

# Adding and Updating Provider Information



## How To

Add to/update a DOH-approved Provider record once the Provider's information has transitioned from Provider Enrollment Management (PEM) into Case Management. This transition occurs after a Provider has been approved by DOH through the application process. A Provider in Case Management is defined as the following:

- Agency Provider (a DOH-approved entity that employs qualified personnel and may contract with DOH-approved individual or agency providers)
- Individual Provider (A DOH-approved individual provider licensed or certified by New York State)
- Vendor
- Billing Provider (agency or individual provider who has an appendix 1 agreement and is able to be assigned to service authorizations and bill for services)



3/11/2022

# Adding/Updating Provider Information

## Job Aid

### HOW TO

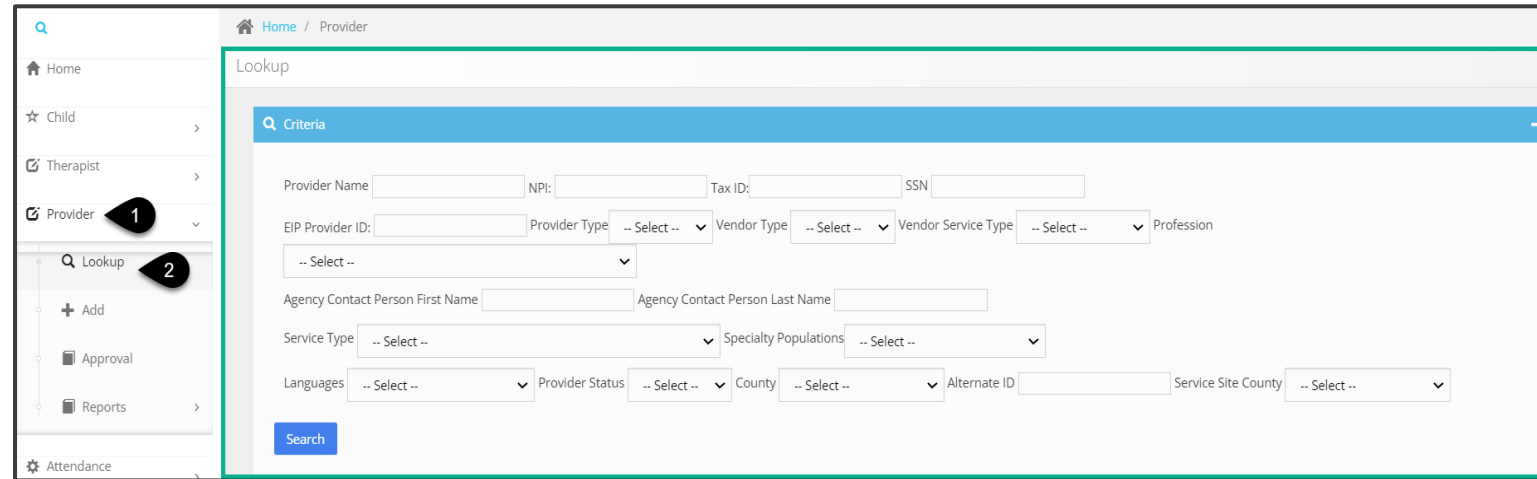
- Add to and update a DOH approved Provider record.

### NOTE

- Adding/updating information on a Provider record is restricted to the Approved Provider (individual provider) or specific user roles for approved agencies.
- Some tabs/panels require a Provider submit an amendment request to edit (i.e., changing services offered, service sites)
- An error will display if the field requires an amendment request to update.
- All screen captures may not reflect the system's current state and will be updated accordingly.

### Step/Action

1. From the **EI-Hub Case Management** Home page, select/expand the **Provider** menu listed on the left pane.
2. Select the **Lookup** submenu located within the **Provider** Menu. The **Provider Lookup** pane populates.



The screenshot shows the 'Provider' menu expanded on the left sidebar, with the 'Lookup' option selected. The main content area displays the 'Lookup' form with the following fields:

- Provider Name:
- NPI:
- Tax ID:
- SSN:
- EIP Provider ID:
- Provider Type:
- Vendor Type:
- Vendor Service Type:
- Profession:
- Agency Contact Person First Name:
- Agency Contact Person Last Name:
- Service Type:
- Specialty Populations:
- Languages:
- Provider Status:
- County:
- Alternate ID:
- Service Site County:

A 'Search' button is located at the bottom left of the form.



Please refer to the EI-Hub Case Management User Guide Unit 10. Provider for more information.

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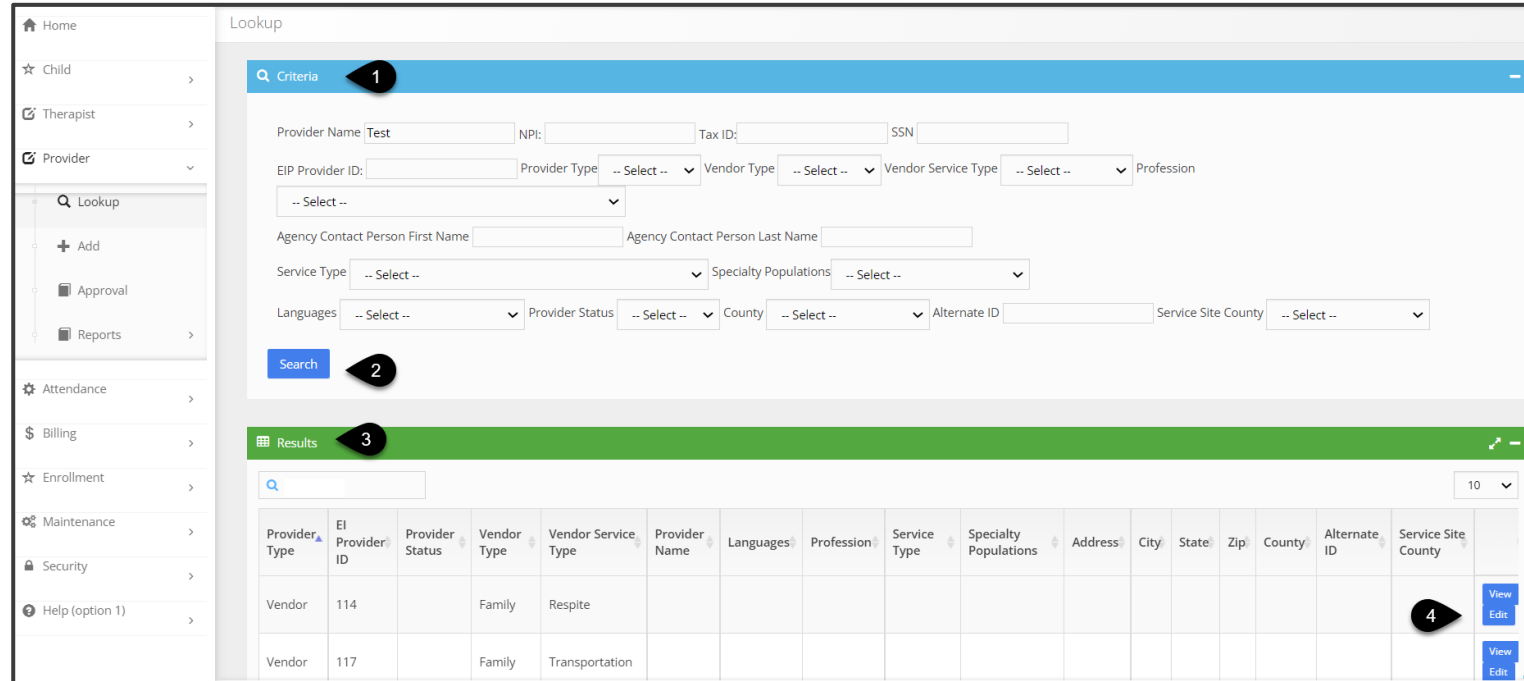
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- Add to and update a DOH approved Provider record.

#### Step/Action

1. Enter information into the search criteria fields (i.e., EIP Provider ID, Provider Type) to create a Provider search criteria.
2. Select the **Search** button, EI-Hub returns a list of Providers in the **Results** pane based on the search criteria entered.
3. Select the Provider profile you wish to update.
4. Click the **Edit** button located next to the Provider's name to open the Provider's profile.



The screenshot shows the 'Lookup' page in the EI-Hub system. On the left is a navigation menu with options: Home, Child, Therapist, Provider, Attendance, Billing, Enrollment, Maintenance, Security, and Help (option 1). The 'Provider' option is selected, and the 'Lookup' sub-option is active. The main area is titled 'Lookup' and contains a 'Criteria' section with various search fields: Provider Name (text), NPI (text), Tax ID (text), SSN (text), EIP Provider ID (text), Provider Type (dropdown), Vendor Type (dropdown), Vendor Service Type (dropdown), Profession (text), Agency Contact Person First Name (text), Agency Contact Person Last Name (text), Service Type (dropdown), Specialty Populations (dropdown), Languages (dropdown), Provider Status (dropdown), County (dropdown), Alternate ID (text), and Service Site County (dropdown). A blue 'Search' button is located below these fields. Below the search criteria is a 'Results' section with a table of providers. The table has columns for Provider Type, EIP Provider ID, Provider Status, Vendor Type, Vendor Service Type, Provider Name, Languages, Profession, Service Type, Specialty Populations, Address, City, State, Zip, County, Alternate ID, and Service Site County. Two providers are listed: Vendor 114 (Family, Respite) and Vendor 117 (Family, Transportation). Each row has 'View' and 'Edit' buttons to its right. Numbered callouts 1 through 4 highlight the search criteria section, the Search button, the Results section, and the Edit button respectively.

Provider Type	EIP Provider ID	Provider Status	Vendor Type	Vendor Service Type	Provider Name	Languages	Profession	Service Type	Specialty Populations	Address	City	State	Zip	County	Alternate ID	Service Site County
Vendor	114		Family	Respite												
Vendor	117		Family	Transportation												

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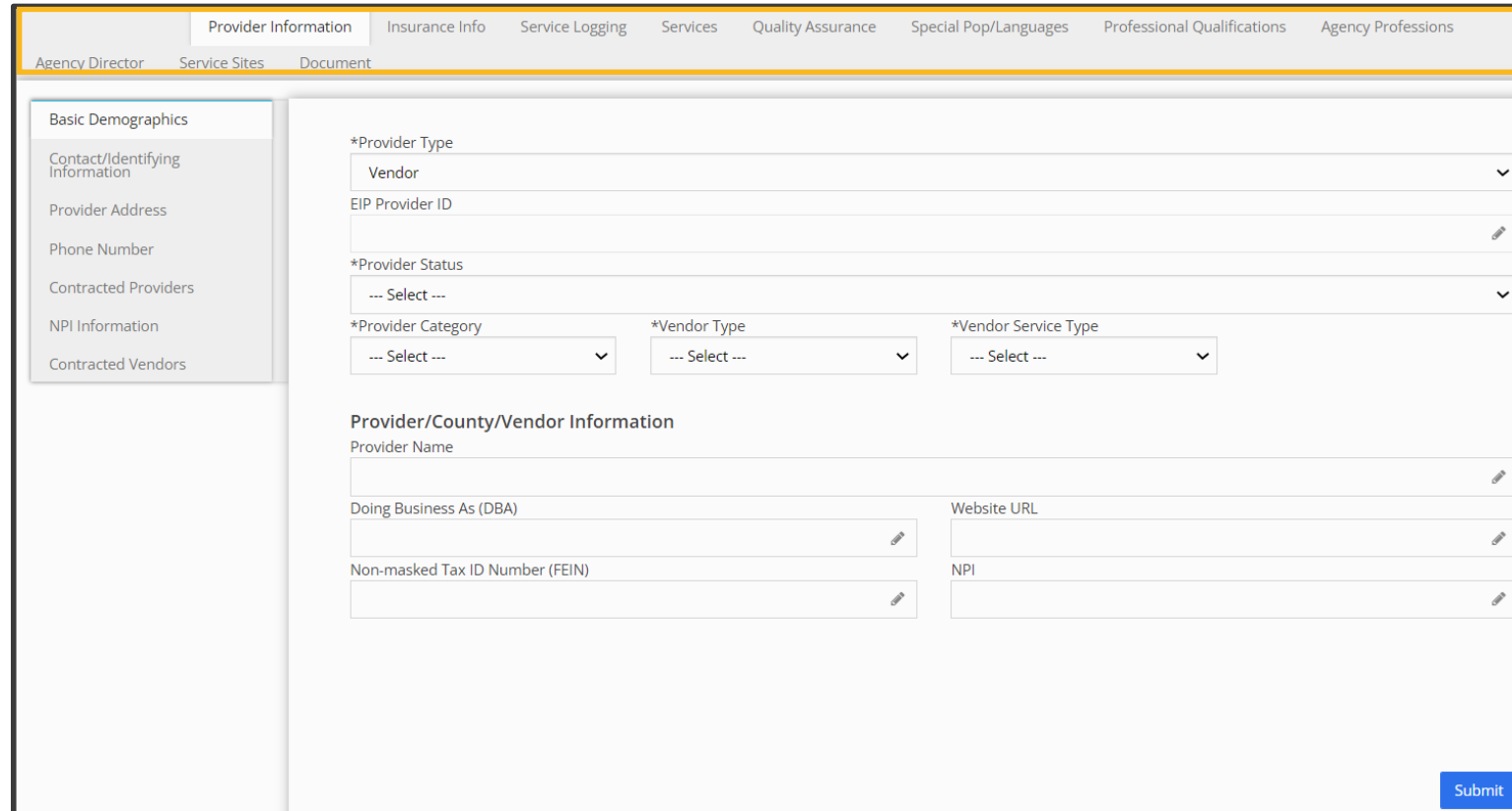
- Add to and update a DOH approved Provider record.

### NOTE

- Please Note: Public Consulting Group, Inc. will offer post go-live support via the PCG Help Desk.

### Step/Action

1. Once in the Provider's Profile, select the tabs (i.e., Provider Information) at the top that correspond to the information that needs to be updated.



The screenshot shows the 'Provider Information' tab selected in the top navigation bar. The left sidebar contains a list of tabs: Basic Demographics, Contact/Identifying Information, Provider Address, Phone Number, Contracted Providers, NPI Information, and Contracted Vendors. The main content area displays the following fields:

- \*Provider Type:** A dropdown menu with 'Vendor' selected.
- EIP Provider ID:** A text input field with a pencil icon for editing.
- \*Provider Status:** A dropdown menu with '--- Select ---' selected.
- \*Provider Category:** A dropdown menu with '--- Select ---' selected.
- \*Vendor Type:** A dropdown menu with '--- Select ---' selected.
- \*Vendor Service Type:** A dropdown menu with '--- Select ---' selected.
- Provider/County/Vendor Information:** A section containing:
  - Provider Name:** A text input field with a pencil icon.
  - Doing Business As (DBA):** A text input field with a pencil icon.
  - Website URL:** A text input field with a pencil icon.
  - Non-masked Tax ID Number (FEIN):** A text input field with a pencil icon.
  - NPI:** A text input field with a pencil icon.

A blue 'Submit' button is located at the bottom right of the form.