

# **Unit 1: Getting Started**

Version 5.04

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## Document Revision History

<b>Date</b>	<b>Release</b>	<b>Description</b>
08/22/2018	5.4	<ul style="list-style-type: none"> <li>Added the “Delete Draft” link as a function within the IFSP Home page manage cluster.</li> </ul>
04/25/2017	5.0	<ul style="list-style-type: none"> <li>Modified Attachment section to reflect only PDF files may be attached.</li> <li>Edited Screen Shots to remove “Create MS Word” tab</li> </ul>
06/14/2016	4.6	<ul style="list-style-type: none"> <li>Updated <b>NYEIS Standard Page Layout</b> section to reflect new <b>Welcome Banner</b> and new <b>Announcements</b> cluster</li> <li>Added Steps for logout of NYEIS and HCS</li> </ul>
04/26/2016	4.5.2	<ul style="list-style-type: none"> <li>System performance improvements have been applied to the My Workspace/Inbox and Municipal Supervisor Metrics pages to improve system response time.</li> </ul>
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12/30/2014	4.01	<ul style="list-style-type: none"> <li>Updated HCS screenshots to v4</li> <li>Updated steps for bookmarking NYEIS user manual in HCS ‘My Favorites’</li> <li>Updated NYEIS Help Desk Phone number</li> <li>Updated NYEIS home page screen shots</li> <li>Removed references to using Boolean search commands, which are automatically used</li> <li>Updated steps for printing</li> <li>Updated information about trailing notifications</li> <li>Added important note about forwarding tasks</li> <li>Updated Provider search feature to reflect new agreements</li> <li>Updated max file size for uploaded attachments</li> </ul>
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02/14/2013	1.6.2	<ul style="list-style-type: none"> <li>• No changes</li> </ul>
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06/05/2012	1.6	<ul style="list-style-type: none"> <li>• No changes</li> </ul>
06/04/2012	1.6	<ul style="list-style-type: none"> <li>• Added <b>Multi-Delete Notifications</b> subtopic.</li> </ul>
10/24/2011	1.5	<ul style="list-style-type: none"> <li>• Updated <b>Notifications</b> subtopic</li> <li>• Updated <b>Searches</b> subtopic.</li> <li>• Added note to <b>Attachments</b> subtopic regarding maximum file size.</li> <li>• Updated <b>System Requirements</b> subtopic.</li> </ul>
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06/27/2011	1.4	<ul style="list-style-type: none"> <li>• No changes</li> </ul>
06/24/2011	1.4	<ul style="list-style-type: none"> <li>• Removed note to <b>Attachments</b> section informing that the functionality is disabled until an Anti-Virus scanning application is added to NYEIS.</li> <li>• Added sample <b>Referral Work Queue</b> screen showing that work queue cases are now sorted oldest first, via a new date sort column.</li> <li>• Replaced EIOD's <b>My Cases</b> screen with one having the new date sort column.</li> <li>• Replaced <b>Address Validation</b> screen, deleting Address line 3 and adding description of Address lines 1 and 2.</li> <li>• Replaced <b>Child Search</b> screens adding Father's Name and renaming Mother's Name and Birth Last Name more clearly.</li> </ul>
06/23/2011	1.4	<ul style="list-style-type: none"> <li>• No changes</li> </ul>
03/31/2011	1.3	<ul style="list-style-type: none"> <li>• Added <b>Adding the NYEIS Production Link to Your HCS My Applications</b> subtopic. Includes steps and screen shots for adding the NYEIS Production link to the HCS My Applications.</li> <li>• Added updated screen shots of Child Home page. Child Information cluster renamed "Child Name".</li> <li>• Added <b>System Requirements</b> section.</li> <li>• Added note to <b>Attachments</b> section informing that the functionality is disabled until an Anti-Virus scanning application is added to NYEIS.</li> </ul>
03/30/2011	1.3	<ul style="list-style-type: none"> <li>• No changes</li> </ul>
03/28/2011	1.3	<ul style="list-style-type: none"> <li>• No changes</li> </ul>
01/31/2011	1.2	<ul style="list-style-type: none"> <li>• <b>Added Accessing NYEIS and Accessing the</b></li> </ul>

		<p>NYEIS User Manual Online <b>sections</b>. Includes information about Terms and Conditions.</p> <ul style="list-style-type: none"> <li>• Edited Searching subtopic with additional information about Provider Status.</li> <li>• Edited Address Validation screen shots and guidance to reflect new required search fields: City, State and Zip.</li> <li>• Updated User Home Page screen shots that now depict number of Reserved and Assigned tasks.</li> </ul>
12/18/2010	1.1	• No changes
11/22/2010	1.1	• Added <b>Searching</b> section.
11/04/2010		• No changes
11/02/2010		• No changes
10/01/2010	1.0	• October 2010 NYEIS launch.

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# Getting Started

## Unit Overview

Getting Started reviews standard page anatomy, navigational buttons, links and page layout of the New York Early Intervention System (NYEIS). Getting Started is an Overview that provides the User with an understanding of how to navigate through NYEIS.

NYEIS has a standard login and password process that determines a User's access to information. It then determines, based on access rights, the type of information displayed for viewing and editing for that User. For example, a Provider would not be able to view the page that records a child's social security number. Also, based on User's role, a User may only view certain pages and not be allowed to add, edit data or perform other functions.

NYEIS Functional User roles/access rights will have their own names and may not correspond to the job titles used by a Provider or Municipality, which will vary significantly.

**Home Pages** are a central location for detailed data and functions available for a specific group or individual. For example, Home Pages exist for each Child, each Service Provider and each User of the System. These pages allow easy access for authorized Users to add, change and delete associated data elements.



### Important Information

Pages in NYEIS are not automatically updated with data/information entered by Users. Updated information or a page refresh occurs only when the page displayed is submitted by clicking the **Save** or **Next** button on the current page.

## SYSTEM REQUIREMENTS

The New York Early Intervention System (NYEIS) is built on the Cúram Software framework. Minimum requirements for running the application include:

**Desktop Operating System:** Windows XP or higher

**Browser:** Microsoft Internet Explorer (versions 9.0 and higher)

**Microsoft Office:** Microsoft Word 2003, 2007  
Microsoft Excel 2003, 2007

### Notes:

- Apple Mac OS is not supported.
- Microsoft Excel is one of the Fiscal Payment file formats.  See **Unit 8 – Provider Invoicing, Provider Electronic (837) Claiming** and/or **Unit 12 – Municipal Financial, Sending Payment File to Municipal Financial** for further information.

### **Adding the NYEIS Production Link to Your HCS My Applications**

If it's your first time logging into NYEIS you will need to add the NYEIS-Production link to the My Applications section.

- Log in to the Health Commerce System
- Open your Internet browser (Internet Explorer recommended) and enter the following URL in the address bar:

<https://commerce.health.state.ny.us>

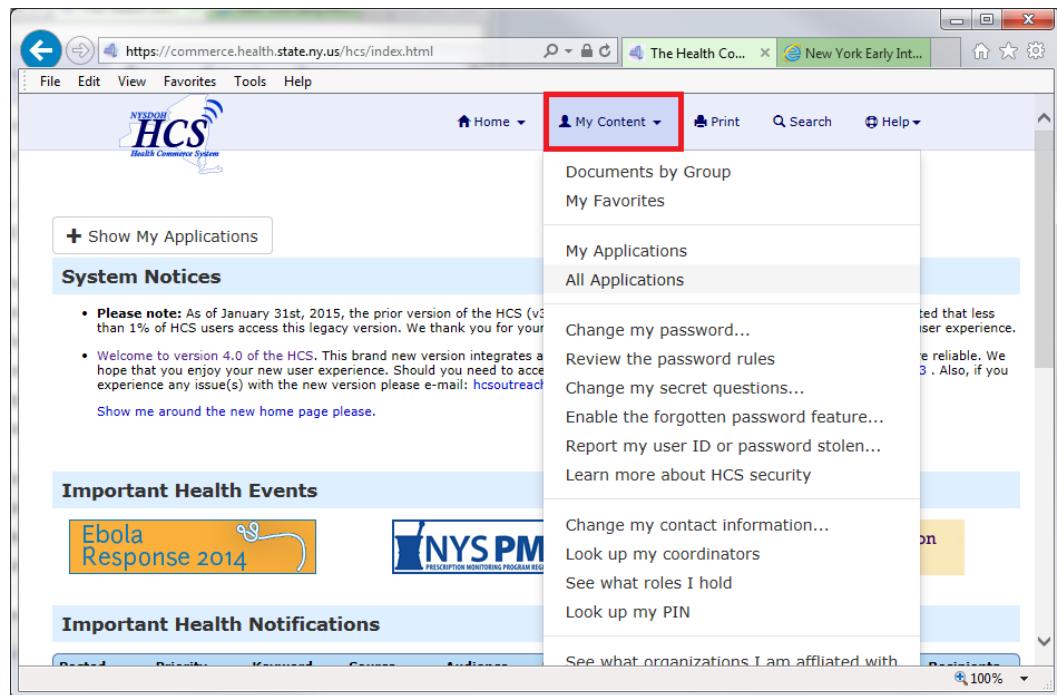
The New York State Department of Health, Health Commerce System login page displays.



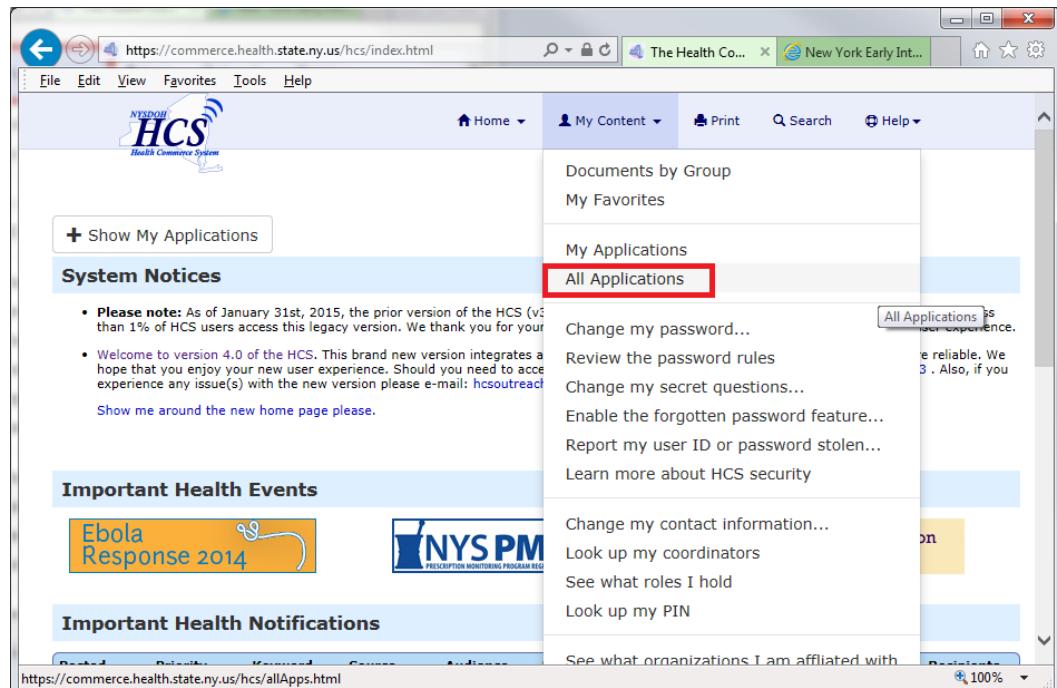
- Enter in your Health Commerce System account username and password. Click the **Sign In** button. The **Health Commerce System Portal** page displays.

Posted	Priority	Keyword	Source	Audience	Description	Recipients
12/24/2014	Advisory	Infectious Disease	NYSDOH		Mixture of IV fluids intended for simulation and education only	Recipients
12/11/2014	Advisory	Influenza	NYSDOH		NYSDOH Commissioner Declares Influenza Prevalent in the State	Recipients
12/06/2014	Advisory	Infectious Disease	NYSDOH		EBOLA VIRUS DISEASE (EVD) UPDATE: NEW CASES IDENTIFIED IN MALI	Recipients
12/04/2014	Advisory	Influenza	CDC		Potential for Circulation of Drifted Influenza A (H3N2) Viruses	Recipients

- Click the ‘My Content’ option from the Portal page Menu Bar. A list of choices appears in the window.



- Select the option 'All Applications'.



- You are then taken to a page with an index tab that will allow you to browse by application name.

**Health Commerce System Applications**

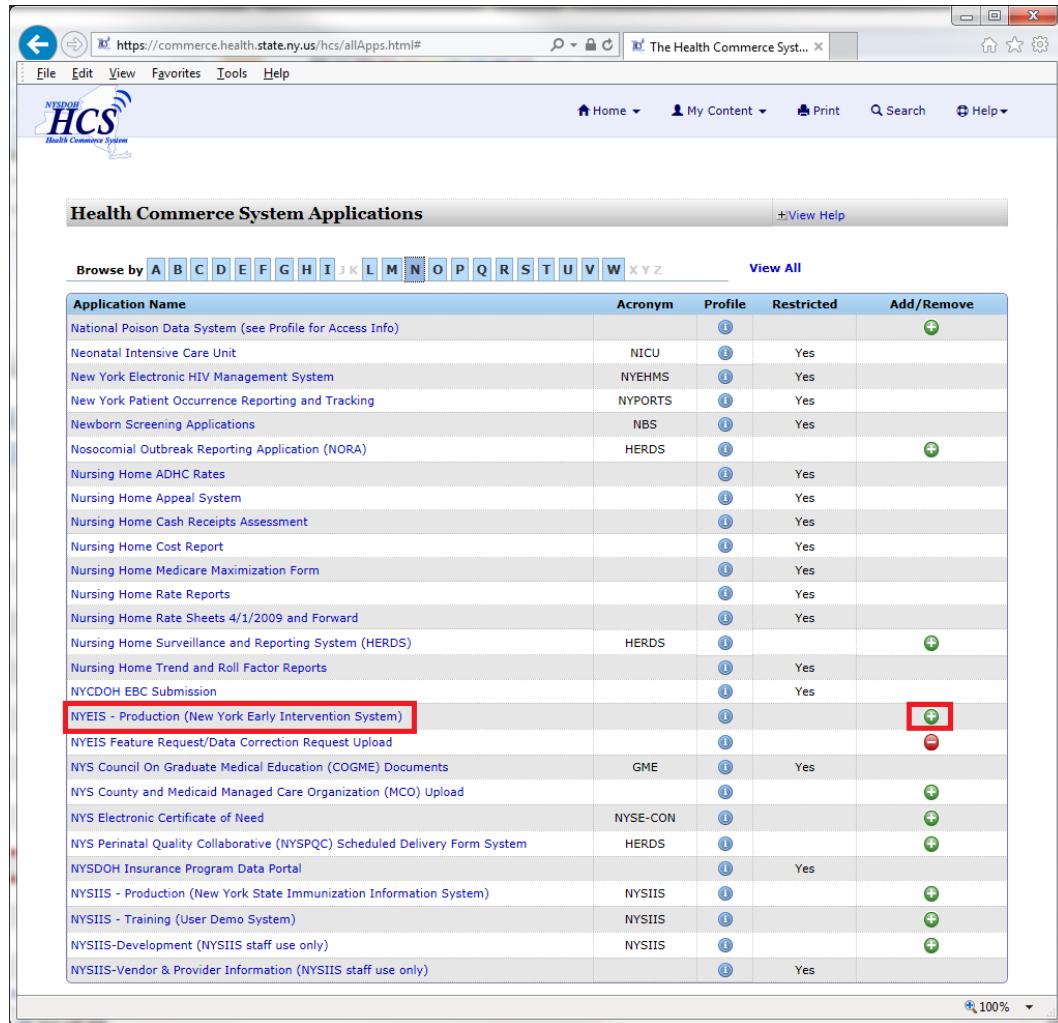
+View Help

Browse by A B C D E F G H I J K L M N O P Q R S T U V W X Y Z [View All](#)

- Click on the ‘N’ tab to navigate to the NYEIS application:

Application Name	Acronym	Profile	Restricted	Add/Remove
National Poison Data System (see Profile for Access Info)		(i)		(+)
Neonatal Intensive Care Unit	NICU	(i)	Yes	
New York Electronic HIV Management System	NYEHMS	(i)	Yes	
New York Patient Occurrence Reporting and Tracking	NYPORTS	(i)	Yes	
Newborn Screening Applications	NBS	(i)	Yes	
Nosocomial Outbreak Reporting Application (NORA)	HERDS	(i)		(+)
Nursing Home ADHC Rates		(i)	Yes	
Nursing Home Appeal System		(i)	Yes	
Nursing Home Cash Receipts Assessment		(i)	Yes	
Nursing Home Cost Report		(i)	Yes	
Nursing Home Medicare Maximization Form		(i)	Yes	
Nursing Home Rate Reports		(i)	Yes	
Nursing Home Rate Sheets 4/1/2009 and Forward		(i)	Yes	
Nursing Home Surveillance and Reporting System (HERDS)	HERDS	(i)		(+)
Nursing Home Trend and Roll Factor Reports		(i)	Yes	
NYCDOH EBC Submission		(i)	Yes	
<b>NYEIS - Production (New York Early Intervention System)</b>		(i)		(+)
NYEIS Feature Request/Data Correction Request Upload		(i)		(-)
NYS Council On Graduate Medical Education (COGME) Documents	GME	(i)	Yes	
NYS County and Medicaid Managed Care Organization (MCO) Upload		(i)		(+)
NYS Electronic Certificate of Need	NYSE-CON	(i)		(+)
NYS Perinatal Quality Collaborative (NYSPQC) Scheduled Delivery Form System	HERDS	(i)		(+)
NYSDOH Insurance Program Data Portal		(i)	Yes	
NYSIIS - Production (New York State Immunization Information System)	NYSIIS	(i)		(+)
NYSIIS - Training (User Demo System)	NYSIIS	(i)		(+)
NYSIIS-Development (NYSIIS staff use only)	NYSIIS	(i)		(+)
NYSIIS-Vendor & Provider Information (NYSIIS staff use only)		(i)	Yes	

- Click the green “+” sign in the Add/Remove column.



The screenshot shows a web browser displaying the 'Health Commerce System Applications' page. The URL is https://commerce.health.state.ny.us/hcs/allApps.html#. The page title is 'The Health Commerce Syst...'. The main content area is titled 'Health Commerce System Applications' and includes a 'View Help' link. Below this is a navigation bar with links for Home, My Content, Print, Search, and Help. A 'Browse by' menu allows selection by letter from A to Z, with 'M' currently selected. A 'View All' link is also present. The main table lists various applications with columns for Application Name, Acronym, Profile, Restricted, and Add/Remove. The 'Add/Remove' column contains icons: a green plus sign for most applications, a red minus sign for NYEIS Production, and a red question mark for NYEIS Feature Request. The NYEIS Production row is highlighted with a red box around its entire row. The NYEIS Feature Request row is also highlighted with a red box around its entire row. The NYEIS Production application is listed twice in the table.

Application Name	Acronym	Profile	Restricted	Add/Remove
National Poison Data System (see Profile for Access Info)				
Neonatal Intensive Care Unit	NICU		Yes	
New York Electronic HIV Management System	NYEHMS		Yes	
New York Patient Occurrence Reporting and Tracking	NYPORTS		Yes	
Newborn Screening Applications	NBS		Yes	
Nosocomial Outbreak Reporting Application (NORA)	HERDS			
Nursing Home ADHC Rates			Yes	
Nursing Home Appeal System			Yes	
Nursing Home Cash Receipts Assessment			Yes	
Nursing Home Cost Report			Yes	
Nursing Home Medicare Maximization Form			Yes	
Nursing Home Rate Reports			Yes	
Nursing Home Rate Sheets 4/1/2009 and Forward			Yes	
Nursing Home Surveillance and Reporting System (HERDS)	HERDS			
Nursing Home Trend and Roll Factor Reports			Yes	
NYCDOH EBC Submission			Yes	
<b>NYEIS - Production (New York Early Intervention System)</b>				
NYEIS Feature Request/Data Correction Request Upload				
NYS Council On Graduate Medical Education (COGME) Documents	GME		Yes	
NYS County and Medicaid Managed Care Organization (MCO) Upload				
NYS Electronic Certificate of Need	NYSE-CON			
NYS Perinatal Quality Collaborative (NYSPPQC) Scheduled Delivery Form System	HERDS			
NYSDOH Insurance Program Data Portal			Yes	
NYSIIS - Production (New York State Immunization Information System)	NYSIIS			
NYSIIS - Training (User Demo System)	NYSIIS			
NYSIIS-Development (NYSIIS staff use only)	NYSIIS			
NYSIIS-Vendor & Provider Information (NYSIIS staff use only)			Yes	

- A confirmation will appear at the top of the page that confirms the application was added. The green plus sign previously displayed next to the NYEIS Production application will now display as a red minus sign.

The screenshot shows a web browser window for 'The Health Commerce System'. The address bar shows the URL: https://commerce.health.state.ny.us/hcs/allApps.html#. A green message bar at the top states: 'The Application was successfully added your MyApp list'. Below this, the title 'Health Commerce System Applications' is displayed, along with a 'View Help' link. A navigation menu includes 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. The main content area is a table titled 'Browse by' with columns: Application Name, Acronym, Profile, Restricted, and Add/Remove. The table lists various applications such as National Poison Data System, NICU, NYEHMS, NYPORTS, NBS, HERDS, etc., each with its acronym, profile status, restricted status, and an 'Add/Remove' button.

Application Name	Acronym	Profile	Restricted	Add/Remove
National Poison Data System (see Profile for Access Info)		(i)		(+)
Neonatal Intensive Care Unit	NICU	(i)	Yes	
New York Electronic HIV Management System	NYEHMS	(i)	Yes	
New York Patient Occurrence Reporting and Tracking	NYPORTS	(i)	Yes	
Newborn Screening Applications	NBS	(i)	Yes	
Nosocomial Outbreak Reporting Application (NORA)	HERDS	(i)		(+)
Nursing Home ADHC Rates		(i)	Yes	
Nursing Home Appeal System		(i)	Yes	
Nursing Home Cash Receipts Assessment		(i)	Yes	
Nursing Home Cost Report		(i)	Yes	
Nursing Home Medicare Maximization Form		(i)	Yes	
Nursing Home Rate Reports		(i)	Yes	
Nursing Home Rate Sheets 4/1/2009 and Forward		(i)	Yes	
Nursing Home Surveillance and Reporting System (HERDS)	HERDS	(i)		(+)
Nursing Home Trend and Roll Factor Reports		(i)	Yes	
NYCDOH EBC Submission		(i)	Yes	
NYEIS - Production (New York Early Intervention System)		(i)		(-)
NYEIS Feature Request/Data Correction Request Upload		(i)		(-)
NYS Council On Graduate Medical Education (COGME) Documents	GME	(i)	Yes	
NYS County and Medicaid Managed Care Organization (MCO) Upload		(i)		(+)
NYS Electronic Certificate of Need	NYSE-CON	(i)		(+)
NYS Perinatal Quality Collaborative (NYSPPQC) Scheduled Delivery Form System	HERDS	(i)		(+)
NYSDOH Insurance Program Data Portal		(i)	Yes	
NYSII - Production (New York State Immunization Information System)	NYSIIIS	(i)		(+)
NYSII - Training (User Demo System)	NYSIIIS	(i)		(+)

- The link is now added to your ‘My Applications’ list. The application can be launched by clicking the application name in the list above, or can be launched from the ‘My Applications’ list on the HCS home page, the page you are taken to upon login to HCS. To get to your HCS ‘Home’ page from any page on HCS, Click the ‘Home’ menu on the upper menu bar, and select ‘Home’:

The screenshot shows the NYEIS - Production page within the Health Commerce System (HCS) portal. The left sidebar lists various applications: My Applications, Acronyms & Abbreviations, CART, Emergency Contacts, NYEIS - Production (which is highlighted with a red box), NYEIS Feature Req/Data Upload, Secure File Transfer, and ServNY. Below this is a link to Refresh My Applications List.

The main content area has three sections: **System Notices**, **Important Health Events**, and **Important Health Notifications**.

- System Notices:** A note states that as of January 31st, 2015, the prior version of the HCS (v3) will not be accessible, and users are encouraged to continue usage and support as they move to the new version.
- Important Health Events:** It features a "Ebola Response 2014" section with a link to the NYS PMP (Prescription Monitoring Program Registry) and a "Visualization Portal".
- Important Health Notifications:** A table lists notifications sent in the past 30 days:
 

Posted	Priority	Keyword	Source	Audience	Description	Recipients
12/24/2014	Advisory	Infectious Disease	NYSDOH		Misuse of IV fluids intended for simulation and education only	Recipients
12/11/2014	Advisory	Influenza	NYSDOH		NYSDOH Commissioner Declares Influenza Prevalent in the State	Recipients
12/06/2014	Advisory	Infectious Disease	NYSDOH		EBOLA VIRUS DISEASE (EVD) UPDATE: NEW CASES IDENTIFIED IN MALI	Recipients
12/04/2014	Advisory	Influenza	CDC		Potential for Circulation of Drifted Influenza A (H3N2) Viruses	Recipients

 Navigation buttons for "Newer" and "Older" are at the bottom of this section.

**Newsroom Highlights...** section shows New Items and Newsletters:

New Items	Newsletters
12/24/2014 12-20-14 Weekly Influenza Report	12/29/2014 In the Field Newsletter - Winter 2015
12/19/2014 L-4 NIMS Training Webinar Announcement	12/08/2014 MidMonth Dec 2014 e-Distance Learning Co

## ACCESSING NYEIS

NYEIS is accessed through the Department of Health, Health Commerce System portal.

1. Open your Internet browser (Internet Explorer recommended) and enter the following URL in the address bar:

<https://commerce.health.state.ny.us>

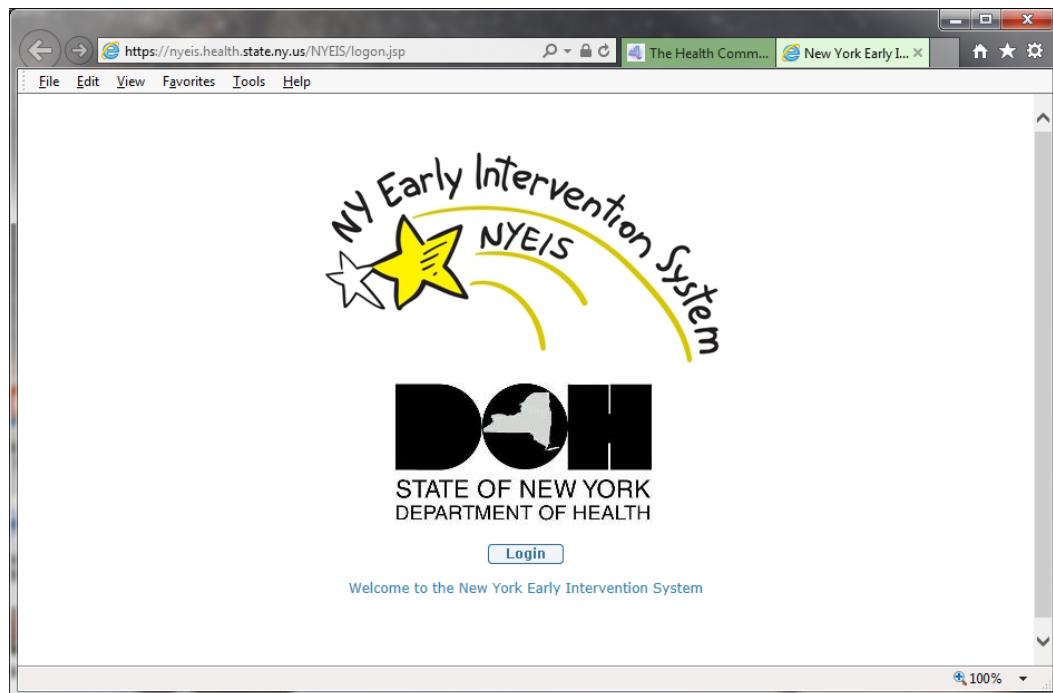
The New York State Department of Health, Health Commerce System login page displays.



2. Enter in your Health Commerce System account username and password. Click the **Sign In** button. The **Health Commerce System Portal** page displays.

Posted	Priority	Keyword	Source	Audience	Description	Recipients
12/24/2014	Advisory	Infectious Disease	NYSDOH		Misuse of IV fluids intended for simulation and education	Recipients
12/11/2014	Advisory	Influenza	NYSDOH		NYSDOH Commissioner Declares Influenza Prevalent in the State	Recipients
12/06/2014	Advisory	Infectious Disease	NYSDOH		EBOLA VIRUS DISEASE (EVD) UPDATE: NEW CASES IDENTIFIED IN MALI	Recipients
12/04/2014	Advisory	Influenza	CDC		Potential for Circulation of Drifted Influenza A (H3N2) Viruses	Recipients

3. Click the **NYEIS-Production** link in the MY Applications section. The **NYEIS Login** page displays.



4. Click the **Login** button. **Terms and Conditions** page displays the first time that the User accesses NYEIS.



5. Click the **Terms and Conditions.doc** link to review the NYEIS Terms of Use/User Agreement. After reading, close the document to return to the application. Click the checkbox next to the **By checking this box you acknowledge that you read and understand the Terms And Conditions.** field. Click the **Accept** button to indicate your acceptance of the terms of use. **User Home** page displays.

#### Important Information

In order to access NYEIS, a user is required to have 1) a Department of Health, Health Commerce System user account, and 2) a NYEIS User Account.

- Without the Health Commerce System account, you cannot access the HCS Portal, which is the only “door” to NYEIS. Contact Commerce Accounts Management Unit (CAMU) at 866-529-1890 for assistance.
- Without a NYEIS User Account, you will receive an error message when clicking the **Login** button referenced in step 4 above. Contact the NYEIS Help Desk for information about getting a NYEIS User Account.

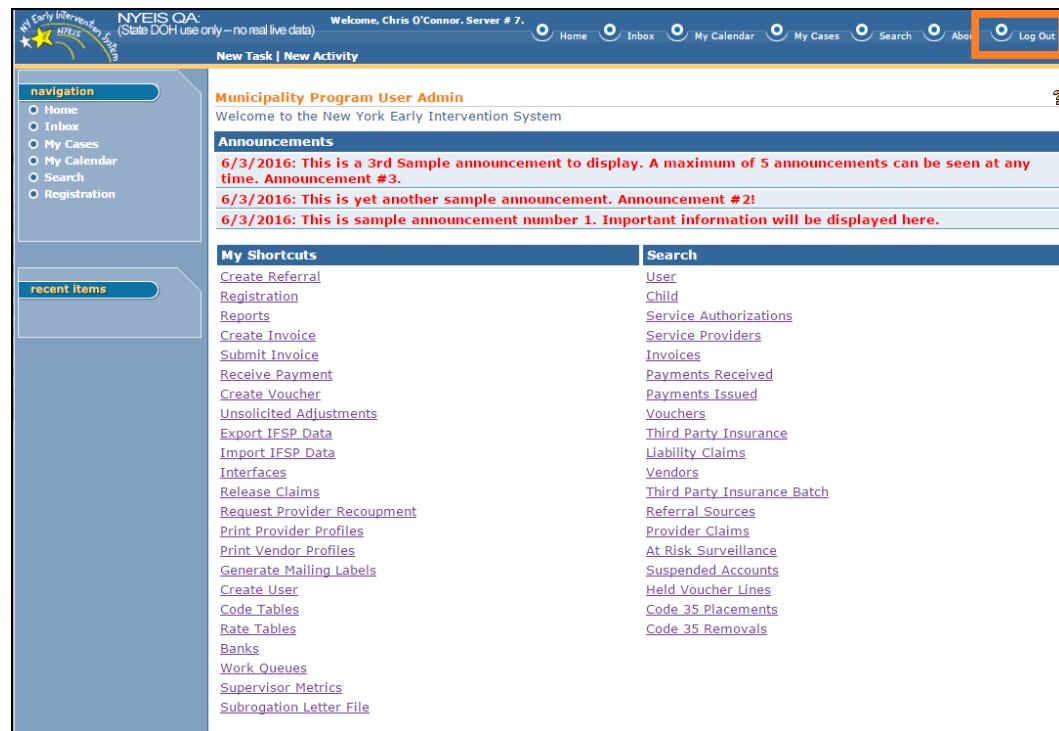
### **Important Information to Providing Agencies regarding HCS User Account Management:**

- Please note that each providing agency should have established an individual(s) within the organization to serve as a liaison between the agency and the HCS for matters relating to agency employee HCS account management. One individual must be designated an HCS Director and an additional one or two individuals may be designated HCS Coordinators.
  - When a user who is employed by only one agency leaves the agency, the HCS Director or Coordinator from the agency should contact the CAMU Help Desk at 1-866-529-1890 so that the HCS login can be terminated.
  - If this employee ever returns to work for an agency in the future, they will likely receive a new HCS user ID. In this specific circumstance, the employee should contact the NYEIS Help Desk to have their previous NYEIS user ID updated to match the latest HCD user ID.
  - In other cases, where employees leave one agency to work for another or are employed by multiple agencies, the HCS account does not need to be terminated. **It is important for HCS Directors and Coordinators to understand this distinction**, as the inappropriate termination of a HCS user ID can ultimately lead to delays in user’s access to NYEIS. Also, the user upon changing agencies should call CAMU Help Desk at 1-866-529-1890 so that CAMU can update their agency information.

## LOGOUT PROCEDURES FOR NYEIS AND HCS

When your NYEIS session has concluded take the following steps to logout of NYEIS and HCS:

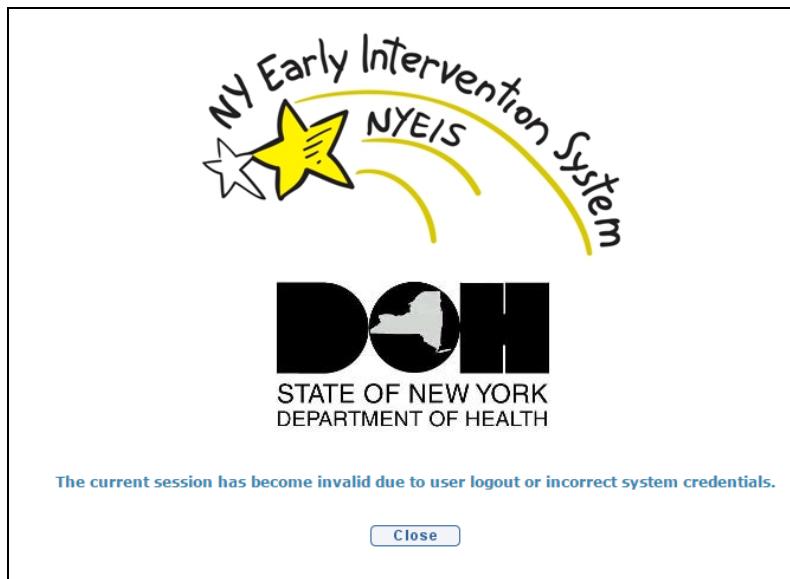
- 1) Click the **Logout** Button located at the end of the upper menu bar:



- 2) The NYEIS logout splash window appears. Click the '**Log Out**' button:



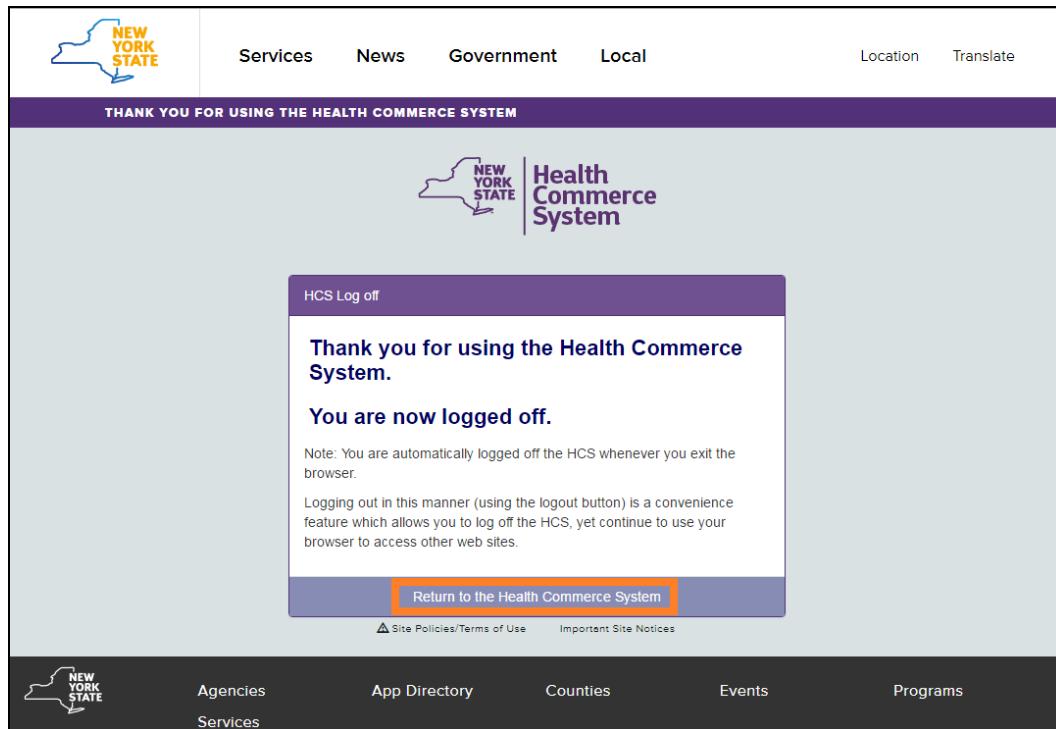
- 3) The NYEIS Logout confirmation window appears. Clicking the **Close** button will close the current tab of the browser:



- 4) If following step 3 the browser does not switch back to the HCS tab by default, select the browser tab for the (still active) HCS session:

- 5) Under the HCS Home Menu, select 'Log Out':

- 6) A page displays confirming successful logout.



**Note:**

Although your NYEIS session may be ending, you do not need to logout of HCS if you need to use another application on the HCS. Logout from the HCS when all your HCS-related work has concluded.

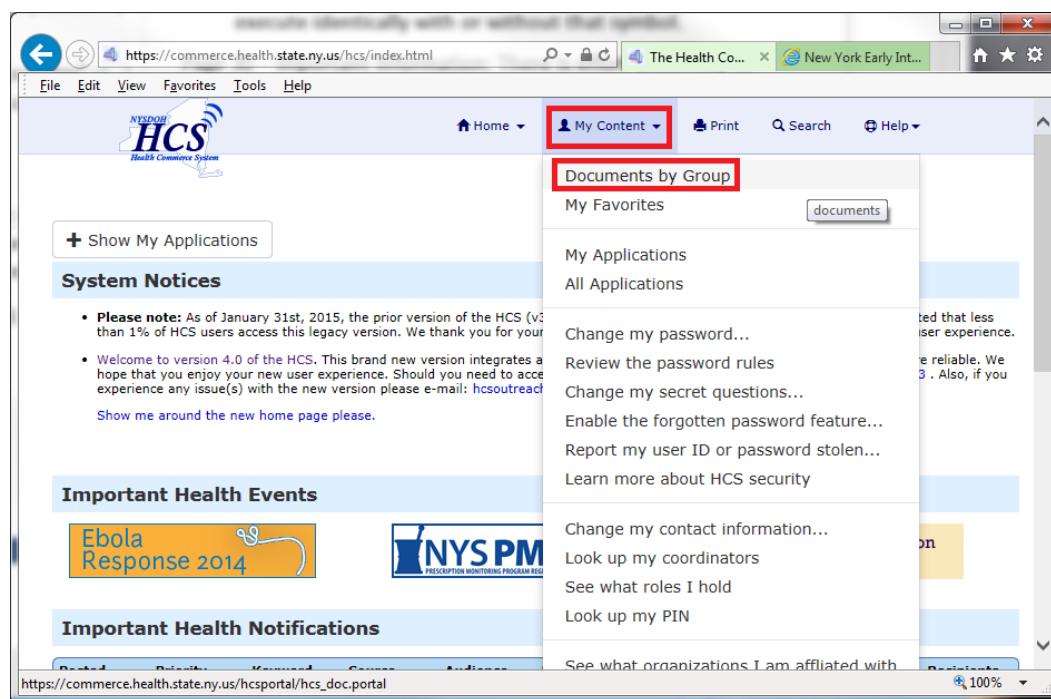
- 7) If your HCS session has ended, close the browser. If desired, click '**Return to The Health Commerce System**' to log back in to HCS.

## ACCESSING THE NYEIS USER MANUAL ONLINE

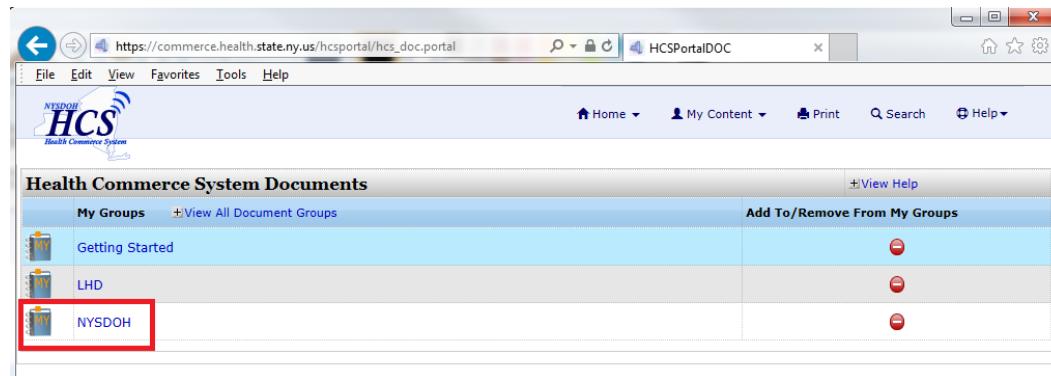
Users can access the current version of the NYEIS User Manual stored on the Department of Health, Health Commerce System.

### Adding the NYEIS User Manual to your “My Favorites” Shortcuts

1. Log onto the Health Commerce System. Click the **My Content** button on the Top Menu Bar of the **Health Commerce System Portal** page, then select **Documents by Group**.



## 2. Health Commerce System Documents page displays.



### 3. Select the NYSDOH group from the **My Groups** section

- If you do not see your Group in the drop down, click the **View All Document Groups** link. Select the green '+' next to your group.

The screenshot shows a web browser window titled "HCS Portal DOC" displaying the "Health Commerce System Documents" interface. The left sidebar lists various document groups under "All Groups". The "NYSDOH" group is highlighted with a red border. The right side of the screen shows a table with columns for "Add To/Remove From My Groups" and other actions.

	Add To/Remove From My Groups
Getting Started	
LHD	
American Indian Nations	
Coordinator	
Emergency Services	
Environmental	
Health Care	
Health Insurance	
Hospitals	
LAB	
Local DSS	
Long Term Care	
Managed Care	
NYSDOH	
Pharmacy	
Physician	
Practitioner	
Schools	

b. The selection will be displayed in your **My Groups** list.

The screenshot shows a web browser window titled "HCS Portal DOC" displaying the "Health Commerce System Documents" interface. The left sidebar lists various document groups under "My Groups". The "NYSDOH" group is listed in the "My Groups" section.

	Add To/Remove From My Groups
Getting Started	
LHD	
NYSDOH	

4. Select your **My Groups** link (either LHD or NYSDOH). Select **Family and Community Health**.

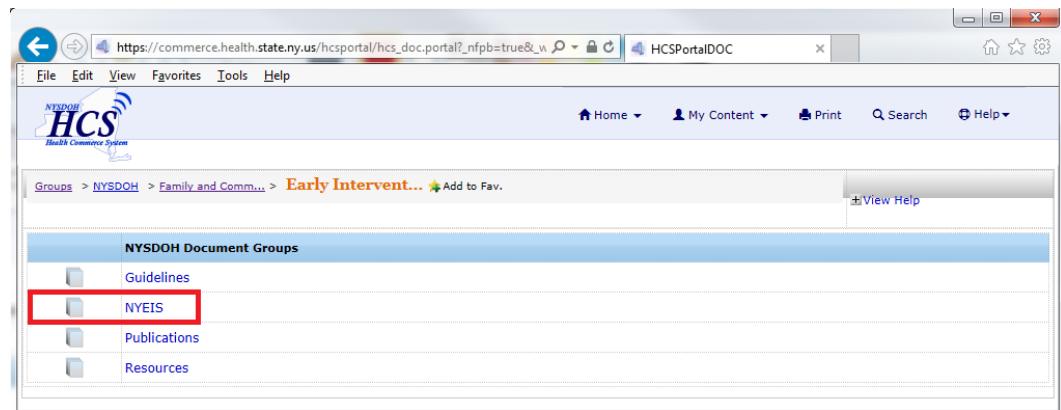
The screenshot shows a web browser window for the NYSDOH HCS Portal. The URL is https://commerce.health.state.ny.us/hcsportal/hcs\_doc.portal?\_nfpb=true&\_v=1. The page title is 'HCSPortalDOC'. The left sidebar lists 'NYSDOH Document Groups' including Calendars, Contacts, Dear Administrator Letters, Dear Pharmacy Letters, Diseases and Conditions, Environmental Health, Family and Community Health (which is highlighted with a red box), Forms, Guidelines, Health Insurance Programs, Help, Manuals, NYSACHO, and NYSIIS. The right sidebar also lists these groups. At the top, there are links for Home, My Content, Print, Search, and Help.

## 5. Select the Early Intervention folder.

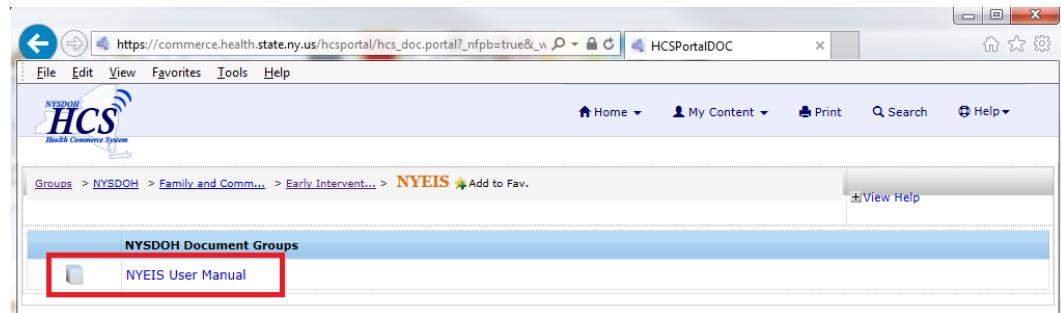
The screenshot shows the 'Family and Community Health' folder expanded. The 'Early Intervention' folder is selected and highlighted with a red box. Other items in the list include Critical Congenital Heart Disease, Early Hearing Detection and Intervention, Immunization, Lead Poisoning Prevention, Nutrition, and Weight Status Category. Below this, a table displays 'Family and Community Health Documents' with 2 records. The columns are Type, Label, Description, and Date Posted. The first record is 'WEB USDA ChooseMyPlate.gov' with a description of new eating guidelines based on the dinner plate, posted on 05/09/2013. The second record is 'PDF Where is CIPS application?' with a description of CIPS - CACFP Information and Payment System, posted on 01/21/2011.

Type	Label	Description	Date Posted
WEB	USDA ChooseMyPlate.gov	New eating guidelines based on the dinner plate,	05/09/2013
PDF	Where is CIPS application?	CIPS - CACFP Information and Payment System	01/21/2011

## 6. Select the NYEIS folder.



## **7. Select the NYEIS User Manual folder.**

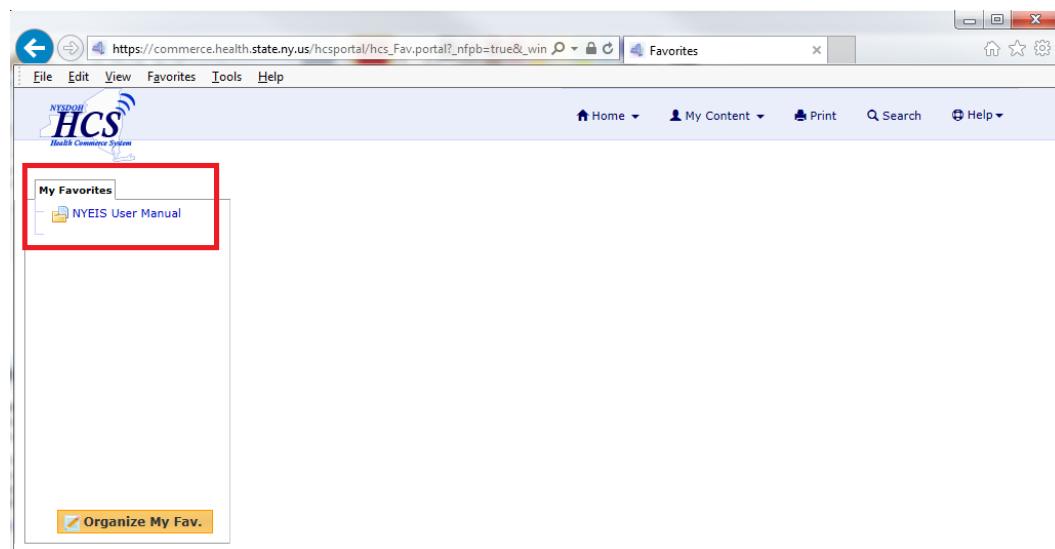


8. You are now viewing the NYEIS User Manual Chapters. The path you followed to get here is referenced along the top of the page. Click on ‘**Add to Fav**’ at the end of that displayed path to access the user Manual chapters more easily from HCS Home:

The screenshot shows a web browser displaying the HCS portal at [https://commerce.health.state.ny.us/hcsportal/hcs\\_doc.portal?\\_nfpb=true&\\_wir=HCSportIDOC](https://commerce.health.state.ny.us/hcsportal/hcs_doc.portal?_nfpb=true&_wir=HCSportIDOC). The page title is "NYEIS User Manual Documents". The header includes links for Home, My Content, Print, Search, and Help. A red box highlights the "Add to Fav." button in the top right corner of the header. Below the header is a navigation breadcrumb: Groups > NYSDOH > Family and Comm... > Early Intervent... > NYEIS > NYEIS User Manual. The main content area displays a table titled "NYEIS User Manual Documents" with columns for Type, Label, Description, and Date Posted. The table lists various documents such as "Unit 12: Municipal Financial", "Appendix A: IFSP Meeting Guidance", and "Unit 1 - Getting Started", all categorized as "NYEIS User Manual" and posted on 08/24/2012.

9. A link to the User Manual is added to your **My Favorites** tab. To access your Favorites, click the **My Content** link on the top of HCS Home, then click **My favorites**

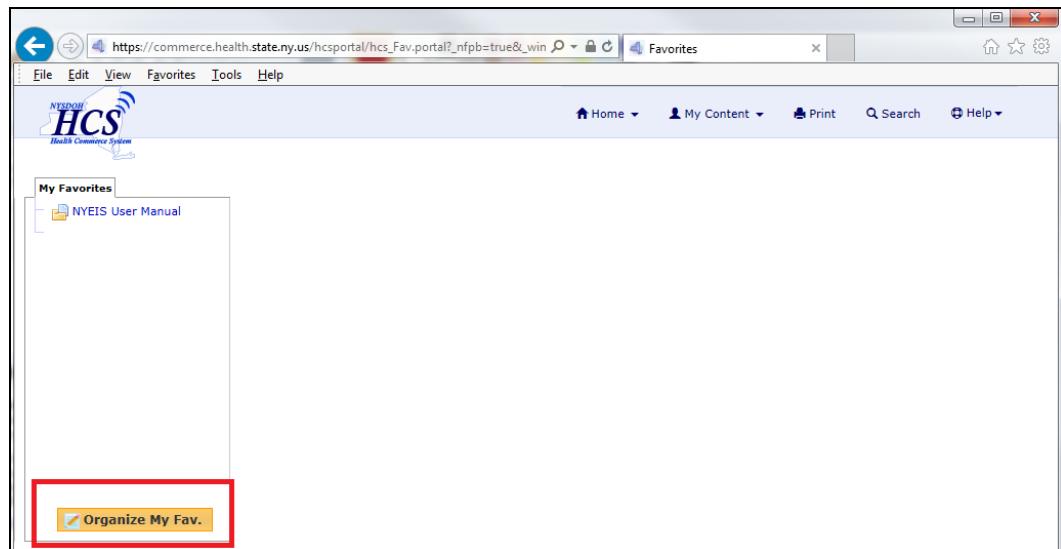
The screenshot shows the HCS portal at <https://commerce.health.state.ny.us/hcs/index.html>. The top navigation bar includes File, Edit, View, Favorites, Tools, and Help. The "My Content" dropdown menu is open, showing options like "Documents by Group" and "My Favorites", with "My Favorites" highlighted by a red box. Other options in the menu include "My Applications", "All Applications", "Change my password...", "Review the password rules", "Change my secret questions...", "Enable the forgotten password feature...", "Report my user ID or password stolen...", "Learn more about HCS security", "Change my contact information...", "Look up my coordinators", "See what roles I hold", "Look up my PIN", "See what organizations I am affiliated with", and "See the IHANS notification lists I am on".



## Deleting an Existing "My Favorites" Shortcut

1. Log onto the Health Commerce System. Click on the **My Content** menu on top of HCS home, then select **My favorites**:

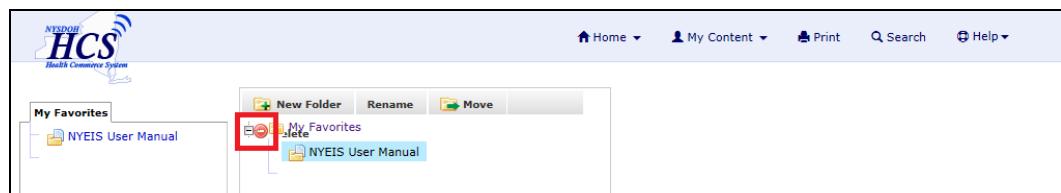
2. Click on the **Organize My Favorites** button on the left hand side of the page. Click **Organize My Fav.** Button.



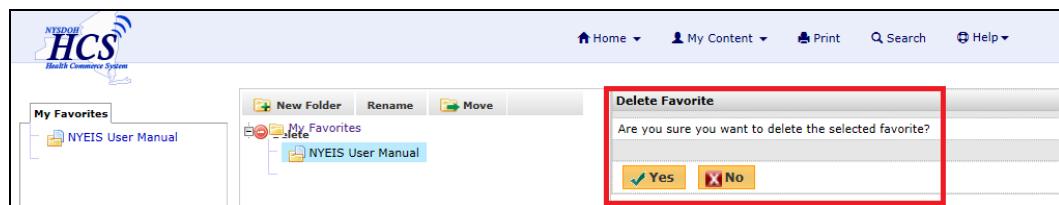
3. Click on the actual name of the NYEIS User Manual shortcut in the **Organize My Favorites** section of the page.



4. Click on the **Delete** icon.



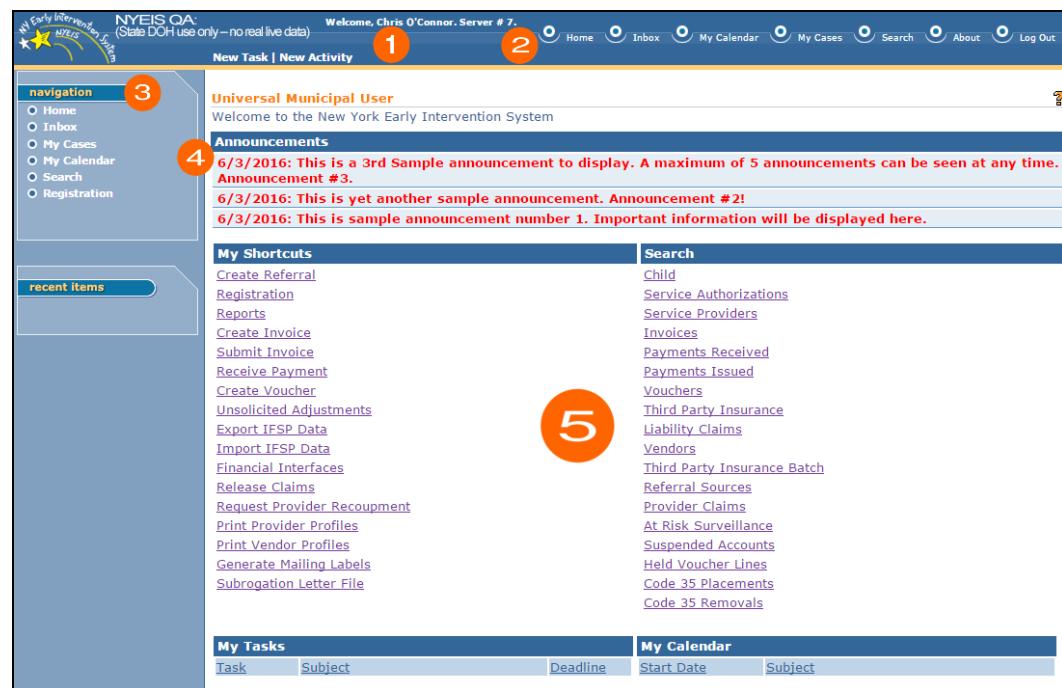
5. Click on **Yes** in the Delete Favorites section of the page to confirm that you want to delete the shortcut. The shortcut has now been deleted.



## THE NYEIS STANDARD PAGE LAYOUT

### Note:

- Functionality varies with user role.



- ① **Welcome Message** – Seen on all pages, this area reflects the name of the user signed onto the workstation and the server number for their current browsing session
- ② **Menu Bar** - allows User to access frequently used shortcuts.

**Home** - returns User to personal Home Page (first page a User comes to when logged in to NYEIS).

**Inbox** - navigates User to a page containing personal tasks and notifications.

**My Calendar** - displays a list of events as links. Click link to display User event.

**My Cases** – navigates users with an assigned role of either EIO/Ds or Service Coordinator to their assigned Cases.

**Search** - displays a search page.

**About** - displays NYEIS release version.

**Log Out** - exits New York Early Intervention System.

- ③ **Navigation Bar** - directs User to different areas of the Application. The buttons or links will be different depending on the displayed page or the role of the User. The lower portion of the Navigation Bar contains a section called **Recent Items**. This section provides quick links to pages recently visited.
- ④ **Announcements Cluster** – Displays important announcements, up to a current maximum of five announcements. All announcements will include a date of posting and a message up to 400 characters.

**Important Note:** The ‘Announcements’ cluster will not be seen if there are no current announcements to display.

- ⑤ **Body** - contains clusters or sections. For example, the screen shot above displays a page with the following sections: **My Shortcuts**, **Search**, **My Tasks** and **My Calendar**. Sections will be different depending on the option selected from the Navigation Bar.

## BUTTONS

<b>Cancel</b> Leaves current page and returns to the previous page <i>without</i> saving any changes made.	Cancel 
<b>Date Lookup</b> A field displaying a <b>Calendar</b> button to the right. If <b>Calendar</b> button is clicked, a calendar pop-up page displays. Select month, day and year. If entering a date, it <i>must</i> be formatted as <b>mm/dd/yyyy</b> .	Date Lookup 
<b>Help</b> Currently displays Cúram Online Help which does not contain Early Intervention Program specific help content.	Help 
<b>Link</b> Navigates to another page.	Link 
<b>Reset</b> Clears all data fields on a page (e.g., search page) back to the initial value (which often is blank).	Reset 
<b>Save</b> Updates data entered on page.	Save 
<b>Search Icon</b> Displays a page to enter search criteria and view a list of results.	Search Icon 

### Important Information

Be aware that clicking the **Back**  icon of Internet Browser during data entry may cause the System to not capture the data properly and display an Error on the page.

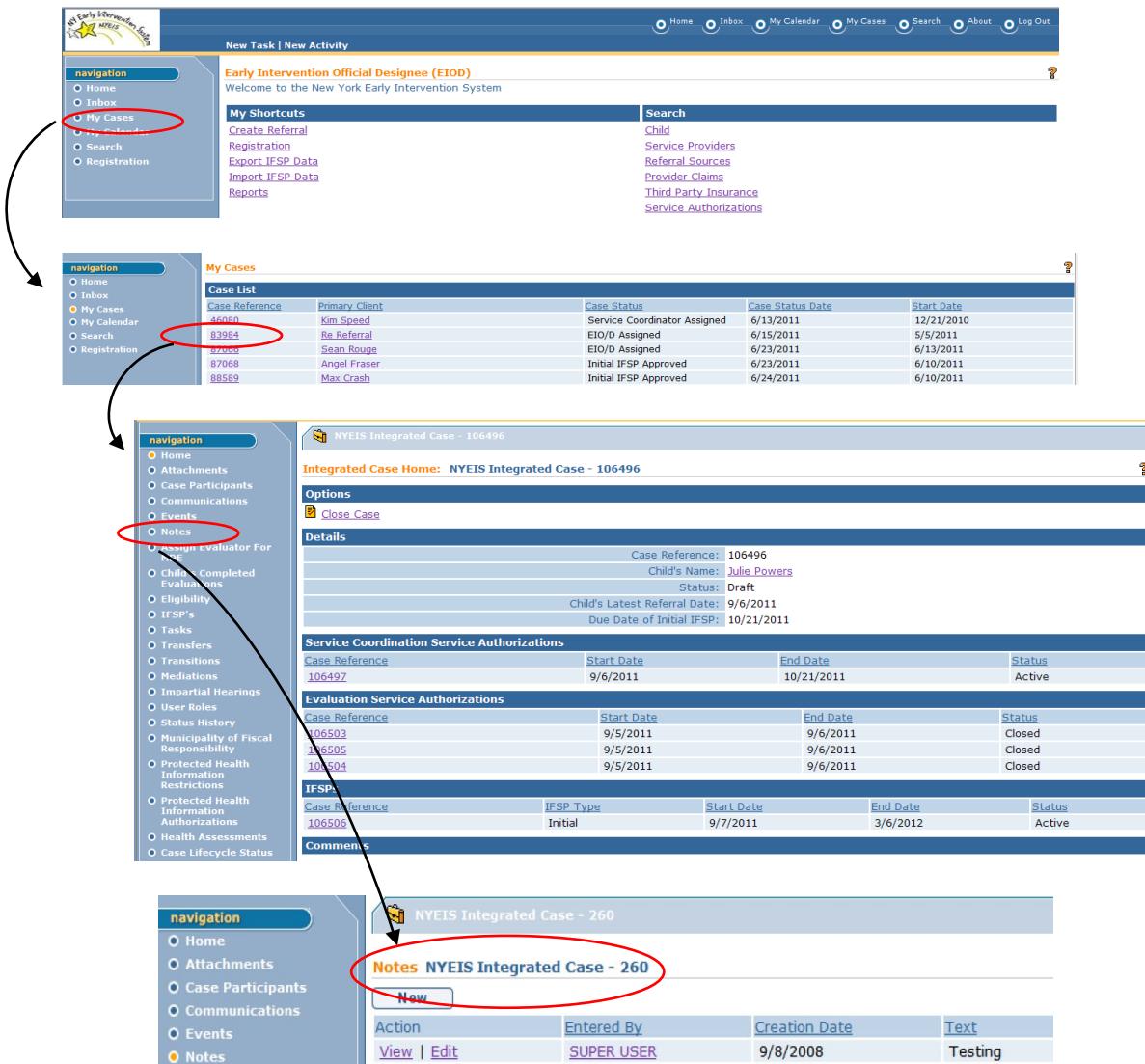
## NAVIGATION BARS

Navigation Bars direct User's to different areas of the Application. The links will be different depending on the displayed page and/or the User.

Below are examples of three specific Navigation Bars:

New York Early Intervention System Navigation Bar	NYEIS Integrated Case Navigation Bar	NYEIS Provider Homepage Navigation Bar
<p><b>navigation</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Home</li> <li><input type="radio"/> Inbox</li> <li><input type="radio"/> My Cases</li> <li><input type="radio"/> My Calendar</li> <li><input type="radio"/> Search</li> <li><input type="radio"/> Registration</li> </ul>	<p><b>navigation</b></p> <ul style="list-style-type: none"> <li><input checked="" type="radio"/> Home</li> <li><input type="radio"/> Attachments</li> <li><input type="radio"/> Case Participants</li> <li><input type="radio"/> Communications</li> <li><input type="radio"/> Events</li> <li><input type="radio"/> Notes</li> <li><input type="radio"/> Assign Evaluator For MDE</li> <li><input type="radio"/> Child's Completed Evaluations</li> <li><input type="radio"/> Eligibility</li> <li><input type="radio"/> IFSP's</li> <li><input type="radio"/> Tasks</li> <li><input type="radio"/> Transfers</li> <li><input type="radio"/> Transitions</li> <li><input type="radio"/> Mediations</li> <li><input type="radio"/> Impartial Hearings</li> <li><input type="radio"/> User Roles</li> <li><input type="radio"/> Status History</li> <li><input type="radio"/> Municipality of Fiscal Responsibility</li> <li><input type="radio"/> Protected Health Information Restrictions</li> <li><input type="radio"/> Protected Health Information Authorizations</li> <li><input type="radio"/> Health Assessments</li> <li><input type="radio"/> Case Lifecycle Status</li> </ul>	<p><b>navigation</b></p> <ul style="list-style-type: none"> <li><input checked="" type="radio"/> Home</li> <li><input type="radio"/> Addresses</li> <li><input type="radio"/> Agreements</li> <li><input type="radio"/> Alternative IDs</li> <li><input type="radio"/> Bank Accounts</li> <li><input type="radio"/> Catchment Areas</li> <li><input type="radio"/> Communications</li> <li><input type="radio"/> Communication Exceptions</li> <li><input type="radio"/> Contacts</li> <li><input type="radio"/> Continuing Education</li> <li><input type="radio"/> Contracts</li> <li><input type="radio"/> Disposition History</li> <li><input type="radio"/> Email Addresses</li> <li><input type="radio"/> Employees/Contractors</li> <li><input type="radio"/> Employers</li> <li><input type="radio"/> Financials</li> <li><input type="radio"/> Flags</li> <li><input type="radio"/> Languages</li> <li><input type="radio"/> Licenses</li> <li><input type="radio"/> Locations</li> <li><input type="radio"/> Models</li> <li><input type="radio"/> Monitoring</li> <li><input type="radio"/> Notes</li> <li><input type="radio"/> Phone Numbers</li> <li><input type="radio"/> Products</li> <li><input type="radio"/> Professional Discipline/Qualified Personnel</li> <li><input type="radio"/> Provider Completed Evaluations</li> <li><input type="radio"/> Provider Configuration</li> <li><input type="radio"/> Provider SCR Number</li> <li><input type="radio"/> Referrals</li> <li><input type="radio"/> Response Files</li> <li><input type="radio"/> Restrictions</li> <li><input type="radio"/> Roles</li> <li><input type="radio"/> Service Authorization Download</li> <li><input type="radio"/> Special Population Served</li> <li><input type="radio"/> Surveys</li> <li><input type="radio"/> Tasks</li> <li><input type="radio"/> Web Addresses</li> </ul>

Below is an example of using the Navigation Bar to access linked pages relating to an Integrated Case. An Integrated Case is a central location for the Child's Cases to be managed. An Integrated Case is created for a Child when an EIO/D is assigned.



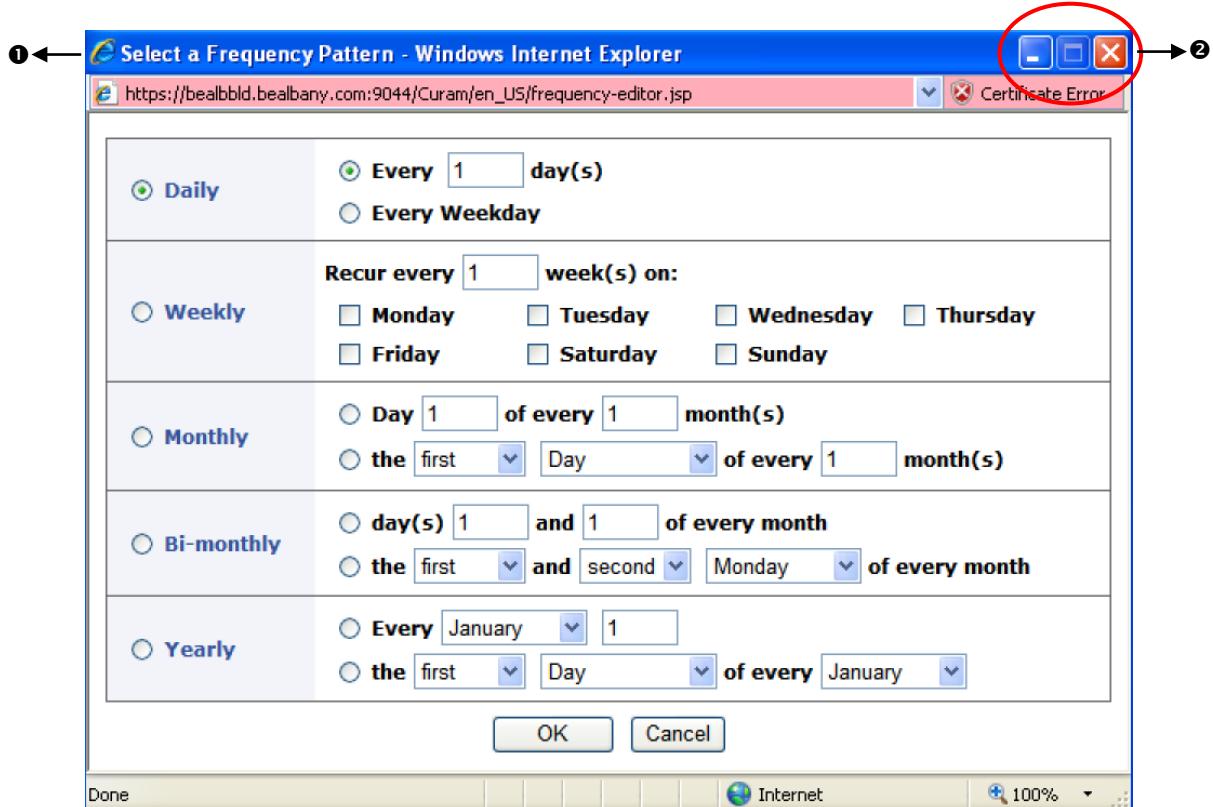
### Common Buttons/Links:

- **Delete** link to eliminate the record. A confirmation page will always be displayed prior to the data being removed when deleting information. [Delete](#)
- **Edit** link to change information. [Edit](#)
- **New** button goes to a create page. [New](#)
- **Next** button navigates to the next page of Application. [Next](#)
- **Previous** button returns to previous page. [Previous](#)
- **Previous** button and **Next** button will save data entered on current page.

## WINDOWS BASICS

Many of the features in NYEIS (e.g., pop-up screens) utilize common Microsoft Windows functions. The information below is provided as a brief introduction to how Windows basic functions are used.

This is an example of a pop-up screen from the NYEIS calendar function.



**① Move a Window/Dialog Box** - position mouse pointer on the blue **Title Bar**. Click and hold down mouse button and drag to desired location.

**② Minimize a Window** - click once on the **Minimize** button. Window displays in Task Bar. Click once on the shortcut in the Task Bar to display Window.

**Maximize a Window** - click once on the **Maximize** button. Window displays on entire screen. *Not all Windows can be maximized.*

**Close a Window/Dialog Box** - click once on the **Close** button. Window/Dialog Box closes.

## Multiple Selection Options

- Use **Shift + click** to select continuous items in a list or drop down.
- Use **Ctrl + click** to select random items in a list or drop down.

## Using the Scroll Bar

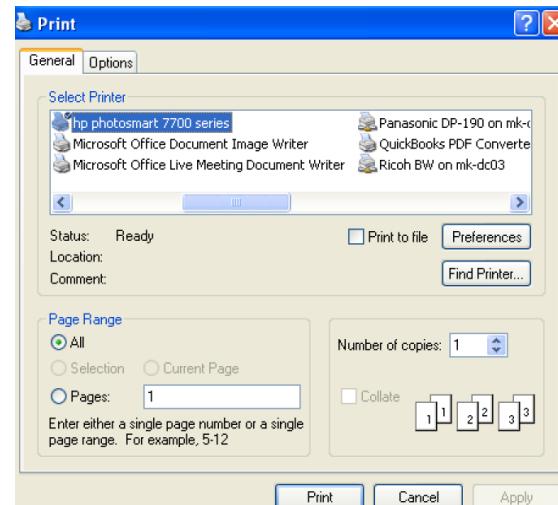
Use the scroll bar on the right side of the screen to scroll up or down to view additional sections and fields on the page.



## Printing Screens

Any page within the Application can be printed.

1. Display Page to print.
2. Click drop down of **Print** button on the Internet Browser toolbar. *If Print button is directly clicked, page prints automatically to the default printer.*
3. Click **Print**. Print dialog box displays.
4. Select Printer. Select any additional print options.
5. Click **Print** button. Page prints.



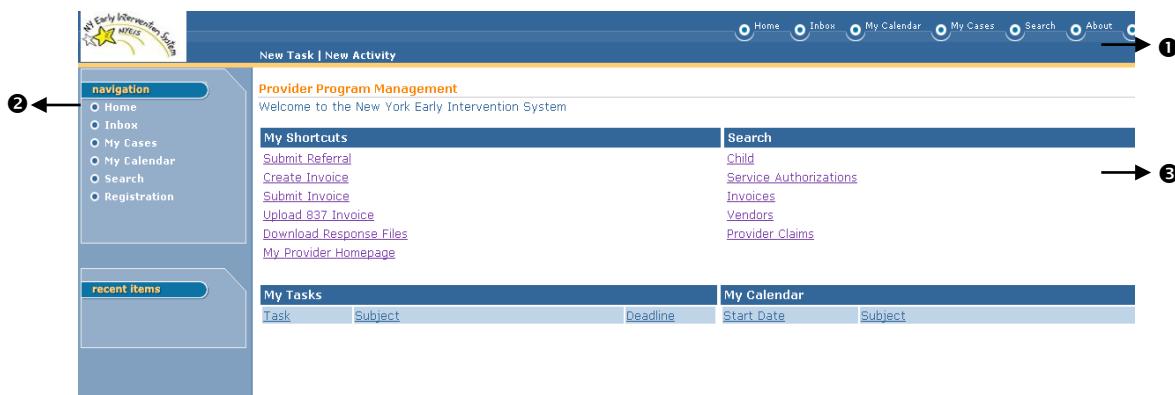
## Notes:

- If you do not see a printer icon in your Internet Explorer browser, try clicking the ‘Alt’ button on the keyboard while Internet Explorer is active. Menus will appear at the top of the browser. Under the ‘View’ menu select **Toolbars** then select the **Command Bar**.
- Click drop down of the **Print** button on the Internet Browser toolbar. *If Print button is directly clicked, page prints automatically to the default printer.* To see the page prior to printing, click **Print Preview**.

## USER HOME PAGE VIEWS

This section demonstrates different views of User Home Pages and lists other Users that have similar Home Page views based on access rights. Home Pages for Provider, Municipal, Department of Health and Administrative Users all have a Menu Bar, Navigation Bar and Body. The Navigation Bar links will be different depending on the page displayed and/or the User. The shortcuts and search sections in the body are different depending on which User Home Page is displayed.

Below is an example of a Universal (General) Home Page view for a Provider.



- ① Menu Bar** - allows User to access frequently used shortcuts.

**Home** - returns User to personal Home Page (first page a User comes to when logged in to NYEIS).

**Inbox** - navigates User to a page containing personal tasks.

**My Calendar** - displays a list of events as links. Click link to display User event. *Applicants will not be able to use the Calendar.*

**My Cases** – navigates users with an assigned role of either EIO/Ds or Service Coordinator to their assigned Cases.

**Search** - displays a search page.

**About** - displays NYEIS release version.

**Log Out** - exits NYEIS.

- ② Navigation Bar** - directs User to different areas of the Application. The buttons or links will be different depending on the displayed page. The lower portion of the Navigation Bar contains a section called **Recent Items**. This section provides quick links to pages recently visited.

③ **Body** - contains the following sections:

**My Shortcuts** - navigates User to different areas of the Application.

**Search** - navigates User to a specific Search page.

**My Tasks** - displays a list of User tasks as links. Select link to display the specific Task page. Tasks are work activities that have to be completed.

**My Calendar** - displays a list of events as links. Click link to display User event.

## Related User Role Access Rights

### Providers

Provider Home Pages have a similar view. Their functionality is based upon a User's assigned role. The role determines the User's access rights, which determines what functions a User can perform in NYEIS: *Each User's shortcuts and searches will be different.*

- Provider All
- Provider All Fiscal
- Provider All Program
- Provider Evaluator
- Provider Fiscal Administrator
- Provider Data Entry
- Provider Fiscal Manager
- Provider Program Data Entry
- Provider Service Coordinator
- Provider Quality Assurance
- Provider Rendering Provider Staff
- Provider Service Director
- Provider Service Manager
- Provider 837 Testing

### Municipalities

Municipality Home Pages have a similar view. Their functionality is based upon a User's assigned role. The role determines the User's access rights, which determines what functions a User can perform in NYEIS: *Each User's shortcuts and searches will be different.*

- Municipal All
- Municipal Fiscal
- Municipal All Program
- Municipal At-Risk

- Municipal Contracting
- Municipal EIO
- Municipal EIOD
- Municipal EIOD/Service Coordinator
- Municipal Service Coordinator
- Municipal Fiscal Admin
- Municipal Fiscal Data Entry
- Municipal Fiscal Manager
- Municipal IT System Admin
- Municipal Intake Staff
- Municipal Program Data Entry
- Municipal Program User Admin
- Municipal Quality Assurance

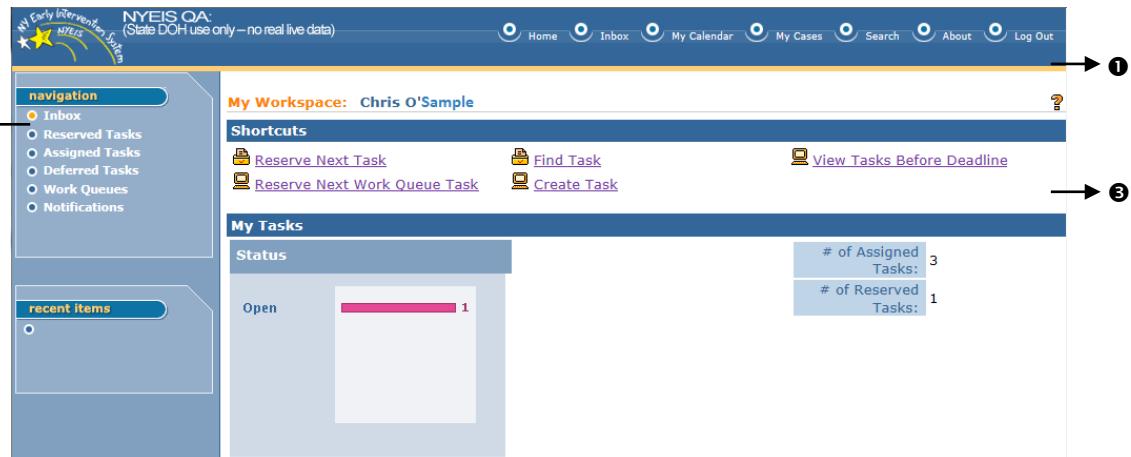
### **Department of Health**

Department of Health Home Pages have a similar view. Their functionality is based upon a User's assigned role. The role determines the User's access rights, which determines what functions a User can perform in NYEIS: *Each User's shortcuts and searches will be different.*

- DOH Audit Unit
- DOH Bureau of Early Intervention (All)
- DOH BEI Program Development and Data Analysis
- DOH Fiscal Manager
- DOH Fiscal Unit Staff
- DOH BEI Program Manager
- DOH BEI Quality Assurance
- DOH OIT
- DOH BEI Technical Assistance
- DOH BEI Due Process
- DOH Management
- DOH BEI Provider Approval

## MY WORKSPACE PAGE OVERVIEW

To work with Tasks, Work Queues and Notifications, from their User Homepage a User navigates to the My Workspace page by selecting either the Inbox from the menu bar, or the Inbox on Navigation bar.



- ① Menu Bar** - allows User to access frequently used shortcuts.

**Home** - returns User to personal Home Page (first page a User comes to when logged in to NYEIS).

**Inbox** - navigates User to a page containing personal tasks.

**My Calendar** - displays a list of events as links. Click link to display User event.

**My Cases** - navigates users with an assigned role of either EIO/D or Service Coordinator to their assigned Cases.

**Search** - displays a search page.

**About** - displays NYEIS release version.

**Log Out** - exits NYEIS.

- ② Navigation Bar** - directs User to the following areas of the Application:

*The following buttons or links will be different depending on the page displayed and/or the User. The lower portion of the Navigation Bar contains a section call **Recent Items**. This section provides quick links to pages recently visited.*

**Inbox** - navigates to the My Workspace page.

**Reserved Tasks** - navigates to the Reserved Tasks page. Displays a list of tasks that a User has previously reserved (e.g., Submitted Referral). If a Task has been reserved by a User, no other User can work on that Task.

**Assigned Tasks** - navigates to Assigned Tasks page. Displays tasks and assignments received from other Users (e.g., Initial Service Coordinator assignment).

**Deferred Tasks** - navigates to the Deferred Tasks page. Displays deferred tasks.

**Work Queues** - navigates to the My Work Queues page. Displays work queues that the User is subscribed to. The User *must* be subscribed to an appropriate Work Queue to reserve tasks in that Queue.

**Notifications** - navigates to the My Alerts page. Displays a list of alerts/notifications sent to the User (e.g., service coordination assignment, service authorizations that have been issued).

- ③ **Body** - contains the ‘My Tasks’ section. Tasks are broken down by number assigned and number reserved. The **status** box provides easy access to tasks requiring attention by status. Click on a colored bar to view tasks in a given status.

#### Important Information



Some Participant types are not applicable. ☰ See **Working with Tasks, Task Participant Types** for further information. A User can create a deadline which displays a due date in the User's Workspace or when the System creates a task with specific date criteria (e.g., evaluation due by date, the due date displays).

**Shortcuts** - navigates User to different areas of the Application related to tasks.

#### Exception

Currently not available to all NYEIS User roles.

#### Reserve Next Task

Reserves next task assigned to User.

#### Reserve Next Work Queue Task

Provides the option for a User to select a work queue subscribed to and reserve the next task from that selected work queue.

#### Find Task

Search for a specific task by **Task ID, Case Reference Number** and **Participant**. [Some Participant types are not applicable. ☰ See **Working with Tasks, Task Participant Types** for further information.]

#### Create Task

Tasks can be created for yourself or for another User. [Some Participant types are not applicable. ☰ See **Working with Tasks, Task Participant Types** for further information. A User can create a deadline which displays a due date in the User's

## **View Tasks Before Deadline**

Workspace or when the System creates a task with specific date criteria (e.g., evaluation due by date, the due date displays).]

Enter a date to view tasks on or before a specified date.

**My Tasks** - displays the **Task Status** box which lists Tasks by status (e.g., Open). Also displays the current number of Assigned Tasks and Reserved Tasks associated with the User.

## **Viewing Notifications**

1. Click **Inbox** from the Navigation Bar on Home Page. **My Workspace** page displays.

The screenshot shows the NYEIS Training interface. At the top, there's a banner for 'NYEIS Training' stating '(Training use only – no real live data)'. Below it is a navigation bar with links for Home, Inbox, My Calendar, My Cases, Search, About, and Log Out. On the left, there's a sidebar with 'navigation' sections for Inbox, Reserved Tasks, Assigned Tasks, Deferred Tasks, Work Queues, and Notifications. Below that is a 'recent items' section. The main content area is titled 'My Workspace: Michael Kepper'. It has a 'Shortcuts' section with links for Reserve Next Task, Find Task, Reserve Next Work Queue Task, Create Task, and View Tasks Before Deadline. Below that is a 'My Tasks' section showing '# of Assigned Tasks: 7' and '# of Reserved Tasks: 0'.

2. Click **Notifications** from the Navigation Bar. **My Alerts** page displays.

The screenshot shows the 'My Alerts' page. At the top, it says 'My Alerts: Michael Kepper'. Below that is a note: 'To view an individual Notification, click the View link in the Action column next to the Notification. To delete multiple Notifications, place a check in the checkbox next to each Notification and then click the Delete button.' A 'Delete' button is shown above a table. The table has columns for Action, Subject, Date, and a Delete link. The data in the table is as follows:

Action	Subject	Date
<a href="#">View</a>	Service Authorization 31752 for child Green Bean84 has been closed as of 08-22-2011.	8/22/2011 00:22
<a href="#">View</a>	Service Authorization 31456 for child Green Bean84 has been closed as of 08-22-2011.	8/22/2011 00:22
<a href="#">View</a>	Service Authorization 36961 for child Jerry Garcia91 has been approved as of 09-16-2011.	9/16/2011 07:41
<a href="#">View</a>	Service Authorization 134297 for child Sam Dean88 has been approved as of 09-15-2011.	9/15/2011 21:18
<a href="#">View</a>	Service Authorization 50727 for child Janie Miller has been approved as of 09-15-2011.	9/15/2011 20:15
<a href="#">View</a>	Service Authorization 50759 for child Gibbs85 Jethro has been approved as of 09-15-2011.	9/15/2011 21:01
<a href="#">View</a>	Service Authorization 203776 for child Lila Rouse has been approved as of 02-21-2012.	2/21/2012 09:08
<a href="#">View</a>	Full evaluation upload notification	2/15/2012 10:44
<a href="#">View</a>	Municipality Transfer Rejection	1/13/2012 14:27
<a href="#">View</a>	Service Authorization 187392 for child Sissy Spaceck83 has been approved as of 01-23-2012.	1/23/2012 10:38
<a href="#">View</a>	Service Authorization 200971 for child Marcus Ian has been approved as of 02-16-2012.	2/16/2012 10:56
<a href="#">View</a>	Service Authorization 200978 for child Marcus Ian has been approved as of 02-16-2012.	2/16/2012 11:38

3. Click **View** link under **Action** column to display Notification. **View Alert** page displays.

The screenshot shows a web-based application interface for viewing a notification. At the top, a message says "View Alert: Service Authorization 31752 for child Green Bean84 has been closed as of 08-22-2011." Below this are two buttons: "Delete" and "Close". A question mark icon is in the top right corner. The main content area is divided into sections: "Details" (Subject: Service Authorization 31752 for child Green Bean84 has been closed as of 08-22-2011; Date Created: 8/22/2011 00:22), "Related Pages" (Action Link, Service Authorization Home Page), and "Content" (Service Authorization 31752 for child Green Bean84 has been closed as of 08-22-2011). At the bottom are "Delete" and "Close" buttons.

4. Review Notification. Click **Close** button. **My Alerts** page displays with Notification in list.

Or

Review Notification. Click **Delete** button. **Delete Alert** page displays with the message ***Are you sure you want to delete this alert?***

#### **Delete Alert: Submitted evaluation acceptance**

Are you sure you want to delete this alert?

**Yes**

**No**

Click **Yes** button. **My Alerts** page displays and the Notification is deleted from the list.

#### **Important Information**

It is important for each User to check their Notifications on a regular basis and delete them when they are viewed. The System limits the Notification page to approximately 200 notifications at a time and if exceeded, new notifications will not display in the Notifications page until older notifications are deleted.

All User Notifications/Alerts generated by NYEIS which are older than 60 days will routinely be deleted from the system. Notifications which have been deleted are not retrievable.

5. Click **Inbox** from the Navigation Bar. **My Workspace** page displays.

**Note:**

- To sort the data displayed on pages, click the underlined column heading. Click once to view the data in ascending order and click again to view the data in descending order.

## Multi-delete Notifications

Notifications can be deleted one at a time (as described in Viewing Notifications) or multiple Notifications can be deleted at the same time.

1. Click **Inbox** from the Navigation Bar on Home Page. **My Workspace** page displays.

The screenshot shows the NYEIS Training interface. At the top, there's a banner for 'NYEIS Training' with the note '(Training use only—no real live data)'. Below it is the 'navigation' sidebar with links for Inbox, Reserved Tasks, Assigned Tasks, Deferred Tasks, Work Queues, and Notifications. The main area is titled 'My Workspace: Michael Kepper'. It has a 'Shortcuts' section with links for Reserve Next Task, Find Task, Reserve Next Work Queue Task, Create Task, and View Tasks Before Deadline. Below that is a 'My Tasks' section showing a summary: '# of Assigned Tasks: 7' and '# of Reserved Tasks: 0'. The overall layout is clean with a blue header and white background.

2. Click **Notifications** from the Navigation Bar. **My Alerts** page displays.

The screenshot shows the 'My Alerts' page. At the top, it says 'My Alerts: Michael Kepper'. Below that is a note: 'To view an individual Notification, click the View link in the Action column next to the Notification. To delete multiple Notifications, place a check in the checkbox next to each Notification and then click the Delete button.' A 'Delete' button is located below the note. The main part is a table with columns for Action, Subject, and Date. Each row contains a checkbox in the Action column, a 'View' link in the Subject column, and a date/time in the Date column. The table lists various notifications, mostly Service Authorizations, with dates ranging from 2011 to 2012.

Action	Subject	Date
<input type="checkbox"/>	<a href="#">View</a> Service Authorization 31752 for child Green Bean84 has been closed as of 08-22-2011.	8/22/2011 00:22
<input type="checkbox"/>	<a href="#">View</a> Service Authorization 31456 for child Green Bean84 has been closed as of 08-22-2011.	8/22/2011 00:22
<input type="checkbox"/>	<a href="#">View</a> Service Authorization 36961 for child Jerry Garcia91 has been approved as of 09-16-2011.	9/16/2011 07:41
<input type="checkbox"/>	<a href="#">View</a> Service Authorization 134297 for child Sam Dean88 has been approved as of 09-15-2011.	9/15/2011 21:18
<input type="checkbox"/>	<a href="#">View</a> Service Authorization 50727 for child Janie Miller has been approved as of 09-15-2011.	9/15/2011 20:15
<input type="checkbox"/>	<a href="#">View</a> Service Authorization 50759 for child Gibbs85 Jethro has been approved as of 09-15-2011.	9/15/2011 21:01
<input type="checkbox"/>	<a href="#">View</a> Service Authorization 203776 for child Lila Rouse has been approved as of 02-21-2012.	2/21/2012 09:08
<input type="checkbox"/>	<a href="#">View</a> Full evaluation upload notification	2/15/2012 10:44
<input type="checkbox"/>	<a href="#">View</a> Municipality Transfer Rejection	1/13/2012 14:27
<input type="checkbox"/>	<a href="#">View</a> Service Authorization 187392 for child Sissy Spaceck83 has been approved as of 01-23-2012.	1/23/2012 10:38
<input type="checkbox"/>	<a href="#">View</a> Service Authorization 200971 for child Marcus Ian has been approved as of 02-16-2012.	2/16/2012 10:56
<input type="checkbox"/>	<a href="#">View</a> Service Authorization 200978 for child Marcus Ian has been approved as of 02-16-2012.	2/16/2012 11:38

- Click **View** link under **Action** column to display Notification. **View Alert** page displays.

The screenshot shows a 'View Alert' window with the following details:

- Subject:** Remittance received from Medicaid on 2010-03-25
- Date Created:** 3/26/2010 00:16
- Category:** Standard
- Related Pages:**
  - Action Link
  - Go To Payment Received Homepage
- Content:** Please review the details of this payment.

Buttons at the bottom: Delete, Close.

- Review Notification. Click **Close** button. **My Alerts** page displays with Notification in list.
- Repeat Step 4 as needed to view Notifications.
- Click the check box next to each Notification on the Notification list page that is to be deleted.

The screenshot shows a 'My Alerts' page with the following information:

To view an individual Notification, click the View link in the Action column next to the Notification. To delete multiple Notifications, place a check in the checkbox next to each Notification and then click the Delete button.

Action	Subject	Date
<input checked="" type="checkbox"/>	View Service Authorization 31752 for child Green Bean84 has been closed as of 08-22-2011.	8/22/2011 00:22
<input checked="" type="checkbox"/>	View Service Authorization 31456 for child Green Bean84 has been closed as of 08-22-2011.	8/22/2011 00:22
<input checked="" type="checkbox"/>	View Service Authorization 36961 for child Jerry Garcia91 has been approved as of 09-16-2011.	9/16/2011 07:41
<input checked="" type="checkbox"/>	View Service Authorization 134297 for child Sam Dean88 has been approved as of 09-15-2011.	9/15/2011 21:18
<input checked="" type="checkbox"/>	View Service Authorization 50727 for child Janie Miller has been approved as of 09-15-2011.	9/15/2011 20:15
<input type="checkbox"/>	View Service Authorization 50759 for child Gibbs85 Jethro has been approved as of 09-15-2011.	9/15/2011 21:01
<input type="checkbox"/>	View Service Authorization 203776 for child Lila Rouse has been approved as of 02-21-2012.	2/21/2012 09:08
<input checked="" type="checkbox"/>	View Full evaluation upload notification	2/15/2012 10:44
<input checked="" type="checkbox"/>	View Municipality Transfer Rejection	1/13/2012 14:27
<input checked="" type="checkbox"/>	View Service Authorization 187392 for child Sissy Spaceck83 has been approved as of 01-23-2012.	1/23/2012 10:38
<input type="checkbox"/>	View Service Authorization 200971 for child Marcus Ian has been approved as of 02-16-2012.	2/16/2012 10:56
<input type="checkbox"/>	View Service Authorization 200978 for child Marcus Ian has been approved as of 02-16-2012.	2/16/2012 11:38

- Click the **Delete** button. A confirmation page displays the number of Notifications to be deleted. Click **Yes** button to delete selected Notifications. Click **No** button to cancel action.

The screenshot shows a confirmation dialog with the following message:

Are you sure you want to delete these 8 alerts? Once they are deleted, they can not be recovered.

Buttons: Yes, No.

- The **My Alerts** page displays.

## WORKING WITH TASKS

There are two categories of Tasks in NYEIS. System-Created Tasks are created by the system as the result of some kind of User interaction. The Task is created by the system to achieve a desired outcome. For example, when a Provider Agency creates and submits a Referral, the system automatically creates a Task for the child's Municipality of Residence to review the referral and register it. System-Created Tasks are generally closed when the User assigned to the Task clicks the Primary Action link on the Task Homepage and completes the workflow associated with the Task. In most cases a System-Created Task cannot be closed by clicking the 'Close' link in the Manage cluster on the Task Homepage.  See **Closing a Task** for more information.

The second category is User-Created Tasks. A User can create a Task using the Create Task feature. Municipal Users can create and assign a Task to another User. A Provider User can create and assign a Task only to themselves. A User-Created Task is closed by clicking the 'Close' link in the Manage cluster on the Task Homepage.

### Task Participant Types

Below defines the different Participant Types that are defined in the Participant drop down:

**Employer** = [Agency Provider] in NYEIS that is employing other Service Providers

**Information Provider** = Referral Source

**Person** = Child

**Product Provider** = Registered Individual or Agency Service Provider

**Representative** = Not Applicable

**Service Supplier** = Not Applicable

**Utility** = Not Applicable

### Creating a Task

These instructions apply to **User-Created Tasks only**.

1. Click **Inbox** from the Navigation Bar on Home Page. **My Workspace** page displays.

- Click **Create Task** link under **Manage** section. **Create User Task** page displays.



When creating a Task, a User can create a deadline which displays as a Due Date box on their Workspace page.

- Type **Subject** and **Deadline** including date and time. Type any other relevant information. Type **Comment** (*Optional*).
- Click **Save** button. **My Workspace** page displays.

#### **Notes:**

- When a Task is created in a specific area of a Case, the new Task will be found in the location where the Task was generated (e.g., Child Home page, IFSP, Service Authorization). For example, a task created in the

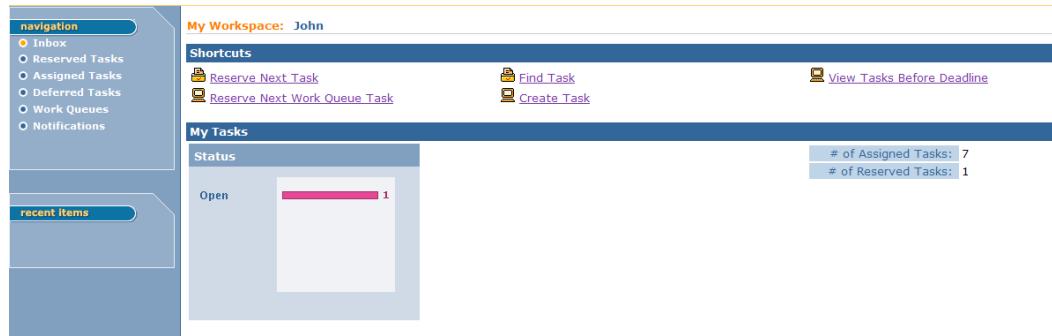
**Provider Home** page will not be able to be viewed from the task link on the **Child Home** page.

- Providers will *only* be able to assign a Task to themselves. They cannot assign the Task to any other NYEIS user.

## Viewing a Task

These instructions apply to both categories of Tasks.

1. Click **Inbox** from the Navigation Bar on Home Page. **My Workspace** page displays.



To view tasks Assigned to you, click on the **Assigned Tasks** link on the left-hand navigation bar of '**My Workspace**'. **Assigned Tasks** page displays. Follow from step 3 below. To view tasks you have reserved, follow from step 2 below.

### Important Information

*System-generated* tasks that are directed to users (in other words, tasks not destined for a work queue) will always be sent to a user's 'Assigned Tasks' by default. When an assigned task or a work queue task is reserved, or if a user creates a task for themselves and selects the 'Reserve to Me' option, the task will be seen in *Reserved Tasks*.

2. Click on the **Open** colored bar from **My Tasks – Status** box. *The number of tasks to open displays to the right of the colored bar. Reserved Tasks by Status* page displays. Click **Reserved Tasks** from the Navigation Bar as another way to display the **Reserved Tasks by Status** page.

The screenshot shows the 'My Early Intervention System' interface. At the top, there's a navigation bar with links for Home, Inbox, My Calendar, My Cases, Search, About, and Log Out. On the left, there's a sidebar with sections for 'navigation' (Inbox, Reserved Tasks, Assigned Tasks, Deferred Tasks, Work Queues, Notifications) and 'recent items'. The main content area is titled 'Reserved Tasks by Status: Art Art' and shows a table of tasks. The table has columns for Action, Task ID, Subject, Priority, Reserved, and Deadline. The tasks listed are:

Action	Task ID	Subject	Priority	Reserved	Deadline
<a href="#">View</a>	3121	Accept/Reject Service Authorization 5148 for Tiffany Martin-163	Medium	10/26/2009 08:37	
<a href="#">View</a>	17675	Please review Voucher for Service Type Respite, Program Year 2010		10/15/2009 20:58	
<a href="#">View</a>	17155	Accept/Reject Service Authorization 22532 for Tiffany Martin-16	Medium	10/12/2009 10:50	
<a href="#">View</a>	18445	MK Task	Medium	10/7/2009 13:01	
<a href="#">View</a>	18452	New Integrated Case Created for TiffanyMK Martin		10/7/2009 17:48	
<a href="#">View</a>	18719	Assign Initial Service Coordinator for Child: Luke Domet	Medium	10/23/2009 15:26	
<a href="#">View</a>	21262	School visit	Medium	10/21/2009 14:31	
<a href="#">View</a>	21284	Larry hearing test	Medium	10/21/2009 20:38	
<a href="#">View</a>	21312	New Integrated Case Created for Donna Dickerson		10/22/2009 12:37	
<a href="#">View</a>	19742	New Task	Medium	10/20/2009 16:28	
<a href="#">View</a>	24087	Review Request for Amendment of IFSP for Thomas Bass to add a Service Authorization	Medium	10/29/2009 15:52	
<a href="#">View</a>	21784	New At Risk Child Bobby Fisher		10/23/2009 16:01	

3. Click View or Task ID link. Task Home page displays.

The screenshot shows the 'Task Home' page for task ID 31766. The page has a header with 'Task Home: ProviderJustificationTask - 31766'. Below the header are sections for 'Manage' (with links for Add Comment, Reserve, Forward, Close, Un-Reserve, and Defer), 'Subject' (Provide Justification for Billing Rule Violation for Claim 12592), and 'Details' (Task ID: 31766, Priority: , Reserved By: , Status: Open, Deadline: , Last Assigned: 11/5/2010 11:48, Time Worked: 00:00 [Change]). At the bottom, there are sections for 'Primary Action' (Create Justification for Billing Rule Violation) and 'Supporting Information' (Provider Claim Homepage).

### Note:

- To view additional (supporting) information about the task, click the link (if one is displayed) in the **Supporting Information** section.

## Viewing Tasks in a Work Queue

These instructions apply to **System-Created Tasks only**.

Most System-Created Tasks are created in the user's Work Queues. Users need to periodically review their work queues to determine what tasks need to be accomplished. Work queues are established for similar types of tasks. One such

work queue is the Referral Work Queue. It lists the tasks associated with reviewing and registering a submitted referral into NYEIS. Users have the option to reserve a task to prevent other users from working on it. Alternatively, clicking the task ID number allows you to view and work the task without first reserving it.

Action	Task ID	Subject	Referral Date	Referral Source	Deadline
Reserve	78594	Referral Submitted for Andy Anderson	6/6/2011	Sally Toonies	
Reserve	78598	Referral Submitted for Alexandra Parker	6/6/2011	John Smith	

### Important Information

Reserving a task is helpful when multiple users within an organization have access to the same work queue, and there is a desire for no other user to work a given task. Once reserved, the task is removed from the work queue and accessible via the **Reserved Tasks** link on **My Workspace** page of the user that reserved the task.

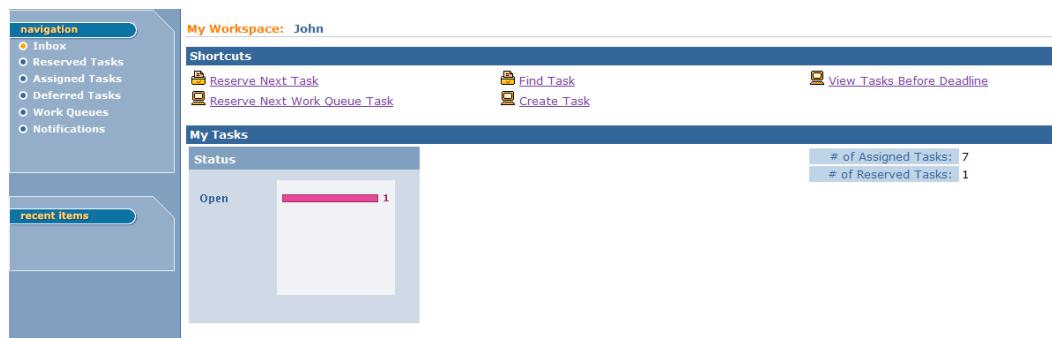
### Important Information

The Case Lifecycle is generally a linear progression of ‘events’ starting with EIOD Assignment and ending with Case Closure. However, not all case events necessarily occur in the same sequence. Check the Case Lifecycle Status page on the Integrated Case Homepage to see a list of all case events that have taken place to date on a case. See **Unit 4 – Case Management, Case Lifecycle Status** for further information.

### Review Task History

These instructions apply to both categories of Tasks.

1. Click **Inbox** from the Navigation Bar on Home Page. **My Workspace** page displays.



- Click on the **Open** colored bar from **My Tasks – Status** box. *The number of tasks to open displays to the right of the colored bar. Reserved Tasks by Status page displays.*

Action	Task ID	Subject	Priority	Reserved	Deadline
<a href="#">View</a>	<a href="#">3121</a>	Accept/Reject Service Authorization 5148 for Tiffany Martin-163	Medium	10/26/2009 08:37	
<a href="#">View</a>	<a href="#">17675</a>	Please review Voucher for Service Type Respite, Program Year 2010		10/15/2009 20:58	
<a href="#">View</a>	<a href="#">17155</a>	Accept/Reject Service Authorization 22532 for Tiffany Martin-16	Medium	10/12/2009 10:50	
<a href="#">View</a>	<a href="#">18445</a>	MK Task	Medium	10/7/2009 13:01	
<a href="#">View</a>	<a href="#">18452</a>	New Integrated Case Created for TiffanyMK Martin		10/7/2009 17:48	
<a href="#">View</a>	<a href="#">18719</a>	Assign Initial Service Coordinator for Child: Luke Domet	Medium	10/23/2009 15:26	
<a href="#">View</a>	<a href="#">21262</a>	School visit	Medium	10/21/2009 14:31	
<a href="#">View</a>	<a href="#">21284</a>	Larry hearing test	Medium	10/21/2009 20:38	
<a href="#">View</a>	<a href="#">21312</a>	New Integrated Case Created for Donna Dickerson		10/22/2009 12:37	
<a href="#">View</a>	<a href="#">19742</a>	New Task	Medium	10/20/2009 16:28	

- Click **View** or **Task ID** link. **Task Home** page displays. *Users have the ability to track the time worked on a Task by clicking the Change link next to the **Time Worked** field in the **Details** section. This is an optional function available to assist Users in time management and organization.*

The screenshot shows the NYEIS QA Task Home page. At the top, there's a navigation bar with links for Home, Inbox, My Calendar, My Cases, Search, About, and Log Out. Below the navigation bar, the main content area has several sections:

- Task Home: Allocate Task - 21784**
- Manage** section with buttons for Add Comment, Reserve, Forward, Close, Un-Reserve, and Restart.
- Subject** section showing "New At Risk Child Bobby Fisher".
- Details** section showing Task ID: 21784, Priority: Art, Reserved By: Art, Status: Open, Deadline: 10/23/2009 16:01, and Time Worked: 00:00 [Change].
- Primary Action** section with a link to "Child At Risk: Bobby Fisher".
- Supporting Information** section.

4. Select one of the following from the Navigation Bar:

**Task History** – displays a summary list of all actions related to Task.

**Task Assignment List** – displays Users/work queues that have touched Task.

**Graphical View** – displays a picture of the action taken in Task. (Requires Adobe SG Viewer to view).

5. Click **Task Home** on the Navigation Bar to return to **Task Home** page.

## Adding Comments to a Task

These instructions apply to both categories of Tasks.

1. Click **Inbox** from the Navigation Bar on Home Page. **My Workspace** page displays.

The screenshot shows the My Workspace page for user "John". At the top, it displays "My Workspace: John". Below that is a "Shortcuts" section with links for Reserve Next Task, Reserve Next Work Queue Task, Find Task, Create Task, and View Tasks Before Deadline. The main area is titled "My Tasks" and shows a "Status" section. A colored bar indicates the number of tasks: "Open" (red bar) with the number 1 displayed next to it. To the right of the bar, it says "# of Assigned Tasks: 7" and "# of Reserved Tasks: 1".

2. Click on the **Open** colored bar from **My Tasks – Status** box. *The number of tasks to open displays to the right of the colored bar. Reserved Tasks by Status* page displays.

Action	Task ID	Subject	Priority	Reserved	Deadline
<a href="#">View</a>	3121	Accept/Reject Service Authorization 5148 for Tiffany Martin-163	Medium	10/26/2009 08:37	
<a href="#">View</a>	17675	Please review Voucher for Service Type Respite, Program Year 2010		10/15/2009 20:58	
<a href="#">View</a>	17155	Accept/Reject Service Authorization 22532 for Tiffany Martin-16	Medium	10/12/2009 10:50	
<a href="#">View</a>	18445	MK Task	Medium	10/7/2009 13:01	
<a href="#">View</a>	18452	New Integrated Case Created for TiffanyMK Martin		10/7/2009 17:48	
<a href="#">View</a>	18719	Assign Initial Service Coordinator for Child: Luke Domet	Medium	10/23/2009 15:26	
<a href="#">View</a>	21262	School visit	Medium	10/21/2009 14:31	
<a href="#">View</a>	21284	Larry hearing test	Medium	10/21/2009 20:38	
<a href="#">View</a>	21312	New Integrated Case Created for Donna Dickerson		10/22/2009 12:37	
<a href="#">View</a>	19742	New Task	Medium	10/20/2009 16:28	

3. Click View or Task ID link. **Task Home** page displays.

4. Click Add Comment link from **Manage** section. **Add Comment** page displays.

#### Add Comment: IFSP Approval - 9475

Details	
*Comments:	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

5. Type **Comments**.

6. Click **Save** button. **Task Home** page displays.

7. Click **Task History** from the Navigation Bar to view Comment.

## Closing a Task

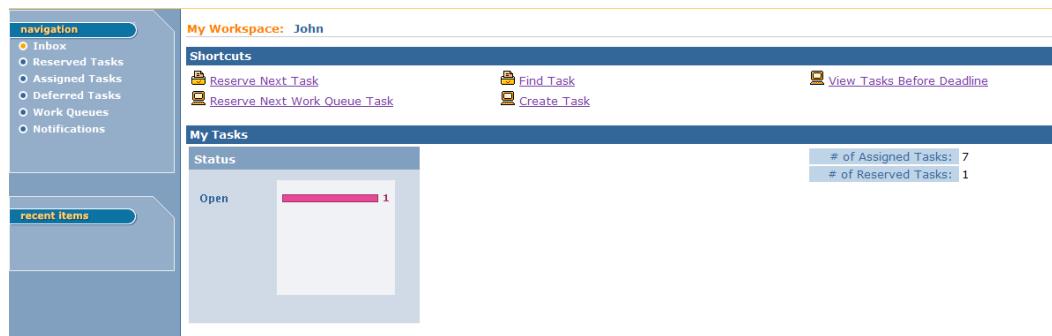
These instructions apply primarily to User-Created Tasks. Most System-Created Tasks require a User to complete the Primary Action link on the Task Homepage in order to close the task. There are a limited number of System-Created Tasks that can be closed by the method outlined in this subtopic, they are:

- Case Closure
- Reassign Service Authorization Provider Agency (when SA is Rejected by assigned agency)
- Reassign MDE Evaluator Agency (when assignment is rejected by assigned agency or if previous assignment is canceled by the Municipality)

The System-Created Case Closure Task can be manually closed if the User needs to stop the case closure workflow. For example, when a child's parent does not consent to transfer the case records to a different agency, the system initiates the Case Closure workflow to close the child's Integrated Case. A User can stop the case closure workflow manually by selecting 'Close' on the Task Home page. The Case Closure workflow can be re-initiated by the User at a later time by clicking "Close Case" on the Integrated Case Homepage.

A User may need to manually close the Reassign SA Agency or Reassign MDE Evaluator Agency tasks when closing a case because the task is no longer required to be completed.

1. Click **Inbox** from the Navigation Bar on Home Page. **My Workspace** page displays.



2. Click on the **Open** colored bar from **My Tasks – Status** box. *The number of tasks to open displays to the right of the colored bar. Reserved Tasks by Status* page displays.

Reserved Tasks by Status: John USER						
Status: Open						
Action	Task ID	Subject	Priority	Reserved	Deadline	
<a href="#">View</a>	291	Check on ATD Vendors in Area	Medium	9/19/2008 15:40	9/25/2008 12:00	
<a href="#">View</a>	290	Check on Transporation Needs	Medium	9/19/2008 15:39	9/25/2008 12:00	
<a href="#">View</a>	1290	New Integrated Case Created for Millie Millie		10/1/2008 12:35		
<a href="#">View</a>	282	Please review We Care Agency's Provider Application.		9/22/2008 10:38		

3. Click View or Task ID link. **Task Home** page displays.

The screenshot shows the 'Manage' section of a Task Home page. It includes links for 'Add Comment', 'Reserve', 'Forward', 'Close', 'Un-Reserve', and 'Restart'. Below the links, there is a subject line: 'Subject: testing'.

4. Click Close link from **Manage** section. **Close Task** page displays with the message *Are you sure you want to close this task?*

#### Close Task: Allocate Task - 9996

Are you sure you want to close this task?

[Yes](#)

[No](#)

Click **Yes** button. **Task Home** page displays. Task **Status** is set to **Closed**.

5. Click **Task History** from the Navigation Bar to view the history of the task.

## Reserving a Task

These instructions apply to both categories of Tasks.

1. Display **Task Home** page. See **Working with Tasks, Viewing Tasks** for further information.

The screenshot shows the 'Manage' section of a Task Home page. It includes links for 'Add Comment', 'Reserve', 'Forward', 'Close', 'Un-Reserve', and 'Restart'. Below the links, there is a subject line: 'Subject: testing'.

2. Click Reserve link from **Manage** section. **Reserve Task** page displays.

#### Reserve Task: IFSP Approval - 9475

##### Comment

[Reserve](#) [Reserve&View](#) [Cancel](#)

3. Type **Comment** (*Optional*).
4. Click **Reserve** or **Reserve&View** button. **Task Home** page displays with Task reserved.
5. Click **Task History** from the Navigation Bar to view the history of the task.

## Un-Reserving a Task

These instructions apply to both categories of Tasks.

1. Display **Task Home** page.  See **Working with Tasks, Viewing Tasks** for further information.



The screenshot shows the 'Manage' section of the Task Home page. It includes links for Add Comment, Reserve, Forward, and Defer, along with a Close button. Below this is a 'Subject' field containing the text 'testing'. The 'Un-Reserve' link is highlighted with a red box.

2. Click **Un-Reserve** link from **Manage** section. **Un-reserve Task** page displays.



The screenshot shows the 'Comment' section of the Un-reserve Task page. It features a large text input area and two buttons at the bottom: 'Save' and 'Cancel'.

3. Type **Comment** (*Optional*).
4. Click **Save** button. **Task Home** page displays. Task is un-reserved. *If the Task came from a Work Queue, then the Task returns to that Work Queue. If the Task came from another User, then the Task returns to the User's assigned Tasks.*
5. Click **Task History** from the Navigation Bar to view the history of the task.

## Forwarding a Task

These instructions apply to both categories of Tasks, and is limited to Municipal User roles. Provider Users cannot forward tasks.

1. Display Task Home page. See Working with Tasks, *Viewing Tasks* for further information.

**Task Home: Allocate Task - 9996**

<b>Manage</b>
Add Comment       Reserve       Forward       Defer
Close       Un-Reserve       Reallocate       Restart
<b>Subject</b>
Schedule IFSP Review for Uma Thurman

2. Click **Forward** link under Manage section. **Forward Task** page displays.

**Forward Task: ReviewCINResults - 4653**

<b>Assignment Details</b>
* Forward To: <input type="text" value="User"/>
<b>Comments</b>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>

3. Tasks can only be forwarded by some Municipal Users to other Municipal staff or Providers with a NYEIS user account. Click **Search** icon. **Search** page displays. Type all known information in **Search Criteria** section. Click **Search** button. Records matching criteria display in **Search Results** section. *To search again, click **Reset** button.* Click **Select** link under **Action** column. **Forward Task** page displays with selected individual/group listed.

**Forward Task: ReviewCINResults - 4653**

<b>Assignment Details</b>
* Forward To: <input type="text" value="User"/> <input type="text" value="john dowley"/>
<b>Comments</b>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>

4. Type **Comments (Optional)**.
5. Click **Save** button. **Task Home** page displays. Task is forwarded.
6. Click **Task History** from the Navigation Bar to view the history of the task.

### Important Information

Although the system permits the *forwarding* of tasks, the recipient of the forwarded task may not have sufficient privileges to actually work the task. For example, Tasks that generate to an EIOD's 'Assigned Tasks' are often only able

to be completed by the child's EIOD. Careful consideration should be given anytime a task is being forwarded. In most circumstances, the only appropriate forwarding of tasks from Municipal Staff to Providers is when the task is being sent to the child's assigned Service Coordinator. If you are unsure that the task should be forwarded, please contact the NYEIS Help Desk for further assistance.

## Deferring a Task

These instructions apply to both categories of Tasks.

1. Display **Task Home** page.  See **Working with Tasks, Viewing a Task** for further information.

2. Click **Defer** link under **Manage** section. **Defer Task** page displays.

3. Enter **Restart Date** from **Details** section. *Date fields must be formatted as mm/dd/yyyy format.* This automatically restarts the task on defined date.
4. Type **Comment (Optional)**.
5. Click **Save** button. **Task Home** page displays. Task **Status** is set to **Deferred**.
6. Click **Task History** from the Navigation Bar to view the history of the task.

### **Note:**

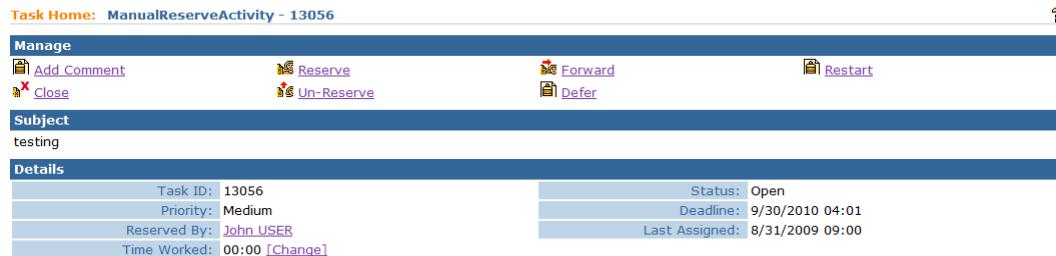
- Deferring a Task that has an Escalation rule (i.e., System alerts the assigned User or another User if that task is not completed by a specific date) associated with it will not cause the escalation action to stop or be paused.

### **Restarting a Task**

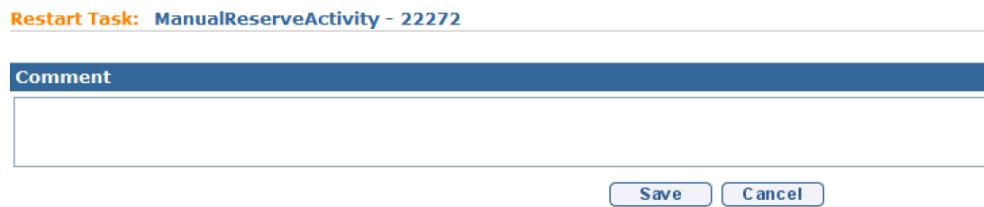
These instructions apply to both categories of Tasks.

Use the steps below to manually restart a task where **Status** has been set to **Deferred**.

- Display **Task Home** page.  See **Working with Tasks, Viewing Tasks** for further information.



- Click **Restart** link under **Manage** section. **Restart Task** page displays.



- Type **Comment (Optional)**.
- Click **Save** button. **Task Home** page displays. Task **Status** is set to **Open**.
- Click **Task History** from the Navigation Bar to view the history of the task.

### **Task Management**

Municipal users with Supervisory roles in NYEIS have the ability to view and manage tasks assigned to or reserved by their staff. Supervisors will find this particularly useful for a number of reasons, including task workload management, and reassigning tasks due to staff vacation or leaves of absence.

See **Unit 10: Municipal Administration, Task Management** for more information.

## PAGE STRUCTURE OVERVIEW

NYEIS pages have similar page layout structures when viewing data.



Pages in NYEIS are not automatically updated with information/data entered by a User. Updated information, *a page refresh*, occurs when the page displayed is submitted by clicking **Save** or **Next** button.



Fields on a page that *require* data entry are marked with an asterisk. A field can also be *required* based on logic that will not have an asterisk.

Below describes each of the page structures available.

### List Page

A List Page provides data presented in a column and row format. A **New** button displays at the top to navigate to another page where new details can be entered. The standard System format is to provide lists of details on pages. **View**, **Edit** and **Delete** are functions available on many of the pages depending upon access rights.

**At-Risk Follow-Up List: tiny tim - 30000026**

At-Risk Follow-Up List: tiny tim - 30000026		
Action	Follow-Up Date	Performed By
<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Delete</a>	11/1/2008	Lorraine Davis
<a href="#">View link</a>		
<a href="#">Edit link</a>		
<a href="#">Delete link</a>		

### View Detail Page

A View Detail Page provides buttons for the User to navigate to a Modify or Delete Page. An **Edit** button will display on a Modify Page. A **Delete** button will display on a Delete Page.

View Phone Number: tiny tim - 30000026

**Details**

Type:	Home	Primary:	Yes
From:	10/1/2008	To:	
Phone:	518 555-1212	Extension:	
Status:	Active		

**Comments**

## Create Page

A Create Page provides fields to add new items. Fields requiring data entry are marked with an asterisk. A field can also be *required* based on logic that will not have an asterisk. A **Save** button saves new data. A **Cancel** button clears data and *does not* save. A **Save & New** button saves data and returns User to Create Page to enter additional information.

Create Phone Number: tiny tim - 30000026

**Details**

*Type:	Main	Primary:	<input type="checkbox"/>
*From:	4/20/2009	To:	
*Phone:		Extension:	

**Comments**

Save button → Save  
 Save and New button → Save & New  
 Cancel button → Cancel

## Modify Page

A Modify Page allows an authorized User to edit information in fields. Fields that may not be edited display on the Modify Page as a view only field. A **Save** button saves new data. A **Cancel** button clears data and *does not* save the data.

**Modify Phone Number: tiny tim - 30000026**

<b>Details</b>		<b>Save</b>	<b>Cancel</b>
Type:	Home	Primary:	<input checked="" type="checkbox"/>
From:	10/1/2008	To:	<input type="text"/>
Phone:	518	555-1212	Extension:
<b>Comments</b>			
<input type="text"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>			

Save button → **Save** **Cancel**  
 Cancel button → **Cancel**

## Delete Page

A Delete Page displays a confirmation message to verify data selected is to be deleted. If the page is deleted, all newly entered information on the page is deleted. Click **Yes** button to perform deletion or **No** to cancel.

**Delete Phone Number: tiny tim - 30000026**

Are you sure you want to delete this phone number?

Yes button (to delete) → **Yes** **No**  
 No button (to cancel) → **Up Arrow**

## Important Information

The act of deleting does not always delete a record in its entirety (known as a ‘hard delete’), and instead sets the record to ‘Canceled’ status. This is referred to as a ‘Soft Delete’. This is especially helpful to preserve the history of changes and/or in cases where the information may again need to be used. In the example above, the act of “deleting” the phone number results in the record going to ‘Canceled’ status. One exception to this is the Delete Draft IFSP function which is always a ‘Hard delete’, and once the function is performed, all information is gone.

## Search Page

A Search Page, such as the **Child Search** page below, displays an area to enter search criteria (e.g., name, DOB or other known information) and view a list of results. Search criteria are entered at the top portion of the page and a list of results will display in the lower portion of page. A **Reset** button is also available to clear all data from the field and go back to the initial value (which often is blank).

The screenshot shows the 'Child Search' page with the following interface elements:

- Search Criteria:** A form with fields for Reference Number, Last Name (smi), Date of Birth, City, SSN, Mother's Last Name, First Name, Address Line 1, Family Telephone Number, Child Birth Last Name, and Father's Last Name.
- Search Results (Number of Items: 11):** A table with columns: Reference Number, First Name, Last Name, Address Line 1, City, Date of Birth, and Municipality. The results are:
 

Reference Number	First Name	Last Name	Address Line 1	City	Date of Birth	Municipality
375	Holly	Smith	55 West St	Albany	4/19/2010	Albany
379	Michayla	Smith	75 Waterloo St	Albany	10/16/2009	Albany
191	James	Smith		Cohoes	10/31/2009	Albany
- Buttons:** 'Search' and 'Reset' buttons at the top right of the search criteria form.
- Annotations:**
  - A red arrow points from the 'Search' button to the 'Search' button on the page.
  - A red circle highlights the 'Reset' button.
  - A red arrow points from the 'Address Line 1' column header in the results table to the 'Address Line 1' field in the search criteria form.

### Notes:

- When **Search** is selected from the **Menu Bar** on the **User's Homepage**, the default **Search** page is Child Search. Other search options are available from the Left-hand Navigation Bar.
- Search Page links may also be found on the User's **Home Page** in the **Search Cluster**. The Search Page links displayed are those most typically used based upon the User's Role.

The screenshot shows the NYEIS OA homepage with the following interface elements:

- Navigation Bar:** Includes links for Home, Inbox, My Calendar, My Cases, Search, About, and Log Out. The 'Search' link is circled in red.
- Left-hand Navigation Bar:** A sidebar with sections like 'navigation' (Child, Provider, Insurance Provider, Referral Source, Organizational Contact, Vendor, Clearing House) and 'recent items'.
- Child Search Page:** A sub-page with the same search criteria and results layout as the previous screenshot. The 'Search' and 'Reset' buttons are visible at the bottom of the search criteria form.
- Annotations:**
  - A large red circle highlights the 'navigation' section of the left sidebar.
  - A red circle highlights the 'Search' link in the top navigation bar.

### **SORTING**

When data is displayed in a column format it can be sorted by clicking on any column heading to sort in either ascending or descending order.

**Example - My Cases page. Sorting by Primary Client.**

**Case List**

Case Reference	Primary Client	Case Status	Case Status Date	Start Date
2079	Katie Pineview			10/29/2009
31232	Julia Wilson	Transfer from other municipality	5/23/2011	10/18/2010
34819	Leslie Reed	Service Coordinator Assigned	5/23/2011	11/9/2010
2111	Antonio Vergas			10/29/2009
1089	Carmine Case			10/26/2009
10240	Mary Dotter			6/1/2010
31235	jo dole			10/18/2010
31240	Mikayla Isotope			10/1/2010
31491	matt brown			10/19/2010
79104	Lakisha Wicks	Service Coordinator Assigned	6/3/2011	5/1/2011
79618	Lori Wilkins	Service Coordinator Assigned	6/6/2011	5/1/2011
768	Lou GarTest			10/22/2009
22784	John Tights			8/25/2010
31488	Joe Smith			10/19/2010
72205	Linda Wells	Transfer to other municipality	6/3/2011	4/1/2011

Click Primary Client column heading link. Cases are now sorted in ascending order - see below:

**Case List**

Case Reference	Primary Client	Case Status	Case Status Date	Start Date
2111	Antonio Vergas			10/29/2009
1089	Carmine Case			10/26/2009
33798	Ellie French			10/5/2010
3586	Gordon Shumway			11/26/2009
22786	Jessica Simmons			8/25/2010
55808	Jim Chu			3/10/2011
31488	Joe Smith			10/19/2010
31761	John Offhouse			10/20/2010
22784	John Tights			8/25/2010
31232	Julia Wilson	Transfer from other municipality	5/23/2011	10/18/2010
33280	Kathy Thompson			10/2/2010
2079	Katie Pineview			10/29/2009
26370	Kid Rock			9/20/2010
79104	Lakisha Wicks	Service Coordinator Assigned	6/3/2011	5/1/2011
4108	Laurel Kinmartin	Transfer to other municipality	5/20/2011	12/20/2009
34819	Leslie Reed	Service Coordinator Assigned	5/23/2011	11/9/2010

## SEARCHING

NYEIS provides search capability for types of participants including children, providers, insurance companies, and vendors. You can access the pages for entering search criteria and viewing search results by clicking **Search** on the **Menu Bar** or the **Left-hand Navigation Bar**.

Search Page links may also be found on the User's **Home Page** in the **Search Cluster**. The Search Page links displayed are those most typically used based upon the User's Role.



### **Important Information**

- Not all search pages are available to every User. Access to search pages is limited by your NYEIS user role.
- Search criteria varies by search type (e.g., Child, Provider, etc.).

The screenshot shows the NYEIS Home Page. On the left, there is a navigation bar with links: Home, Inbox, My Cases, My Calendar, Search (which is circled in red), and Contact. In the center, there is a "Provider Program Management" section with a "Welcome to the New York Early Intervention System" message and a "My Shortcuts" list. The "Search" section in the "My Shortcuts" list is also circled in red. At the top, there is a menu bar with links: Home, Inbox, My Calendar, My Cases, Search (which is circled in red), About, and Log Out.

In either case the default **search** page that displays is the **Child** Search page.

The screenshot shows the "Child Search" page on the NYEIS QA site. On the left, there is a navigation bar with links: Child (which is circled in red), Provider, Insurance Provider, Referral Source, Organizational Contact, Vendor, and Clearing House. In the center, there is a "Search Criteria" section with fields for Reference Number, Last Name, Date of Birth, City, SSN, Mother's Last Name, First Name, Address Line 1, Family Telephone Number, Child Birth Last Name, Father's Last Name, and a "Search" and "Reset" button. At the bottom, there is a "Search Results" section with columns for Reference Number, First Name, Last Name, Address Line 1, City, Date of Birth, and Municipality.

Once the Child search page displays, you can proceed to enter search criteria if searching for a child, or select a different search option from the **Left Navigation Bar**.

A Search Page displays an area to enter search criteria (e.g., Last Name, First Name, Date of Birth, NPI, FEIN or other known information) and view a list of results. Search criteria are entered at the top portion of the page and a list of results will display in the lower portion of page. A **Reset** button is also available to clear all data from the field and go back to the initial value (which often is blank).

Use the following tips to improve your search success:

### **Child search**

1. Use the reference number (if available) first. Each child has a unique reference number. If you do not see any results, go to step 2.
2. Enter the last name and search. If you do not see the results you seek, try using a portion of the last name (e.g., *ken* for “Kennedy”) in case it has been misspelled. Sort the column labeled “Last Name” in the search results cluster by clicking the header.
3. As a last resort you can use the wild card character % in the last name field. This will show results for all children associated with a municipality when used by Municipal staff, and all children associated with a provider when used by Provider staff.

#### **Note:**

- Provider user roles can only see children to whom they (or their agency) have been assigned to provide services.
4. If you find results that seem to match your search criteria, click the View link in the Action column next to the child’s name and view the record. Look for more information that will confirm it is the child you seek.

## **Provider search**

1. Providers can be searched for based upon their **Agreement Type** and current **Status**. Agreement Type options include **Appendix**, **Basic**, '**No Agreement**', and <Blank>. Status options include **Approved**, **Disapproved**, **Disqualified**, **Pending Agreement**, **Withdrawn** and <blank>. The system defaults the search on **Agreement Type** to 'Basic' and **Status** to 'Approved'. If the initial search does not return the expected results, try selecting the <blank> **Status** and **Agreement Type** options. When viewing a located Provider, the user will see a limited-view page for a Provider with a Status of **Disapproved**, **Disqualified** and **Withdrawn**.
2. Use the **Reference Number** if available; it is the most direct search method.

**Note:**

- A provider can have multiple 'reference numbers' but only one Primary reference number.

If you do not see any results, go to step 3.

Primary Reference Number for each type of provider:

- Approved Provider Agency = State ID
- Approved Provider Individual = State ID
- Agency Employee = Employee ID

**Note:**

- You will not see the results you seek if you do not know the Provider's primary NYEIS reference number.
3. **NPI or State ID** are also good search criteria as they are associated with a single Provider.
  4. Enter the provider agency or individual's name and search. If you do not see the results you seek, try using a portion of the name (e.g., *adirondack* for "Adirondack Medical Group, Inc." or *ken* for "Kennedy") in case it has been misspelled. Sort the column labeled "Registered Name" in the search results cluster by clicking the header.
  5. You can narrow the search results by selecting options available in the Municipality, Special Population Served, and/or Qualified Personnel search criteria fields.

6. **Do not use the wild card character % as your only Provider search criteria.** There are many provider records stored in the database and it will take quite a long time for the search results to display. In some instances it may cause the application to not respond at all.
7. If you find results that seem to match your search criteria, click the Reference Number link in the Action column next to the provider's Registered Name and view the record. Look for more information that will confirm it is the provider you seek.

### **Referral Source search**

1. Use the **Referral Source Reference Number** if available; it is the most direct search method. Note that a Provider who is also registered as a Referral Source will have a separate **Referral Source Reference Number**. Do not use the Provider Reference Number in this search. If you do not see any results, go to step 2.
2. Enter the Vendor's name and search. If you do not see the results you seek, try using a portion of the name (e.g., *adirondack* for "Adirondack Medical Group, Inc." or *ken* for "Kennedy") in case it has been misspelled. Sort the column labeled "Registered Name" in the search results cluster by clicking the header.
3. Note that Referral Sources categorized as Type 'Parent/Family' and 'Foster Care' will only show up for Municipal Users who work for the municipality recorded as the sources county of residence.

### **Vendor search**

1. Use the **Vendor Reference Number** if available; it is the most direct search method. Note that a provider who are also registered as a Vendor have a separate **Vendor Reference Number**. Do not use the Provider Reference Number in this search. If you do not see any results, go to step 2.
2. Enter the vendor's name and search. If you do not see the results you seek, try using a portion of the name (e.g., *adirondack* for "Adirondack Medical Group, Inc." or *ken* for "Kennedy") in case it has been misspelled. Sort the column labeled "Vendor Name" in the search results cluster by clicking the header.

3. You can narrow the search results by selecting options available in the Municipality, Vendor Transport Method, Vendor Type, and/or Vendor Vehicle Needs search criteria fields.
4. Do not use the wild card character % as your only Vendor search criteria. There are many vendor records stored in the database and it will take quite a long time for the search results to display. In some instances it may cause the application to not respond at all.
5. If you find results that seem to match your search criteria, click the Reference Number link in the Action column next to the vendor's Registered Name and view the record. Look for more information that will confirm it is the vendor you seek.

## DISPLAYING CHILD HOME PAGE

There are several ways to access the Child Home Page based on access rights. The steps below describe the most common options to navigate to the Child's page. First  See **Searching** for information and tips for conducting a search for children.

1. Type all known information in **Child Search** page **Search Criteria** section. Click **Search** button. Records matching criteria display in **Search Results** section. *To search again, click **Reset** button.*
2. Click **Reference Number** link for specific Child. **Child Homepage** displays.



The screenshot shows the 'Child Search' application interface. At the top, there is a 'Child Search' title bar with a magnifying glass icon and a help icon. Below it is a 'Search Criteria' section with various input fields:

Reference Number:	500110
Last Name:	[empty]
Date of Birth:	[empty] 
City:	[empty]
SSN:	[empty]
Mother's Name:	[empty]
First Name: [empty]	
Address Line 1: [empty]	
Family Telephone Number: [empty]	
Child Birth Last Name: [empty]	

Below the search criteria are two buttons: 'Search' and 'Reset'. Underneath is a 'Search Results' section titled '(Number of Items: 1)'. It contains a table with one row of data:

Search Results (Number of Items: 1)						
Reference Number	First Name	Last Name	Address Line 1	City	Date of Birth	Municipality
500110	Stephanie	Stevens	28 Orchard Ln	Albany	3/7/2011	Rensselaer

A red circle highlights the '500110' entry in the 'Reference Number' column of the search results table.

**Child Homepage: Stephanie Stevens - 500110**

<a href="#">Edit</a>	<a href="#">Register Sibling</a>	?	
<b>Child Name</b>			
First Name:	Stephanie	Middle Name:	
Last Name:	Stevens	Suffix:	
<b>Contact</b>			
Address:	28 Orchard Ln Albany (Albany) New York 10001	Phone Number:	518 333-7777
<b>Child Information</b>			
Child's Referral Date:	4/1/2011	Child's Case Status:	
Date of Birth:	3/7/2011	Gender:	Female
Calculated Age of Child:	0 Years, 1 Months	Birth Last Name:	
Ethnic Origin:	Not Hispanic or Latino	Child's Dominant Language:	
Child's Living Arrangement:		Municipality of Residence:	Rensselaer
Child's School District:		Caregiver's Name (If other than parent):	
Caregiver's Relationship:		Date of Death:	
<b>Race</b>			
American Indian or Alaskan Native			

OR

Click **My Cases** from the Menu Bar of Home Page. **My Cases** page displays with a list of Child Cases.

### **Notes:**

The My Cases link displays the list of children assigned to an EIO/D for EIO/D users or the list of children assigned to a service coordinator for service coordinators (municipal or provider). It does not display children for any other user roles or positions.

Refer to the following tips if a child is not appearing in ‘My Cases’ that should be seen:

#### **If the user browsing ‘My Cases’ is an EIO/D:**

- Perform a Child Search from the Home Page by child name
- If Child found in results, go to child homepage → Cases page → Integrated Case → User Roles page, and confirm who is listed as the Child’s current EIO/D
  - If child found but no Integrated Case exists, child was referred as ‘At-Risk’ and will not have an Integrated Case, thus the child will not appear in a “My Cases” list.
  - If child not found in results, either the child’s name has been misspelled or the child was referred to a different county. Contact the Municipal Supervisor or Family for clarification.
- Work with the assigned EIO/D and the Municipal Supervisor to confirm the EIO/D assignment, and (if appropriate) modify the current EIO/D assignment via the ‘New EIO/D’ button on the Case User Roles page.

**Important Note:** If the correct individual's name is listed in Case User Roles, but the child is still not appearing in 'My Cases', contact the NYEIS Help Desk for assistance.

**If the user browsing 'My Cases' is a Service Coordinator** assigned on a service authorization through an active Service Plan (IFSP) for the child:

- a. Perform a Child Search from the Home Page by child name
- b. If Child found in results, go to child homepage → Cases page.  
Click the reference number for the current service plan
  - i. If child not found in results, contact the Child's EIO/D or the Municipal Supervisor of the child's county.
- c. Navigate to the bottom of the service plan and view the current authorization for Service Coordination. Confirm:
  - i. The intended Service Coordinator is listed as Rendering Provider
  - ii. The Start date for the authorization has been met
  - iii. The Authorization is in 'Active' status

**Important Notes:**

- The status of a Service Coordination Service Authorization must be 'Active' in order for the child to appear in 'My Cases'. Children associated with Service Coordination Authorizations not in 'Active' status and/or whose start dates have not yet been met will not appear in 'My Cases'.
- The NYEIS Help Desk is also available to answer questions regarding children who are not seen in the 'My Cases' list.

**Additional Important Information**

Providers, except for those assigned the Provider Service Coordinator role, will not see a list of their cases when clicking the My Cases link on the Menu Bar. Instead, click the Search button on the Menu Bar to display the Child Search page. Enter the wildcard character (%) in the Last Name field and press the Search button. A list of children assigned to the agency will be listed.

3. Click link of Child's name under the **Primary Client** column. **Child Homepage** displays.

**Important Information**

 See Unit 4: Case Management for common Navigation Bar functions.

## DISPLAYING INTEGRATED CASE HOME PAGE

Cases are used to manage the delivery of services to a Child in NYEIS. Cases should be thought of as folders where information for a Child is stored. Examples of Cases/*Folders* are: a Child's IFSPs and Service Authorizations. An Integrated Case is a central location for the Child's Case to be managed. An Integrated Case is created for a Child when an EIO/D is assigned.

There are several ways to access the Integrated Case Home Page based on access rights. See below for the most common options to navigate to the Integrated Case.

1. To locate a specific Case, click My Cases from the Navigation Bar or Menu Bar on Home Page. A list of Cases display.

**Note:**

- The My Cases link displays the list of children assigned to an EIO/D for EIO/D users or the list of children assigned to a service coordinator for service coordinators.

**Important Information**

Providers, except for those assigned the Provider Service Coordinator role, will not see a list of their cases when clicking the My Cases link on the Menu Bar. Instead, click the Search button on the Menu Bar to display the Child Search page. Enter the wildcard character (%) in the Last Name field and press the Search button. A list of children assigned to the provider will be listed.



Case Reference	Primary Client	Case Status	Case Status Date	Start Date
95744	Albert Prego	EIO/D Assigned	8/8/2011	7/1/2011
100356	Beth Lancer	MDE Approved	10/6/2011	8/1/2011
103426	Albie Pinkster	Initial IFSP Approved	10/10/2011	8/1/2011
84736	Alex Parker	Service Coordinator Assigned	10/10/2011	6/12/2011
5656	Dawn Maynus	Initial IFSP Approved	10/24/2011	5/20/2010
87068	Angel Fraser	Initial IFSP Approved	6/23/2011	6/10/2011
82245	Jack Dowling1	Service Coordinator Assigned	10/24/2011	6/11/2011
93188	Farak Pepper	MDE Approved	10/10/2011	7/1/2011
106496	Julie Powers	Initial IFSP Approved	9/6/2011	9/6/2011
19728	Sheena Anderson	IFSP 12 Month Review Approved	8/9/2011	7/15/2010
96513	Kevin Ellis	Service Coordinator Assigned	10/12/2011	7/29/2011
93463	Stephanie Powers	EIO/D Assigned	7/21/2011	7/21/2011
93472	Trudy Good	Interim IFSP	7/21/2011	7/1/2011
100352	Baxter Murray	Initial IFSP Approved	9/26/2011	7/20/2011
76033	Charles Treca	EIO/D Assigned	10/25/2011	4/10/2011

2. Click **Case Reference** link under Case Reference column. **Integrated Case Home** page displays.

OR

3. Click **Search** from Menu Bar of Home Page. **Child Search** page displays.  
 See **Searching** for information and tips for conducting a search for child records.



Reference Number	First Name	Last Name	Address Line 1	City	Date of Birth	Municipality
500019	Park	Montague	777 Hills Town Blvd	Albany	6/1/2010	Albany

4. Type all known information in **Search Criteria** section. Click **Search** button. Records matching criteria display in **Search Results** section. *To search again, click **Reset** button.*



Search Results (Number of Items: 1)						
Reference Number	First Name	Last Name	Address Line 1	City	Date of Birth	Municipality
500019	Park	Montague	777 Hills Town Blvd	Albany	6/1/2010	Albany

5. Click **Reference Number** link for specific Child. **Child Homepage** displays.



6. Click **Cases** from the Navigation Bar. **Cases** page displays.

Cases: Park Montague - 500019				
Case Reference	Type	Owner	Start Date	Status
43781	Individualized Family Service Plan (IFSP)	Ernie Kings	12/22/2010	Active
41984	NYEIS Integrated Case	Ernie Kings	12/6/2010	Draft

7. Click **Case Reference** link under Case Reference column. Be sure to select NYEIS Integrated Case for Case Type. Integrated Case Home page displays.

The screenshot shows the Integrated Case Home page for Case Reference 106496. The page includes a navigation menu on the left with various options like Home, Attachments, Case Participants, Communications, Events, Notes, Assign Evaluator For MDE, Child's Completed Evaluations, Eligibility, IFSP's, Tasks, Transfers, Transitions, Mediations, Impartial Hearings, User Roles, Status History, Municipality of Fiscal Responsibility, Protected Health Information Requests, and Health Assessments. The main content area displays the case details: Case Reference 106496, Child's Name Julie Powers, Status Draft, Child's Latest Referral Date 9/6/2011, and Due Date of Initial IFSP 10/21/2011. It also lists Service Coordination Service Authorizations, Evaluation Service Authorizations, and IFSPs, each with their respective case references, start dates, end dates, and statuses.

## DISPLAYING INDIVIDUALIZED FAMILY SERVICE PLAN HOME PAGE

1. Click **My Cases** from the Menu Bar on User Home Page. A list of children assigned to an EIO/D for EIO/D users or the list of children assigned to a service coordinator for Service Coordinator users displays.

### Important Information

Providers, except for those assigned the Provider Service Coordinator role, will not see a list of their cases when clicking the My Cases link on the Menu Bar. Instead, click the Search button on the Menu Bar to display the Child Search page. Enter the wildcard character (%) in the Last Name field and press the Search button. A list of children assigned to the provider will be listed.

My Cases				
Case List				
Case Reference	Primary Client	Case Status	Case Status Date	Start Date
46080	Kim Speed	Service Coordinator Assigned	6/13/2011	12/21/2010
83984	Re Referral	EIO/D Assigned	6/15/2011	5/5/2011
87066	Sean Rouge	EIO/D Assigned	6/23/2011	6/13/2011

- Click **Case Reference number** link under **Case Reference** column to select a specific Child. **Integrated Case Home** page displays.

### Important Information

Clicking the child's name link under **Primary Client** column will display the **Child Home Page**.

- Click **Case Reference** link under **Case Reference** column in IFSPs section.

The screenshot shows the NYEIS Integrated Case - 106496 page. On the left, there is a navigation menu with various options like Home, Attachments, Case Participants, Communications, Events, Notes, Assign Evaluator For MDE, Child's Completed Evaluations, Eligibility, IFSP's, Tasks, Transfers, Status History, Municipality of Fiscal Responsibility, Protected Health Information Requirements, and Health Assessments. The 'Case Lifecycle Status' option is also listed. The main content area displays the Integrated Case Home information for case reference 106496, child name Julie Powers, status Draft, latest referral date 9/6/2011, and due date of initial IFSP 10/21/2011. Below this, there are tables for Service Coordination Service Authorizations, Evaluation Service Authorizations, and IFSPs. The 'IFSPs' table has columns for Case Reference, IFSP Type, Start Date, End Date, and Status. It lists three entries: 106503 (Closed), 106505 (Closed), and 106506 (Active). The '106506' row is circled in red.

Case Reference	IFSP Type	Start Date	End Date	Status
106506	Initial	9/7/2011	3/6/2012	Active

OR

Click **Search** from Menu Bar of Home Page. **Child Search** page displays.  
*See Searching* for information and tips for conducting a search for child records.

The screenshot shows the NYEIS QA Child Search interface. At the top, there's a navigation bar with links for Home, Inbox, My Calendar, My Cases, Search, About, and Log Out. On the left, a sidebar titled 'navigation' includes links for Child, Provider, Insurance Provider, Referral Source, Organizational Contact, Vendor, and Clearing House. Below this is a 'recent items' section. The main area is titled 'Child Search' and contains a 'Search Criteria' section with fields for Reference Number, Last Name, Date of Birth, City, SSN, Mother's Last Name, First Name, Address Line 1, Family Telephone Number, Child Birth Last Name, Father's Last Name, and a 'Search' and 'Reset' button. Below this is a 'Search Results' section with a table header: Reference Number, First Name, Last Name, Address Line 1, City, Date of Birth, and Municipality.

4. Type all known information in **Search Criteria** section. Click **Search** button. Records matching criteria display in **Search Results** section. *To search again, click **Reset** button.*
5. Click **Reference Number** link for specific Child. **Child Homepage** displays.

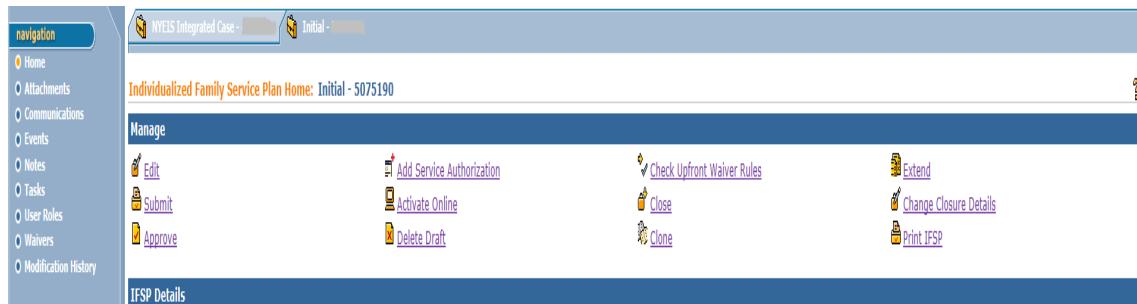
A screenshot of the 'Search Results' table. It has a header row with columns: Reference Number, First Name, Last Name, Address Line 1, City, Date of Birth, and Municipality. Below the header, there is one data row: 500019, Park, Montague, 777 Hills Town Blvd, Albany, 6/1/2010, Albany. The 'Reference Number' cell (500019) is circled in red.

The screenshot shows the 'Child Homepage' for Park Montague - 500019. The navigation bar on the left includes a link for 'Cases', which is circled in red. The main content area shows the child's name (First Name: Park, Last Name: Montague), contact information (Address: 777 Hills Town Blvd, Albany (Albany), New York 10001, Phone Number: 518 222-0000), and child information (Child's Referral Date: 12/6/2010, Child's Case Status:).

6. Click **Cases** from the Navigation Bar. **Cases** page displays. Review records where **Case Type** is **Individualized Family Service Plan (IFSP)**.

A screenshot of the 'Cases' table. The header row includes columns: Case Reference, Type, Owner, Start Date, and Status. Below the header, there are two data rows: 43781, Individualized Family Service Plan (IFSP), Ernie Kings, 12/22/2010, Active; and 41984, NYEIS Integrated Case, Ernie Kings, 12/6/2010, Draft. The 'Type' column for the first row (43781) is circled in red.

7. Click **Case Reference** link under **Case Reference** column. **Individualized Family Service Plan Home** page displays.



### **Note:**

- The start date column and status column should be used to locate the appropriate IFSP.

## **ATTACHMENTS**

NYEIS allows a User to attach scanned or uploaded documents to a Child's Integrated Case and in other areas of the Child's record (e.g., MDE, IFSP and SA's) for various authorized Users to view. The process for attaching files is consistent in all locations. The example used below is attaching a file to the Child's Integrated Case.

Early Intervention Officials are responsible for confidential exchange of information among the Parent, Evaluators, Service Providers and Service Coordinators. This includes electronic data and documents contained within NYEIS. All information stored in NYEIS is part of the Child's EIP record. When parents provide informed consent for a general release of information, Municipalities and all EIP Providers delivering services to the Child will be able to view all data in a Child's Integrated Case. This includes any documents attached to the Child's Cases/*Folders*.

When an Attachment is created in a specific area of a Case, the new Attachment will be found in the location where the attachment was generated (e.g., Child, Integrated Case, IFSP, SA). An attachment created in an IFSP Case will not be viewed from the Child's Integrated Case or the Child Home Page. Attachments

should be attached to the Case that is most relevant to the attachment content (e.g., information on services for a Child should be attached to the IFSP attachment section).

When parents do not provide consent for a general release, and deny consent or request selective consent for release of confidential information, the Child's record will not be accessed/used in NYEIS. Providers and Municipalities *must* maintain all required information off-line.

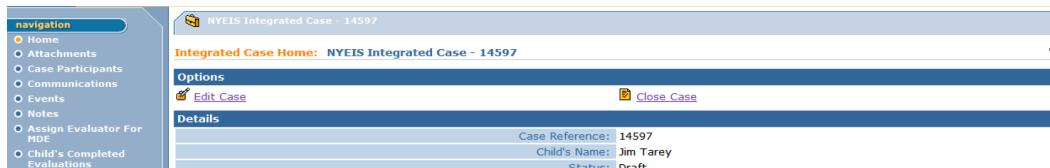
## Attaching Files to a Case

Any portable document format (PDF) file can be attached to a Case. The User *must* have appropriate software to open/display the file attached. Files up to 5 MB in size can be attached.

1. Display the Child's Integrated Case Home Page.  See ***Displaying the Integrated Case Home Page*** for further information.

### Important Information

Attachments should be placed where they are most relevant. This may be on the Child's Integrated Case Home page, a Child's IFSP Home page, a Service Authorization home page or on the MDE.



2. Click **Attachments** from the Navigation Bar. **Attachments** page displays.

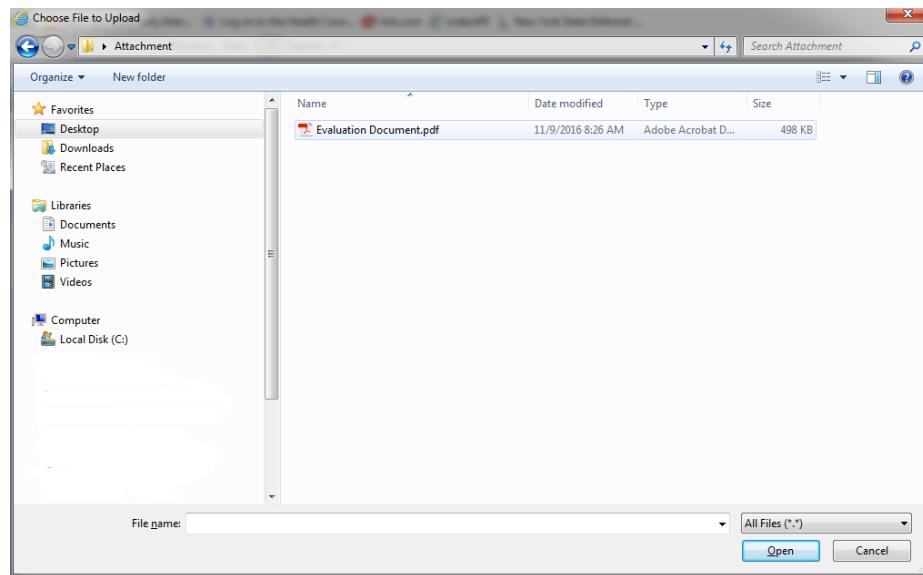
Attachments: NYEIS Integrated Case - 14597			
Action	Description	Date	Status
<a href="#">View</a>   <a href="#">Edit</a>	file	2/22/2009	Active

3. Click **New** button. **Create Attachment** page displays.

Create Attachment: NYEIS Integrated Case - 14597

<b>Select file to attach</b>	
File:	<input type="text"/> <input type="button" value="Browse..."/>
<b>File Details</b>	
Location:	<input type="text"/>
Document Type:	Letter <input type="button" value="▼"/>
Receipt Date:	3/25/2009 <input type="button" value="▼"/>
<b>Attachment Description</b>	
*Description:	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Cancel"/>	

- Click **Browse** button for **File** field in the **Select file to attach** section. **Choose file** dialog box displays.



- Locate and select file. Click **Open**. File attachment name displays in **File** field.

Create Attachment: NYEIS Integrated Case - 14597

<b>Select file to attach</b>	
File:	<input type="text" value="C:\Maureen\Maureens\1\1"/> <input type="button" value="Browse..."/>
<b>File Details</b>	
Location:	<input type="text"/>
Document Type:	Letter <input type="button" value="▼"/>
Receipt Date:	3/25/2009 <input type="button" value="▼"/>
<b>Attachment Description</b>	
*Description:	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Cancel"/>	

- Complete **File Details** section. *It is important to select Document Type.*

7. Type **Description** in **Attachment Description** section. *Fields requiring data entry are marked with an asterisk. A field can also be required based on logic that will not have an asterisk.*

8. Click **Save** to save attachment and display **Attachments** page.

OR

Click **Save & New** to save attachment and add another file.

**Note:**

Attachments are stored in New York State's Enterprise Content Management (ECM) system, FileNet

### Viewing Attachments

Attachments can only be viewed by a User with assigned access rights.

1. Display the Child's Integrated Case Home Page. See **Displaying Integrated Case Home Page** for further information.

#### Important Information

Look for attachments where they are most relevant. This may be on the Child's Integrated Case Home page, a child's IFSP Home page, a Service Authorization home page or on the MDE.

2. Click **Attachments** from the Navigation Bar. **Attachments** page displays with a list of attachments.

Attachments: NYEIS Integrated Case - 14597			
<a href="#">New</a>			
Action	Description	Date	Status
<a href="#">View</a>   <a href="#">Edit</a>	file	2/22/2009	Active

3. Click [View](#) link under **Action** column. **View Attachment** page displays.

**View Attachment: NYEIS Integrated Case -**

<b>Details</b>			
Name:	RequestforIFSPAmendment -.pdf	Participant Name:	
Location:		Reference:	
Document Type:	Letter	Receipt Date:	8/26/2016
Status:	Active		
<b>Attachment Description</b>			
Approved IFSP amendment for to add Spec.Inst and Speech			
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Close</a>			

- Click **file name** link in **Name** field of **Details** section. **File Download** dialog box displays.



- Click **Open** to quickly open and view file. *Clicking Open does not save the file to a location. Click Save button to download and save file to a desired location prior to opening.* File displays.
- Click **Close** button to close file. **View Attachments** page displays.

## Editing/Replacing Attachments

Attachments can only be edited/replaced by a User with assigned access rights. The contents of the document cannot be edited.

- Display the Child's Integrated Case Home Page. See **Displaying Integrated Case Home Page** for further information.

### Important Information

Look for attachments where they are most relevant. This may be on the Child's Integrated Case Home page, a child's IFSP Home page, a Service Authorization home page or on the MDE.

- Click **Attachments** from the Navigation Bar. **Attachments** page displays with a list of attachments.

**Attachments: NYEIS Integrated Case - 14597**

Action	Description	Date	Status
<a href="#">View</a>   <a href="#">Edit</a>	file	2/22/2009	Active

- Click Edit link under **Action** column for the attachment to change. **Modify Attachment** page displays.

**Modify Attachment: NYEIS Integrated Case -**

<b>Details</b>	<b>Save</b>	<b>Cancel</b>
Attached File: <b>SW.Request.pdf</b> <a href="#">[Open Attachment]</a> New File: <input type="button" value="Browse..."/> Location: <input type="text"/> Receipt Date: <input type="text" value="8/26/2016"/>	Participant Name: <input type="text"/> Document Type: <b>Supporting Documentation</b> Reference: <input type="text"/>	
<b>Attachment Description</b> *Description: <input type="text" value="Approved IFSP Amendment to increase Social Work"/>		
<b>Save</b> <b>Cancel</b>		

4. Apply changes in **Details** or **Attachment Description** sections.

#### **Important Information**

As of NYEIS Version 5.0, if an attachment is replaced, it may only be replaced with a PDF file. To replace an existing file with a different attachment, click **Browse** button for **New File** field in **Details** section.

5. Click **Save** button. **Attachments** page displays.

#### **Note:**

- Click **Edit** button from **View Attachment** page as an alternative for editing Attachments

### **Deleting Attachments**

Attachments can only be deleted by a User with assigned access rights.

1. Display the Child's Integrated Case Home Page. See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.

#### **Important Information**

Look for attachments where they are most relevant. This may be on the Child's Integrated Case Home page, a child's IFSP Home page, a Service Authorization home page or on the MDE.

2. Click **Attachments** from the Navigation Bar. **Attachments** page displays.
3. Click **View** link under **Action** column. **View Attachment** page displays.
4. Click **Delete** button. **Delete Attachment** page displays with message ***Are you sure you want to delete this attachment?***

[Delete Attachment: NYEIS Integrated Case - 14597](#)

Are you sure you want to delete this attachment?

5. Click **Yes** button. **Attachments** page displays. Attachment is removed from the list.

## VALIDATING ADDRESSES

Every **Primary Mailing Address** and **Mailing Address** *must* be verified when entering or accepting the data into NYEIS. Address validation is not available to Providers or the Public when creating a Referral. Below is an example of where an address validation is used. In NYEIS whenever an address is entered, it *must* be validated.

### Important Information

Although you must submit the address for validation as outlined below, Address validation functionality is not currently active at this time.

1. Click **Search** from Menu Bar of Home Page. **Child Search** page displays.
2. Type all known Child data in **Search Criteria** section.
3. Click **Search** button. Records matching display in **Search Results** section.  
*To search again, click **Reset** button.*
4. Click **Reference Number** link for Child. **Child Homepage** displays.

**Child Homepage: Sarah Abercrombie - 455**

Child Name	
First Name:	Sarah
Last Name:	Abercrombie
Contact	
Address:	145 Sanford Lane Albany (Albany) New York 10001
Phone Number:	518 777-9999
Child Information	
Child's Referral Date:	10/14/2010
Date of Birth:	10/11/2010
Calculated Age of Child:	0 Years, 6 Months
Ethnic Origin:	Hispanic or Latino
Child's Living Arrangement:	
Child's School District:	
Caregiver's Relationship:	
Race	
Black or African American	
Family Information	
Mother's First Name:	Mary Beth
Mother's Date Of Birth:	
Father's First Name:	Frank
Father's Date Of Birth:	
Is a Parent Proficient in English?:	Yes
Mother's Last Name:	Abercrombie
Mother's Dominant Language:	
Father's Last Name:	
Father's Dominant Language:	
Preferred Communication:	

5. Click **Addresses** from the Navigation Bar. **Addresses** page displays.

The screenshot shows a table with one row of data. The columns are labeled: Action, Primary, Type, Address, City, From, and To. The data in the table is:

<a href="#">View</a>   <a href="#">Edit</a>	Yes	Registered	765 Terrace Ln	Albany	10/14/2010	
---	-----	------------	----------------	--------	------------	--

6. Click New button. **Create Address** page displays.

The screenshot shows a form with three main sections: Details, Address, and Comments. The Details section includes fields for Type (Physical), Primary status, From date (11/1/2010), and To field. The Address section has an Address input field and a search icon. The Comments section is empty. At the bottom are Save, Save & New, and Cancel buttons.

7. Click **Search** icon in **Address** section. **Address Validation** page displays.

The screenshot shows the **Address Validation** form. It has fields for Address Line 1, Address Line 2, City, State, County, Zip, and Census Tract. Below the form are two sets of Submit and Cancel buttons. At the bottom are Action and Formatted Address Value buttons.

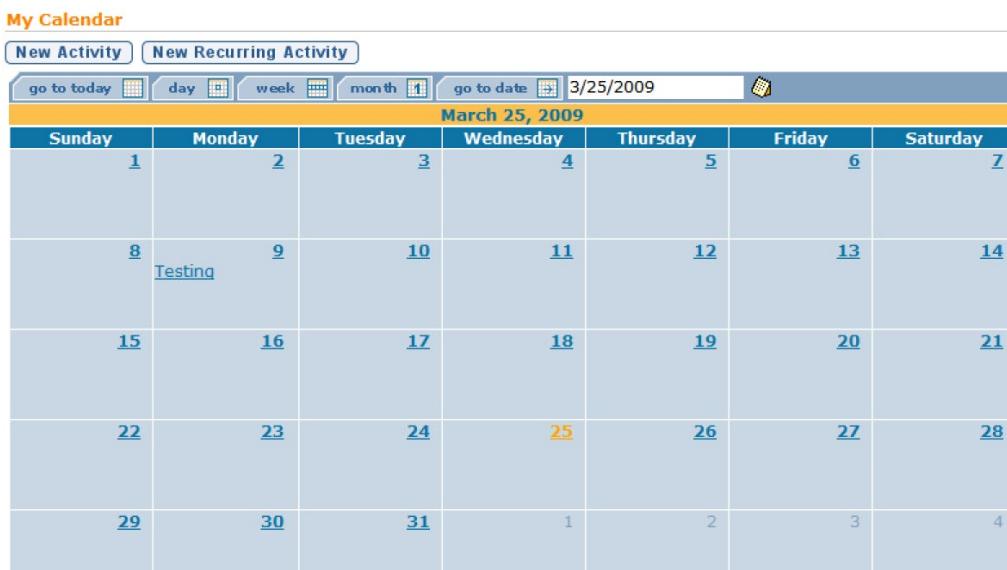
8. Use the **Tab** key to move from field-to-field to fill in all known information. **City, State, County and Zip** are required fields. **Address 1** is the street number and name; **Address 2** is the apartment number, suite #, etc. **Census Tract** field will not be used at this time. Click **Submit** button. Validation of address takes place immediately upon submission. Lower section of page provides a list of available addresses. The first address listed in the results is the address that was manually entered. Select this address if the other addresses do not match from validation process.

9. Click **Select** link under **Action** column to save validated address. **Modify Address** page redisplays with valid Address.
  
10. Click **Save** button. **Addresses** page displays and valid address is tied to Child's record.

## DISPLAYING CALENDAR

The Calendar allows a User to see all activities by date.

1. Click **My Calendar** from Menu Bar. **My Calendar** page displays.



### Note:

A down arrow displays on dates within the Calendar view that contain additional events that cannot be viewed. Click down arrow to view the full set of events for that specific date.

**Exception**  
Currently not available to all NYEIS User roles.

### Creating a New Activity on a Calendar

Users have access to and can create **Activities** on their own calendar. Only authorized Users will have the ability to create **Activities** on a Child's calendar. **Activities** can be created by a User for involvement by other Case Participants. For example, an EIO/D can schedule a conference call to discuss information

about a Child's services with an ongoing Service Coordinator and a service Provider.

1. Click **My Calendar** from Menu Bar. **My Calendar** page displays.



2. Click **New Activity** button. **Create Activity** page displays.

**Create Activity**

**Details**

\*Subject:  \*Priority:

Location:   Ignore all conflicts:

**Time**

\*Start:   00 : 00 : 00      \*End:   00 : 00 : 00

All Day:  \*Show As:

**Concerning**

Client:

Case Reference:

**Comments**

**Buttons:** Save, Save & New, Save & Invite, Cancel

3. Enter appropriate information for the following sections using **Tab** key to navigate from field-to-field: **Details**, **Time**, **Concerning** and **Comments**. *Fields requiring data entry are marked with an asterisk. A field can also be required based on logic that will not have an asterisk. Date fields must be formatted as mm/dd/yyyy format.*
4. Click **Save** button to save activity and return to **Events** page. Activity displays on specified date.



OR

Click **Save & New** button to save activity and create an additional activity.

OR

Click **Save & Invite** button to invite Attendees. See **Unit 4: Case Management, Events, Inviting Attendees** for further information.

### Creating Recurring Activity on a Calendar

The Recurring Events function in NYEIS can be very useful to record Events that will occur on the same schedule for a period of time. A good example would be to record the various schedules for the multiple services a Child receives (e.g., PT every Tuesday and Thursday from 10:00 A.M. - 10:30 A.M.). Services can be set up on the Child's calendar for other authorized Service Providers, the Service Coordinator and the EIO/D to view.

1. Click **My Calendar** from Menu Bar. **My Calendar** page displays.
2. Click **New Recurring Activity** button. **Create Recurring Activity** page displays.

**Create Recurring Activity**

Save Save & New Save & invite Cancel

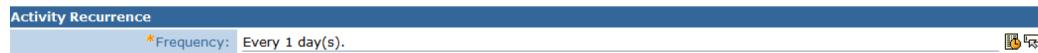
<b>Details</b>
* Subject: <input type="text"/> * Priority: <input type="button" value="Medium"/>
Location: <input type="text"/> <input type="button"/> <input type="button"/>
<b>Time</b>
* Start: <input type="text"/> <input type="button"/> : <input type="button"/> : <input type="button"/> * End: <input type="text"/> <input type="button"/> : <input type="button"/> : <input type="button"/>
* Show As: <input type="button" value="Busy"/> Ignore Conflicts: <input type="checkbox"/>
All Day: <input type="checkbox"/>
<b>Concerning</b>
Client: <input type="button" value="Person"/> <input type="button"/> <input type="button"/>
Case Reference: <input type="text"/> <input type="button"/> <input type="button"/>
<b>Activity Recurrence</b>
* Frequency: <input type="text"/> <input type="button"/> <input type="button"/>
<b>Recurrence Duration</b>
Number of Occurrences: <input type="text"/> To Date: <input type="text"/> <input type="button"/>
<b>Comments</b>

3. Enter appropriate information for the following sections using **Tab** key to navigate from field-to-field: **Details**, **Time** and **Concerning**. *Fields requiring data entry are marked with an asterisk. A field can also be required based on logic that will not have an asterisk. Date fields must be formatted as mm/dd/yyyy format.*
4. Click **Frequency Pattern**  button for **Frequency** field in **Activity Recurrence** section. Select a **Frequency Pattern** window displays.

Select a Frequency Pattern - Windows Internet Explorer  
[https://bealbld.bealbany.com:9044/Curam/en\\_US/frequency-editor.jsp](https://bealbld.bealbany.com:9044/Curam/en_US/frequency-editor.jsp) Certificate Error

<input checked="" type="radio"/> Daily    Every <input type="text"/> day(s) <input type="radio"/> Every Weekday
<input type="radio"/> Weekly    Recur every <input type="text"/> week(s) on: <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday <input type="checkbox"/> Sunday
<input type="radio"/> Monthly    Day <input type="text"/> of every <input type="text"/> month(s) <input type="radio"/> the <input type="button"/> Day <input type="button"/> of every <input type="text"/> month(s)
<input type="radio"/> Bi-monthly    day(s) <input type="text"/> and <input type="text"/> of every month <input type="radio"/> the <input type="button"/> first <input type="button"/> and <input type="button"/> second <input type="button"/> Monday <input type="button"/> of every month
<input type="radio"/> Yearly    Every <input type="button"/> January <input type="button"/> 1 <input type="radio"/> the <input type="button"/> first <input type="button"/> Day <input type="button"/> of every <input type="button"/> January <input type="button"/>
<input type="button" value="OK"/> <input type="button" value="Cancel"/>

5. Select recurring pattern. Click **OK**. **Create Recurring Activity** page displays with **Frequency** field populated.



6. Specify the **Number of Occurrences** for the Event or define a **To Date** in **Recurrence Duration** section.
7. Type **Comments** (*Optional*).
8. Click **Save** button to save activity and return to **Events** page. Activity displays on specified date.



OR

Click **Save & New** button to save activity and create an additional activity.

OR

Click **Save & Invite** button to invite Attendees. See **Unit 4: Case Management, Events, Inviting Attendees** for further information.