Quick Start Guide for Role Administrators

early intervention
shaping futures

NYS EI-Hub
EARLY INTERVENTION SOLUTION

PUBLIC
CONSULTING GROUP

Table of Contents

Revision History

Version Number	Release Date	Author	Revision Summary
v.0.1.0	12.20.2022	Lauren Zelinsky	First Draft Release
v.0.2.0	01.04.2023	Lauren Zelinsky	Second Draft Release
v.0.3.0	01.31.2023	Lauren Zelinsky	Third Draft Release
v.0.4.0	04/12/2023	Lauren Zelinsky	Draft version posted to LMS
v.0.5.0	08/21/2024	Lauren Zelinsky	First revision

Section 1: Before Getting Started

1. Quick Start Guide Introduction

The EI-Hub Quick Start Guide is a quick and easy-to-read document that will help prepare Role Administrators for the launch of the EI-Hub. The guide gives role administrators pertinent information on how to set up EI-Hub accounts for their county/agency. The guide also provides a high-level overview of the primary EI-Hub components.

2. Required Steps to Access the EI-Hub

The EI-Hub is a web-based product accessible through the Health Commerce System (HCS). To access the EI-Hub, all users will need the following:

☑ Active HCS account
☑ Compatible Web Brower

NEED HELP?

If a user cannot access one or more of the requirements listed above or needs more information, click the links below for further instructions.

- HCS instructions
- Web Browser Requirements

3. What is a Role Administrator?

A Role Administrator is a person who is responsible for setting and maintaining all of the individual user role accounts for their entity. This role is typically held by an individual(s) in administrative leadership for a county/agency or by an independent provider. There are two types of Role Administrators in the EI-Hub.

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

To determine if you have a Role Administrator designation, visit the '**My Profile**' section on the EI-Hub Landing Page. Your designated account type is highlighted in **purple** under the '**Type**' section (shown below).

Example: Agency Role Administrator Profile

HELPFUL HINT

You do not have a Role Administrator designation if 'Type' '**User**' is highlighted in **purple**.

4. Information on User Roles

A user role defines which module(s) an individual can access within the EI-Hub and what information they can view and/or edit within each module. At the launch of the EI-Hub, all active NYEIS users will transition to the EI-Hub. User roles will be auto-assigned based on a user's equivalent account status in NYEIS.

3.1 Billing

The EI-Billing application is not behind the Health Commerce System (HCS) firewall. Therefore, EI-Billing user roles will **NOT** migrate over at the EI-Hub launch.

Current billing user roles will NOT migrate at the launch of the EI-Hub. Following the system's launch, EI Billing is named the "Billing" module in Case Management

Role Administrators must configure access to the Billing module for all eligible users.

3.2 Case Management

Each user will be assigned the corresponding user role (1 role) to their previous NYEIS user role. If a user needs an additional user role(s), the Role Administrator will be responsible for updating the user's account. (i.e., a former NYEIS user with the MUNI ALL role will be automatically assigned the MuniProgAllNy user role. If the user also needs to perform functions of an EIO/D, the Role Administrator can add the EIO/D NY user role to this user's profile.)

Please reference the table below to learn which EI-Hub user role matches the former NYEIS user role.

NYEIS User Role (old)	EI-Hub User Role (new)
MUNI All (Universal Municipal)	MuniProgAllNY
MUNI All Fiscal	MuniFiscalAllNY
MUNI At-Risk	MuniAtRiskMgtNY
MUNI Contracting	EIO/D NY
MUNI EIO	EIO/D NY
MUNI EIO/D	EIO/D NY
MUNI EIO/D-SC	EIO/D NY
MUNI Fiscal Admin	MuniFiscalAllNY
MUNI Fiscal Manager	MuniFiscalAllNY
MUNI Fiscal Data Entry	MuniDataEntryNY
MUNI Intake Staff	MuniDataEntryNY
MUNI Program Data Entry	MuniDataEntryNY
MUNI Program User Admin	MuniProgAllNy
MUNI QA	MuniViewOnlyNY
MUNI Service Coord	ISC/OSC NY
**No Historic NYEIS Role*	MuniTransferNY
PROV All (Universal Prov.) Program Role: Agency Director / Agency Administrator	UniversalProvNY
PROV All (Universal Prov.) Program Role: Independent Providers	InProviderNY
PROV All Fiscal	ProvFiscalMgrNY
PROV All Program	ProvDataEntryNY
PROV Eval	RenderProvNY
PROV Fiscal Admin	ProvFiscalMgrNY

NYEIS User Role (old)	EI-Hub User Role (new)
PROV Fiscal Manager	ProvFiscalMgrNY
PROV Program Data Entry	ProvDataEntryNY
PROV QA	ProvQA NY
PROV Render Prov Staff	RenderProvNY
PROV Render Prov Staff	JrRenderProvNY
PROV Service Coordinator	ISC/OSC NY
PROV Service Director	ProvDataEntryNY
PROV Service Manager	ProvDataEntryNY

3.3 Service Logging

A user's access to the EI-Hub Service Logging component will correspond with the method used to create claims before the EI-Hub system launch.

Entities that submitted manual claims in NYEIS to create claims will have access to the EI-Hub's Service Logging component.

Entities that utilized a third-party system or clearinghouse to create claims will **not** have access to the EI-Hub's Service Logging component. These users will continue to use their external systems to generate claims.

Role Administrators must configure access to the Service Logging module for all eligible users.

Please note users cannot utilize both methods for service logging at the launch of the EI-Hub. An exception applies to counties using a third-party billing system, allowing them to submit only transportation and respite claims through the EI-Hub's Service Logging component.

NEED HELP?

If you are looking for more information on user roles, please reference the following resources:

- User Management Admin Guide
- EI-Hub User Role Crosswalk
- EI-Hub User Roles Job Aid

Section 2: Configuring User Roles

1. Understanding your Role Administrator Designation

Your Role Administrator designation determines which user role types you can configure. Please reference the table below to learn which user roles you have the permission to configure:

Agency Role Administrator (Account Type: AdminAgency)	County Role Administrator (Account Type: AdminCounty)
Definition: This Role Administrator type is used by Agencies and Independent Providers.	**Definition**: This Role Administrator type is used by Counties/Municipalities
Universal Provider = UniversalProvNY	Municipal EI Manager = MuniProgAllNY
Independent Provider = InProviderNY	EIO/D = EIO/D NY
ISC/OSC = ISC/OSC NY	ISC/OSC = ISC/OSC NY
Rendering Provider = RenderProvNY	Rendering Provider = RenderProvNY
Junior Rendering Provider = JrRenderProvNY	Municipal Fiscal Staff = MuniFiscalAllNY
Provider Compliance and QA = ProvQA NY	Municipal Data Entry Staff = MuniDataEntryNY
Provider Fiscal Staff = ProvFiscalMgrNY	Municipal At-Risk Management = MuniAtRiskMgtNY
Provider Data Entry Staff = ProvDataEntryNY	Municipal View Only (user role has no editing rights) = MuniViewOnlyNY

HELPFUL HINTS

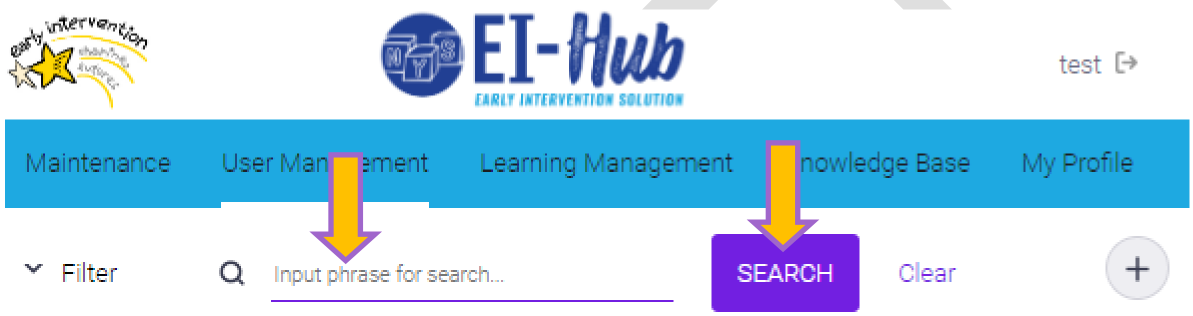
- The State must assign the Municipal Transfer role (MuniTransferNY). Please contact [*to be determined*] to add this user role type.
- At the launch of the EI-Hub, information on the therapist (with active status) will be migrated from NYEIS to the EI-Hub. At the system launch, role administrators and/or users with the ProviderDataEntryNY user role will need to add active therapists to case management as this information is included in the data migration process.

2. How to Configure User Roles

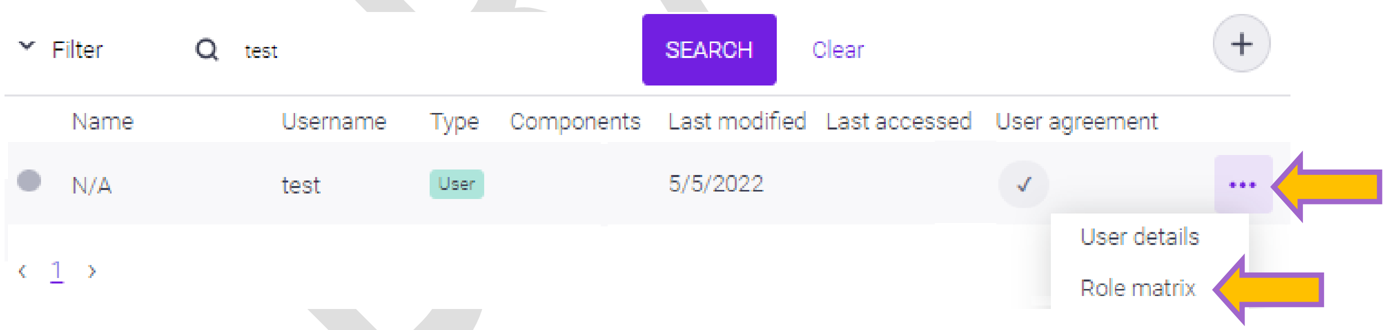
Below is a high-level overview of configuring user role accounts from the EI-Hub Landing Page.

- Navigate to the **User Management** section on the EI-Hub Landing Page.

- Begin by searching for a user by typing in all or part of their name, email address, or HCS ID in the search bar, then select/click the **Search** button.



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



- Select the component(s) and appropriate role(s) for the user using the drop-down menus. Additional roles can be added by selecting the **'+'** sign next to any role. Selecting the **'-'** sign will remove that role for the user. Once all the appropriate component(s) and appropriate role(s) are added, Role Administrators will select/click **Save**.

HELPFUL HINT

The **Account type** field controls the options available under the **Role** field. Understanding the options under each field will help Role Administrators quickly assign user roles. Please reference the tables below to learn more:

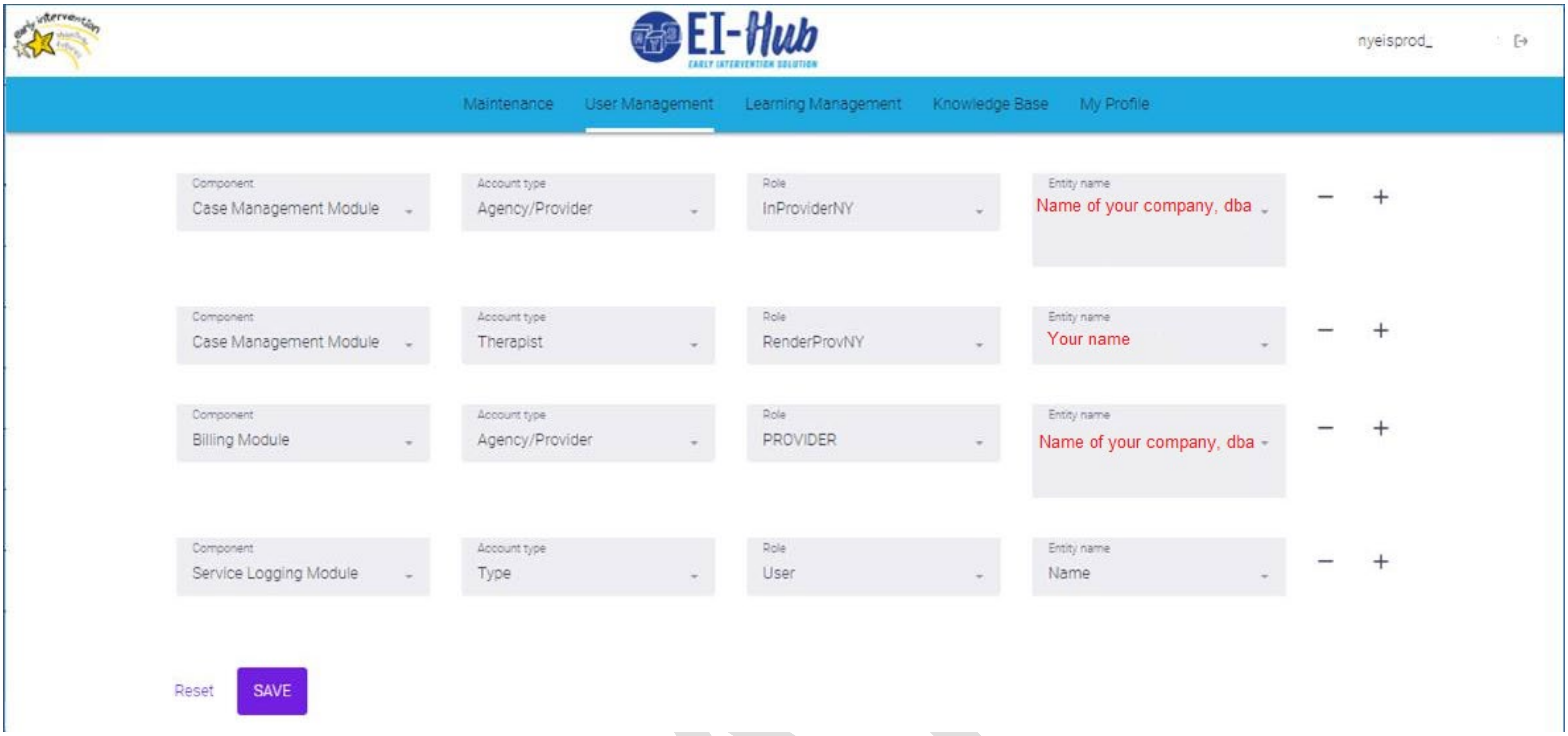
For AdminCounty Role Administrators

Component	Account Type	Role
Case Management Module	County/SPOE	MuniAtRiskMgtNY MuniDataEntryNY MuniFiscalAllNY MuniProgAllNY MuniViewOnlyNY
Case Management Module	Service Coordinator	EIO/D NY ISC/OCS NY
Case Management Module	Therapist	RenderProvNY
Service Logging Module	Type	User
Billing Module	County/SPOE	County

For AdminAgency Role Administrators

Component	Account Type	Role
Case Management Module	Agency/Provider	InProviderNY ProvDataEntryNY ProvFiscalMgrNY ProvQA NY UniversalProvNY
Case Management Module	Service Coordinator	ISC/OCS NY
Case Management Module	Therapist	RenderProvNY JrRenderProvNY
Service Logging Module	Type	User
Billing Module	Agency/Provider	Provider

Independent Providers using the EI-Hub Service Logging module should setup their account as shown below:



NEED HELP?

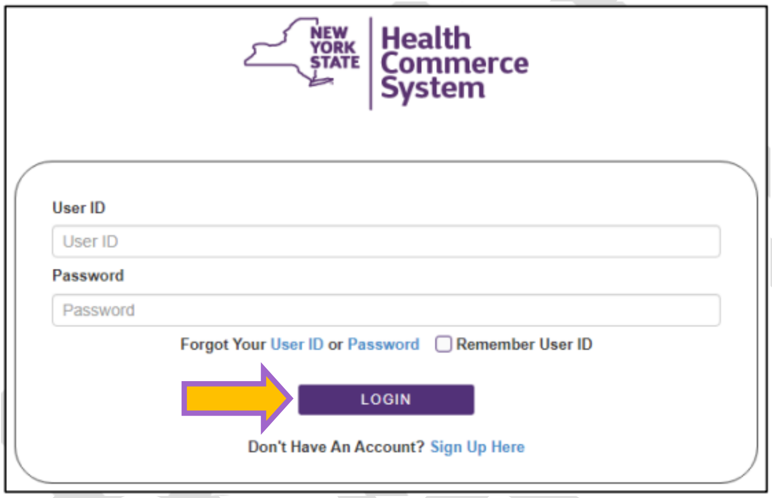
Please reference the [Case Management User Roles job aid] and/or the [User Role Configuration Infographic] for more information on configuring user roles.

Section 3: EI-Hub System Information

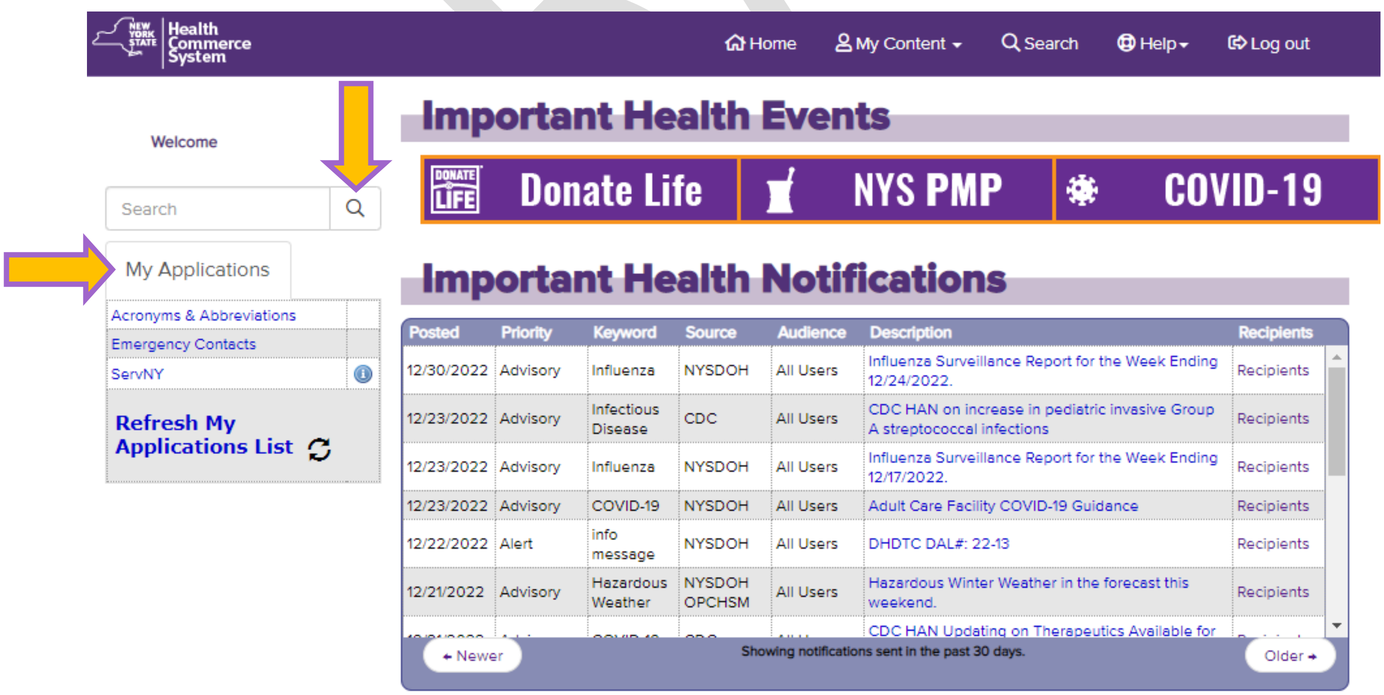
1. How to Log into the EI-Hub

To access the EI-Hub through the Health Commerce System (HCS) website, follow the instructions below:

1. Visit the Health Commerce System (HCS) website: https://commerce.health.state.ny.us
2. Enter your HCS User ID and Password, and select/click the LOGIN button (shown below).



3. Select the EI-Hub application hyperlink under My Applications. If not shown in My Applications, use the search feature to find the application.



4. The EI-Hub Landing Page appears after successfully logging through the HCS.

NEED HELP?

You can reach the Health Commerce System Commerce (HCS) Commerce Account Management Unit (CAMU) Help Desk at:

- **Telephone:** 1-866-529-1890

The **CAMU** Hours of Operation for account information and passwords – are 8:00 am - 4:45 pm, Monday through Friday.

2. EI-Hub Overview

The EI-Hub is your one-stop shop for managing your work for children in the Early Intervention Program (EIP). Depending on your role, you will use the EI-Hub to capture and report on child information from referral (intake) to transition and manage provider data, claim creation, billing, and payments.

Module Overview	
Case Management	Manage and report on a child's progression from referral to transition out of the EIP: Track referrals, service authorizations, claims, and child transition. Manage provider data and tasks such as re-approvals, amendments, provider profiles, and rosters.
Billing	Use for reporting and claims management with direct links to data within the Case Management module.
Service Logging	Log and track EI services provided at the provider site and in the field. Capture visit data and record notes linked to the child's record directly.
Provider Enrollment	Enroll new and returning providers seeking a new agreement using an all-online process.
Learning Management System (LMS)	The resource repository is where you can find system onboarding, training, and references for the EI-Hub solution.

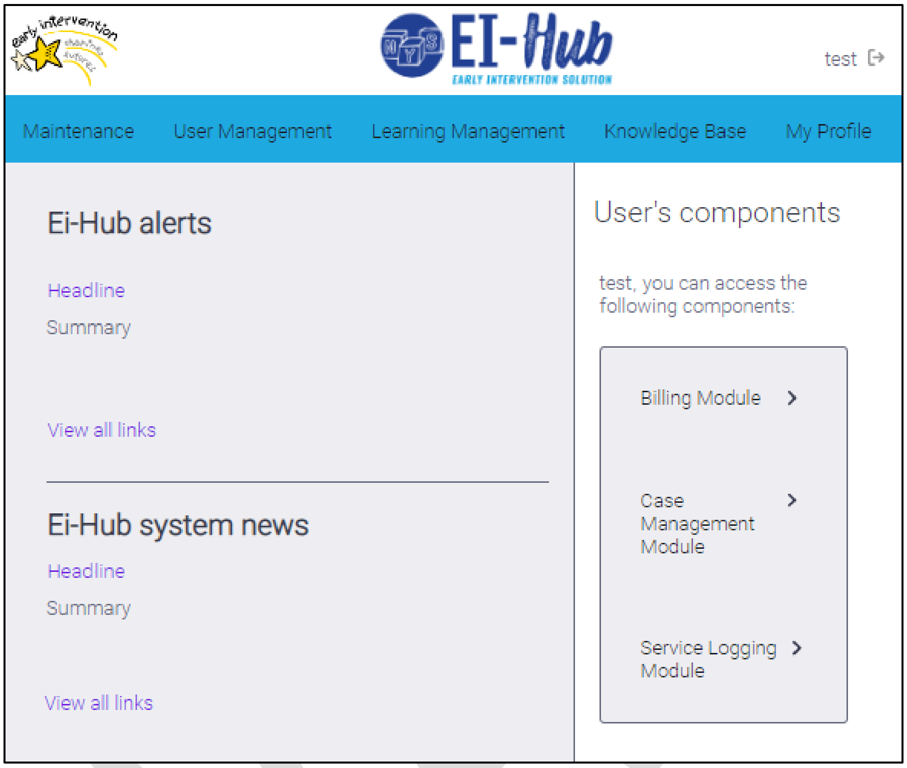
HELPFUL HINT

Looking for more information about the EI-Hub, please reference the following job aid:

- [EI-Hub Introduction Job Aid]

2.1 EI-Hub Landing Page Overview

From the EI-Hub Landing Page (shown below), users will access the EI-Hub components. In addition, the EI-Hub Landing Page also displays important alerts and system news.



HELPFUL HINTS

- Components are visible based on a user's account access
- The **Maintenance** and **User Management** menu options are only available to Role Administrators
- Headlines in purple under **Ei-Hub alerts** or **Ei-Hub system news** are hyperlinks that will bring the user to an external website to find additional information on that topic.

2.2 Case Management Component Overview

In the EI-Hub's Case Management component, users will maintain information on the children and families they serve. Users can access/view their dashboards on the Case Management home page, toggle between user roles, and enter the different areas within the Case Management component. From the Menu pane, users will select which area of the Case Management component they would like to access.

Case Management Menus

- **Child menu**: Access all areas related to a child's record, from creating the record to exiting a child from the EIP.
- **Therapist menu**: Access to view and maintain therapist records.

- **Provider menu**: Access to view and maintain provider records; this includes viewing (View)status in the EIP, viewing application and amendment requests, and initiating re-approval and amendment requests.
- **Attendance menu**: Accepts claims into the system and sends claims for payment. It also includes the 837 file loader, used by individuals who use third-party systems or clearinghouses.

Dashboards

Dashboards will help users track a child's movement through the lifecycle of a child (Backwards 'S') within the Case Management component of the EI-Hub. Dashboards will replace the inbox and work queues currently used in NYEIS.

HELPFUL HINT

All users will have dashboards. However, access to the dashboards and types of alerts received will vary based on a user's role.

NEED HELP?

If you want more information on the Case Management module, please reference the Case Management User Guide.

- CM User Guide – 8.0 Child Menu
- CM User Guide – 9.0 Therapist Menu
- CM User Guide – 10.0 Provider Menu (coming soon)
- CM User Guide – 11.0 Attendance Menu (coming soon)

If you are looking for more information on dashboards and alerts, please reference the following resources:

- CM User Guide – 7.1 Dashboards & Alerts
- Dashboards Infographic

2.3 Service Logging Component Overview

In the EI-Hub's Service Logging (SL) component, users will enter **Evaluation**, **Visit**, **Service Coordination**, **Respite**, and **Transportation** information from the services provided. Entering this information in SL is then used to create a billable claim. Remember, if your entity used manual claims submission in NYEIS for billing and claims (claiming), you will have access to the EI-Hub's Service Logging component at the launch of the EI-Hub. If your entity used a third-party system or clearinghouse for billing and claims, you will not have access to the EI-Hub's Service Logging component.

In Service Logging, users will access the appropriate portal based on their corresponding role(s) in the Case Management component. Please reference the list below for a summary of each portal:

- The **Rendering Portal** allows the rendering provider to see all children assigned to them, enter visits, schedule visits, review billing errors, and make necessary corrections.
- The **Service Coordinator Portal** allows the service coordinator to see all children assigned to them, enter notes, schedule visits, review billing errors, and make necessary corrections.
- The **Billing Provider Portal** allows the billing provider to see all cases assigned to their business. See the visit information entered by the rendering provider or service coordinator they employ. Users can also see visit errors, assign claims to be fixed, and move claims to Case Management for payment.
- The **County Portal** allows users to view all cases for children in their county.
- The **Provider QA Portal** is a view-only portal allowing users to review cases for quality assurance.
- The **Clerical Portal**- allows access to all cases assigned to the billing provider; assists with scheduling, entry, and billing functions.
- The **Clinical Supervisor Portal**- a view-only portal allowing the clinical supervisor associated with a rendering provider to view visit logs but not edit any information.

HELPFUL HINT

Users will access the appropriate portal based on their corresponding role(s) in the Case Management component.

NEED HELP?

Need access to another portal? Please get in touch with your **EI-Hub Role Administrato**r for assistance.

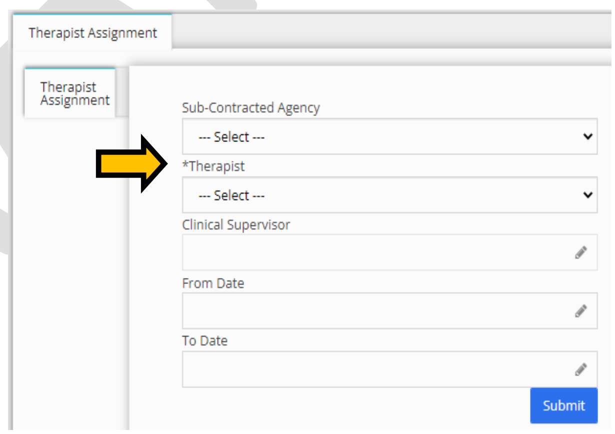
If you want more information on the Service Logging component, please reference the *Service Logging User Guide* (coming soon) and/or the Service Logging job aid.

.

Section 4: Tips and Tricks

1. Glossary of New Terms

In the EI-Hub, some familiar terms may have changed. Below is a glossary of new terms used in the EI-Hub:

Term	Definition
Company	Agency / Billing Provider
Therapist	Rendering Provider **HELPFUL HINT** ▪ The term 'Therapist' when used in the lookup feature, is inclusive of rendering providers, EIO/Ds, and Service Coordinators ▪ The term 'Therapist' refers to the "Rendering Rrovider' only when seen within a child's record. *i.e., When completing the Therapist assignment panel for IFSP services, users will input the rendering provider's name in the 'Therapist' field.* 
Provider	Provider Agency
Family	Anyone connected with the child, including mother, father, alternate parent, and caregiver
Guardian	Alternate parent/caregiver
Primary Referral	Initial Referral
Dashboards / Alert	EI-Hub's equivalent to work queues and tasks in NYEIS
Enrollments	Claims / Service Authorizations
Voucher	Invoice
Individual Attendance	Claim
Medical DME	Assistive Technology Device

Term	Definition
Service Authorizations statuses (SA)	▪ **Active -** Service Authorization has been approved by the EIO/D and reached the start date of the SA. ▪ **Approved -** The EIO/D has approved Service Authorization but has not reached the SA' Start Date.'
Child statuses	▪ **Active** - If a child is in any phase of the Early Intervention program, they reflect an active status. ▪ **Exited** - A child has left the Early Intervention program ▪ **Closed** - A child that has reached five (5) years or eight (8) months, in which **no more edits can be done to the record**, and all claiming and billing time limits have passed. ▪ **Duplicate** - a child's record is marked as duplicate after the information has been merged (migrated) into the primary (active) record.

NEED HELP?

If you are looking for more information on navigating and utilizing the HUB, please reference the appropriate user guide:

- *Case Management User Guide* (coming soon)
- *Service Logging User Guide* (coming soon)

2. Tips and Tricks – For All Users

Below are some tips that are helpful for new users.

- To return to the EI-Hub Landing Page from the Case Management or Service Logging component, select/click the EI-Hub logo at the top of the page
- From the Case Management homepage, users can switch between user roles from the User Profiles drop-down menu (shown below)

- Most panels will have several fields to complete; however, only fields with an asterisk (*) are required. Note, required fields in the EI-Hub will have an asterisk and/or users will receive a notification when saving if a required field is not completed.

HELPFUL HINT

- After the required fields are satisfied, users can exit, re-enter, and resume at any panel.
- If a field indicates that a narrative should be entered, users can write the word "n/a" to satisfy the field's requirement.
- In the Case Management component, the **Submit** button also acts as a 'Save' button.
- Email addresses have to follow a typical naming convention. (i.e., noname@gmail.com)
- Users must manually select/click the **Address Validate** button to save an address. **Users must select/click the Address Validation button before submitting the address information**; otherwise, the system generates an error (a system validation process is required to save addresses).
- The Case Management component has "type-ahead" functionality. As users start to type in fields with searchable data, a list of matching options will populate. (i.e., diagnosis codes, types of services, etc.)
- Users with the following user roles - MuniProgAllNY, UniverisalProvNY, & InProviderNY - will have the most access to the screens within the EI-Hub system. They can view all children assigned to their county, agency, or caseload. While these role types have the highest level of access, some areas of the system may not be appropriate for these roles to access.
- Users can enter/view comments about the child that may not be captured in other tabs/panels, such as the 'Contact Log' panel found in the Family Info tab. (i.e., parent concerns that may have been discussed at the initial meeting but not at the point of referral) This panel is viewable to all users with access to the child's record. This panel can be edited by the following user roles:
  - ProvDataEntryNY
  - ISC/OSC NY
  - RenderProvNY
  - JrRenderProvNY
  - MuniDataEntryNY
  - EOI/D NY
  - MuniProgAllNY

- Use the '**Therapist look up**' option to search for rendering providers, EIO/Ds, and service coordinators.
- Users should search to see if a therapist is already in the system before adding a new therapist record. Using the lookup feature found under the Therapist Menu, users can search to see if there is an existing therapist record in the system.

HELPFUL HINT

- If a therapist is already in the system, agencies can use the '**Add to Agency**' option to quickly and easily add the therapist's association to their agency. From there, Role Administrators can configure the user's access following the same process outlined in the [**Configuring User Roles section**]() of the Quick Start Guide.

3. Tips – By User Role Type

Below are some tips that apply to specific user roles:

Municipal User Roles

- Access to a child's record is given to EIO/D and ISC/OCS through the Teams tab. The SA enables billing for authorized services.
- Roles that can create new child records include MuniDataEntryNY, EIO/D NY, & MuniProgAllNY.
- The MuniTransferNY role can view children throughout the State.
- For an EIO/D to approve an IFSP, the service authorization(s) for any services tied to the IFSP must be approved prior to approving the entire IFSP.
- System-generated waiver requests are accepted or rejected by an EIO/D as part of the approval of the service authorization. For manually generated waiver requests, the approvals for the waiver can be completed by the EIO/D **after the date of service**. However, the request **MUST** be submitted prior to or on the date of service.

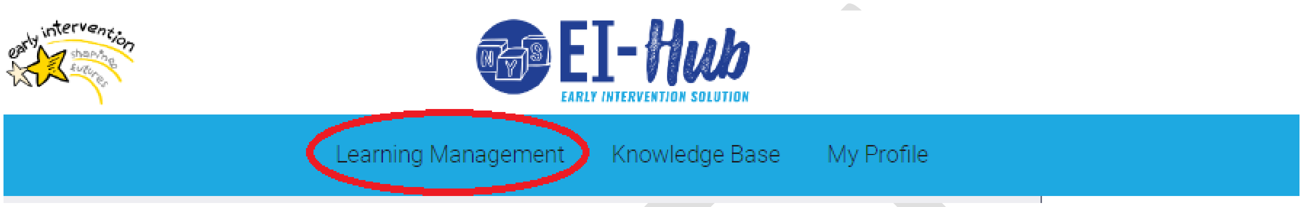
Provider User Roles

- Access to a child's record is granted through the service authorization process.
- 'Billing Providers' or 'Rendering Providers' **must** submit their waiver request(s) before or within the same day the service is rendered (by midnight). **Waiver requests after the service date will not be allowed**, and providers will receive an error message when attempting to submit a late waiver request.

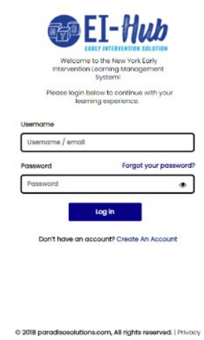
Section 5: Training Resources & Support

1. Accessing Training Resources

All training resources are on the Learning Management System (LMS). The LMS is accessible from the EI-Hub Landing Page. To access the LMS from the EI-Hub Landing Page users will select the "Learning Managment" option from the blue menu bar.

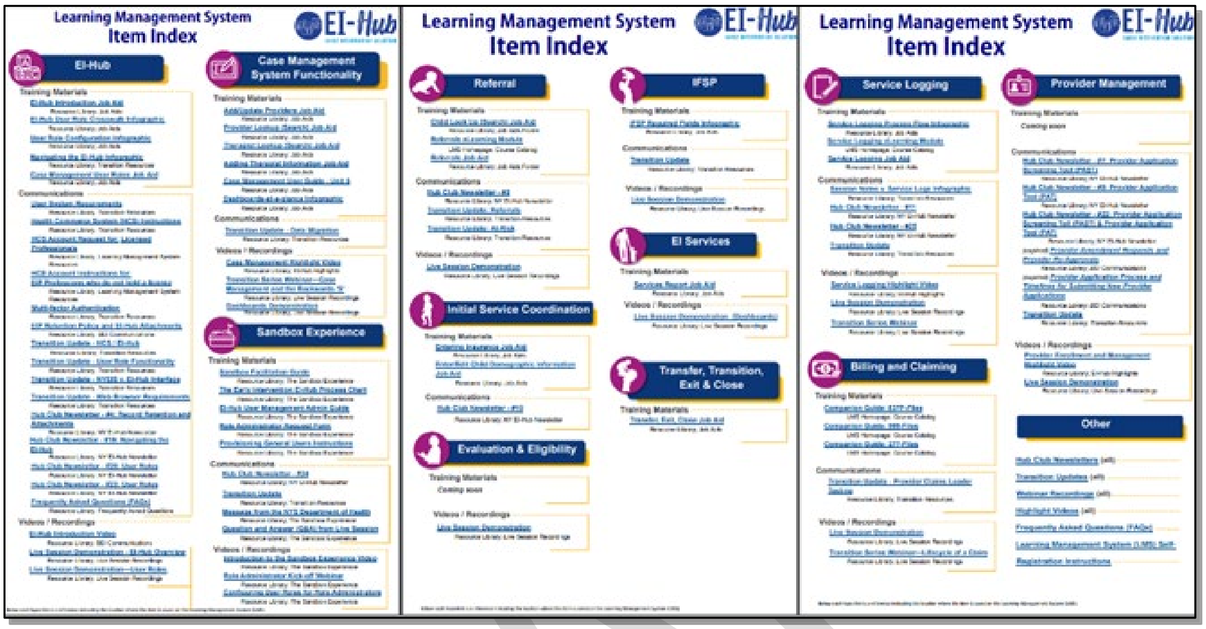


The LMS is accessible via self-registration; no EI-Hub account is required. Follow these instructions to create an account.



2. LMS Item Index

BEI and PCG developed a comprehensive set of training resources to help new users learn how to perform particular functions in the EI-Hub. The Item Index will help users navigate the LMS and find available training resources.



3. Customer Support

Public Consulting Group (PCG) will provide Customer Service support to EI-Hub users via a Call Center. The Call Center will attempt to answer calls in real-time. Callers may be asked to leave a voicemail, depending on the call volume. A representative will return calls by the following business day. You can reach the PCG Call Center at the below:

Telephone: 866-315-3747

Email: NYEITraining@pcgus.com

Agents are available Monday to Friday: 7:00 am – 7:00 pm EST