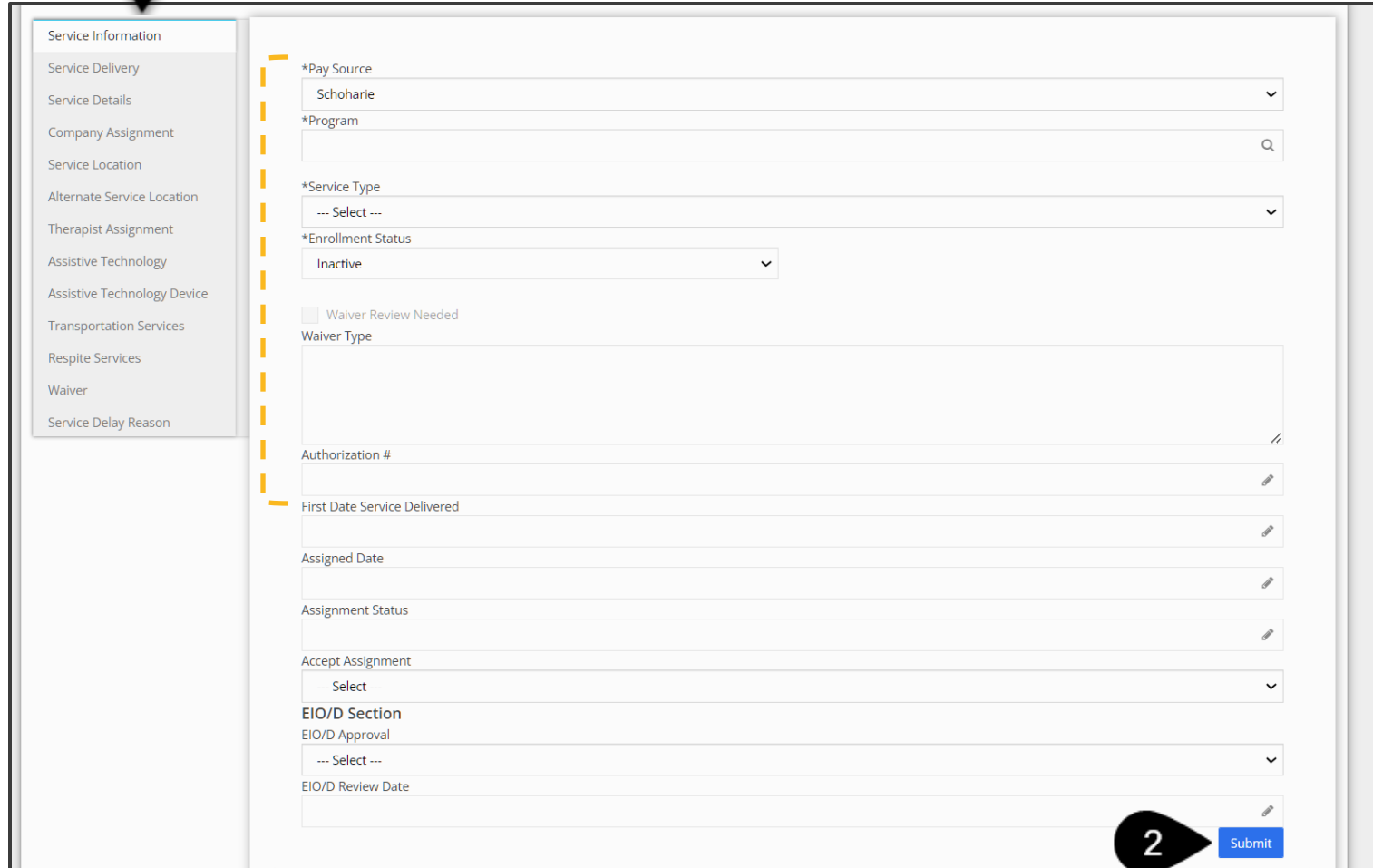
Submit a Service Authorization

### NOTE

- Fields with an asterisks (\*) indicate required fields.
- The **Service Information**, **Service Delivery**, and **Service Location** panels are **required** for approval for services.
- The **Company Assignment** panel is **not** required to enter service authorizations for general services; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for *all* service authorizations to become **Active**.
- The **Alternative Service Location** panel is **not** required.

### Step/Action

1. Once all required panels (and any additional panel relevant to the service authorization) are complete, return to the **Service Information** panel
2. Click the **Submit** button once more to submit (not just save!) your completed service authorization. Once the **Submit** button is clicked, the service authorization is included in the IFSP and upon submission of the IFSP, routes to the EIO/D for approval.
3. The IFSP, including all service authorizations, routes to the EIO/D's **IFSP Alerts** dashboard.



# **EIO/D Approval/Rejection of Service Authorizations for General Services**

Entering Service Authorizations for General Services Job Aid



# Creating Service Authorizations

## Job Aid

### HOW TO

Approve/Reject a Service Authorization as an EIO/D



### NOTE

The EIO/D can approve service authorizations for general services in the following situations:

- **No Agency Assignment/Acceptance Before Approval:** An SA can still be entered and approved **without** a company assignment. The SA remains **inactive** until a company is **assigned** and **accepts** the SA.
- **Agency Assignment/No Agency Acceptance Before Approval:** An SA can be approved **after** an **assigned** agency, but **before** that assigned agency **accepts** the SA. The SA remains **inactive** until the agency/company assigned accepts the SA.
- **Agency Assignment/Acceptance Before Approval:** The SA can be approved and become **active after** an agency is assigned **and** accepts the SA.





# Creating Service Authorizations

## Job Aid

### HOW TO

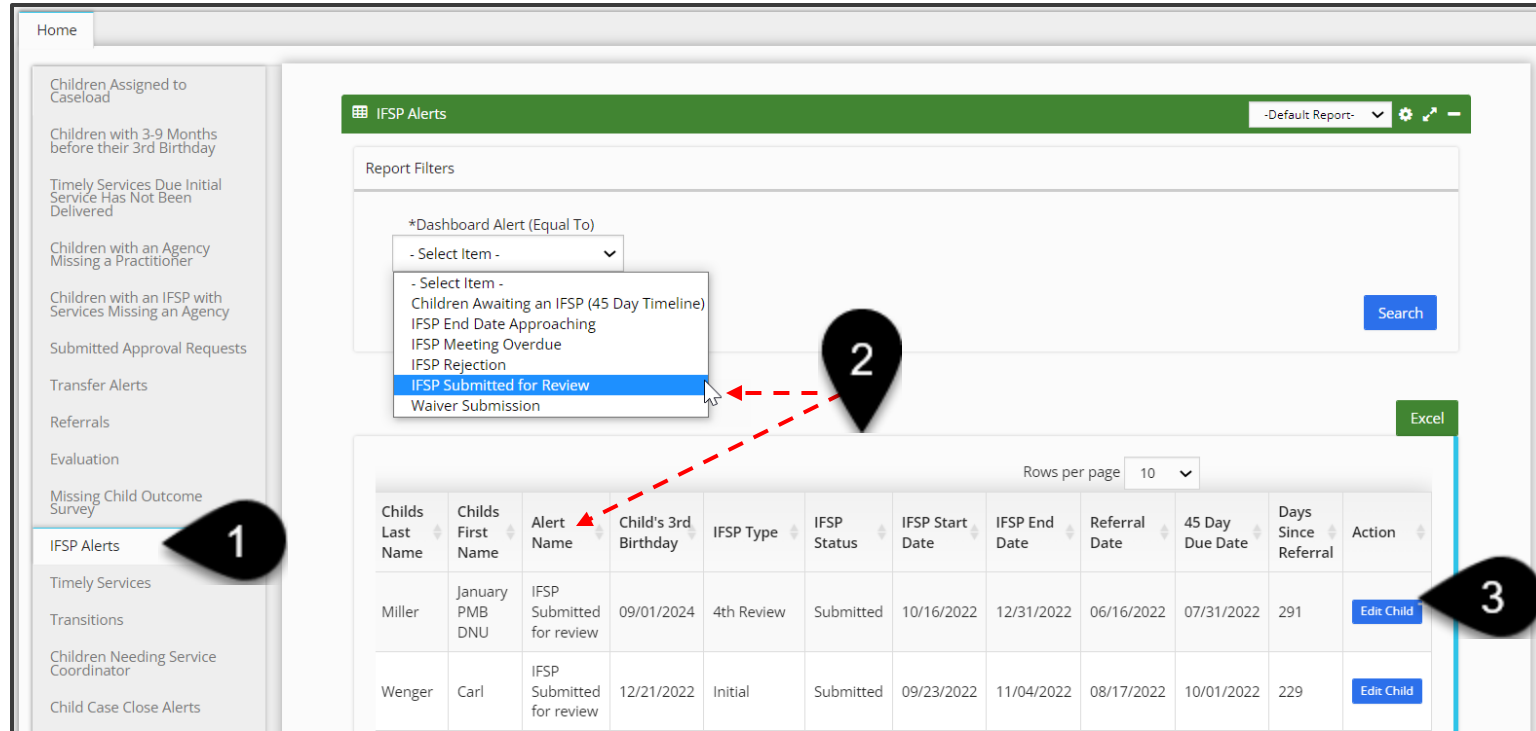
Approve/Reject a Service Authorization as an EIO/D

### NOTE

- For an EIO/D to approve an IFSP from the **IFSP Information** panel, they must first approve **each** service authorization tied to the IFSP, including general services.
- The following roles may approve an ongoing service coordination service authorization: EIO/D NY.

### Step/Action

- Once the Service Authorization for a general service is submitted via the IFSP, the IFSP transitions to the EIO/D's **IFSP Alerts** dashboard
- The EIO/D will need to routinely check the **IFSP Alerts** dashboard/**IFSP Submitted for Review** dashboard filter/alert to approve any IFSPs that contain a Service Authorization for general services.
- After locating the Child on their **IFSP Alerts** dashboard, the EIO/D selects the **Edit Child** button to open the Child's record.



The screenshot shows the 'IFSP Alerts' dashboard. On the left sidebar, 'IFSP Alerts' is highlighted with a black circle and the number 1. The main area shows a 'Report Filters' dropdown menu with 'IFSP Submitted for Review' selected, indicated by a black circle and the number 2. Below the filters is a table of alerts. The first row for 'Miller' has an 'Edit Child' button highlighted with a black circle and the number 3. The table has columns: Child's Last Name, Child's First Name, Alert Name, Child's 3rd Birthday, IFSP Type, IFSP Status, IFSP Start Date, IFSP End Date, Referral Date, 45 Day Due Date, Days Since Referral, and Action.

Child's Last Name	Child's First Name	Alert Name	Child's 3rd Birthday	IFSP Type	IFSP Status	IFSP Start Date	IFSP End Date	Referral Date	45 Day Due Date	Days Since Referral	Action
Miller	January PMB DNU	IFSP Submitted for review	09/01/2024	4th Review	Submitted	10/16/2022	12/31/2022	06/16/2022	07/31/2022	291	Edit Child
Wenger	Carl	IFSP Submitted for review	12/21/2022	Initial	Submitted	09/23/2022	11/04/2022	08/17/2022	10/01/2022	229	Edit Child

# Creating Service Authorizations

## Job Aid



### HOW TO

Approve/Reject a Service Authorization as an EIO/D

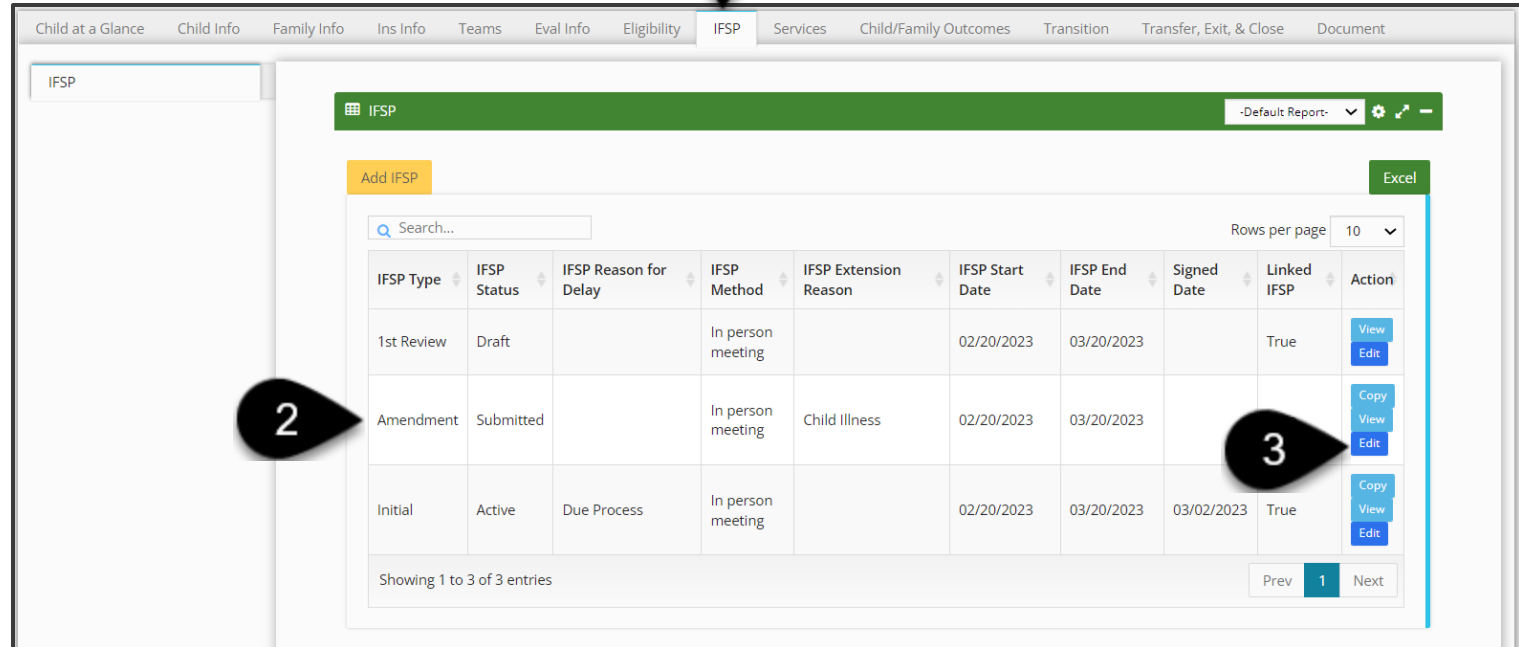


### NOTE

- For an EIO/D to approve an IFSP from the **IFSP Information panel**, they must first approve each service authorization tied to the IFSP.

### Step/Action

1. The Child's record opens, and the EIO/D selects the **IFSP** tab.
2. The EIO/D uses the **IFSP** grid/table to locate the IFSP associated with the Service Authorization.
3. The EIO/D selects the **Edit** button to open the IFSP.



The screenshot shows the EI-Hub interface with the **IFSP** tab selected. A callout '1' points to the **IFSP** tab in the top navigation bar. A callout '2' points to the IFSP grid table. A callout '3' points to the **Edit** button in the **Action** column of the grid.

IFSP Type	IFSP Status	IFSP Reason for Delay	IFSP Method	IFSP Extension Reason	IFSP Start Date	IFSP End Date	Signed Date	Linked IFSP	Action
1st Review	Draft		In person meeting		02/20/2023	03/20/2023		True	View Edit
Amendment	Submitted		In person meeting	Child Illness	02/20/2023	03/20/2023			Copy View Edit
Initial	Active	Due Process	In person meeting		02/20/2023	03/20/2023	03/02/2023	True	Copy View Edit

Showing 1 to 3 of 3 entries

Prev 1 Next

# Creating Service Authorizations

## Job Aid



### HOW TO

Approve/Reject a Service Authorization as an EIO/D

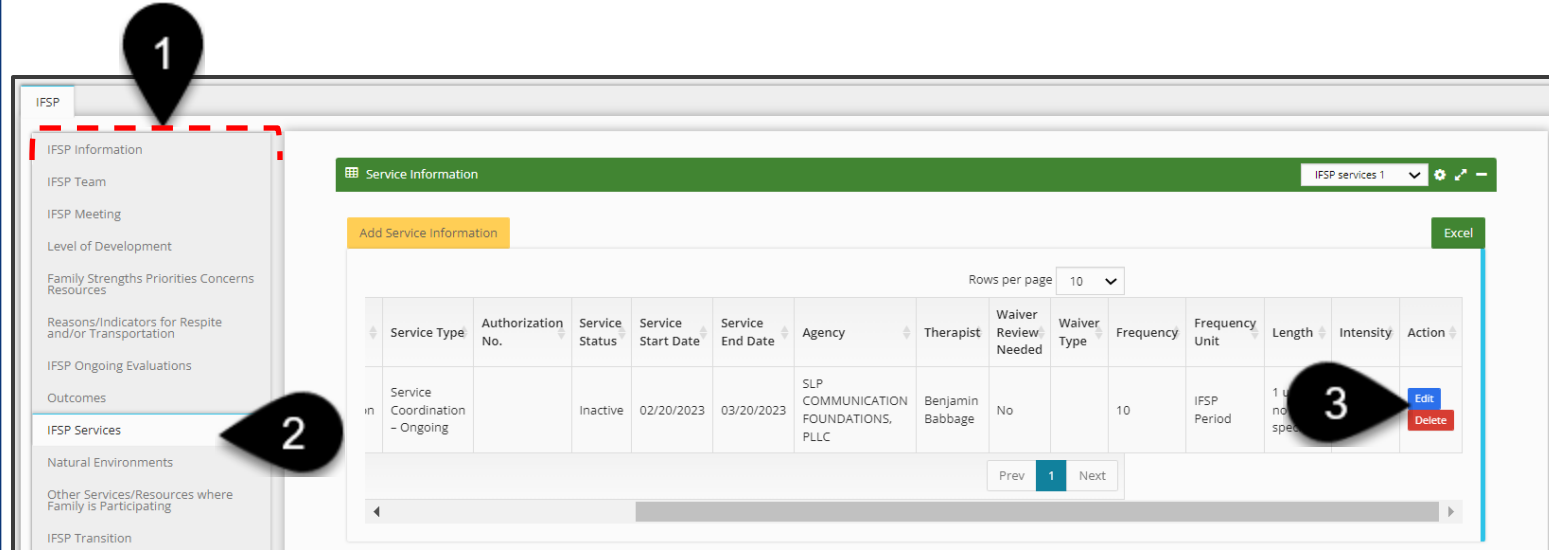


### NOTE

- For an EIO/D to approve an IFSP from the **IFSP Information panel**, they must first approve each service authorization tied to the IFSP.

### Step/Action

- Upon opening the IFSP, the IFSP screen populates with the IFSP panels.
- The EIO/D selects the **IFSP Services** panel.
- The EIO/D selects the **Edit** button to open the correct Service Authorization.



1

2

3

Service Type	Authorization No.	Service Status	Service Start Date	Service End Date	Agency	Therapist	Waiver Review Needed	Waiver Type	Frequency	Frequency Unit	Length	Intensity	Action
Service Coordination - Ongoing		Inactive	02/20/2023	03/20/2023	SLP COMMUNICATION FOUNDATIONS, PLLC	Benjamin Babbage	No		10	IFSP Period	1 hr	no spec	<a href="#">Edit</a> <a href="#">Delete</a>

# Creating Service Authorizations

## Job Aid

### HOW TO

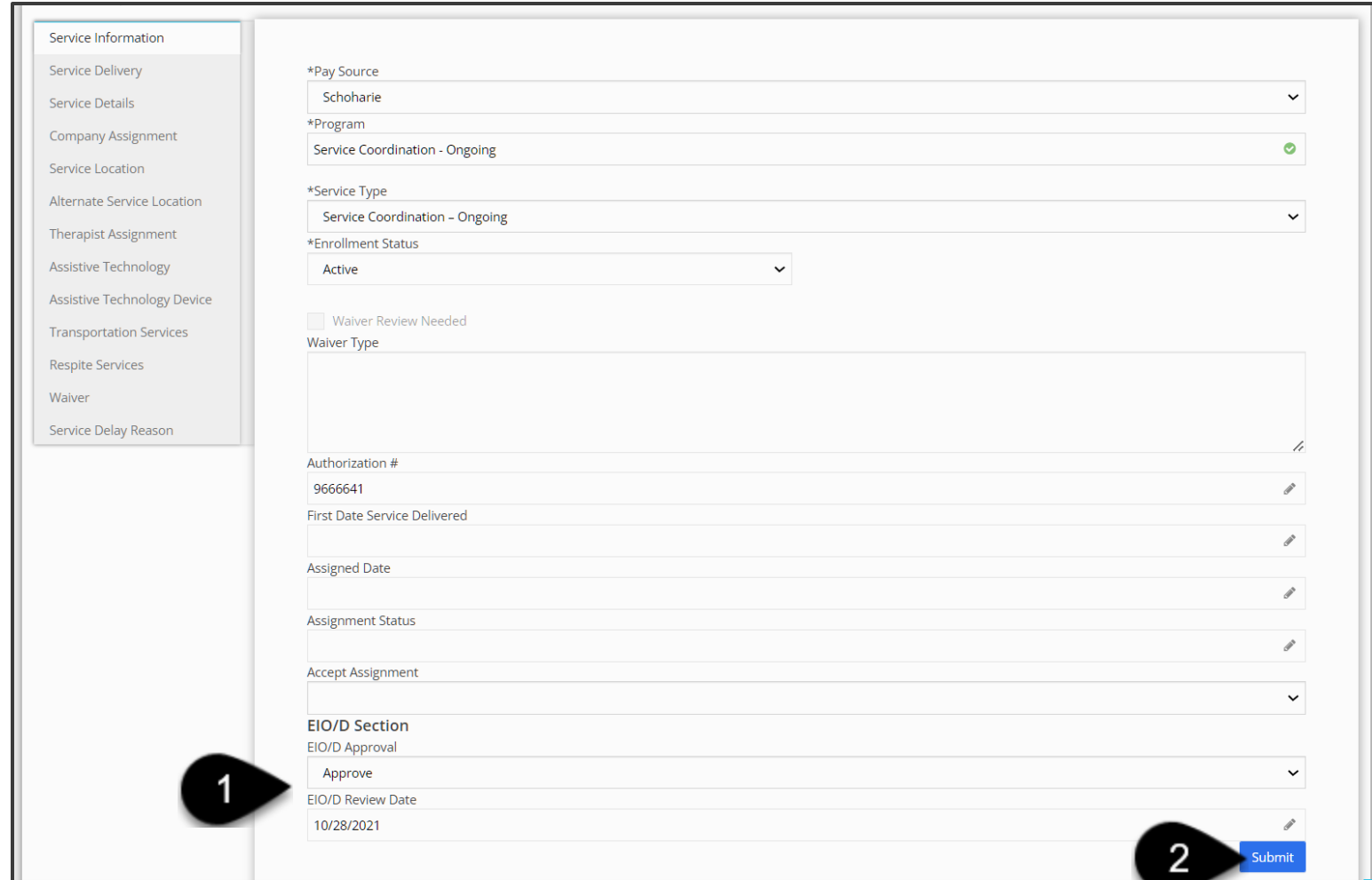
Approve/Reject a Service Authorization as an EIO/D

### NOTE

- Fields with an asterisks (\*) indicate required fields.
- For an EIO/D to approve an IFSP from the **IFSP Information panel**, they must first approve each service authorization tied to the IFSP.
- The EIO/D must approve, and an agency must accept the service authorization before a service authorization number is generated.

### Step/Action

1. The EIO/D reviews and approves the service authorization. The EIO/D Review Date auto-populates.
2. Upon selecting the **Submit** button, the service authorization routes to the approved provider for acceptance or rejection.



The screenshot shows the 'Service Information' form in the EI-Hub system. A sidebar on the left lists various service categories. The main form contains several dropdown menus and text fields. A black callout bubble with the number '1' points to the 'EIO/D Approval' dropdown, which is currently set to 'Approve'. Another black callout bubble with the number '2' points to the 'Submit' button at the bottom right of the form.

**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  
Schoharie

\*Program  
Service Coordination - Ongoing

\*Service Type  
Service Coordination - Ongoing

\*Enrollment Status  
Active

☐ Waiver Review Needed

Waiver Type

Authorization #  
9666641

First Date Service Delivered

Assigned Date

Assignment Status

Accept Assignment

**EIO/D Section**

EIO/D Approval  
Approve

EIO/D Review Date  
10/28/2021

Submit

# Creating Service Authorizations

## Job Aid

### HOW TO

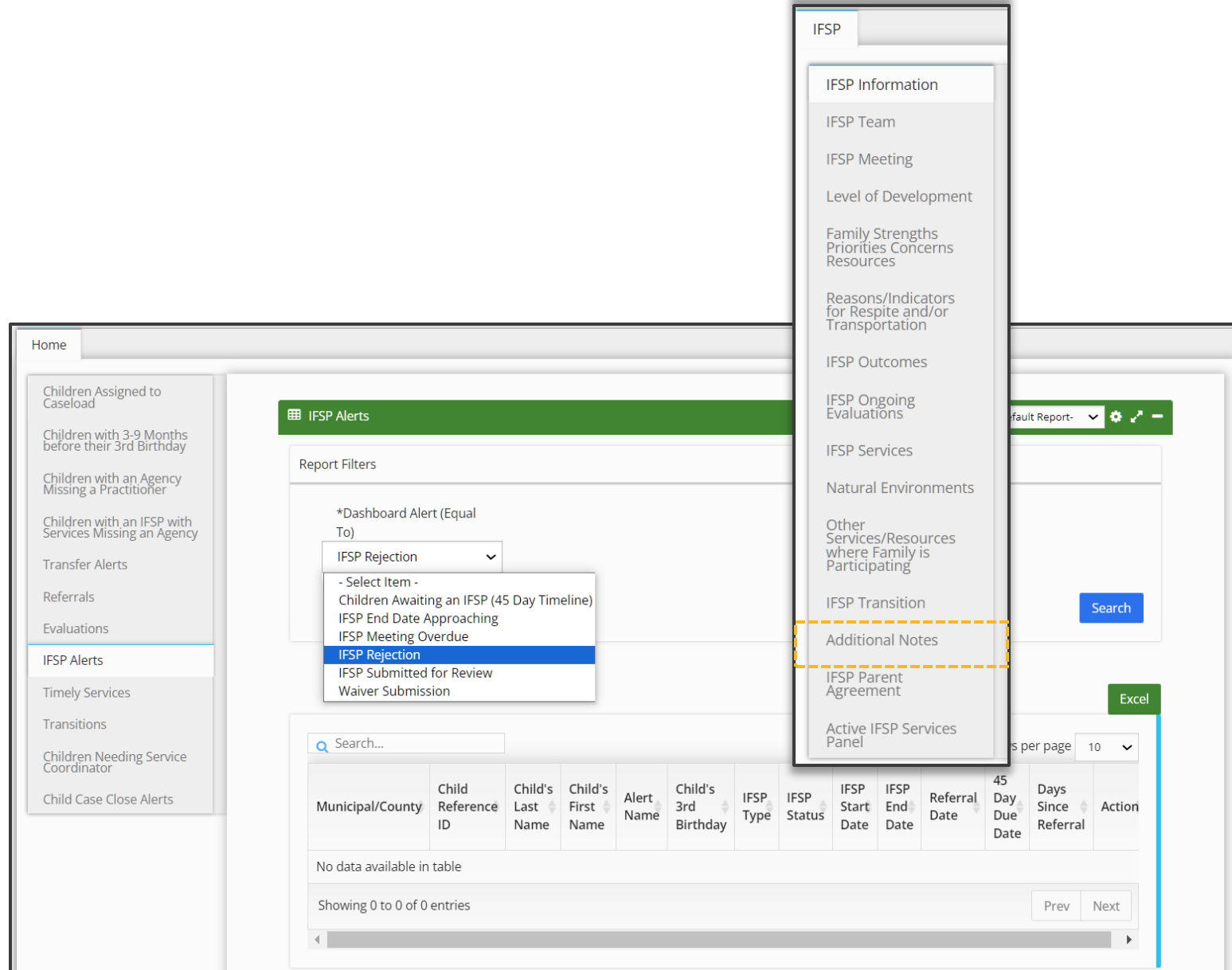
Approve/Reject an IFSP as an EIO/D

### NOTE

**EIO/Ds who reject a service authorization(s) will then need to reject the entire IFSP.** This will change the IFSP Status from "Submitted" to "Draft".

Upon rejecting the IFSP, the IFSP routes to the Service Coordinator's **IFSP Alerts** dashboard, where the **IFSP Rejection** drop-down should be used to locate the rejected IFSP for further editing and resubmittal. When an IFSP is re-submitted, the EIO/D Approval field will be blank.

The Service Coordinator is encouraged to document changes made to the IFSP and associated service authorizations in the **Additional Notes** panel located within the **IFSP** tab. Changes may also be communicated to the EIO/D through offline communications.



The screenshot shows the 'IFSP Alerts' dashboard. On the left is a sidebar with navigation links: Home, Children Assigned to Caseload, Children with 3-9 Months before their 3rd Birthday, Children with an Agency Missing a Practitioner, Children with an IFSP with Services Missing an Agency, Transfer Alerts, Referrals, Evaluations, IFSP Alerts (selected), Timely Services, Transitions, Children Needing Service Coordinator, and Child Case Close Alerts. The main content area has a green header 'IFSP Alerts' and a 'Report Filters' section. A dropdown menu is open for 'IFSP Rejection', showing options: - Select Item -, Children Awaiting an IFSP (45 Day Timeline), IFSP End Date Approaching, IFSP Meeting Overdue, **IFSP Rejection** (highlighted), IFSP Submitted for Review, and Waiver Submission. Below the filters is a search bar and a table with columns: Municipal/County, Child Reference ID, Child's Last Name, Child's First Name, Alert Name, Child's 3rd Birthday, IFSP Type, IFSP Status, IFSP Start Date, IFSP End Date, Referral Date, 45 Day Due Date, Days Since Referral, and Action. The table currently shows 'No data available in table' and 'Showing 0 to 0 of 0 entries'. On the right, there is a vertical menu for the 'IFSP' tab with options: IFSP Information, IFSP Team, IFSP Meeting, Level of Development, Family Strengths/Priorities/Concerns/Resources, Reasons/Indicators for Respite and/or Transportation, IFSP Outcomes, IFSP Ongoing Evaluations, IFSP Services, Natural Environments, Other Services/Resources where Family is Participating, IFSP Transition, **Additional Notes** (highlighted with a dashed orange box), IFSP Parent Agreement, and Active IFSP Services Panel. At the bottom right, there are 'Search', 'Excel', and pagination controls.

# Assigning a Company to Approved Services without an Agency Assignment

Entering Service Authorizations for General Services Job Aid

# Creating Service Authorizations

## *Job Aid*



### HOW TO

Add a Company Assignment



### NOTE

- Please recall, service authorizations for general services are attached to a child's IFSP. When an EIO/D approves a child's IFSP, they **also** have to approve each service associated with the IFSP.
- In the instance that an IFSP is approved by an EIO/D **before** an agency is assigned to service(s), and an agency is later identified, the IFSP must be unlocked, and previous approval of services for which an agency needs to be assigned reversed. These two actions allow an agency to be assigned and services to be accepted by the agency assigned.
- The IFSP **must only be unlocked to** correct a data entry error or to assign an agency to a service authorization that did not have an agency assigned. Users must **not** unlock an IFSP for any other purposes.
- The upcoming pages cover how to unlock an IFSP and reverse the approval on a service authorization needing an agency.





# Creating Service Authorizations

## Job Aid

### HOW TO

Add a Company Assignment

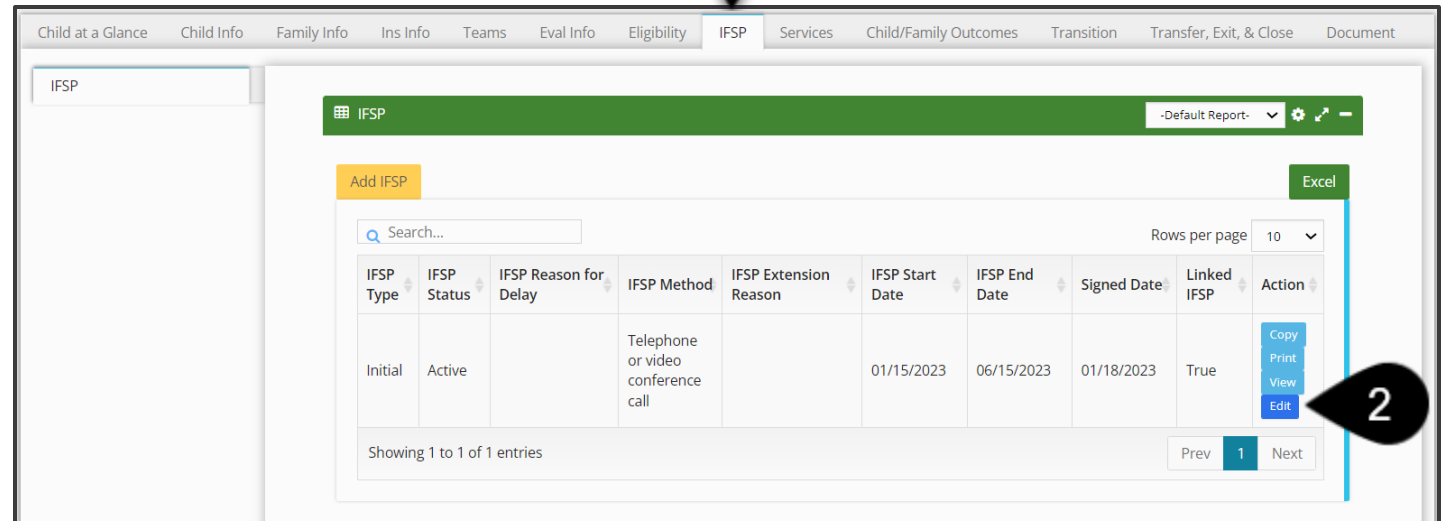
### NOTE

The EIO/D should be alerted in an off-line process that an agency has now been identified for services previously approved without an agency,

The EIO/D will need to unlock the IFSP to add an agency to services previously approved without agency assignment.

### Step/Action

1. To unlock the IFSP, Select the **IFSP** tab from the Child's record.
2. To edit/unlock an existing IFSP, locate the existing IFSP from the **IFSP** grid and select the **Edit** button. The **IFSP Information** panel populates for updating/editing.



The screenshot shows the EI-Hub interface with the 'IFSP' tab selected. The grid displays one entry with the following details:

IFSP Type	IFSP Status	IFSP Reason for Delay	IFSP Method	IFSP Extension Reason	IFSP Start Date	IFSP End Date	Signed Date	Linked IFSP	Action
Initial	Active		Telephone or video conference call		01/15/2023	06/15/2023	01/18/2023	True	Copy, Print, View, Edit

The 'Edit' button is highlighted in blue in the 'Action' column. The grid shows 'Showing 1 to 1 of 1 entries' and 'Rows per page: 10'.



# Creating Service Authorizations

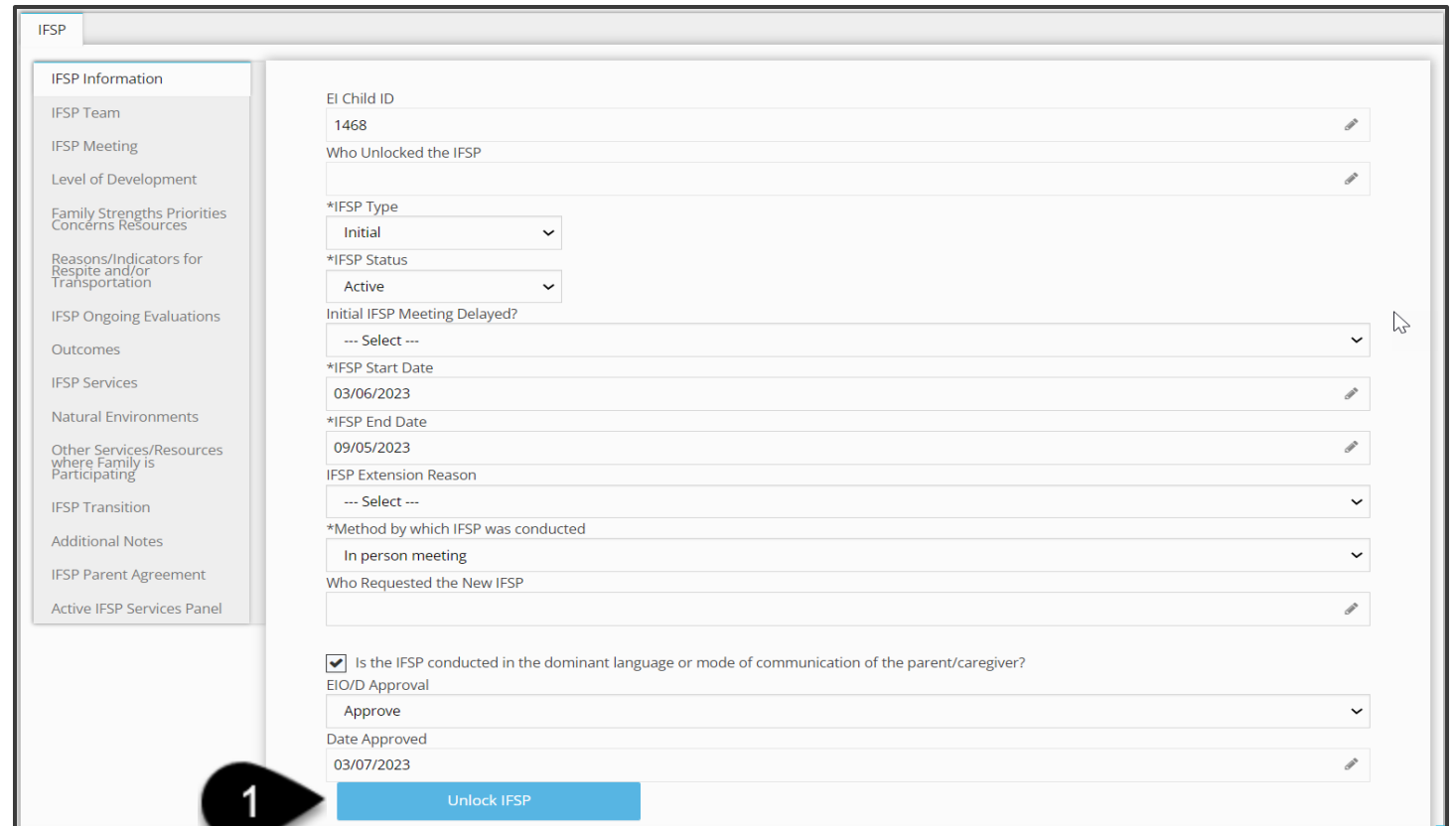
## Job Aid

### HOW TO

#### Add a Company Assignment

#### Step/Action

1. On the **IFSP Information Panel**, click the **Unlock IFSP** button
2. A window will appear asking users to confirm they want to unlock the IFSP. Select 'Yes'. This action changes the IFSP back into 'Draft' status.



# Creating Service Authorizations

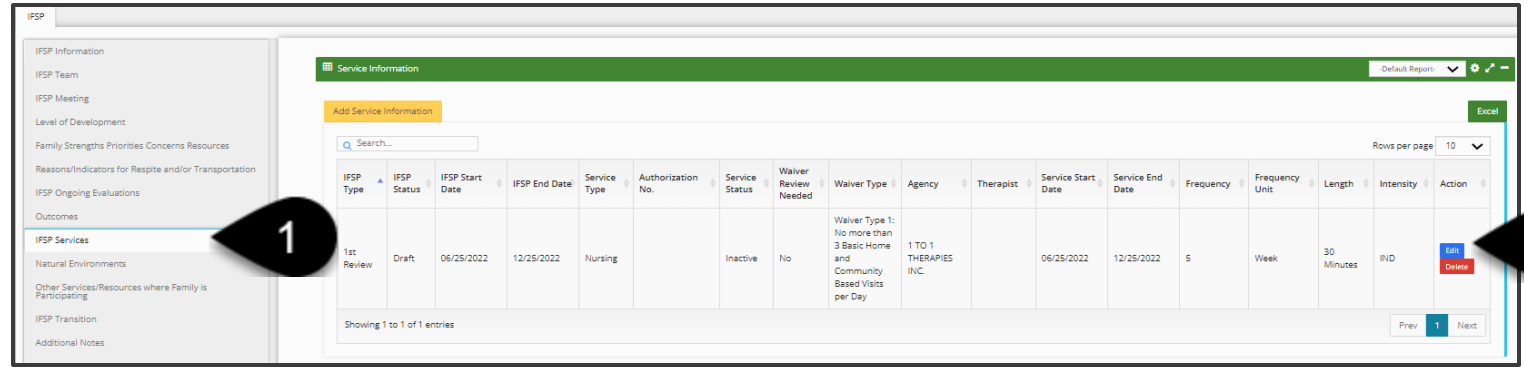
## Job Aid

### HOW TO

#### Add a Company Assignment

#### Step/Action

1. Once the IFSP has been unlocked, the EIO/D (or Service Coordinator) can locate the service authorization from the **IFSP Services** panel.
2. Click the **Edit** button associated with the service that does not have an agency assigned. The **Service Information** panel populates.
3. While on the **Service Information** panel, update the **EIO/D Approval** field to "Select". This action reverses the service authorization's approval.
4. Click on the **Submit** button to save the reversal of the service authorization approval.



IFSP Information

IFSP Team

IFSP Meeting

Level of Development

Family Strengths/Priorities/Concerns/Resources

Reasons/Indicators for Respite and/or Transportation

IFSP Ongoing Evaluations

Outcomes

**IFSP Services**

Natural Environments

Other Services/Resources where Family is Participating

IFSP Transition

Additional Notes

**Service Information**

Add Service Information

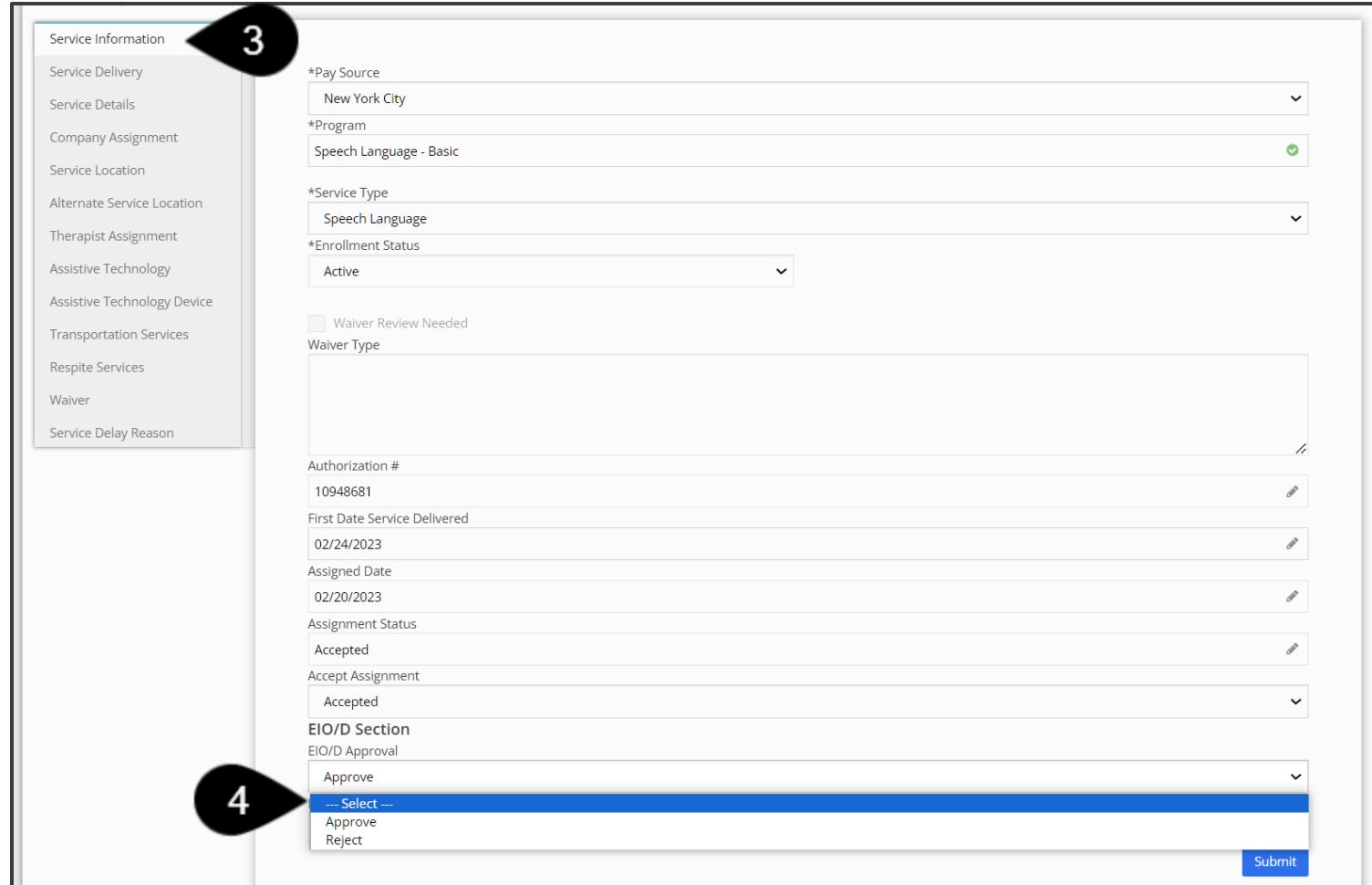
Search...

Rows per page: 10

IFSP Type	IFSP Status	IFSP Start Date	IFSP End Date	Service Type	Authorization No.	Service Status	Waiver Review Needed	Waiver Type	Agency	Therapist	Service Start Date	Service End Date	Frequency	Frequency Unit	Length	Intensity	Action
1st Review	Draft	06/25/2022	12/25/2022	Nursing		Inactive	No	Waiver Type 1: No more than 3 Basic Home and Community Based Visits per Day	1 TO 1 THERAPIES INC.		06/25/2022	12/25/2022	5	Week	30 Minutes	IND	<b>Edit</b>

Showing 1 to 1 of 1 entries

Prev 1 Next



**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

New York City

\*Program

Speech Language - Basic

\*Service Type

Speech Language

\*Enrollment Status

Active

☐ Waiver Review Needed

Waiver Type

Authorization #

10948681

First Date Service Delivered

02/24/2023

Assigned Date

02/20/2023

Assignment Status

Accepted

Accept Assignment

Accepted

**EIO/D Section**

EIO/D Approval

Approve

**Select**

Approve

Reject

Submit

# Creating Service Authorizations

## Job Aid

### HOW TO

Add a Company Assignment

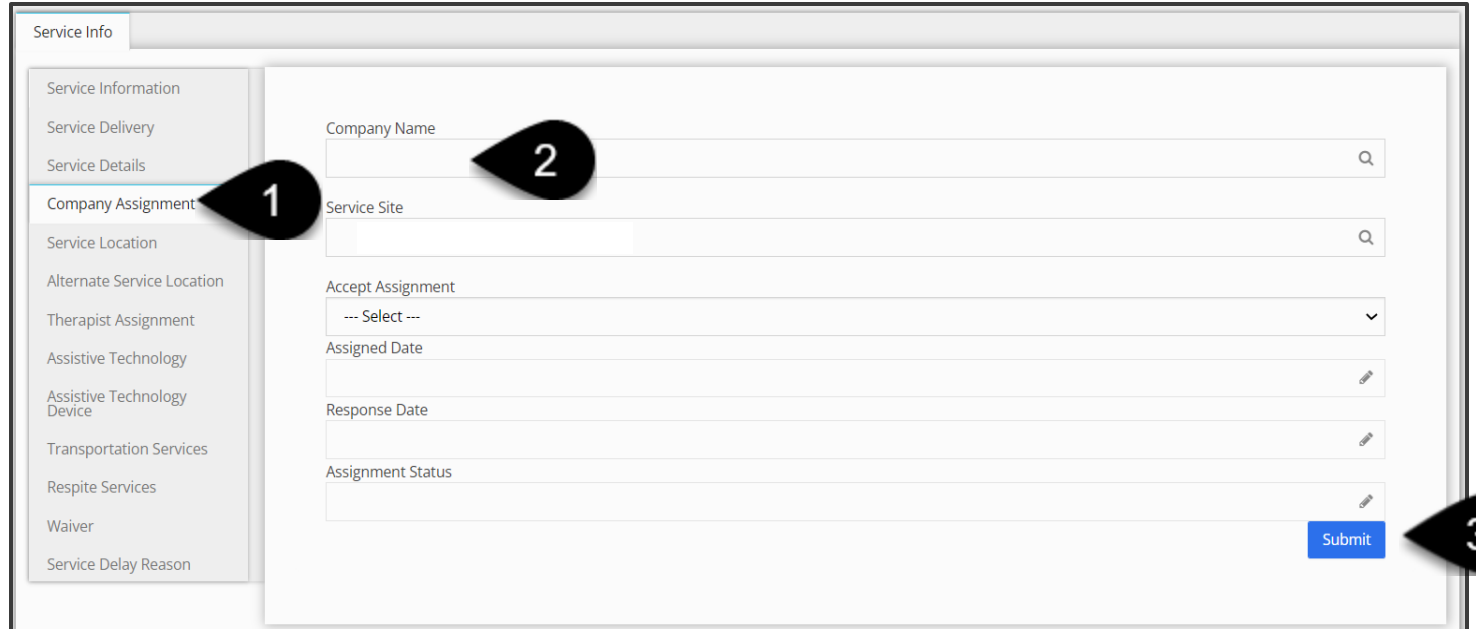


### NOTE

- The **Service Information**, **Service Delivery**, and **Service Location** panels are **required** for approval for services.
- The **Company Assignment** panel is **not** required to enter service authorizations for general services; however, the **Company Assignment** panel, company acceptance, and EIO/D approval are **required** for *all* service authorizations to become **Active**.

### Step/Action

1. Now, the EIO/D or service coordinator can proceed to assign a company (Agency/Municipality/Independent Provider) to the Service Authorization by selecting the **Company Assignment** panel.
2. Begin typing the **Company Name** within the **Company Name** field. Multiple values may populate. Select the appropriate value.
3. Select **Submit** to save the company assignment.



The screenshot shows the 'Service Info' form interface. On the left is a sidebar with a list of tabs: Service Information, Service Delivery, Service Details, Company Assignment (highlighted with callout 1), Service Location, Alternate Service Location, Therapist Assignment, Assistive Technology, Assistive Technology Device, Transportation Services, Respite Services, Waiver, and Service Delay Reason. The main form area contains several fields: 'Company Name' (with a search icon and callout 2), 'Service Site' (with a search icon), 'Accept Assignment' (a dropdown menu showing '--- Select ---'), 'Assigned Date' (with an edit icon), 'Response Date' (with an edit icon), and 'Assignment Status' (with an edit icon). At the bottom right of the form is a blue 'Submit' button (with callout 3).

# Creating Service Authorizations

## Job Aid

### HOW TO

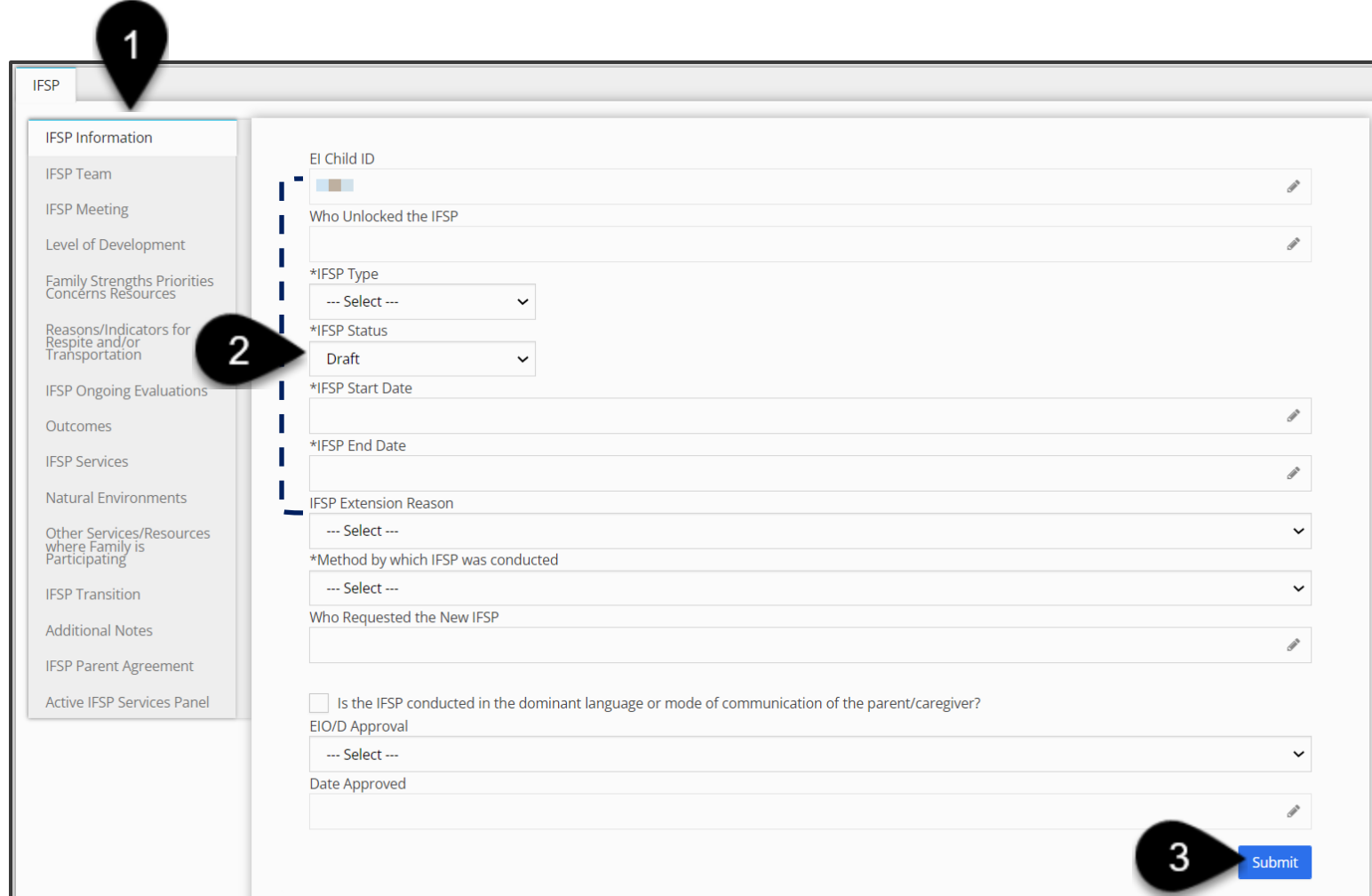
#### Submitting an IFSP

### NOTE

- Fields with an asterisks (\*) indicate required fields.

### Step/Action

- Once the IFSP has been drafted and the company added to all service authorizations, return to the **IFSP Information** panel.
- Under the **IFSP Status** field change the status of the IFSP to "Submitted"
- Select the **Submit** button. This action will trigger a request to the EIO/D to review and approve the IFSP on their **IFSP Alerts** dashboard.



The screenshot shows the 'IFSP Information' form. Callout 1 points to the 'IFSP' tab. Callout 2 points to the 'IFSP Status' dropdown menu, which is currently set to 'Draft'. Callout 3 points to the 'Submit' button at the bottom right of the form.

**IFSP Information**

- IFSP Team
- IFSP Meeting
- Level of Development
- Family Strengths Priorities Concerns Resources
- Reasons/Indicators for Respite and/or Transportation
- IFSP Ongoing Evaluations
- Outcomes
- IFSP Services
- Natural Environments
- Other Services/Resources where Family is Participating
- IFSP Transition
- Additional Notes
- IFSP Parent Agreement
- Active IFSP Services Panel

**IFSP Form Fields:**

- EI Child ID
- Who Unlocked the IFSP
- \*IFSP Type (--- Select ---)
- \*IFSP Status (Draft)
- \*IFSP Start Date
- \*IFSP End Date
- IFSP Extension Reason (--- Select ---)
- \*Method by which IFSP was conducted (--- Select ---)
- Who Requested the New IFSP
- ☐ Is the IFSP conducted in the dominant language or mode of communication of the parent/caregiver?
- EIO/D Approval (--- Select ---)
- Date Approved
- Submit**

# **Company Acceptance/Rejection of Service Authorizations for General Services**

Entering Service Authorizations for General Services Job Aid



# Creating Service Authorizations

## *Job Aid*

### HOW TO

Accept/Reject an Assignment as a Company

### NOTE

- The EIO/D must approve, **and** a company (Agency/Municipality/Independent Provider) must accept the service authorization before a service authorization number is generated.
- Once the EIO/D approves the service authorization for general services(s), the service authorization routes to the company (Agency/Municipality/Independent Provider) assigned to the child and identified on the service authorization.
- The company must 'Accept' or 'Reject' the service authorization.
- The following roles are able to accept/reject a service authorization: UniversalProvNY **OR** ProvDataEntryNY.



# Creating Service Authorizations

## Job Aid

### HOW TO

Accept/Reject an Assignment as a Company

### NOTE

- After accepting or rejecting a child's service authorization, the child may still appear on your dashboard with an **Accept Assignment** button. This indicates there are multiple service authorizations associated with the child that must be reviewed and responded to.
- Even if multiple service authorizations are being assigned to the agency or provider, a child will only display **once** on the **Children Assigned to Caseload** dashboard
- The agency/provider will not have access to the child's record until all service authorizations have been accepted or rejected.

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
Baker	Jim	Albany	Active	10/02/2021	1312	Edit
bLcaLXXcfXbL	CeZaba	Albany	Active	11/01/2021	1003	Edit
Feb23	Ram	Albany	Active	02/01/2022	1432	Edit
Grant	Pet	Albany	Active	07/04/2022	1197	Accept Assignment
Hall	Eric	Queens	Active	06/13/2022	1209	Edit

Agency Accept/Reject Assignment

EIO/D or Coordinator Type

Initial Service Coordinator

\*Start Date

01/31/2024

\*Agency Accept/Reject Assignment

-- Select --
-- Select --
Accepted
Rejected

Submit

Cancel

# Creating Service Authorizations

## Job Aid

### HOW TO

Accept/Reject an Assignment as a Company

### NOTE

It is best practice to write down the Child Reference ID **before** clicking the 'Accept Assignment' button. Once an assignment is accepted, the child will transition, in alphabetical order **by last name**, to the **Children Assigned to Caseload** dashboard. The child will have an 'Edit' button in the Action column. To return to that child's record, you will have to find the child by name or Child Reference ID.

### Step/Action

1. Upon EIO/D's approval, the service authorization routes to the company's **Children Assigned to Caseload** dashboard
2. Select the **Accept Assignment** button.
3. The **Agency Accepts/Reject Assignment** dialogue box populates. Choose 'Accepted' or 'Rejected' from the **Agency Accept/Reject Assignment** dropdown.
4. Click the **Submit** button to save the selection.
  - Upon accepting the assignment, the **Accept Assignment** button changes to an **Edit** button to allow the company access to the child's record.

Children Assigned to Caseload 1

-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
Baker	Jim	Albany	Active	10/02/2021	1312	Edit 5
bLcaLXXcfXbL	CeZaba	Albany	Active	11/01/2021	1003	Edit
Feb23	Ram	Albany	Active	02/01/2022	1432	Edit
Grant	Pet	Albany	Active	07/04/2022	1197	Accept Assignment 2
Hall	Eric	Queens	Active	06/13/2022	1209	Edit

Agency Accept/Reject Assignment

EIO/D or Coordinator Type  
Initial Service Coordinator

\*Start Date  
01/31/2024

\*Agency Accept/Reject Assignment

-- Select --

Accepted 3

Rejected

Submit 4



# Creating Service Authorizations

## Job Aid

### HOW TO

Accept/Reject an Assignment as a Company

### NOTE

- If the company (Agency/Municipality/Independent Provider) **rejects** the assignment, the child will route to the EIO/D and Service Coordinator's **Children With an IFSP with Services Missing an Agency** Dashboard for another assignment.

Home

Children Assigned to Caseload

Children with 3-9 Months before their 3rd Birthday

Children with an Agency Missing a Practitioner

Children with an IFSP with Services Missing an Agency

Submitted Approval Requests

Transfer Alerts

Evaluations

IFSP Alerts

Timely Services

Transitions

Children Needing Service Coordinator

Child Case Close Alerts

Review 271 Response

Search...

Rows per page 10

Municipal/County	Child Reference ID	Child's Last Name	Child's First Name	Status	Date of Birth	Child's 3rd Birthday	IFSP Type	IFSP Status	IFSP Start Date	Service Type
No data available in table										
Showing 0 to 0 of 0 entries										
<div>Prev</div> <div>Next</div>										

# Assigning a Therapist

Entering Service Authorizations for General Services Job Aid

# Creating Service Authorizations

## Job Aid

### HOW TO

Assign a Therapist

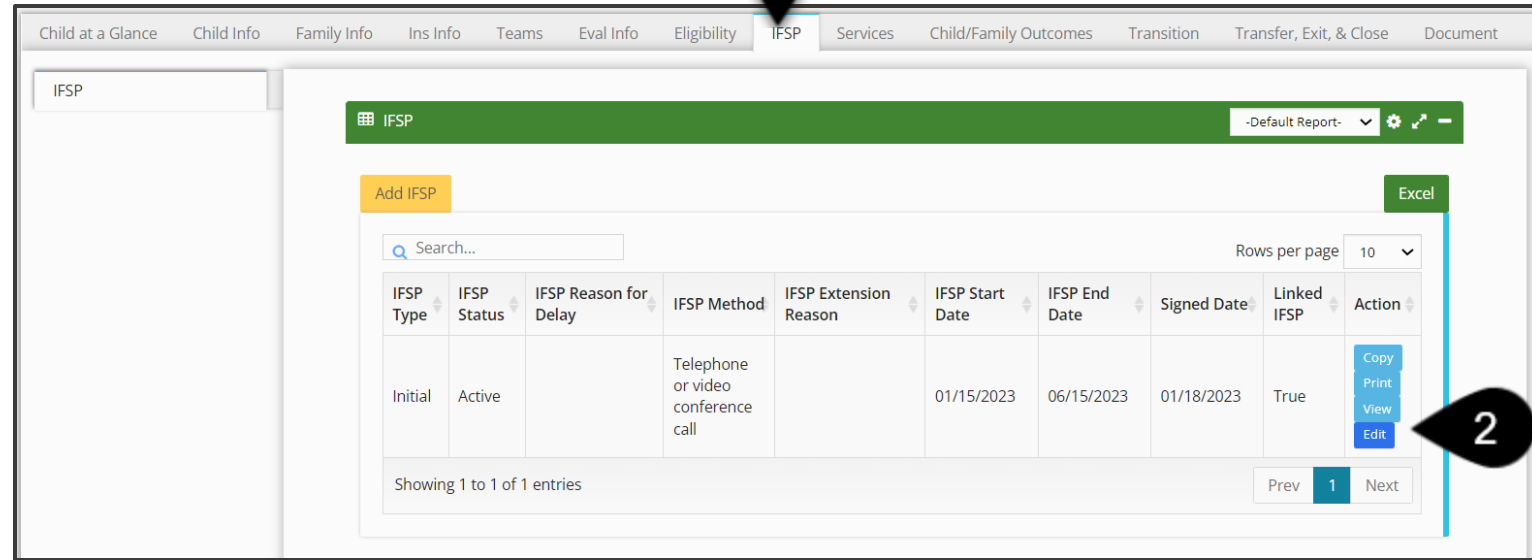
### NOTE

Therapist Assignments can only be assigned to service authorizations through the **IFSP** tab, **IFSP Services** panel.

Please keep in mind, **provider** refer to an agency or an individual provider acting as their own agency. A **therapist** refers to an individual who may be employed by an agency and is responsible for rendering services (i.e., an occupational therapist, a speech-language pathologist).

### Step/Action

1. To add a therapist assignment, open a child's record and select the **IFSP** tab from the Child's record. The page defaults to the **IFSP** grid.
2. From the **IFSP** grid, locate the correct IFSP and select the **Edit** button to open the IFSP. The IFSP sub-tab populates.
3. Locate and select the **IFSP Services** panel.
4. From the **IFSP Services** panel, select the **Edit** button next to the service authorization needing a therapist. Upon selecting **Edit**, the **Service Info** tab/**Service Information** panel populates.



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

IFSP

IFSP

-Default Report-

Add IFSP

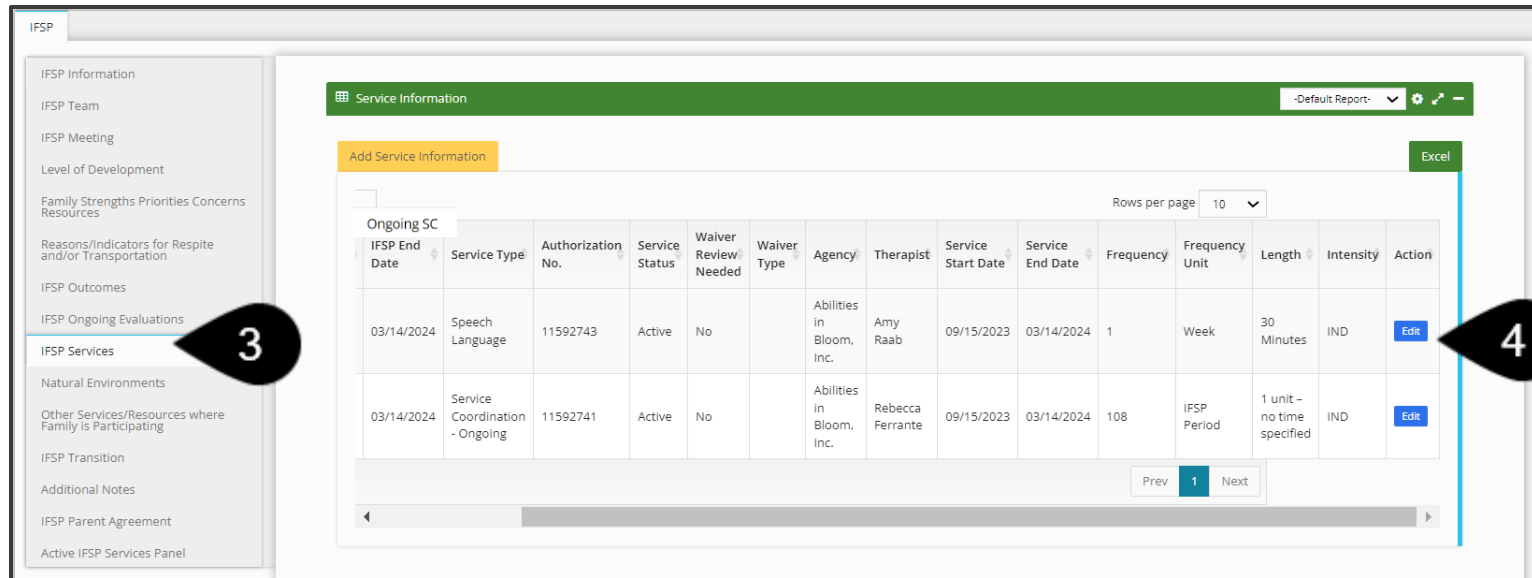
Search...

Rows per page 10

IFSP Type	IFSP Status	IFSP Reason for Delay	IFSP Method	IFSP Extension Reason	IFSP Start Date	IFSP End Date	Signed Date	Linked IFSP	Action
Initial	Active		Telephone or video conference call		01/15/2023	06/15/2023	01/18/2023	True	<a href="#">Copy</a> <a href="#">Print</a> <a href="#">View</a> <a href="#">Edit</a>

Showing 1 to 1 of 1 entries

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IFSP

IFSP Information

IFSP Team

IFSP Meeting

Level of Development

Family Strengths Priorities Concerns Resources

Reasons/Indicators for Respite and/or Transportation

IFSP Outcomes

IFSP Ongoing Evaluations

**IFSP Services**

Natural Environments

Other Services/Resources where Family is Participating

IFSP Transition

Additional Notes

IFSP Parent Agreement

Active IFSP Services Panel

Service Information

-Default Report-

Add Service Information

Rows per page 10

IFSP End Date	Service Type	Authorization No.	Service Status	Waiver Review Needed	Waiver Type	Agency	Therapist	Service Start Date	Service End Date	Frequency	Frequency Unit	Length	Intensity	Action
03/14/2024	Speech Language	11592743	Active	No		Abilities in Bloom, Inc.	Amy Raab	09/15/2023	03/14/2024	1	Week	30 Minutes	IND	<a href="#">Edit</a>
03/14/2024	Service Coordination - Ongoing	11592741	Active	No		Abilities in Bloom, Inc.	Rebecca Ferrante	09/15/2023	03/14/2024	108	IFSP Period	1 unit - no time specified	IND	<a href="#">Edit</a>

Prev 1 Next

# Creating Service Authorizations

## HOW TO

## Job Aid

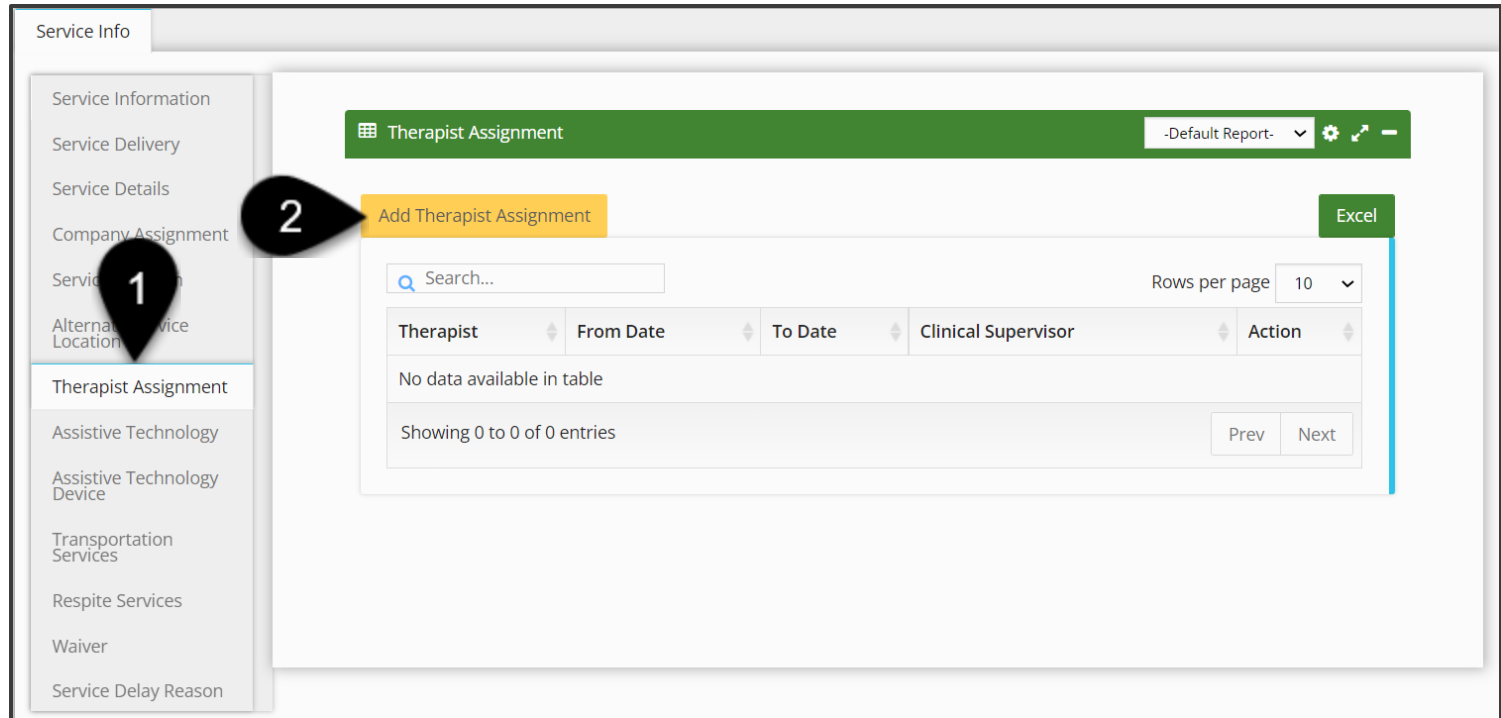
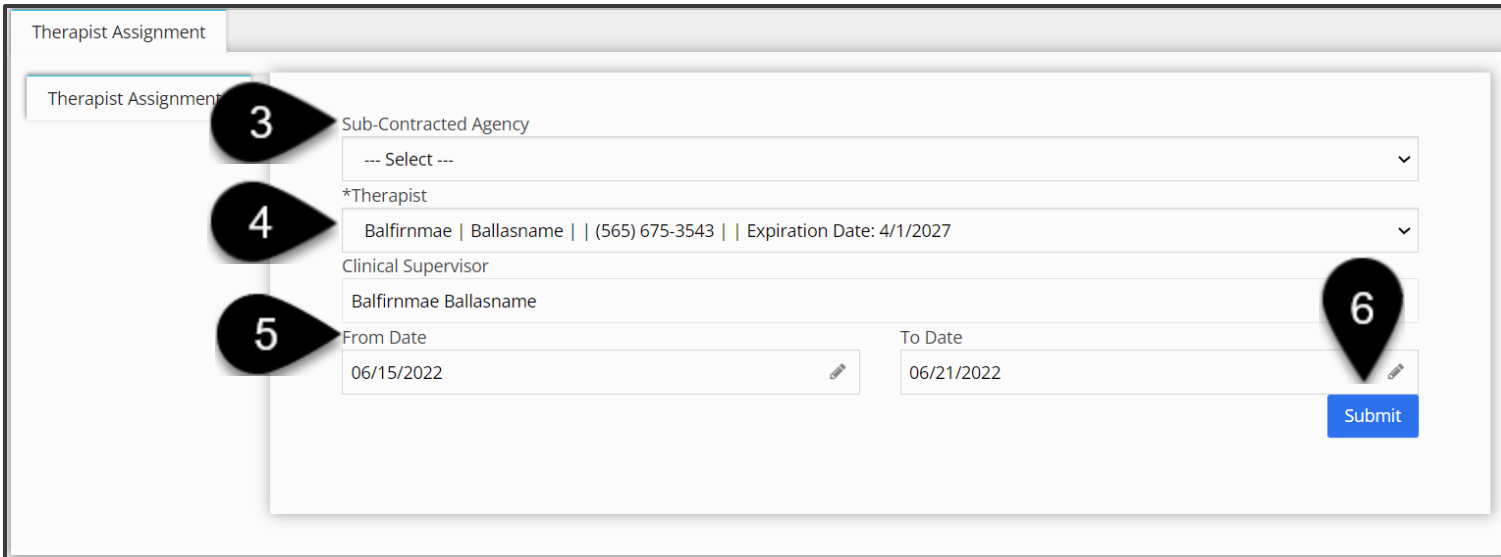
### Assign a Therapist

### NOTE

- Fields with an asterisks (\*) indicate required fields.
- Agencies can assign multiple therapists to a single service authorization by repeating the below steps. This allows for substitution or replacement of rendering therapists. Therapist assignments should be end-dated when their access is no longer appropriate. The assignment should end the day before the Service Authorization end-date.

### Step/Action

- From the **Service Info** sub-tab, Click the **Therapist Assignment** panel.
- Select the **Add Therapist Assignment** button from the **Therapist Assignment** grid/table.
- Select a **Sub-Contracted Agency**, if applicable. Agencies should only select a sub-contracted agency if the 'Company Assigned' has entered a contractual relationship with another agency to supply therapists.
- Select a therapist from the **Therapist** drop-down.
- Manually enter or use the calendar picker to select **From Date** and **To Date** for the therapist.
- Click the **Submit** button to save/submit the information entered. This action prompts the assignment to route to the assigned therapist's **Children Assigned to Caseload** dashboard.

# Creating Service Authorizations

## Job Aid

### HOW TO

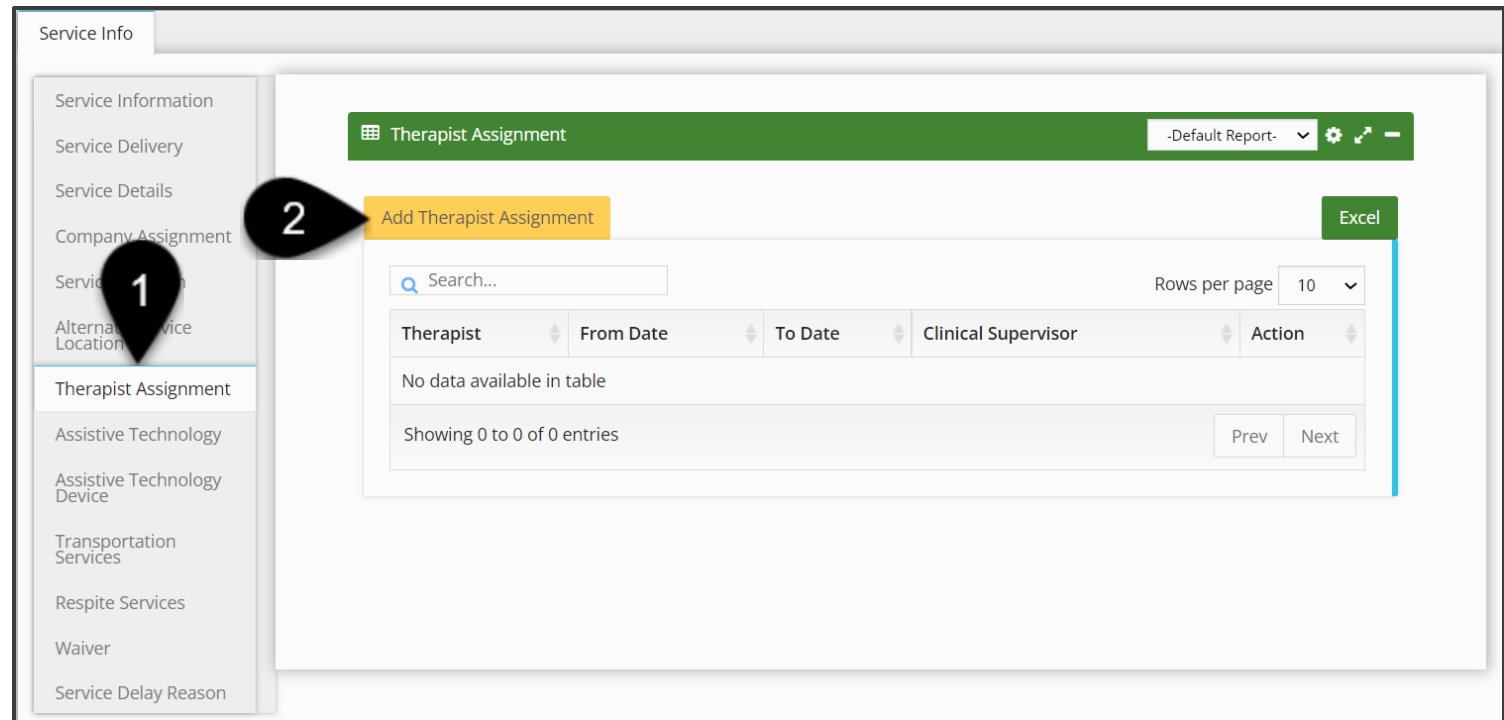
#### Assign a Therapist



### NOTE

**What if my therapist (rendering provider) is not populating in the Therapist Assignment panel?**

- Therapist available for selection are based upon their assigned catchment area and their relationship with the provider of record/billing provider. If the therapist you are attempting to locate does not populate within the Therapist Assignment panel, users (agencies) are encouraged to check and ensure the therapist has assigned catchment areas.
- If it appears a therapist lacks a catchment area, please ensure that roles designated to manage providers (i.e., MuniProgAlINY or UniversalProvNY) check the provider's record to confirm the provider has a county and catchment area added to their profile. For more information on managing providers, please review the NYS DOH - EI-Hub CM Unit 10 [Provider] and the NYS DOH - EI-Hub CM User Guide - Unit 9 [Therapist] user guides.



Service Info

Service Information

Service Delivery

Service Details

Company Assignment

Service Information

Alternative Service Location

**Therapist Assignment**

Assistive Technology

Assistive Technology Device

Transportation Services

Respite Services

Waiver

Service Delay Reason

**Therapist Assignment** -Default Report- [Settings] [Refresh] [Close]

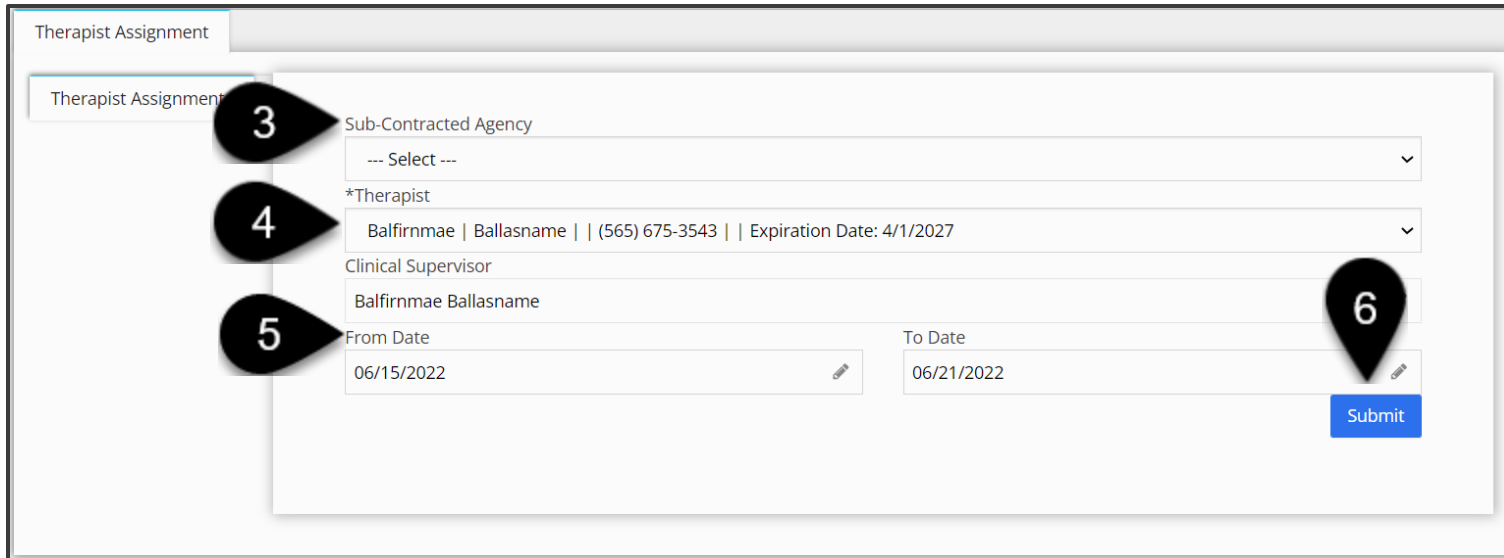
**Add Therapist Assignment** [Excel]

Search...

Rows per page 10

Therapist	From Date	To Date	Clinical Supervisor	Action
No data available in table				
Showing 0 to 0 of 0 entries				

Prev Next



Therapist Assignment

Therapist Assignment

**3** Sub-Contracted Agency

--- Select ---

**4** \*Therapist

Balfirnae | Ballasname | | (565) 675-3543 | | Expiration Date: 4/1/2027

Clinical Supervisor

Balfirnae Ballasname

**5** From Date

06/15/2022

To Date

06/21/2022

**6** Submit

# Remaining Service Panels – All Types

Entering Service Authorizations for General Services Job Aid

# Creating Service Authorizations

## Job Aid

### HOW TO

Use the Remaining Service Panels

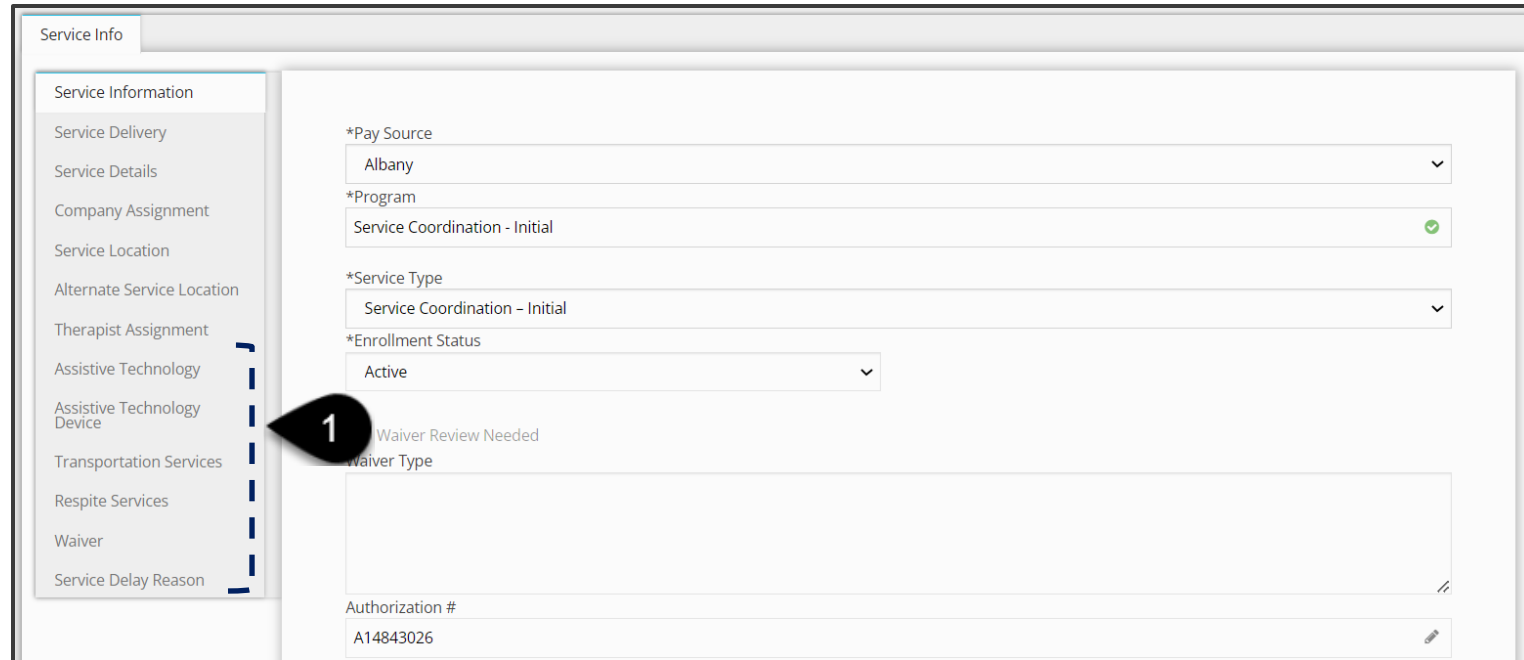


### NOTE

- Fields with an asterisks (\*) indicate required fields
- **Assistive Technology, Assistive Technology Device, Transportation Services, Respite Services, and Waivers** will be addressed in more detail in subsequent job aids
- Please note, that **only one** service **Delay Reason** should be selected from the available options.
- The **Delay Reason Comment** field (not shown in the screenshot) is system-required if a Delay Reason is chosen. Please enter "N/A" when appropriate.

### Step/Action

1. The remaining Service Information panels (i.e., **Assistive Technology, Assistive Technology Device, Transportation Services, Respite Services, Waiver**) are only necessary for specific types of Service Authorizations (i.e., Assistive Technology Service Authorizations).
2. The **Service Delay Reason panel/grid** is also applicable if Service Coordination and newly authorized general services cannot start within 30 days of a Child's IFSP start date or start date of the SA.



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

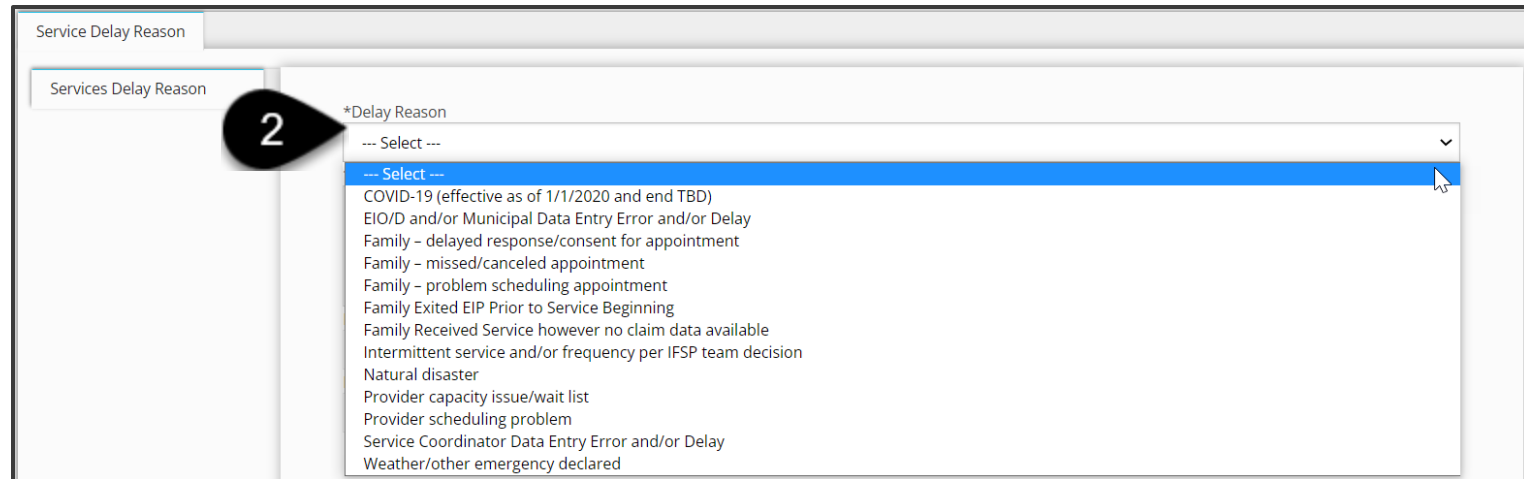
\*Program  
Service Coordination - Initial

\*Service Type  
Service Coordination - Initial

\*Enrollment Status  
Active

Waiver Review Needed  
Waiver Type

Authorization #  
A14843026



Service Delay Reason

Services Delay Reason

\*Delay Reason  
--- Select ---

COVID-19 (effective as of 1/1/2020 and end TBD)

EIO/D and/or Municipal Data Entry Error and/or Delay

Family - delayed response/consent for appointment

Family - missed/canceled appointment

Family - problem scheduling appointment

Family Exited EIP Prior to Service Beginning

Family Received Service however no claim data available

Intermittent service and/or frequency per IFSP team decision

Natural disaster

Provider capacity issue/wait list

Provider scheduling problem

Service Coordinator Data Entry Error and/or Delay

Weather/other emergency declared