

Entering Initial Service Coordination Service Authorizations (ISC SA)



How To

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



Audience

- ISC/OSC NY
- MuniDataEntryNY
- MuniProgAll
- EIO/D NY
- ProvDataEntryNY

***For Information on Waivers, please visit the Waivers infographic located on the EI-Hub LMS.**

Overview

Entering Initial Service Coordination Service Authorizations

Topics Covered

1. Overview of the Initial Service Coordination Process
2. Entering and Submitting Service Authorizations for Initial Service Coordination
3. EIO/D Approval/Rejection of Initial Service Coordination Service Authorizations
4. Company (Agency) Acceptance/Rejection of Initial Service Coordination Assignments



Creating Service Authorizations

Job Aid

HOW TO

Enter Service Authorizations

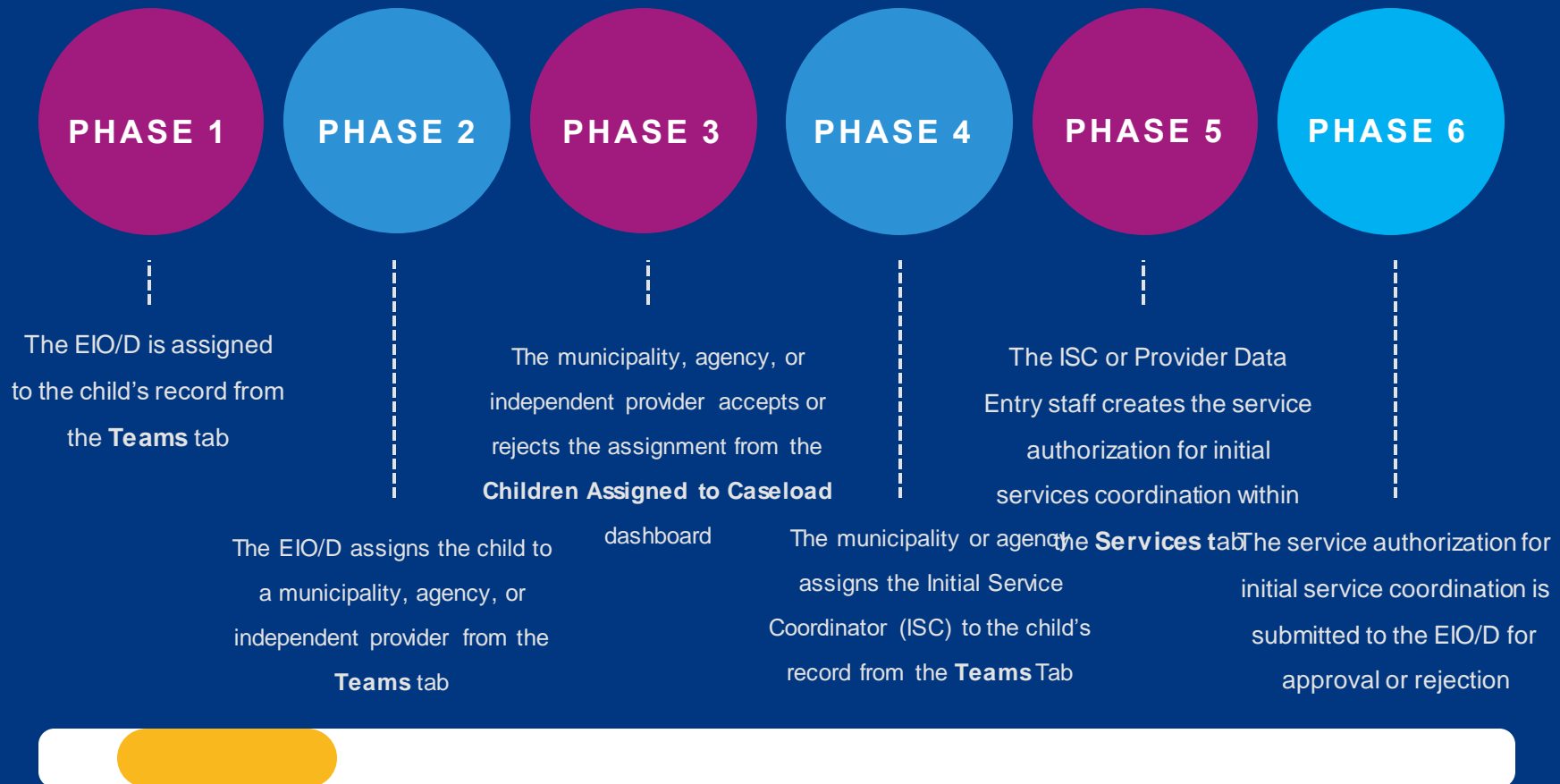
UNDERSTANDING SERVICE AUTHORIZATIONS

- Entering a service authorization for initial service coordination allows Billing Providers to bill for the initial coordination of services through the initial IFSP.
- Please note, that the initial service coordination authorization **precedes** the creation of an IFSP.
- All service authorizations require EIO/D approval.



Overview of the Initial Service Coordination Process

In EI-Hub, entering initial service coordination 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. This graphic highlights these steps.



*For Information on assigning EIO/Ds and Service Coordinators, please review the linked [Assigning EIO/Ds and Service Coordinators \(SC\) Job Aid](#) located on the EI-Hub LMS.

Entering Service Authorizations for Initial Service Coordination

Entering Initial Service Coordination Service Authorizations

Creating Service Authorizations

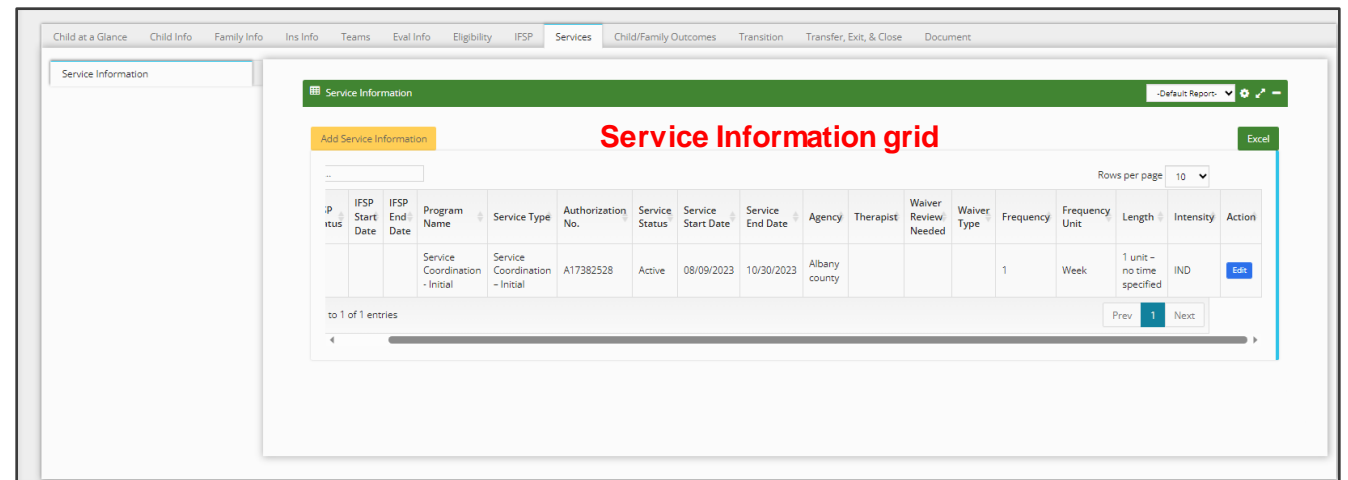
Job Aid

HOW TO

Enter Service Information

NOTE

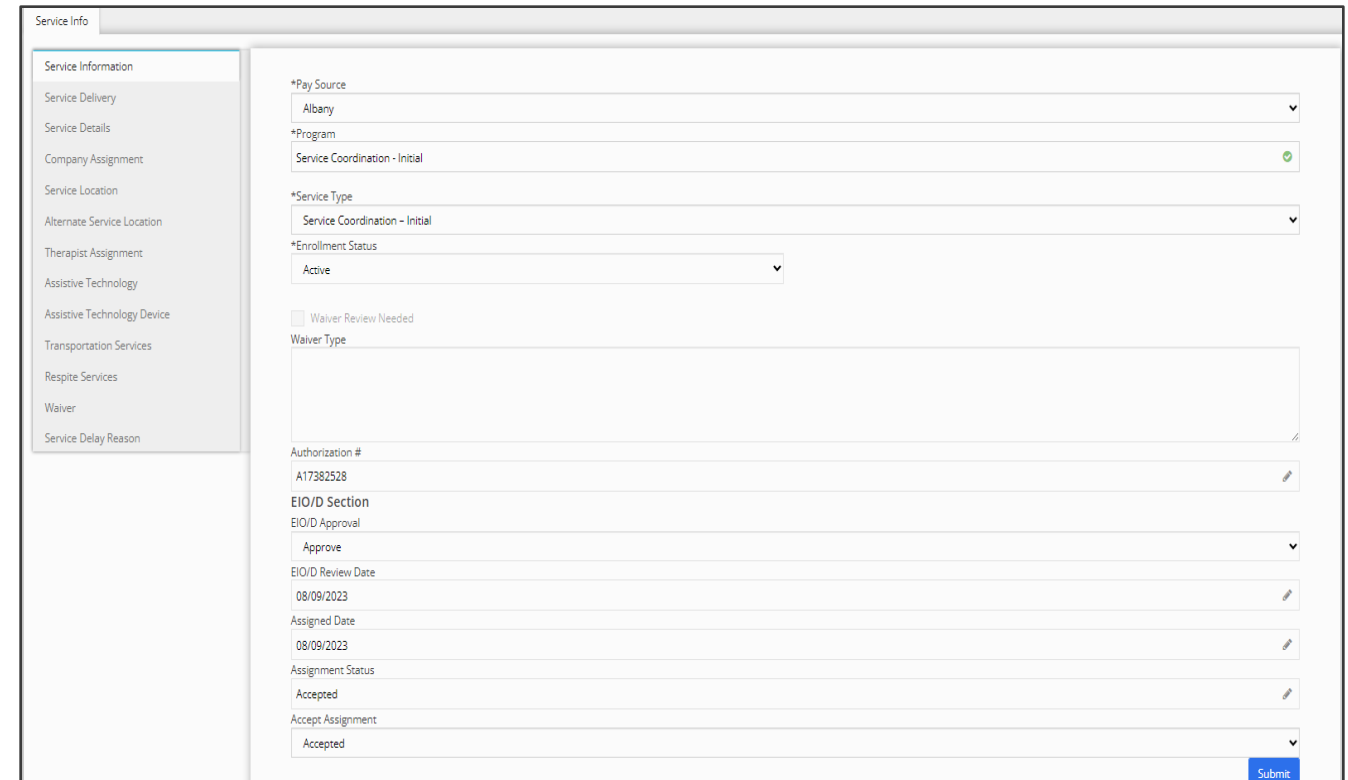
- Fields with asterisks (*) indicate required fields.
- Services provided by the ISC are the **only** services initiated/entered directly into the **Services** tab. The **Service Information** grid (housed within the Services tab) primarily aids as a repository for all services a Child receives throughout their stay in Early Intervention.
- In the EI-Hub, the ISC SA can be entered by the following roles: ISC/OSC NY, MuniDataEntryNY, EIO/D NY, and ProvDataEntryNY.
- The **Service Information**, **Service Delivery**, **Company Assignment**, and **Service Location** panels must be completed before submitting the initial service coordination service authorization to the EIO/D for approval.
- The EIO/D must approve, **and** an agency must accept the service authorization before a service authorization number is generated.



The screenshot shows the 'Service Information' tab in the EI-Hub interface. It features a table titled 'Service Information grid' with columns for various service details. The table contains one entry for a service coordination authorization.

IP	IFSP Start Date	IFSP End Date	Program Name	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 - Initial	Service Coordination - Initial	A17382528	Active	08/09/2023	10/30/2023	Albany county				1	Week	1 unit - no time specified	IND	Edit

Below the table, it indicates 'to 1 of 1 entries' and provides navigation buttons for 'Prev', '1', and 'Next'.



The screenshot shows the 'Service Information' form in the EI-Hub interface. It includes various fields for service details, some of which are marked as required with asterisks.

Service Information

- *Pay Source: Albany
- *Program: Service Coordination - Initial
- *Service Type: Service Coordination - Initial
- *Enrollment Status: Active
- Waiver Review Needed: ☐
- Waiver Type: [Empty field]
- Authorization #: A17382528
- EIO/D Section: EIO/D Approval
- EIO/D Approval: Approve
- EIO/D Review Date: 08/09/2023
- Assigned Date: 08/09/2023
- Assignment Status: Accepted
- Accept Assignment: Accepted

The form includes a 'Submit' button at the bottom right.

Creating Service Authorizations

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HOW TO

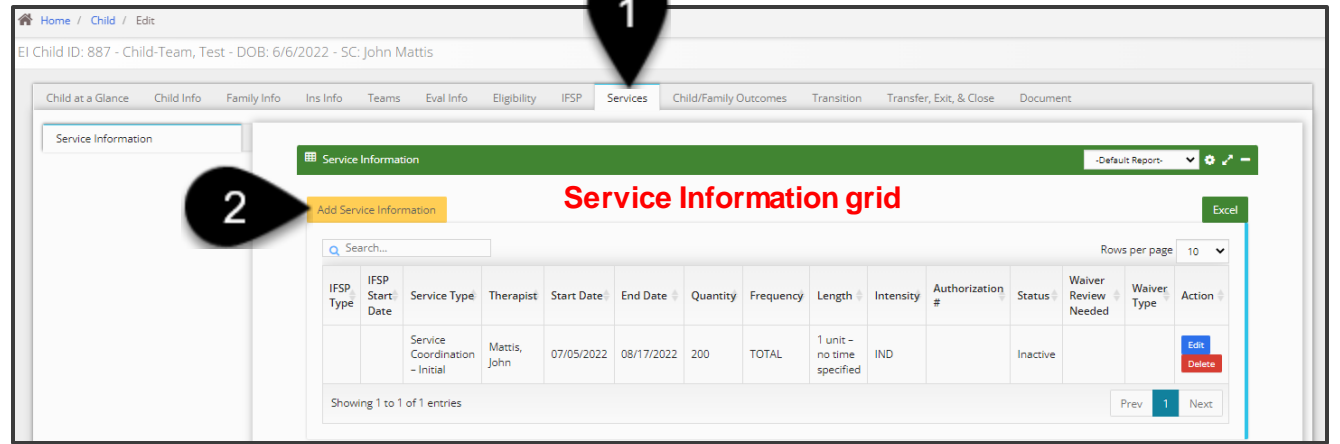
Enter Service Information

NOTE

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

Step/Action

1. Select the **Services** tab from the Child's record.
2. Click the **Add Services Information** button.
3. Enter the **Service Information**. The **Pay Source** defaults to the Child's county of residence. The **Program** is a type-ahead field and should be entered as "Service Coordination - Initial." Once a Program is chosen, the **Service Type** will auto-populate. **Enrollment Status** will default to Inactive.
4. Click the **Submit** button to save the information entered.



Home / Child / Edit

EI Child ID: 887 - Child-Team, Test - DOB: 6/6/2022 - SC: John Mattis

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

Service Information

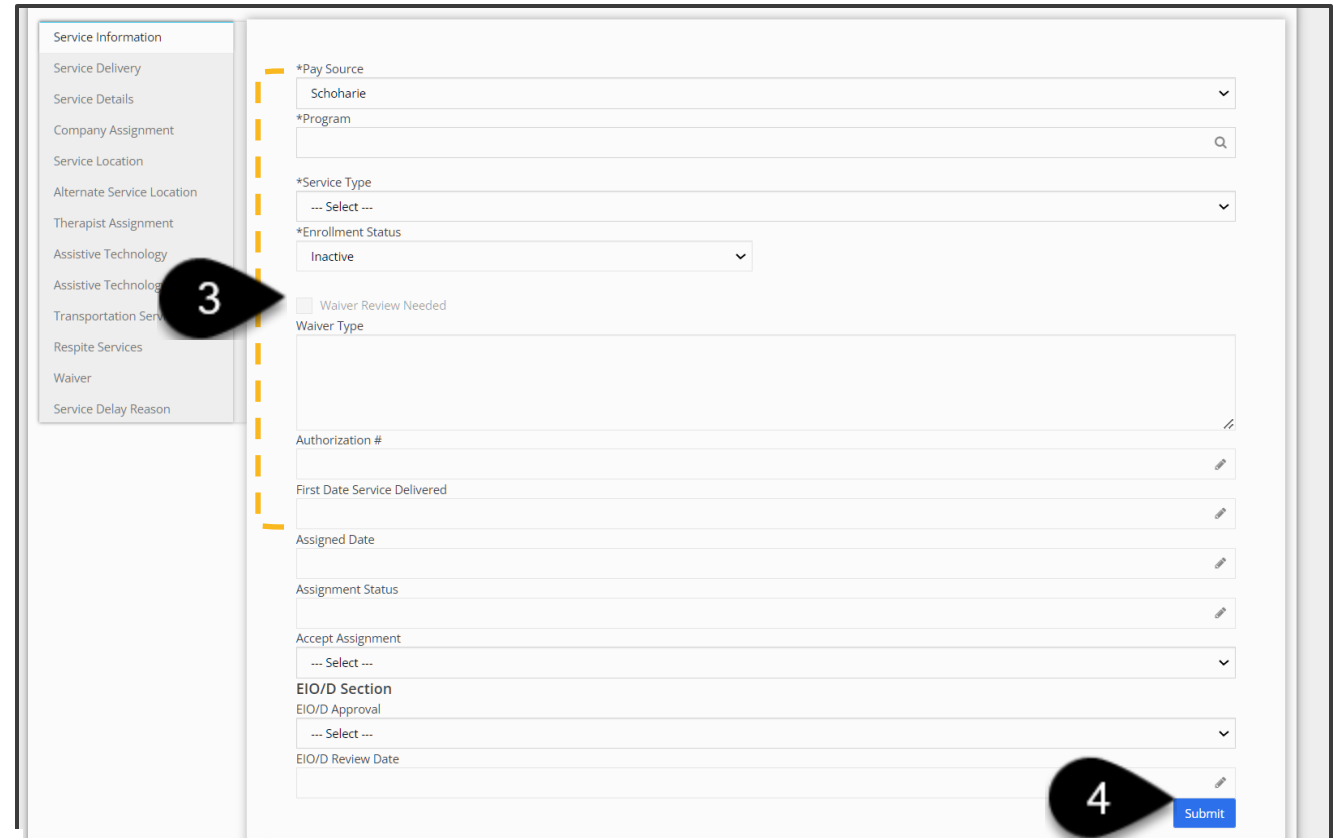
Add Service Information

Service Information grid

IFSP Type	IFSP Start Date	Service Type	Therapist	Start Date	End Date	Quantity	Frequency	Length	Intensity	Authorization #	Status	Waiver Review Needed	Waiver Type	Action
		Service Coordination - Initial	Mattis, John	07/05/2022	08/17/2022	200	TOTAL	1 unit - no time specified	IND		Inactive			Edit Delete

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

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

Assigned Date

Assignment Status

Accept Assignment

... Select ...

EIO/D Section

EIO/D Approval

... Select ...

EIO/D Review Date

Submit

Creating Service Authorizations

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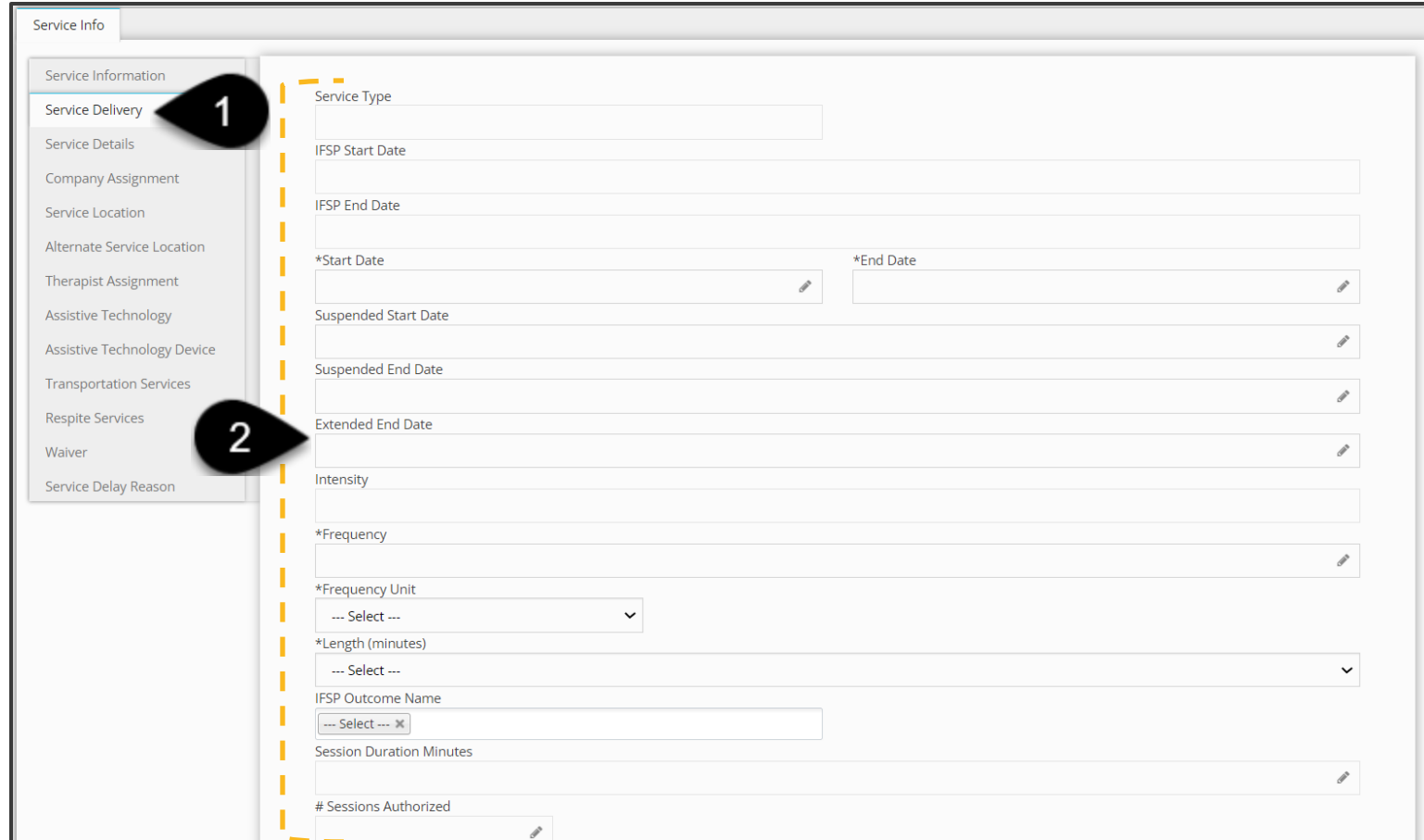
Enter Service Delivery Information

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

- Select the **Service Delivery** panel.
- Enter the **Service Delivery** details:
 - Service Type**: Will auto-populate with **Service Coordinator – Initial**.
 - Services Start/End Date**: Click into the field to choose a date from the calendar picker or the dates may be entered manually.



Service Info

Service Information

Service Delivery **1**

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 Type

IFSP Start Date

IFSP End Date

*Start Date

*End Date

Suspended Start Date

Suspended End Date

Extended End Date

Intensity

*Frequency

*Frequency Unit

--- Select ---

*Length (minutes)

--- Select ---

IFSP Outcome Name

--- Select --- ✕

Session Duration Minutes

Sessions Authorized

2

Creating Service Authorizations

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HOW TO

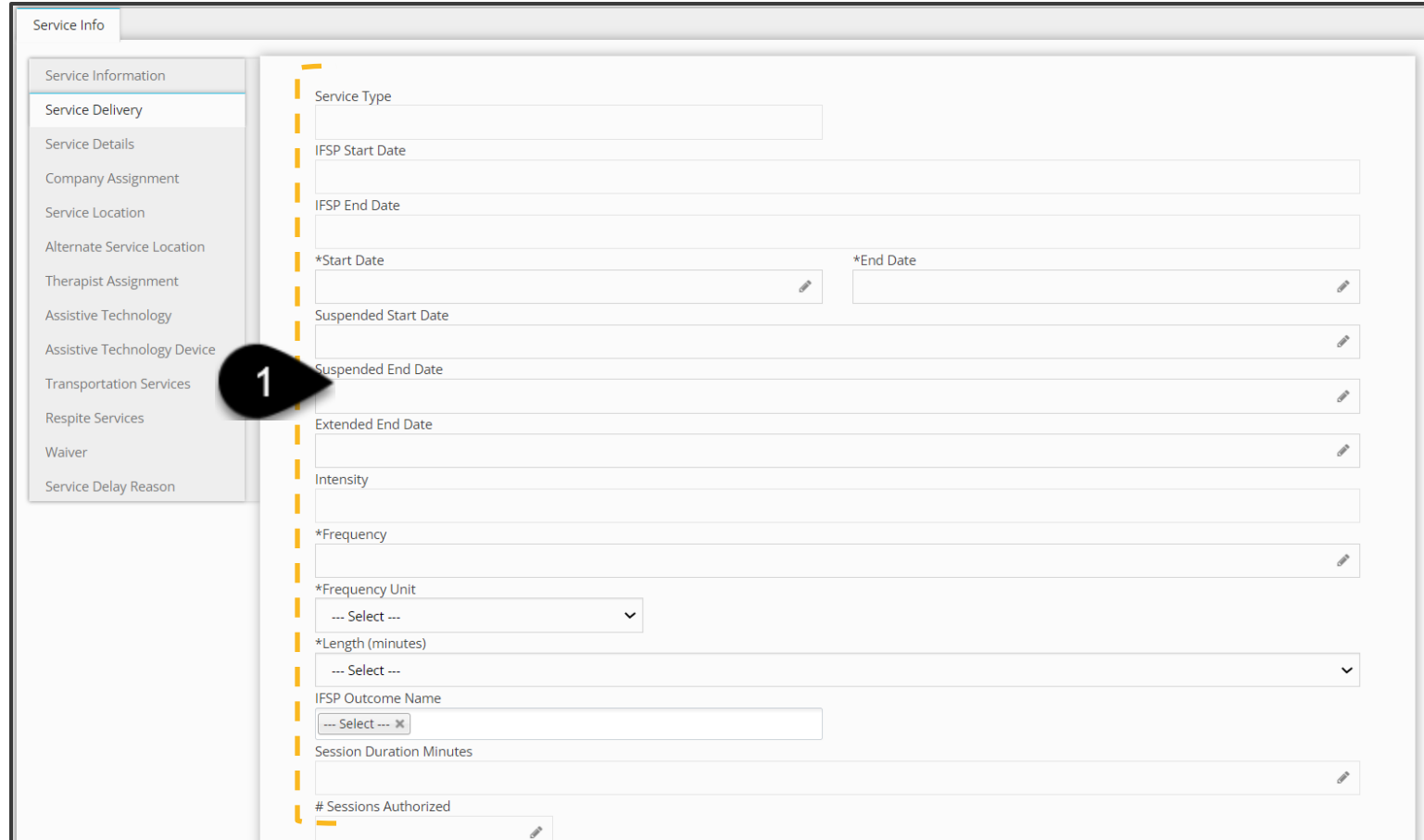
Enter Service Delivery Information

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. For Service Coordination, this field auto-populates with IND. Group services do not apply to Service Coordination.



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HOW TO

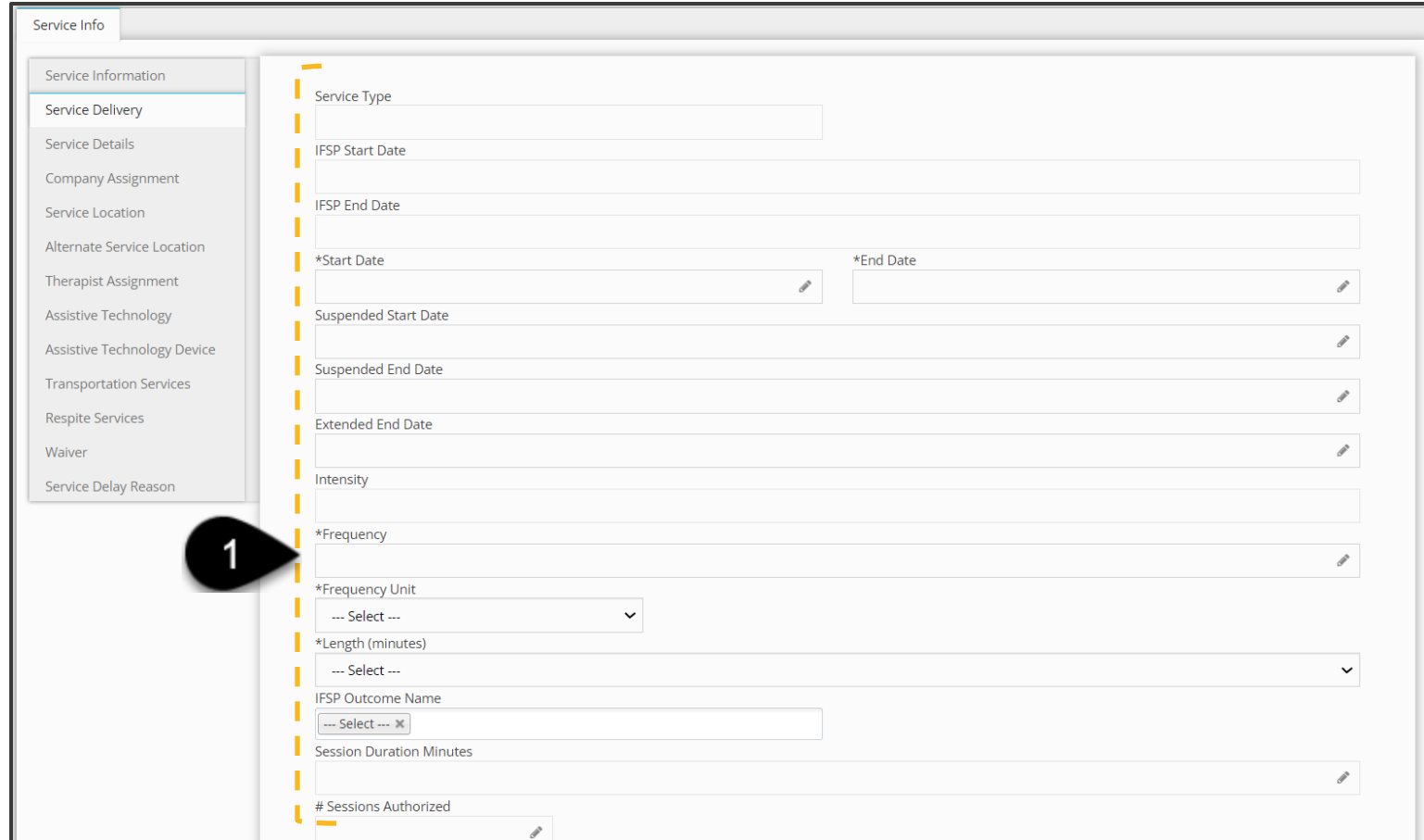
Enter Service Delivery Information

NOTE

- Fields with an asterisks (*) indicate required fields.
- The **Service Information**, **Service Delivery**, **Company Assignment**, and **Service Location** is required for the approval of services.
- Service Coordination units authorized should be consistent with the needs of the family.

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. For service coordination, frequency is the number of 15-minute SC units being authorized.
 - Frequency Unit:** Choose the applicable frequency unit from the dropdown (Day, Week, Month, IFSP Period) SC units may be authorized by any of the available values (Day, Week, Month). The IFSP Period option is not applicable for ISC.
 - Length:** The duration of the service in minutes. For **ALL** service coordinator service authorizations, please use the dropdown value **"No Time Specified"** for the length.



Creating Service Authorizations

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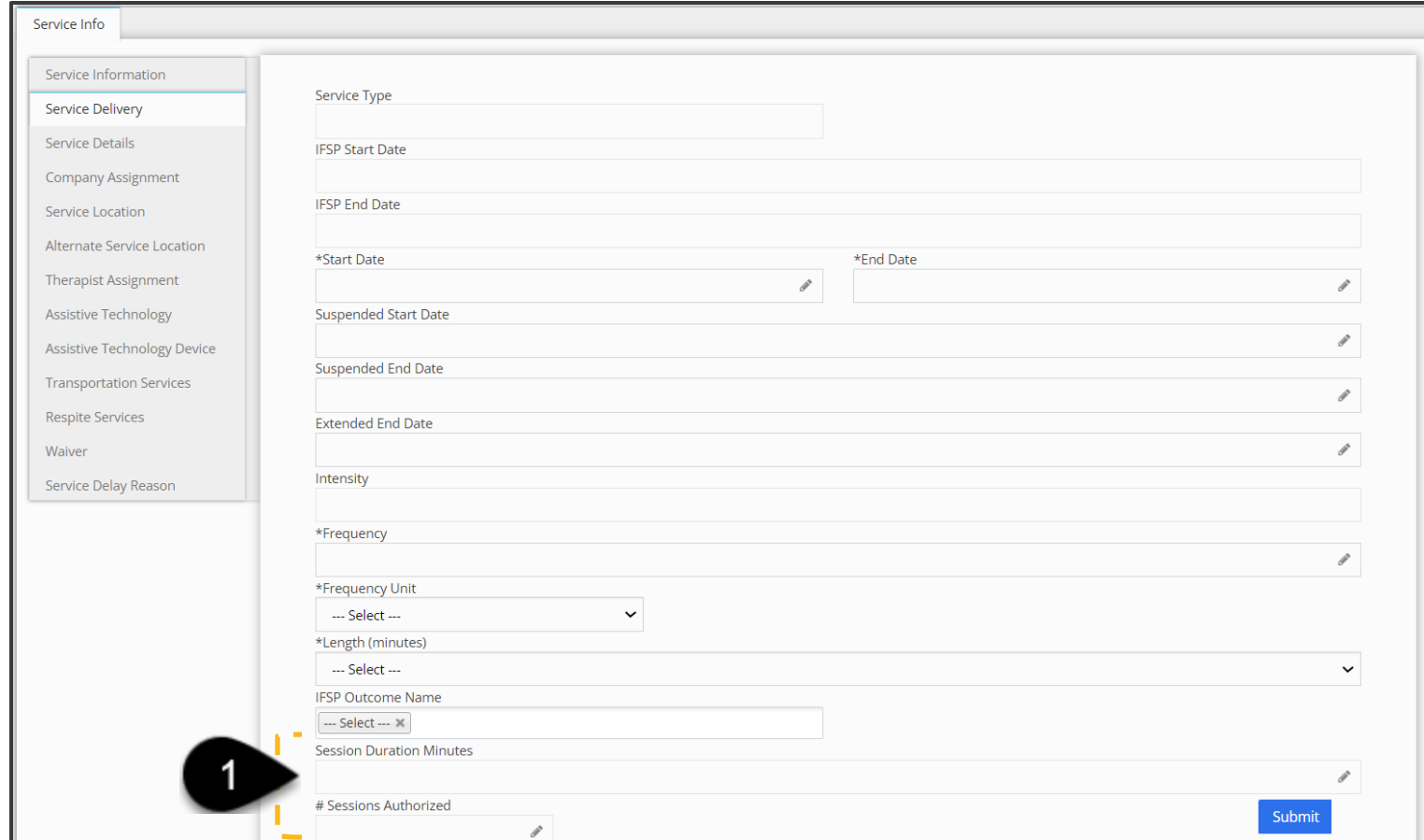
Enter Service Delivery Information

NOTE

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

Step/Action

- 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.



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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** is required for the approval of services.

Step/Action

1. Please note the following fields are typically **not** applicable to service coordination:
 - ***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.
2. Select the **Submit** button to save your service delivery information.

Service Info

Service Information
Service Delivery
Service Details
Company Assignment
Service Location
Alternate Service Location
Therapist Assignment
Assistive Technology
Assistive Technology Device

*Pay Source
Schoharie

*Program

*Service Type
--- Select ---

*Enrollment Status
Inactive

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 Type

IFSP Start Date

IFSP End Date

*Start Date

*Suspension Start Date

*Suspension End Date

Extended End Date

Intensity

*Frequency

*Frequency Unit
--- Select ---

*Length (minutes)
--- Select ---

IFSP Outcome Name
--- Select ---

Session Duration Minutes

Sessions Authorized

Service Group Type
--- Select ---

If any service is being provided in a group setting without typically developing peers, explain why the IFSP team agrees this is appropriate

1

2

Submit

Creating Service Authorizations

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HOW TO

Add a Company Assignment

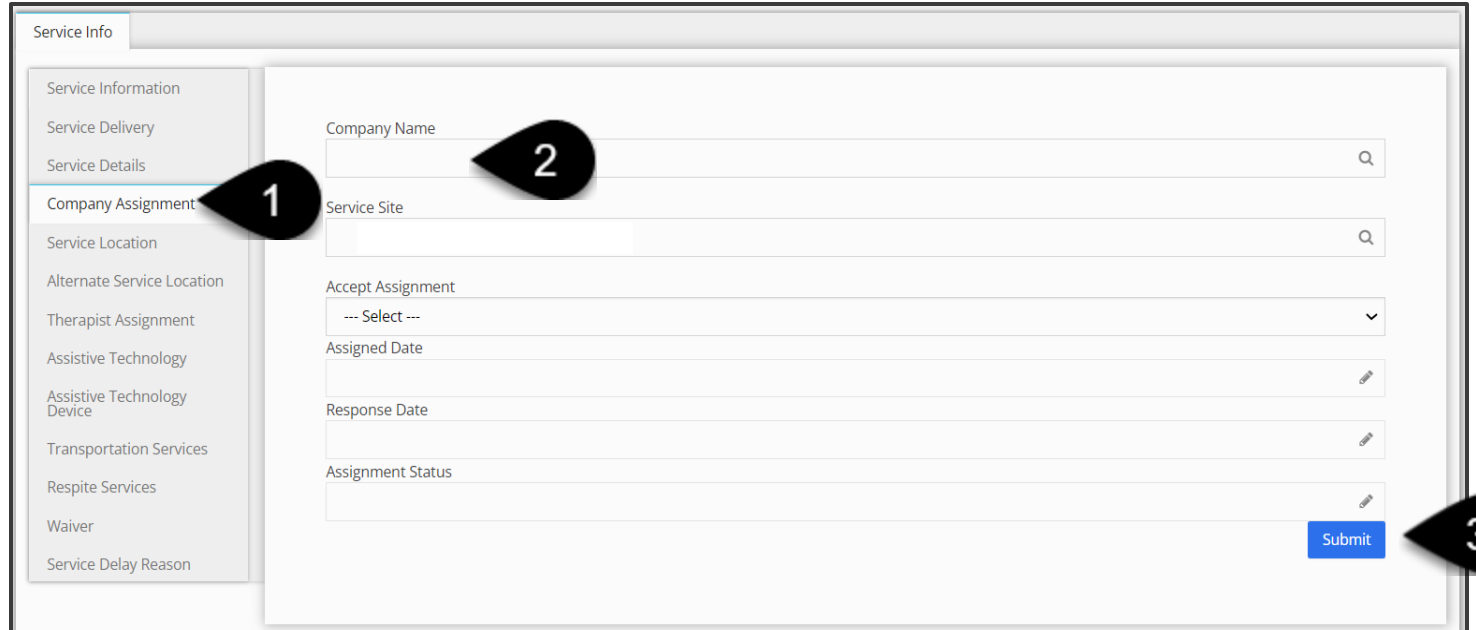


NOTE

- The **Service Information**, **Service Delivery**, **Company Assignment**, and **Service Location** are **required** for the approval of services.
- 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.

Step/Action

1. To assign a company (Municipality/Agency/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 in the EI-Hub. On the left is a sidebar menu with 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 (a dropdown menu), Assigned Date, Response Date, and Assignment Status. At the bottom right of the form is a blue 'Submit' button (with callout 3).

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HOW TO

Enter Service Details 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.
- The **Service Details** panel is **not** required for Service Coordination.
- The **Services Details** panel is used for make-up and co-visits.
- The **Service Details** panel can be used for General Services Service Authorization but is not used for Service Coordination Service Authorizations.
- In the instance that an EIO/D were to approve service coordination with a co-visit type, that service would be rejected by both Service Logging and 837 Claims.

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

☐ Makeup visits allowed?
 Makeup Quantity

Makeup Frequency

--- Select ---

Total Makeups Authorized

☐ CoVisits allowed?
 Qualified Personnel List for CoVisit

--- Select ---

CoVisit Quantity

CoVisit Frequency

--- Select ---

Total CoVisits Authorized

Visits Per Day

Submit

Creating Service Authorizations

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HOW TO

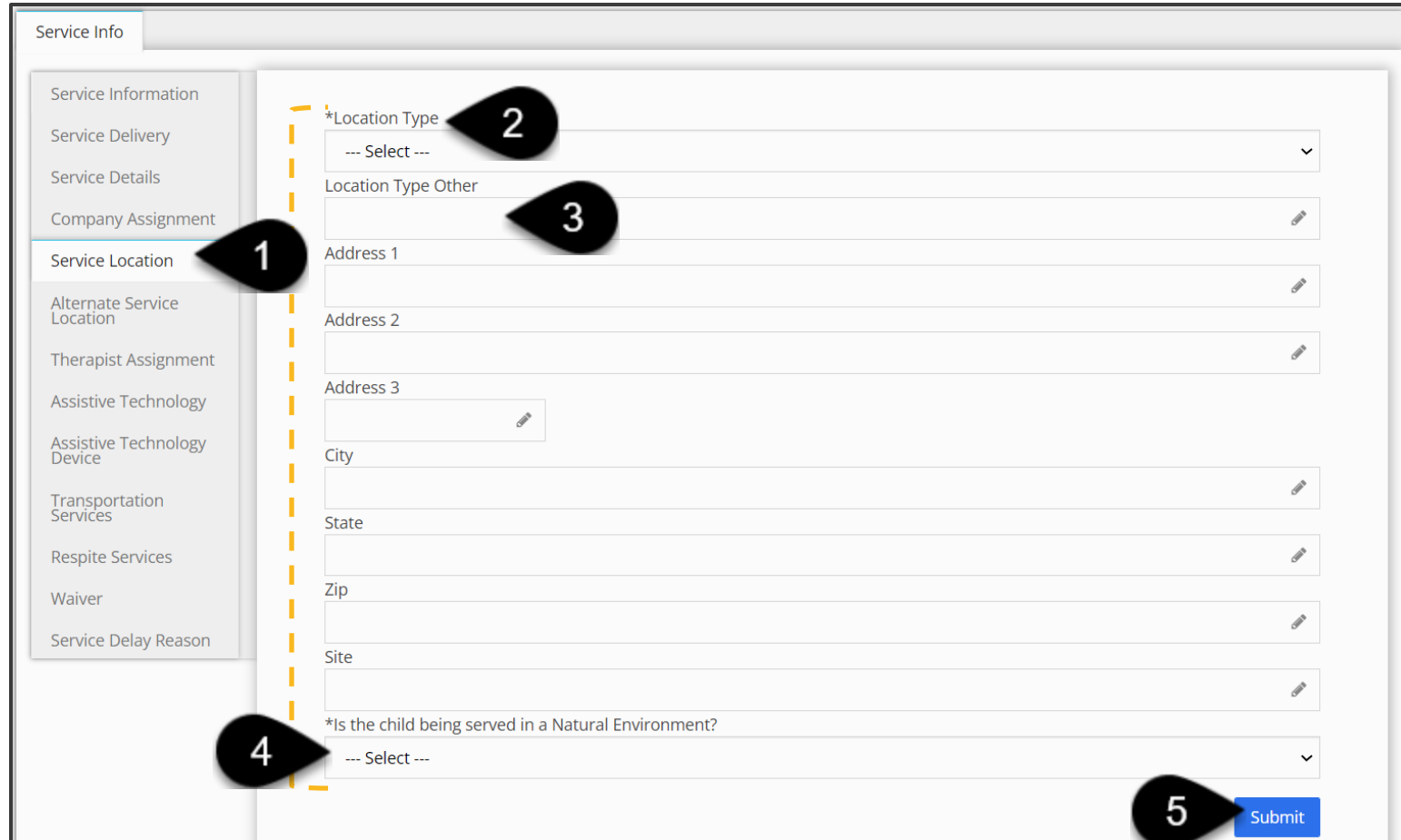
Add a Service Location

NOTE

- Fields with an asterisks (*) indicate required fields.
- The **Service Information**, **Service Delivery**, **Company Assignment**, 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). Service Coordinators can select 'Caregiver Home' for the location.
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**. Service Coordinators will select 'Yes'.
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.



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

*Location Type

--- Select ---

Location Type Other

Address 1

Address 2

Address 3

City

State

Zip

Site

*Is the child being served in a Natural Environment?

--- Select ---

Submit

Creating Service Authorizations

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HOW TO

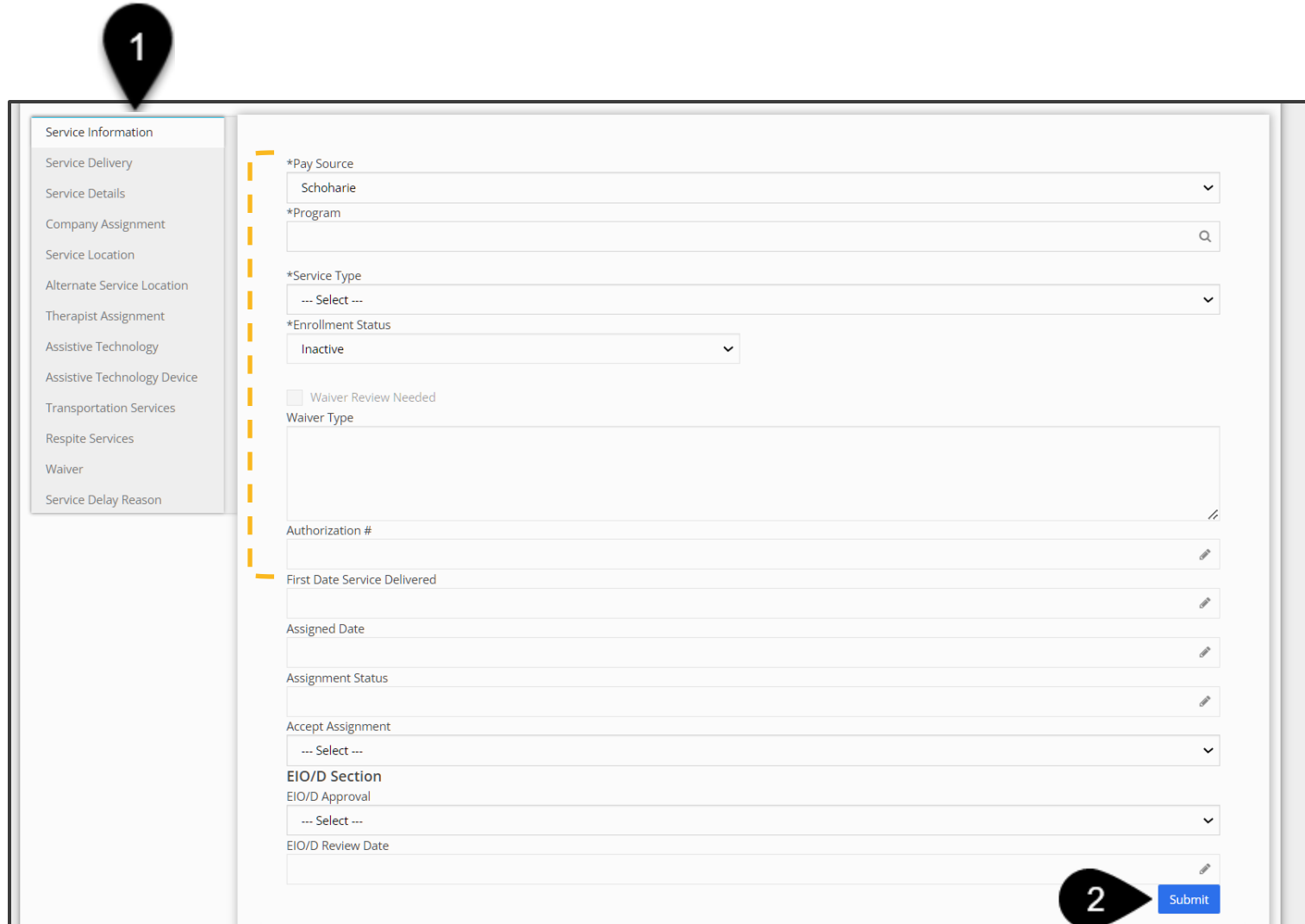
Submit a Service Authorization

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.
- 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 routes to the EIO/D for approval.
3. The service authorization routes to the EIO/D's **Evaluation** dashboard.



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

Assigned Date

Assignment Status

Accept Assignment
--- Select ---

EIO/D Section

EIO/D Approval
--- Select ---

EIO/D Review Date

Submit

EIO/D Approval/Rejection of Initial Service Coordination Service Authorizations

Entering Initial Service Coordination Service Authorizations

Creating Service Authorizations

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Approve/Reject a Service Authorization as an EIO/D



NOTE

The EIO/D can approve initial service coordination service authorizations in the following situations:

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

There are **two** ways for a company to accept a service authorization. Both methods will be covered in upcoming section.



Creating Service Authorizations

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HOW TO

Approve/Reject a Service Authorization as an EIO/D

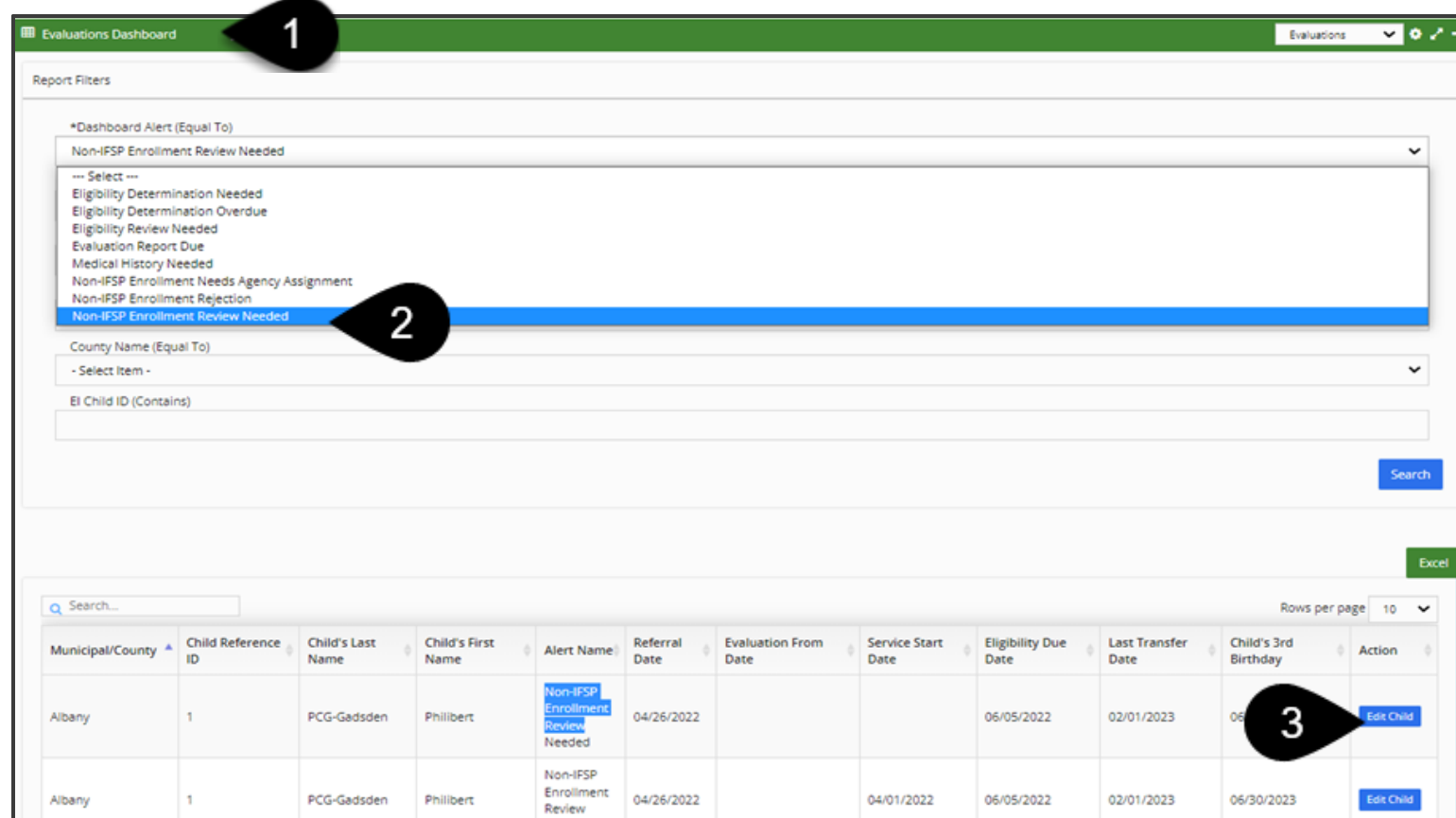


NOTE

- The EIO/D must approve, **and** an agency must accept the service authorization before a service authorization number is generated.
- The following roles may approve an initial service coordination service authorization: EIO/D NY.

Step/Action

- After the initial service coordination service authorization is completed and submitted, the service authorization routes to the EIO/D's **Evaluation** dashboard.
- The EIO/D selects the **Non-IFSP Enrollment Review Needed** report filter to locate the child's record whose initial service coordination service authorization requires approval.
- After locating the Child on their dashboard, the EIO/D opens the Child's record by selecting the **Edit** button



The screenshot shows the 'Evaluations Dashboard' interface. A green header bar contains the title and a search icon. Below the header, there are 'Report Filters' and a table of evaluations.

Report Filters:

- *Dashboard Alert (Equal To): Non-IFSP Enrollment Review Needed (selected)
- County Name (Equal To): - Select Item -
- EI Child ID (Contains):

Evaluations Table:

Municipal/County	Child Reference ID	Child's Last Name	Child's First Name	Alert Name	Referral Date	Evaluation From Date	Service Start Date	Eligibility Due Date	Last Transfer Date	Child's 3rd Birthday	Action
Albany	1	PCG-Gadsden	Phillibert	Non-IFSP Enrollment Review Needed	04/26/2022			06/05/2022	02/01/2023	06/30/2023	Edit Child
Albany	1	PCG-Gadsden	Phillibert	Non-IFSP Enrollment Review	04/26/2022		04/01/2022	06/05/2022	02/01/2023	06/30/2023	Edit Child

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HOW TO

Approve/Reject a Service Authorization as an EIO/D

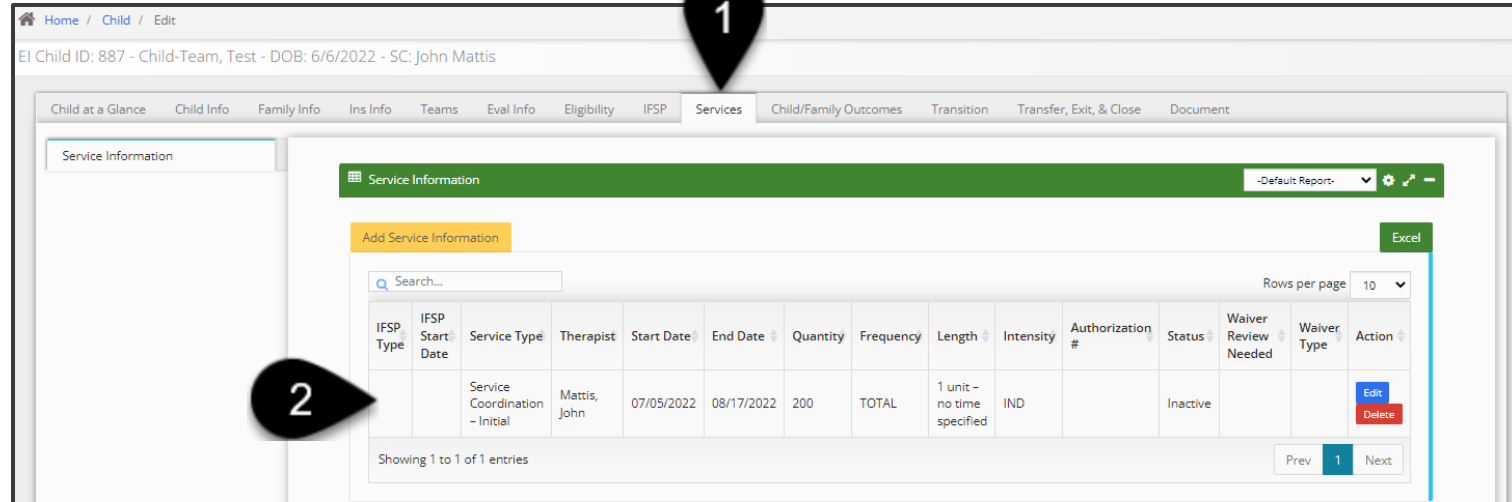


NOTE

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

Step/Action

1. Proceed to the **Services** tab.
2. The EIO/D references the **Service Information** grid to locate/select the Service Authorization with Service Coordination – Initial listed as the **Service Type**.



Home / Child / Edit

EI Child ID: 887 - Child-Team, Test - DOB: 6/6/2022 - SC: John Mattis

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

Service Information

Add Service Information

Search...

IFSP Type	IFSP Start Date	Service Type	Therapist	Start Date	End Date	Quantity	Frequency	Length	Intensity	Authorization #	Status	Waiver Review Needed	Waiver Type	Action
		Service Coordination - Initial	Mattis, John	07/05/2022	08/17/2022	200	TOTAL	1 unit - no time specified	IND		Inactive			Edit Delete

Showing 1 to 1 of 1 entries

Prev 1 Next

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HOW TO

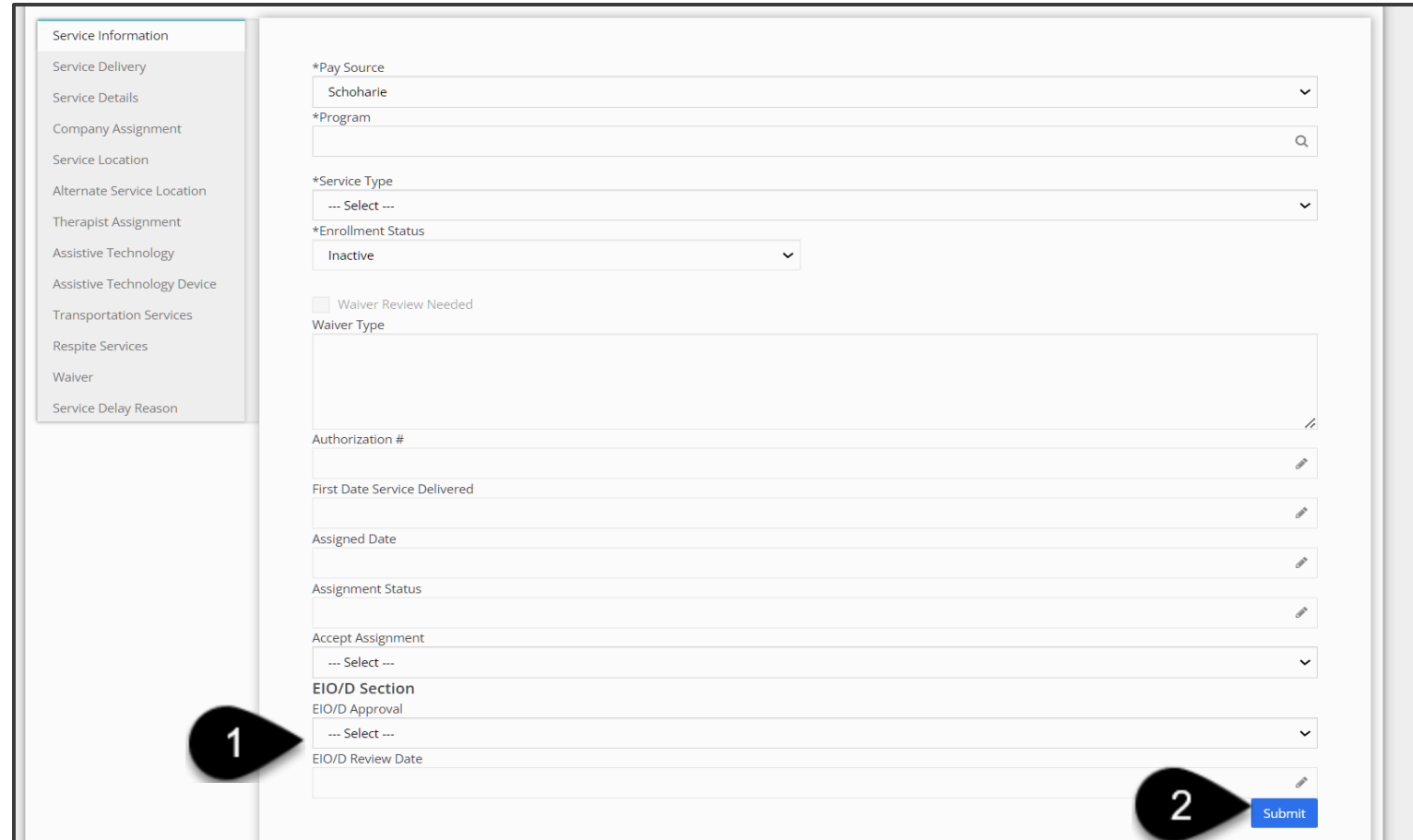
Approve/Reject a Service Authorization as an EIO/D

NOTE

- Fields with an asterisks (*) indicate required fields.
- The **Service Information**, **Service Delivery**, **Company Assignment**, and **Service Location** are **required** for the approval of Initial Service Coordination services.
- The **Alternative Service Location** panel is **not** required.
- The EIO/D must approve, **and** an Agency must approve/accept the Service Authorization before a Service Authorization number is generated.

Step/Action

1. The EIO/D reviews the required panels in the service authorization and selects 'Approved' or 'Rejected' from the **EIO/D Approval** dropdown.
2. The **EIO/D Review Date** field auto-populates with today's date.
3. Select the **Submit** button to approve/reject the service authorization.



The screenshot shows the 'Service Information' panel of a web application. A sidebar on the left lists various service categories. The main form area contains several dropdown menus and text fields. Callout 1 points to the 'EIO/D Approval' dropdown, and callout 2 points to the 'Submit' button.

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

Assigned Date

Assignment Status

Accept Assignment
--- Select ---

EIO/D Section

EIO/D Approval
--- Select ---

EIO/D Review Date

Submit

Creating Service Authorizations

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HOW TO

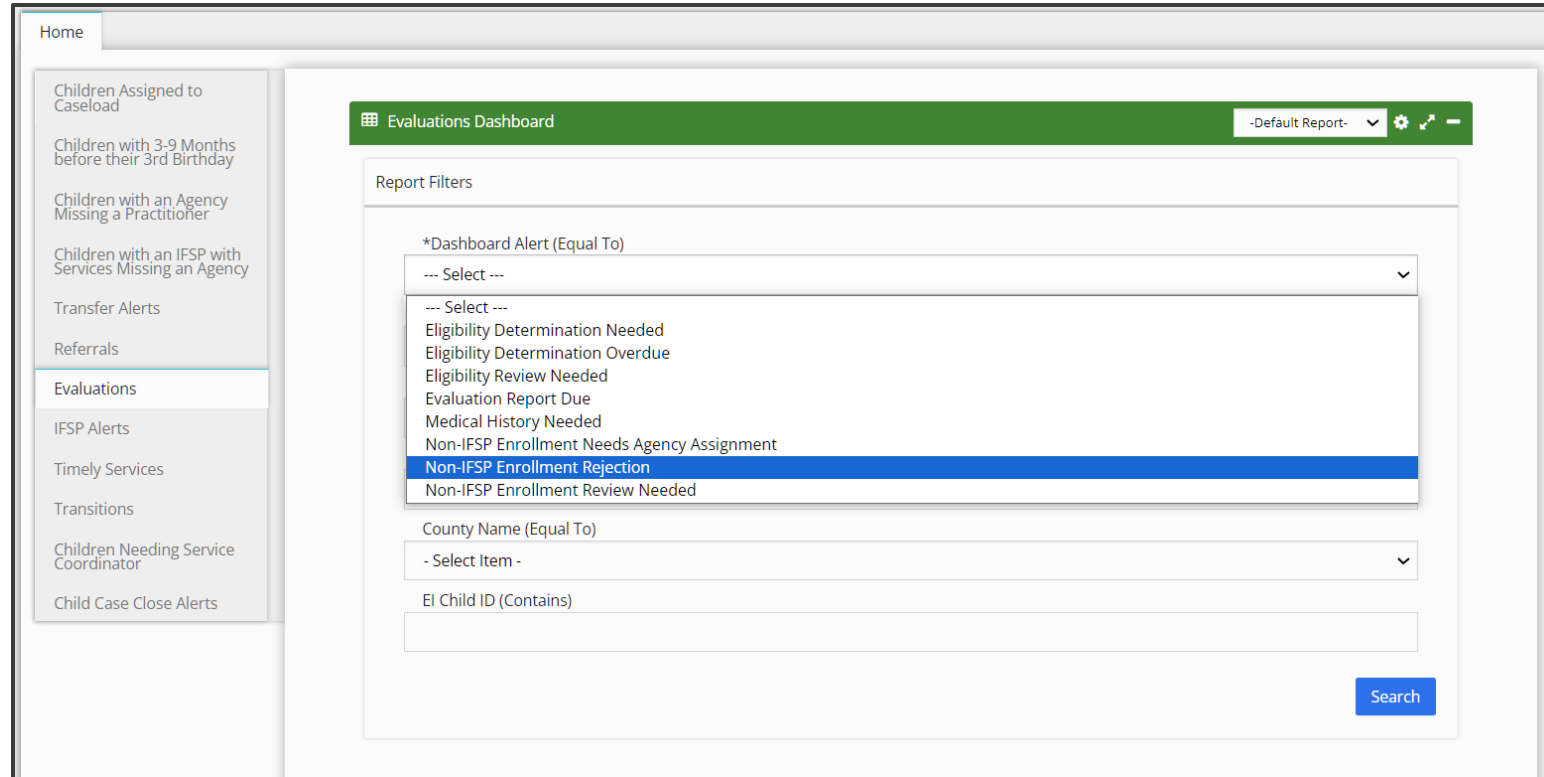
Approve/Reject a Service Authorization as an EIO/D



NOTE

If the EIO/D rejects the initial service coordination service authorization, the service authorization flows back to the Initial Service Coordinator's Agency's **Evaluations** Dashboard/**Non-IFSP Enrollment Rejection** dashboard alert.

Users will be able to adjust the service and should notify the EIO/D when the updated SA is ready for re-review.



The screenshot shows the 'Evaluations Dashboard' interface. On the left is a sidebar menu with the following items: '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' (highlighted), 'IFSP Alerts', 'Timely Services', 'Transitions', 'Children Needing Service Coordinator', and 'Child Case Close Alerts'. The main content area has a green header bar labeled 'Evaluations Dashboard' with a '-Default Report-' dropdown and icons for settings, share, and close. Below the header is a 'Report Filters' section containing three filters: '*Dashboard Alert (Equal To)' with a dropdown menu open showing options like 'Eligibility Determination Needed', 'Eligibility Determination Overdue', 'Eligibility Review Needed', 'Evaluation Report Due', 'Medical History Needed', 'Non-IFSP Enrollment Needs Agency Assignment', 'Non-IFSP Enrollment Rejection' (highlighted), and 'Non-IFSP Enrollment Review Needed'; 'County Name (Equal To)' with a '- Select Item -' dropdown; and 'EI Child ID (Contains)' with a text input field. A blue 'Search' button is located at the bottom right of the filter section.

Company Acceptance/Rejection of Initial Service Coordination Assignments

Entering Initial Service Coordination Service Authorizations

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HOW TO

Accept/Reject an Assignment as a Company



NOTE

- The EIO/D must approve, **and** a company (Agency/County/Municipality/Independent Provider) must accept the service authorization before a service authorization number is generated.
- Once the EIO/D approves the initial service coordination service authorization, the service authorization routes to the company (Municipality/Agency/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 provisioned to accept/reject a service authorization: UniversalProvNY **OR** ProvDataEntryNY.



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HOW TO

Accept/Reject an Assignment as a Company

NOTE

- A child will only display on the **Children Assigned to Caseload** dashboard **once**, even if multiple service authorizations are being assigned to the agency or provider.
- In the case of initial service coordination service authorizations, the service(s) associated with service authorization is located within the **Agency Accept/Reject Assignment** dialogue box.
- After accepting or rejecting a child's service authorization, The child may still appear on your dashboard with an 'Accept' or 'Reject' option, this indicates there are additional service authorizations associated with the child that must be reviewed and responded to.
- All service authorizations must be responded to **before** the child's record will be available to the agency or provider.

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

- The service authorization routes to the company's **Children assigned to Caseload** dashboard where the company selects the **Agency Assignment** button.
- The **Agency Accepts/Reject Assignment** dialogue box populates. Choose 'Accepted' or 'Rejected' from the **Agency Accept/Reject Assignment** dropdown.
- Click the **Submit** button to save the selection.
- Upon accepting the assignment, the **Agency Assignment** button changes to an **Edit** button to allow the agency access to the child's record.

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 4
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 1
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 -- 2
Accepted
Rejected

Submit 3

Creating Service Authorizations

Job Aid

HOW TO

Locating a Rejected Assignment as an EIO/D

NOTE
If the agency assigned to the child and identified on the service authorization (SA) rejects the service authorization, this can be accomplished through the **Company Assignment** panel on the Services tab, **or** the company may access the child through the **Children Assigned to Caseload** dashboard and select the **Reject Assignment** button.

After the initial service coordination service authorization is rejected that service authorization flows back to the EIO/D's **Evaluations Dashboard/Non-IFSP Enrollment Rejection** dashboard alert. The **Non-IFSP Enrollment Rejection** dashboard alert applies to services that are NOT attached or fall outside of the IFSP, for example, Initial Service Coordination.

Users will be able to adjust the service and should notify the EIO/D when the updated SA is ready for re-review.

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

Company Name
Suffolk County Department of Health Services Division of Services for Children with Special Needs ✓
Service Site
Accept Assignment
Accepted ▼
Assigned Date
06/23/2023 ✎
Response Date
06/23/2023 ✎
Assignment Status
Rejected ✎
Submit

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
Timely Services
Transitions
Children Needing Service Coordinator
Child Case Close Alerts

Evaluations Dashboard -Default Report- ⚙️ ↗️ -

Report Filters

*Dashboard Alert (Equal To)
--- Select ---
--- Select ---
Eligibility Determination Needed
Eligibility Determination Overdue
Eligibility Review Needed
Evaluation Report Due
Medical History Needed
Non-IFSP Enrollment Needs Agency Assignment
Non-IFSP Enrollment Rejection
Non-IFSP Enrollment Review Needed

County Name (Equal To)
- Select Item - ▼

EI Child ID (Contains)

Search

Assigning a Therapist

Entering Initial Service Coordination Service Authorizations

Creating Service Authorizations

Job Aid

HOW TO

Assign a Therapist

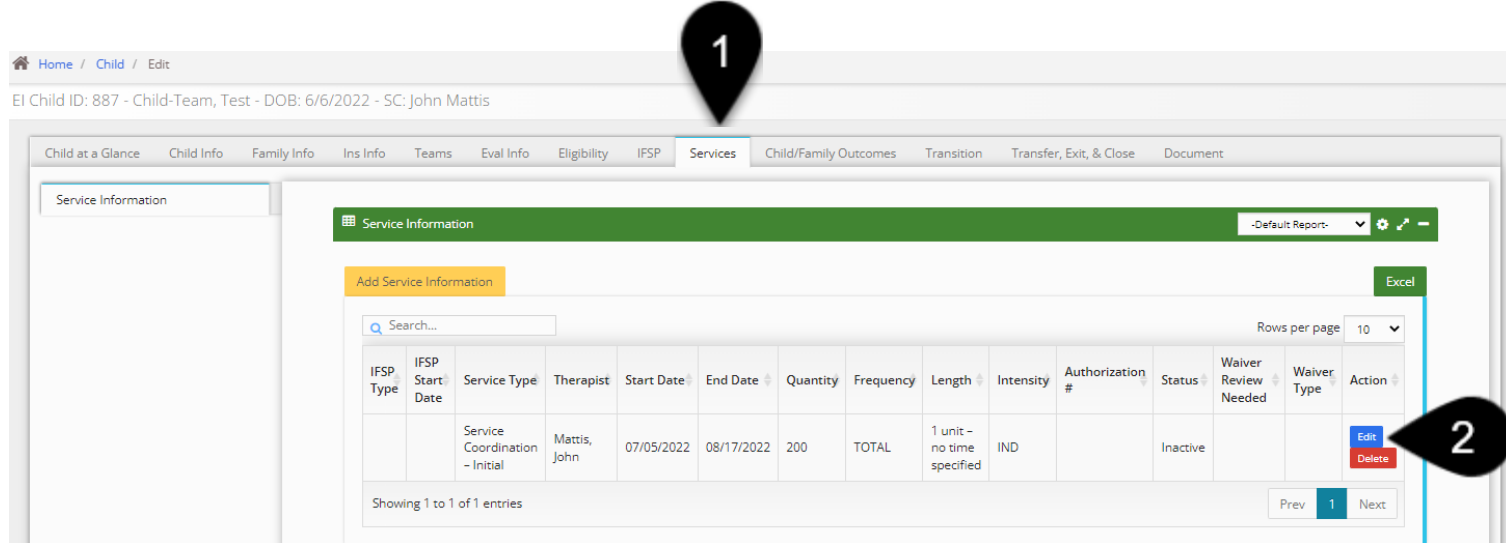
NOTE

Therapist Assignments for Initial Service Coordination can only be assigned to service authorizations through the **Services** tab.

Please keep in mind, a **therapist** refers to an individual who may be employed by an agency and is responsible for rendering services.

Step/Action

1. To add a therapist assignment, open a child's record and select the **Services** tab from the Child's record. The page defaults to the **Service Information** grid.
2. From the **Service Information** grid, locate the Service Coordination – Initial service authorization and select the **Edit** button to open the **Service Info** sub-tab.



Home / Child / Edit

EI Child ID: 887 - Child-Team, Test - DOB: 6/6/2022 - SC: John Mattis

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

Service Information

Add Service Information

Search...

IFSP Type	IFSP Start Date	Service Type	Therapist	Start Date	End Date	Quantity	Frequency	Length	Intensity	Authorization #	Status	Waiver Review Needed	Waiver Type	Action
		Service Coordination - Initial	Mattis, John	07/05/2022	08/17/2022	200	TOTAL	1 unit - no time specified	IND		Inactive			Edit Delete

Showing 1 to 1 of 1 entries

Prev 1 Next

Creating Service Authorizations

HOW TO

Job Aid

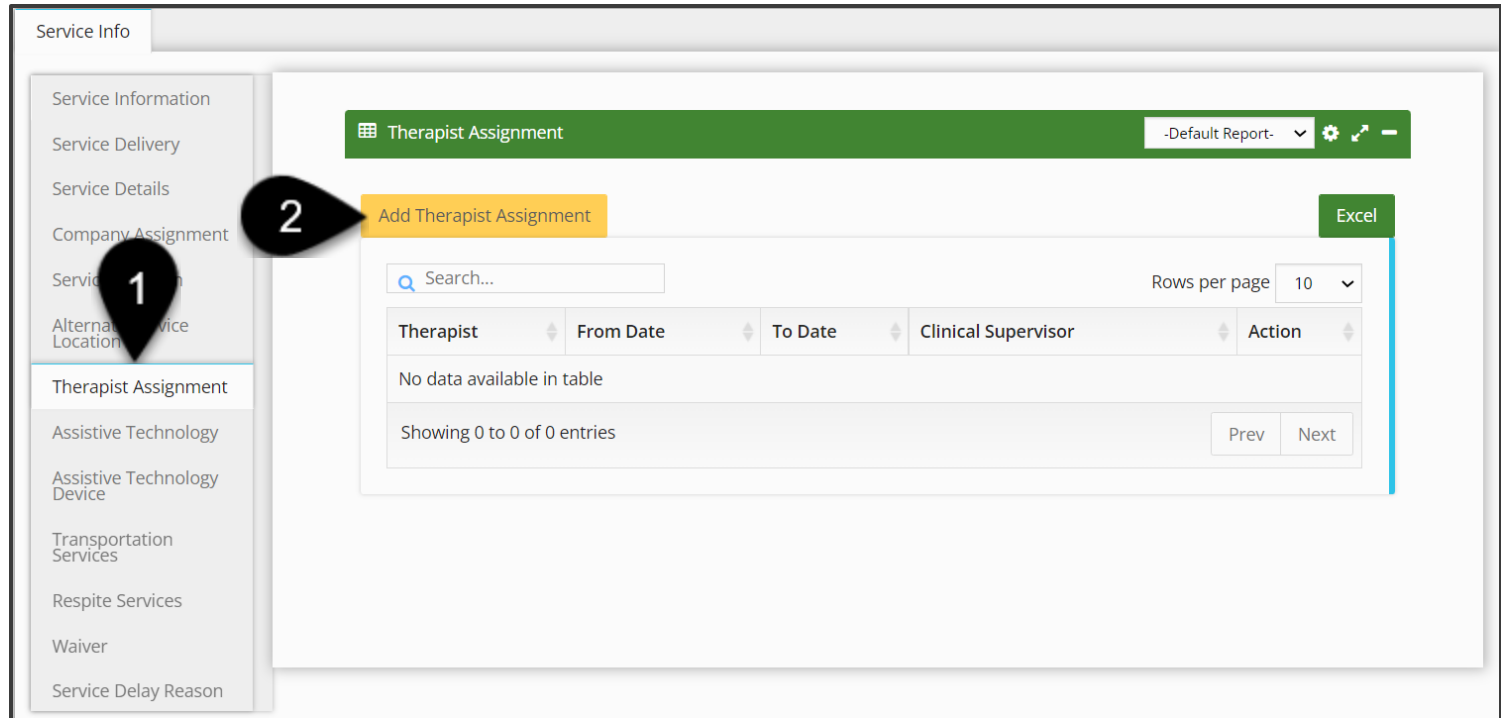
Assign a Therapist

NOTE

- Fields with an asterisk (*) indicate required fields.

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.



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-

Excel

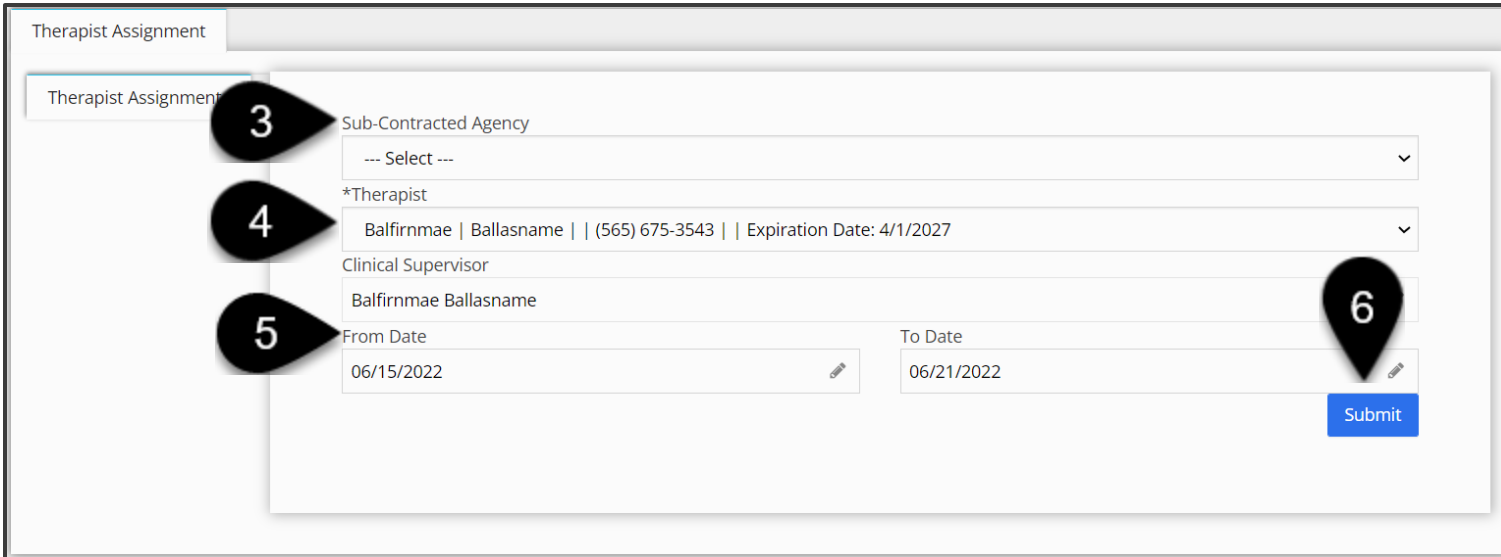
Add Therapist Assignment

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

Sub-Contracted Agency

--- Select ---

*Therapist

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

Clinical Supervisor

Balfirnae Ballasname

From Date

06/15/2022

To Date

06/21/2022

Submit

Creating Service Authorizations

Job Aid

HOW TO

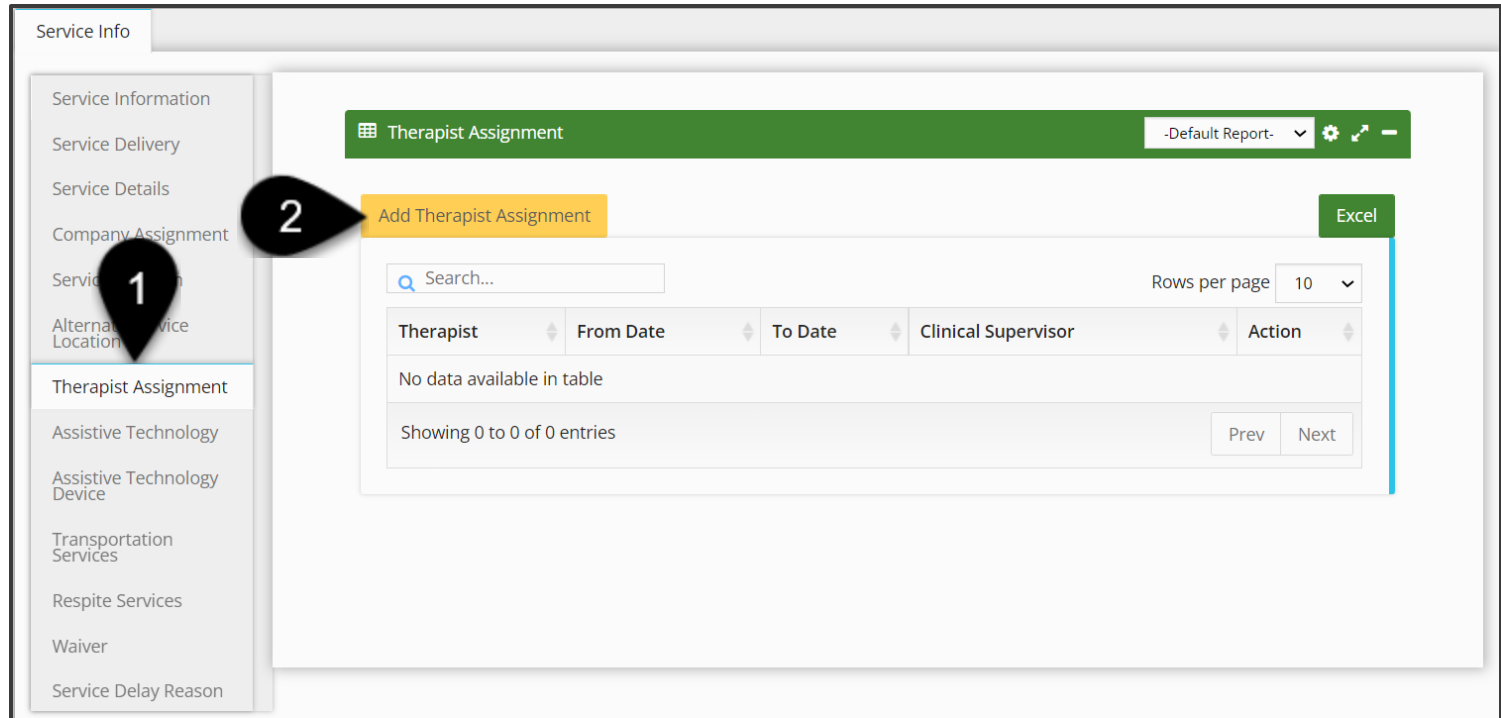
Assign a Therapist



NOTE

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

- Therapists available for selection are based on 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-

Add Therapist Assignment

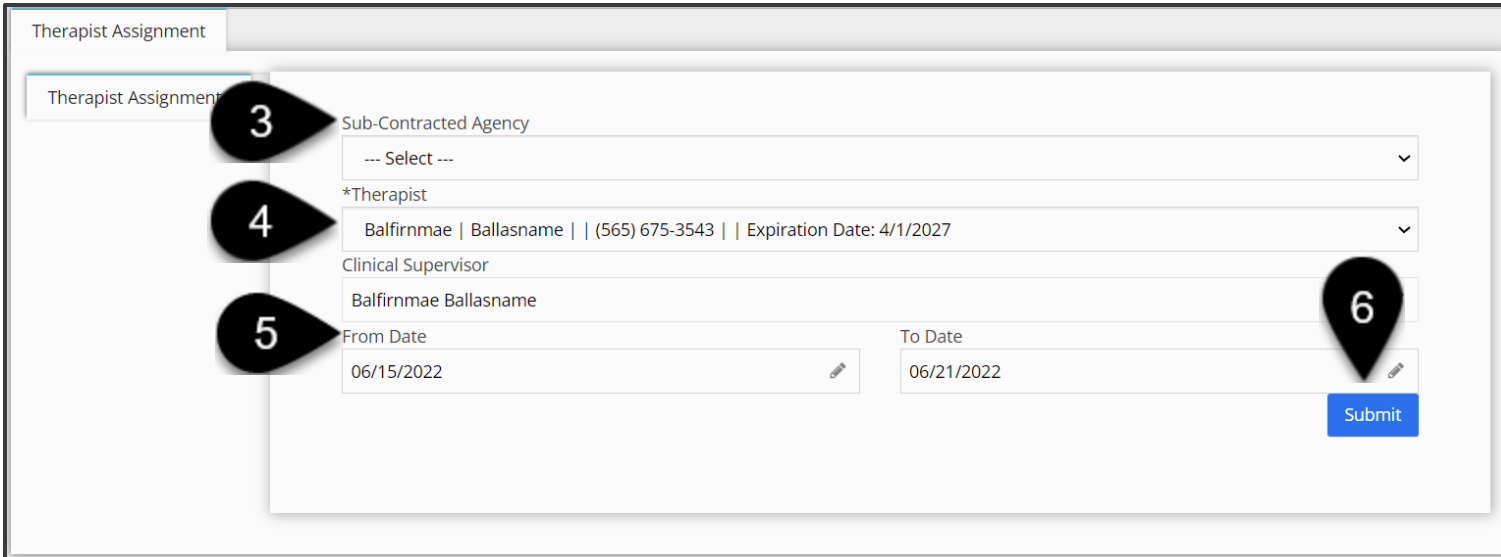
Excel

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

Sub-Contracted Agency

--- Select ---

*Therapist

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

Clinical Supervisor

Balfirnae Ballasname

From Date

06/15/2022

To Date

06/21/2022

Submit

Remaining Service Panels – All Types

Entering Service Authorizations for Initial Service Coordination 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.

