

Evaluations



How To

Add Evaluations, Screenings, and Waivers in EI-Hub's Case Management Module.



Audience

- EIO/D
- Municipal and Data Entry Staff for Evaluating Provider of Record
- Evaluating Providers
- Initial Service Coordinator
- Ongoing Service Coordinator

Information regarding bi-lingual add-ons will be added to this training resource soon! Stay tuned!

Topics Covered

1. [Overview](#)
2. [Viewing and Entering Evaluations](#)
3. [Creating a Service Authorization for an Evaluation](#)
4. [Assigning an Evaluator](#)
5. [Viewing and Adding Waivers](#)
6. [Entering Screening Information](#)
7. [Entering a Developmental Assessment](#)
8. [Entering a Supplemental Assessment](#)
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Overview

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Evaluations

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How To

Move a Child Forward in the Evaluation Process in EI-Hub



About Evaluations (Initial MDE Specific)

- By the time a Child is ready for an evaluation, the assigned Service Coordinator has met with the Child's family and Referral and Intake information has been entered into the Child's EI-Hub record (i.e., Child Info, Family Info, and Insurance tabs).
- It is recommended the evaluation be conducted and entered within 30-days of the date of referral. The first step is for the Service Coordinator to work with the family to select an Evaluator and create and submit an Evaluation Service Authorization.
- During this process, the Service Coordinator assigns an Evaluation Provider of Record (agency) who will supply the Evaluator. This work takes place within the **Eval Info** tab/**Evaluation Information** panel of a Child's EI-Hub record. Once the Evaluation Service Authorization is created and submitted, the Evaluation Service Authorization routes to the EIO/D's **Evaluations** dashboard.
- The EIO/D should routinely check the **Evaluations** dashboard/**/Non-IFSP Enrollment Review Needed** filter name to track Evaluation Service Authorizations needing review/approval.
- The EIO/D reviews and approves the Evaluation Service Authorization under the **Evaluations** tab.

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Move a Child Forward in the Evaluation Process in EI-Hub



About Evaluations (Initial MDE Specific)

- As previously explained, the Service Coordinator assigns an Evaluation Provider of Record (i.e., an agency) to conduct the Evaluation and the EIO/D approves the Service Authorization.
- If an Evaluation Provider of Record is assigned to supply an Evaluator, the assignment routes to that Agency's **Children Assigned to Caseload** Dashboard for the Agency to accept. Once the Agency accepts, a Service Authorization number generates, and the Service Authorization becomes 'Active'. The Evaluation Provider of Record may now access the Child's record to assign an Evaluator directly from the Child's EI-Hub record (Evaluator Assignment panel). It is recommended that Agencies routinely check the **Children Assigned to Caseload** dashboard for new assignments.
- If the Evaluation Provider of Record accepts the assignment, but the Evaluator assignment remains pending, this pending item will display on the **Children with an Agency Missing a Practitioner** dashboard awaiting an Evaluator to be assigned by the Evaluation Provider of Record.
- After an Evaluator is assigned, the Evaluator may begin the Evaluation process.
- Once the Evaluation is conducted, the Evaluator or Data-Entry staff at the assigned Evaluation Provider of Record can enter and submit the Evaluation results into the Child's EI-Hub record.



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How To

Move a Child Forward in the Evaluation Process in EI-Hub



About Evaluations (Initial MDE Specific)

- Next, the MDE Team/Service Coordinator (depending on the county) enters other pertinent information, such as the Child's Medical History and Medical Diagnostic Codes etc., into the remaining panels of the **Eval Info** tab.
- Once all information has been entered, EI-Hub auto-generates a **MDE Summary Report (MDE Summary Report panel)** which pulls together results for all evaluations and screenings into a concise, grid format.
- Once the Child's Evaluation is submitted and medical records entered, the Service Coordinator/Evaluating Provider's Data-Entry staff submits the Child's eligibility determination based on the evaluation results (via the **Eligibility** tab).
- Upon submittal, eligibility determination is routed to the EIO/D's **Evaluations** dashboard where the EIO/D must routinely search for and approve cases requiring an 'Eligibility Review' or 'Eligibility Determination' to move a Child forward to the next step, the **Individualized Family Service Plan (IFSP)**, if eligible.

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Viewing and Entering Evaluations

Evaluations Job Aid

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Evaluations

Evaluation Information

How To

View and Enter Evaluation Information

Notes

- The **Evaluation Information** panel captures information to create an evaluation service authorization.
- After the Service Coordinator has been assigned to a referred Child and parental consent is obtained, the Service Coordinator initiates the evaluation process.
- An eligibility determination must be made within 45 days of a Child's referral. If eligible, an IFSP meeting must take place within 45 days of referral as well.
- The Evaluation Service Authorization Number and Status is viewable from the Evaluation Information grid, once approved by the EIO/D and accepted by an Agency (Evaluation Provider of Record).

Step / Action

- After searching, selecting and opening a Child's record, locate and select the **Eval Info** tab within the Child's record.
- The **Evaluation Information** panel/screen displays housing the **Evaluation Information** grid.
- To edit an **existing** evaluation service authorization, select the **Edit** button from the **Evaluation Information** grid.
- To **create** a new evaluation service authorization, select the **Add Evaluation Information** button from the **Evaluation Information** grid.

Action	Authorization #	Agency	Evaluator	EVAL Meeting Date	Start Date	End Date	Diagnosis Code	Waiver Review Needed	Assessment Date	Action
	A10062031	[REDACTED]	[REDACTED]		10/31/2022	10/31/2022		False		Edit Delete
	A10062111	[REDACTED]	[REDACTED]		10/31/2022	10/31/2022		False		Edit Delete

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Creating a Service Authorization for an Evaluation

Evaluations Job Aid

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Evaluations

Evaluation Information - Authorization

How To

Create a Service Authorization for an Evaluation

Notes

- After the Service Authorization has been approved and Evaluator assigned, the evaluation can be conducted, and results entered.
- An asterisk (*) indicates a required field.
- Please note, the IFSP fields are **not** applicable when creating an Initial MDE,

Step / Action

1. Enter the following into the **Evaluation Information** panel to create an evaluation service authorization:

- Pay Source:** An auto-generated field that populates with the Child's Country of Residence to start
- Program:** To add a program, select Binoculars to activate a drop-down search list and select the appropriate program/evaluation type.
- Service Type:** This is an auto-generated field that populates based on the 'Program' selected.
- Dates of Evaluation (From/To):** Manually enter the **start** date ("From") of the Child's evaluation or use the calendar picker (invoked by clicking this field). Manually enter the **end** date ("To") of the Child's evaluation or use the calendar picker (invoked by clicking this field).

The screenshot shows the 'Evaluation Edit' screen in the EI-Hub software. On the left, there is a sidebar with tabs: Home, Child, Edit, and Evaluation Edit. The 'Evaluation Edit' tab is active. In the main area, there are four tabs: Evaluation, Screening, Development Assessment, and Supplemental Evaluation. The 'Evaluation' tab is selected. On the left, there is a vertical panel titled 'Evaluation Information' with three items: *Pay Source, Evaluator Assignment, and Waiver. The 'Pay Source' field contains 'New York City'. The 'Program' field is highlighted with a yellow border and has a small binoculars icon to its right. A red arrow points from this field to a 'Select Program' modal window. The 'Select Program' window has a title bar 'Select Program'. It has a 'Program' dropdown menu which is currently open, showing a list of evaluation types. The item 'Bilingual Evaluation Add on - NonPhysician' is highlighted in blue. Other items in the list include Multidisciplinary Evaluation, Bilingual Multidisciplinary Evaluation Add on, Multidisciplinary Evaluation, Non-physician Supplemental Eval - Assistive Technology, Non-physician Supplemental Eval - Audiology, Non-physician Supplemental Eval - Nursing, Non-physician Supplemental Eval - Nutrition, Non-physician Supplemental Eval - OT, Non-physician Supplemental Eval - Psych, Non-physician Supplemental Eval - PT, Non-physician Supplemental Eval - Social Work, Non-physician Supplemental Eval - Special Instruction, Non-physician Supplemental Eval - Speech, Non-physician Supplemental Eval - Vision, Physician Supplemental Evaluation, and Screening Evaluation. At the bottom of the 'Select Program' window, it says '1 TO 11'.

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Evaluations

Evaluation Information - Authorization

How To

Create a Service Authorization for an Evaluation

Notes

- After the Service Authorization has been approved and Evaluator assigned, the evaluation can be conducted, and results entered.
- An asterisk (*) indicates a required field.

Step / Action

2. Continue to enter information for the Evaluation Service Authorization from the **Evaluation information** panel :

- Agency (Evaluation Provider of Record):** To add an Agency or Individual Provider, begin typing (type-ahead) in this field to activate a search list and select the appropriate provider.
- Assigned Date:** Houses the date the evaluating agency is assigned.
- Accepted Assignment:** Displays whether the agency has 'Accepted' or 'Rejected' the assignment.
- Response Date:** Displays the date the agency responded by 'Accepting' or 'Rejecting' the assignment.
- Assignment Status:** Displays the status of the assignment, noting whether the assignment has been 'Accepted' or 'Rejected'.

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2

Agency		<input checked="" type="checkbox"/>
Assigned Date		
Accept Assignment		
Response Date		
Assignment Status		
Location Type		
Agency Provider Sites		
*Authorization Status		
Waiver Review Needed	<input type="checkbox"/>	
Waiver Type		
Authorization Number		
EIO/D Section		
EIO/D Approval		
EIO/D Review Date		
		Submit

Evaluations

Evaluation Information - Authorization

How To

Create a Service Authorization for an Evaluation

Notes

- After the Service Authorization has been approved and Evaluator assigned, the evaluation can be conducted, and results entered.
- An asterisk (*) indicates a required field.

Step / Action

3. Continue to enter information for the Evaluation Service Authorization from the **Evaluation information** panel :

- Location Type:** Use this drop-down and select the appropriate location type from the list.
- Agency Provider Site:** Use this drop-down and select the appropriate agency provider site from the list.
- Authorization Status:** This field is read-only; it cannot be changed and does not change from 'Inactive' to 'Active' until accepted by an agency.
- Waiver Review Needed (Checkbox):** A read-only checkbox, if selected, displays if a waiver review for the Child is needed.

3

Agency		<input checked="" type="checkbox"/>
Assigned Date		
Accept Assignment		
Response Date		
Assignment Status		
Location Type		
Agency Provider Sites		
*Authorization Status		
Waiver Review Needed	<input type="checkbox"/>	
Waiver Type		
Authorization Number		
EIO/D Section		
EIO/D Approval		
EIO/D Review Date		
		Submit

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Evaluations

Evaluation Information - Authorization



How To

Create a Service Authorization for an Evaluation



Notes

- After the Service Authorization has been approved and Evaluator assigned, the evaluation can be conducted, and results entered.
- An asterisk (*) indicates a required field.

Step / Action

4. Continue to enter information for the Evaluation Service Authorization from the **Evaluation information** panel :

- Waiver Type:** If applicable, a read-only field displays the waiver type for the Child. Auto-populates if Waiver Type-15 (Billing Rule Violation) applies. [Please see Section 5: Viewing and Adding Waivers of this job aid for more information.](#)
- Authorization Number:** This read-only field populates the Child's current authorization number. An authorization number auto-generates after the agency accepts the assignment.

4

<input type="checkbox"/> Waiver Review Needed	<input type="text"/> Waiver Type	<input type="button" value=""/>
<input type="text"/> Authorization Number		<input type="button" value=""/>
A10391829		<input type="button" value=""/>
<input type="text"/> EIO/D Section		<input type="button" value=""/>
EIO/D Approval		<input type="button" value=""/>
Approve		<input type="button" value=""/>
<input type="text"/> EIO/D Review Date		<input type="button" value=""/>
10/27/2022		<input type="button" value="Submit"/>

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Evaluations

Evaluation Information - Authorization

How To

Create a Service Authorization for an Evaluation (SC)

Notes

- After the Service Authorization has been approved and Evaluator assigned, the evaluation can be conducted, and results entered.
- An asterisk (*) indicates a required field.

Step / Action

- Continue to enter information for the Evaluation Service Authorization from the **Evaluation information** panel :
 - EIO/D Approval:** The EIO/D uses this drop-down and selects the appropriate response ('Approve' or 'Reject'). If the Service Authorization is rejected, the waiver is also rejected. The waiver status can then be seen within the Waiver grid and will indicate as rejected. The EIO/D refers to the **Evaluations** dashboard and selects the '**Enrollment Review Needed**' filter to review, approve, or reject evaluation service authorizations.
 - EIO/D Review Date:** A read-only field. Reflects EIO/D's review date. The system auto-populates this field with the current date.
- Select the **Submit** button to submit the authorization.



The screenshot shows a form for creating a Service Authorization (SC). The fields visible are:

- Waiver Review Needed (checkbox)
- Waiver Type (dropdown menu)
- Authorization Number (text input): A10391829
- EIO/D Section (dropdown menu)
- EIO/D Approval (dropdown menu, set to 'Approve')
- EIO/D Review Date (text input): 10/27/2022

A large black arrow labeled '5' points to the 'EIO/D Approval' dropdown. A blue arrow labeled '6' points to the 'Submit' button in the bottom right corner.



Please refer to the EI-Hub Case Management User Guide Unit 8. Child for more information

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Assigning an Evaluator

Evaluation Job Aid

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Evaluations

Evaluation Information

How To

Assign an Evaluator

Notes

- The **Evaluation Information** panel captures information to create a service authorization.
- The Evaluation Service Authorization Number and Status populates within the **Evaluation Information** grid once accepted by an Agency (Evaluation Provider of Record).

Step / Action

- After searching, selecting and opening a Child's record, locate and select the **Eval Info** tab within the Child's record.
- The **Evaluation Information** panel/screen displays.
- To edit an **existing** Evaluation Service Authorization and Evaluation, select the **Edit** button from the **Evaluation Information** grid.
- To **create** an Evaluation Service Authorization and enter Evaluation information, select the **Add Evaluation Information** button from the **Evaluation Information** grid.

Action	Authorization #	Agency	Evaluator	EVAL Meeting Date	Start Date	End Date	Diagnosis Code	Waiver Review Needed	Assessment Date	Action
	A10062031	redacted	redacted	10/31/2022	10/31/2022		redacted	False	redacted	Edit Delete
	A10062111			10/31/2022	10/31/2022			False		Edit Delete

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Evaluations

Evaluator Assignment

How To

Assign an Evaluator

Notes

- This panel can be edited by the Service Coordinator if the Primary Evaluator is known.
- The assigned Agency (Evaluation Provider of Record) may also edit this panel to assign a specific evaluator if needed.
- Please note, if the Agency has not responded to their assignment (to assign an Evaluator), no Evaluator can be assigned and an error message displays.

Step / Action

- The **Evaluation** tab populates.
- Select the **Evaluator Assignment** panel.
- Select **Binoculars** to lookup primary evaluator
- Select a therapist from the **Therapist** drop-down located on the **Primary Evaluator** pop-up window.
- Select the **Save** button.
- The **Primary Evaluator NPI** will prepopulate.
- If **Secondary Evaluator** is needed, follow the same process for selecting the Primary Evaluator.
- Select the **Submit** button once all evaluators are selected.

1

2

3

4

5

6

7

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Entering Screening Information

Evaluations Job Aid

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Evaluations

Screenings

How To

Access Screening Information

Notes

- The **Evaluation Information** panel captures information to create a Service Authorization.
- The screenshot displayed does not show all columns available in the **Evaluation Information** grid.
- The Evaluation Service Authorization Number and Status populates within the **Evaluation Information** grid once accepted by an Agency (Evaluation Provider of Record).
- Service Authorizations for evaluations and screenings must be approved prior to the evaluation/screening being conducted and results entered into the system.

The screenshot shows the EI-Hub software interface with the 'Eval Info' tab selected. A sidebar on the left lists various evaluation-related panels. The main area is titled 'Evaluation Information' and contains a grid titled 'Evaluation Information grid'. The grid has columns for Authorization #, Agency, Evaluator, EVAL Meeting Date, Start Date, End Date, Diagnosis Code, Waiver Review Needed, Assessment Date, and Action (with 'Edit' and 'Delete' buttons). Two rows of data are visible in the grid.

Action	Authorization #	Agency	Evaluator	EVAL Meeting Date	Start Date	End Date	Diagnosis Code	Waiver Review Needed	Assessment Date	Action
	A10062031	[REDACTED]	[REDACTED]		10/31/2022	10/31/2022		False		<button>Edit</button> <button>Delete</button>
	A10062111				10/31/2022	10/31/2022		False		<button>Edit</button> <button>Delete</button>

Step / Action

- After searching, selecting and opening a Child's record, locate and select the **Eval Info** tab within the Child's record.
- The **Evaluation Information** panel/screen displays.
- To edit an **existing** Evaluation Service Authorization and Evaluation, select the **Edit** button from the **Evaluation Information** grid.
- To **create** an Evaluation Service Authorization and enter Evaluation information, select the **Add Evaluation Information** button from the **Evaluation Information** grid.

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Evaluations

Screenings

How To

Enter Screening Information

Notes

- To enter screening information, 'Screening Evaluation' must be identified as the 'Program' and 'Service Type' within the Evaluation Service Authorization (**Evaluation tab**). If the 'Service Type' is not identified as a 'Screening Evaluation', users will be unable to enter screening information (an error message will populate).
- Chronological age will prepopulate based on the **screening date** and **Child's date of birth**. The screening date must be entered for either field to populate.
- These fields can be completed by the Initial Service Coordinator or **other appropriate roles**.
- Certain fields (i.e., the screening date) are **required** to complete subsequent fields (i.e., screening time). Users should select the date and time the screening occurs.
- Parental Consent and Parental Withdrawal of Consent** can happen on the same day. If checked for the same day, this is considered a withdraw.
- Users cannot withdrawal consent **after** the screening occurs.
- Individuals Present at Screening should include *all* present including evaluators, providers, parents, siblings, etc.
- An evaluator may bill for both a screening and evaluation for the same child as long as the screening was performed at the child's home or at an off-site location different from the evaluator's business site. Please refer to EI Memorandum 2005-02.



Please refer to the EI-Hub Case Management User Guide Unit 8.
Child for more information

Evaluation Screening Development Assessment Supplemental Evaluation

*Pay Source
Albany

*Program
Screening Evaluation

*Service Type
Screening Evaluation

Error: You cannot enter 'Developmental Assessment Information' when the service type is 'Screening Evaluation'.

Home / Child / Ward, Eric / Evaluation

Evaluation Edit

Evaluation Screening Development Assessment Supplemental Evaluation

Screening Information

Screening Results

Screening Recommendations

If the evaluator determines that they will conduct a screening, prior to a screening being conducted, the evaluator must provide notice to the parent/legal guardian of the intent to conduct a screening. This notice must also inform the parent/legal guardian that parental consent is required to conduct a screening and that the parent/legal guardian has the right to request a multidisciplinary evaluation at any time during the screening process (10 NYCRR §69-4.8(b)(1)(i)).

Notification of Intent to Conduct a Screening given to parent

Date Parent/Legal Guardian Consented to Screening

Parent/Legal Guardian Consented to Screening

Date Parent/Legal Guardian withdrew screening consent

Parent/Legal Guardian withdrew screening consent

Screening Date

Screening Time (ignored until Screening Date is entered)

Screening Date

Parent/Legal Guardian Consented to Share Information with Primary Care Physician

Location of Screening

If applicable, parent's/guardian's written designation of an alternate family member to be present during the screening has been uploaded

Chronological Age at Date of Screening

NA

Individuals Present at Screening

Adjusted Age at Date of Screening

5 months 15 days

Submit

Evaluations

Screenings



How To

Enter Screening Information



Notes

Please carefully review the notes on the previous slide when completing this panel.

Step / Action

1. Once the appropriate Service Type (Screening Evaluation) has been approved and selected as a part of the Evaluation Service Authorization, Select the **Screening** tab to add screening information.
2. Select the **Screening Information** panel.
3. Complete fields, including all individuals present at the screening.
4. Select the **Submit** button.

If the evaluator determines that they will conduct a screening, prior to a screening being conducted, the evaluator must provide notice to the parent/legal guardian of the intent to conduct a screening. This notice must also inform the parent/legal guardian that parental consent is required to conduct a screening and that the parent/legal guardian has the right to request a multidisciplinary evaluation at any time during the screening process (10 NYCRR §69-4.8(b)(1)(i)).

Notification of Intent to Conduct a Screening given to parent

Parent/Legal Guardian Consented to Screening

Parent/Legal Guardian withdrew screening consent

Screening Date
[Field]

Screening Time (ignored until Screening Date is entered)
[Field]

Parent/Legal Guardian Consented to Share Information with Primary Care Physician

If applicable, parent's/guardian's written designation of an alternate family member to be present during the screening has been uploaded
Chronological Age at Date of Screening
NA

Notification Intent Date
[Field]

Date Parent/Legal Guardian Consented to Screening
[Field]

Date Parent/Legal Guardian withdrew screening consent
[Field]

Individuals Present at Screening
[Field]

Location of Screening
[Field]

Adjusted Age at Date of Screening
5 months 15 days

4 **Submit**

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Screenings

How To

Enter Screening Results

Notes

By checking the 'Parent/Legal Guardian: Was Child's Behavior Optimal/Typical?' checkbox, you are indicating that "Yes" the Child's behavior was optimal/typical. If this checkbox is **not** checked, you will be expected to enter comments as to why the Child's behavior is atypical.

In a future EI-Hub update, an error message will appear if the, 'Was Child's Behavior Optimal/Typical?' checkbox is left unchecked and there are no comments entered.

Step / Action

1. Select the **Screening Results** panel.
2. The **Screener Name**, **Screener's Credentials**, and **Screener's Agency** fields auto-populates based on the Agency and Evaluator identified in the Evaluation Service Authorization (**Evaluation tab.**)
3. Enter the Screening results and any other observations and notes pertaining to the screening results into the remaining fields.
4. Select the **Submit** button to submit the screening results.

The screenshot shows the 'Screening' tab selected in the top navigation bar. The 'Screening Results' panel is active. Numbered callouts point to specific fields:

- 1**: Points to the 'Screener Name – Individual (rendering provider)' dropdown menu.
- 2**: Points to the 'Screener's Agency' field.
- 3**: Points to the 'Comments' text area.
- 4**: Points to the blue 'Submit' button in the bottom right corner.



Evaluations

Screenings



How To

Enter Screening Recommendations (Evaluator)



Notes

- There are several reasons why an Evaluator may check the, 'No Further Evaluation(s) Required at this Time' checkbox, reasons include a parent changing their mind and requesting an MDE during a screening or the Evaluator recommending a Developmental Screening. In both instances, the 'No Further Evaluation(s) Required at this Time' checkbox should be checked along with any comments explaining why the screening was not complete.
- Developmental Monitoring should be selected if recommendation is not for an MDE.
- Asterisks (*) indicate required fields.

Step / Action

1. After entering Screening Results, select the **Screening Recommendations** panel.
2. Select Yes/No from the 'Parent/Legal Guardian Requested MDE' drop-down field to indicate whether the parent has requested an MDE.
3. Proceed to enter comments pertaining to the Parent's MDE decision.
4. If applicable, select the checkbox and enter comments if 'No Further Evaluations(s) [are] Required at this Time' or if an ' MDE is Recommended'.

The screenshot shows the 'Evaluation Edit' screen in the EI-Hub software. The top navigation bar includes 'Home', 'Child', and 'Evaluation'. Below the navigation is a breadcrumb trail: 'Evaluation Edit'. The main content area has tabs for 'Evaluation', 'Screening' (which is selected), 'Development Assessment', and 'Supplemental Evaluation'. On the left, there is a vertical sidebar with three panels: 'Screening Information', 'Screening Results', and 'Screening Recommendations'. The 'Screening Recommendations' panel is currently active. It contains a dropdown menu labeled '*Parent/Legal Guardian Requested Multi-Disciplinary Evaluation (MDE)' with the option '--- Select ---' and a 'Comments' text area below it. To the right of this panel, a large text area titled 'Recommendations by Screener:' contains two sections. The first section, indicated by a yellow dashed line, has a checked checkbox 'No Further Evaluation(s) Required at this Time' and a 'Comments' text area. The second section, also indicated by a yellow dashed line, has an unchecked checkbox '(MDE) Recommended?' and a 'Comments' text area. Numbered callouts (1, 2, 3, 4) with arrows point to each of these four items respectively.

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Please refer to the EI-Hub Case Management User Guide Unit 8. Child for more information



Evaluations Screenings



How To

Upload and Submit Screening Documentation (if needed)



Notes

- Asterisks (*) indicate required fields.
- Acceptable upload file types include image, PDF, Spreadsheet, Text, and Word.

Step / Action

1. Continue entering any additional recommendations within the remaining fields (i.e., Suggestions for parents/caregivers to foster further development, Suggested Activities and Developmental Milestones)
2. Select the **Upload Screening Documentation** button to upload any pertinent screening documentation.
3. The **Upload Screening Documentation** dialogue box will appear. Select the appropriate **Document Type** from the 'Document Type' drop-down menu.
4. Select the **Choose File** button to upload and select a file from your computer hard-drive.
5. Select the **Submit** button to submit the screening recommendations.

Suggestions for parents/caregivers to foster further development

If in the future you have concerns about your child's development, please contact

Upload Screening Documentation

Submit

Upload Screening Documentation

Document Area : Evaluation
 *Document Type

--- Select ---

--- Select --

Development Assessment Document
 Screening Summary
 Supplemental Evaluation Document

Choose File No file chosen

Notes

Upload **Cancel**

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Entering a Developmental Assessment (MDE)

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Evaluations

Developmental Assessment

How To

Access and/or Enter a Developmental Assessment (MDE)

Notes

- The **Evaluation Information** panel captures information to create a Service Authorization.
- The Evaluation Service Authorization Number and Status populates within the **Evaluation Information** grid once accepted by an Agency (Evaluation Provider of Record).
- Service Authorizations for evaluations and screenings **must be approved prior** to the evaluation/screening being conducted and results entered into the system.

Step / Action

- After searching, selecting and opening a Child's record, locate and select the **Eval Info** tab within the Child's record.
- The **Evaluation Information** panel/screen displays.
- To edit an **existing** Evaluation Service Authorization and Evaluation, select the **Edit** button from the **Evaluation Information** grid.
- To **create** an Evaluation Service Authorization and enter Evaluation information, select the **Add Evaluation Information** button from the **Evaluation Information** grid.

Action	Authorization #	Agency	Evaluator	EVAL Meeting Date	Start Date	End Date	Diagnosis Code	Waiver Review Needed	Assessment Date	Action
	A10062031	[REDACTED]	[REDACTED]	10/31/2022	10/31/2022			False		Edit Delete
	A10062111	[REDACTED]	[REDACTED]	10/31/2022	10/31/2022			False		Edit Delete

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Evaluations

Developmental Assessment

How To

Enter Developmental Assessment Information (MDE)

Notes

Asterisks (*) indicate required fields.

Step / Action

1. Select the **Development Assessment** tab.
2. Select the **Developmental Assessment - Information** panel.
3. Select the required 'Parent/Legal Guardian Consented to Evaluation' checkbox.
4. Enter information in the remaining panel fields, as appropriate.
5. The 'Chronological and Adjusted Age' fields auto-populate.
6. Use the **Upload Development Assessment Document** button to upload any documentation related to the Developmental Assessment.
7. Select the **Submit** button to submit the Developmental Assessment Information.

The screenshot shows the 'Evaluation Edit' screen for a child named 'Ward, Eric'. The 'Development Assessment' tab is active. A callout box labeled '1' points to the tab. A callout box labeled '2' points to the 'Developmental Assessment - Information' panel. A callout box labeled '3' points to the 'Parent/Legal Guardian Consented to Evaluation' checkbox, which is checked. A callout box labeled '4' points to the 'Date Parent/Legal Guardian Consented to Evaluation' field, which contains '04/01/2022'. A callout box labeled '5' points to the 'Chronological Age at Date of Evaluation' field, which contains '6 months 11 days'. A callout box labeled '6' points to the 'Upload Development Assessment Document' button. A callout box labeled '7' points to the 'Submit' button at the bottom right.

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Evaluations

Development Assessment

How To

Access the Developmental Assessment Information (MDE)

Notes

- Asterisks (*) indicate required fields.
- Users may enter information for any of the 5 domains; however, each domain assessed in a supplemental evaluation must be entered as a separate item in this panel.

Step / Action

1. Select the **Development Assessment** tab.
2. Select the **Evaluation Assessment** panel, which houses the **Evaluation Assessment** grid.
3. To edit an existing MDE, select the **Edit** button from the **Evaluation Assessment** grid.
4. To add an MDE, select the **Add Evaluation Assessment** button from the **Evaluation Assessment** grid.
5. Upon clicking, the **Add Evaluation Assessment** button, the **Evaluation** tab populates housing the **Evaluation Assessment** panel/screen.

Domain Category	Assessment Date	Raw Test Score	Developmental Status	Evaluation Method	Instrument	Action
Adaptive	12/05/2022	0	12 month or more delay	Criterion Referenced Test		Edit Delete

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Evaluations

Development Assessment

How To

Enter Developmental Assessment Data (MDE)

Notes

- Asterisks (*) indicate required fields.
- There are 5 domains. The **Evaluation Assessment** panel must be completed for each domain.
- It may take more than one day to complete the **Evaluation Assessment**.
- ICD codes should be pulled from a Child's record based on the referral and medical information entered.
- Only designated practitioners (i.e., Speech Language Pathologists or Nurse Practitioners) can assign an ICD code(s) most appropriate for a Child.
- Users can enter N/A if no raw score is available.

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Evaluations

Development Assessment

How To

Enter Developmental Assessment Data (MDE)



Important Information Pertaining to the MDE

- Regulations require that children who have been found to have a delay only in the communication domain delay shall be defined as a score of 2.0 standard deviations below the mean in the area of communication; or, if no standardized test is available or appropriate for the child, or the tests are inadequate to represent the child's developmental level in the accurately informed clinical opinion of the evaluator, a delay in the area of communication shall be a severe delay or marked regression in communication development as determined by specific qualitative evidence-based criteria articulated in clinical practice guidelines issued by the Department. Two additional options are available in the Communication Domain Status drop-down field labeled "No Standardized test Available" and "Test Inadequately Represents Child's Developmental Level" to accommodate this requirement.
- If the evaluation is the Initial MDE, neither the option for "1.0 Standard deviation or more below the mean" nor "Outside expected range" can be selected.
- If the Raw Test Score is not applicable, please enter N/A in the **Raw Test Score** field.

The screenshot shows the 'Evaluation Assessment' section of the EI-Hub software. It contains the following fields:

- *Domain Category: A dropdown menu with the placeholder "... Select ...".
- *Assessment Date: A date input field.
- *Assessment Evaluator: A dropdown menu with the placeholder "... Select ...".
- *Raw Test Score: An input field.
- *Developmental Status: A dropdown menu with the placeholder "... Select ...".
- *Evaluation Method: A dropdown menu with the placeholder "... Select ...".
- Evaluation Instrument: A dropdown menu with the placeholder "... Select ...".
- If Other Instrument: An input field.
- Clinical Opinion: A large text area.
- ICD 10 Code & Description Search: A search bar with a magnifying glass icon.
- Diagnosed Conditions: A dropdown menu with the placeholder "Select Some Options".
- Was Child's Behavior Optimal/Typical?
If No, Explain: A text area.



Please refer to the EI-Hub Case Management User Guide Unit 8. Child for more information.

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Evaluations

Development Assessment

How To

Submit Developmental Assessment Data (MDE)

Notes

- Asterisks (*) indicate required fields.
- By checking 'the Was Child's Behavior Optimal/Typical?' checkbox, you are indicating that "Yes" the Child's behavior was optimal/typical. **If this checkbox is not checked, you will be expected to enter comments as to why the Child's behavior is atypical.**

Step / Action

1. Complete all **required** fields housed within the **Evaluation Assessment** panel. **This screen needs to be completed for each domain.**
 - Select **Domain Category**
 - Enter **Assessment Date**
 - Select the **Assessment Evaluator** (which populates with the therapist from the agency assigned to complete the evaluation).
 - Enter **Raw Test Score** (**the Hub currently reflects this as a required field and it will be changed in the future. If no value needs to be entered here, please type in "N/A" or other appropriate value.**)
 - Select **Developmental Status**
 - Select **Evaluation Method** (**if multiple evaluation methods need to be reflected, you may have to complete this screen again**)
 - Enter **Evaluation Instrument** information
2. If applicable, enter a clinical opinion into the **Clinical Opinion** text-entry box.

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Evaluations

Development Assessment

How To

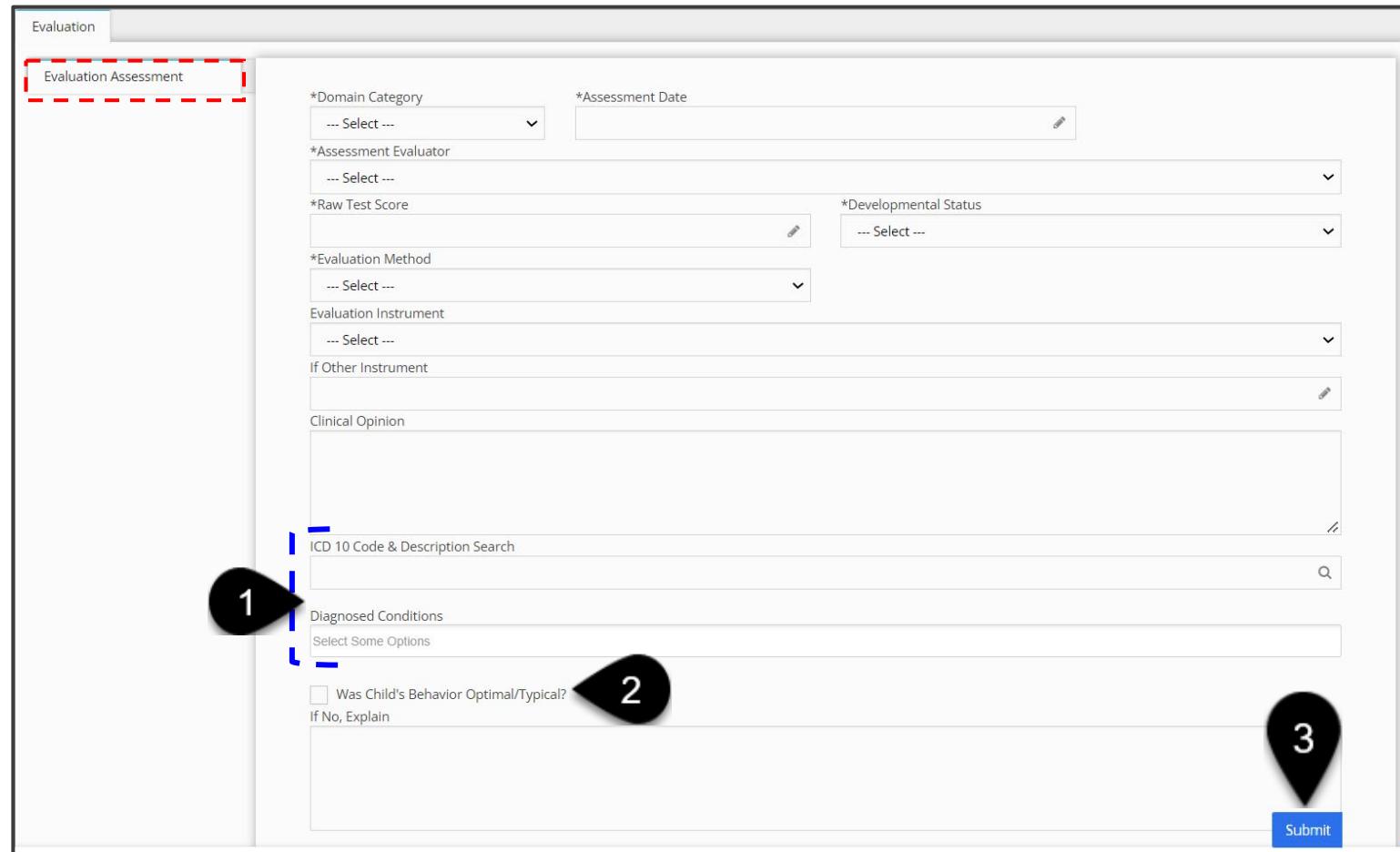
Submit Developmental Assessment Data (MDE)

Notes

- Asterisks (*) indicate required fields.
- By checking 'the Was Child's Behavior Optimal/Typical?' checkbox, you are indicating that "Yes" the Child's behavior was optimal/typical. **If this checkbox is not checked, you will be expected to enter comments as to why the Child's behavior is atypical.**

Step / Action

1. Use the type-ahead to activate smart search and locate **ICD 10 Code(s) & Description(s)**. Select the appropriate code. Multiple Codes can be selected by clearing the search field, searching for and selecting the new code which will then populate in the 'Diagnosed Conditions' field.
2. Select the checkbox, if 'Child's Behavior was Optical/Typical'
3. Select the **Submit** button to submit the domain entered.



The screenshot shows the 'Evaluation' screen with the 'Evaluation Assessment' section highlighted by a red dashed box. The form includes fields for Domain Category, Assessment Date, Assessment Evaluator, Raw Test Score, Developmental Status, Evaluation Method, Evaluation Instrument, and Clinical Opinion. A large 'ICD 10 Code & Description Search' input field is present. Step 1 is indicated by a blue arrow pointing to this search field. Step 2 is indicated by a black arrow pointing to a checkbox labeled 'Was Child's Behavior Optimal/Typical?'. Step 3 is indicated by a black arrow pointing to a blue 'Submit' button in the bottom right corner.

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Entering a Supplemental Assessment

Evaluations Job Aid

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Evaluations

Supplemental Evaluation

How To

Access and/or Enter a Supplemental Assessment

Notes

- The **Evaluation Information** panel captures information to create a service authorization.
- The Evaluation Service Authorization Number and Status populates within the **Evaluation Information** grid once accepted by an Agency (Evaluation Provider of Record).
- Service Authorizations for evaluations and screenings must be approved prior to the evaluation/screening being conducted and results entered into the system

Step / Action

- After searching, selecting and opening a Child's record, locate and select the **Eval Info** tab within the Child's record.
- The **Evaluation Information** panel/screen displays.
- To edit an **existing** Evaluation Service Authorization and Evaluation, select the **Edit** button from the **Evaluation Information** grid.
- To **create** an Evaluation Service Authorization and enter Evaluation information, select the **Add Evaluation Information** button from the **Evaluation Information** grid.

Action	Authorization #	Agency	Evaluator	EVAL Meeting Date	Start Date	End Date	Diagnosis Code	Waiver Review Needed	Assessment Date	Action
	A10062031	[redacted]	[redacted]	10/31/2022	10/31/2022			False		Edit Delete
	A10062111			10/31/2022	10/31/2022			False		Edit Delete

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Evaluations

Supplemental Evaluation

How To

Enter Supplemental Evaluation Information

Notes

- Asterisks (*) indicate required fields.
- By checking the "Was Child's Behavior Optimal/Typical?" checkbox, you are indicating that "Yes" the Child's behavior was optimal/typical. If this checkbox is not checked, you will be expected to enter comments as to why the Child's behavior is atypical.
- In a future EI-Hub update, an error message will appear if the, 'Was Child's Behavior Optimal/Typical?' checkbox is left unchecked and there are no comments entered.

Step / Action

- Select the **Supplemental Evaluation** tab.
- The **Supplement Evaluation** screen populates with the **Supplemental Evaluation** panel.
- Indicate if the parent or legal guardian consents to a Supplemental Evaluation, by checking the 'Parent/Legal Guardian to Supplemental Evaluation' checkbox.
- Enter information in the fields, as appropriate.
- Fields pertaining to the Child's age (Chronological Age/Adjusted Age) will pre-populate.

Supplement Evaluation

Evaluation Assessment

*Parent/Legal Guardian Consented to Supplement Evaluation

Date From _____ Date To _____

Location Type
... Select ...

Description of Assessment Process and Conditions

Individuals Present at Evaluation
Ms. Lamps

Chronological Age at Date of Evaluation
2 years 10 months 24 days

Adjusted Age at Date of Evaluation

Bilingual Evaluation Performed

Language
... Select ...

Other Language

Was Child's Behavior Optimal/Typical?

Summary of Observation of Child's Behavior

Upload Evaluation Document

Submit

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Please refer to the EI-Hub Case Management User Guide Unit 8. Child for more information.



Evaluations

Supplemental Evaluation

How To

Upload Supplemental Evaluation Documentation (if needed)

Notes

- Asterisks (*) indicate required fields.
- Acceptable upload file types include image, PDF, Spreadsheet, Text, and Word.

Step / Action

1. Select the **Upload Evaluation Document** button.
2. The **Upload File** dialogue box will appear. Select **Document Type** from the dropdown menu.
3. Enter the **Document Name** button.
4. Select the **Choose File** button.
5. Enter **Notes**, if applicable.
6. Select the **Upload** button.
7. Select the **Submit** button to submit the Supplemental Evaluation information.

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Please refer to the EI-Hub Case Management User Guide Unit 8. Child for more information.



Evaluations

Supplemental Evaluation

How To

Enter Supplemental Evaluation Assessment Data

Notes

- Asterisks (*) indicate required fields.
- Users may enter information in one or more of the 5 domains depending upon the supplemental evaluator's area of expertise; however, each domain assessed in a supplemental evaluation must be entered as a separate item in this panel.

Step / Action

1. Select the **Supplemental Evaluation** tab.
2. Select the **Evaluation Assessment** panel, which houses the **Evaluation Assessment** grid.
3. To edit an existing Evaluation Assessment, select the **Edit** button from the **Evaluation Assessment** grid.
4. To add an Evaluation Assessment, select the **Add Evaluation Assessment** button from the **Evaluation Assessment** grid.
5. The **Evaluation** tab populates housing the **Evaluation Assessment** panel/screen.

Domain Category	Assessment Date	Raw Test Score	Developmental Status	Evaluation Method	Instrument	Action
Adaptive	01/02/2023	0	12 month or more delay	Standardized Test		Edit Delete

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Please refer to the EI-Hub Case Management User Guide Unit 8. Child for more information.



Evaluations

Supplemental Evaluation

How To

Submit Supplemental Evaluation Assessment Data

Notes

- Asterisks (*) indicate required fields.
- By checking 'the Was Child's Behavior Optimal/Typical?' checkbox, you are indicating that "Yes" the Child's behavior was optimal/typical. If this checkbox is **not** checked, you will be expected to enter comments as to why the Child's behavior is atypical.

Step / Action

1. Complete all **required** fields housed within the **Evaluation Assessment** panel. **This screen is submitted for each domain that may have been completed.**
 - Select **Domain Category**
 - Enter **Assessment Date**
 - Select the **Assessment Evaluator** (which populates with the therapist from the agency assigned to complete the evaluation).
 - Enter **Raw Test Score** or **N/A** if applicable.
 - Select **Developmental Status**
 - Select **Evaluation Method**
 - Enter **Instrument** information
2. Enter the **Evaluation Instrument** information. If 'Informed Clinical Opinion & Standardize Test' is selected as the **Evaluation Method**, enter a clinical opinion into the **Clinical Opinion** text-entry box.

The screenshot shows the 'Evaluation' screen in the EI-Hub system. The left side features a sidebar with navigation icons for Home, Case Management, Reports, and Help. The main content area has a title 'Evaluation' and a sub-section titled 'Evaluation Assessment'. This section contains several required fields marked with asterisks (*): 'Domain Category' (dropdown), 'Assessment Date' (date picker), 'Assessment Evaluator' (dropdown), 'Raw Test Score' (text input), 'Developmental Status' (dropdown), 'Evaluation Method' (dropdown), 'Evaluation Instrument' (dropdown), and 'Clinical Opinion' (text area). Below these are optional sections for 'ICD 10 Code & Description Search' (button) and 'Diagnosed Conditions' (checkbox). At the bottom is a checkbox for 'Was Child's Behavior Optimal/Typical?' followed by a text area for 'If No, Explain'. A blue 'Submit' button is located in the bottom right corner.

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Evaluations

Supplemental Evaluation



How To

Submit Supplemental Evaluation Assessment Data



Notes

- Asterisks (*) indicate required fields.
- By checking 'the Was Child's Behavior Optimal/Typical?' checkbox, you are indicating that "Yes" the Child's behavior was optimal/typical. If this checkbox is **not** checked, you will be expected to enter comments as to why the Child's behavior is atypical.

Step / Action

1. Use the type-ahead to activate smart search and locate **ICD 10 Code(s) & Description(s)**. Select the appropriate code. Multiple Codes can be selected by clearing the search field, searching for and selecting the new code which will then populate in the 'Diagnosed Conditions' field.
2. Select the checkbox, if 'Child's Behavior was Optical/Typical'
3. Select the **Submit** button to submit the domain entered.

Evaluation

Evaluation Assessment

*Domain Category
... Select ...

*Assessment Date

*Assessment Evaluator
... Select ...

*Raw Test Score

*Developmental Status
... Select ...

*Evaluation Method
... Select ...

Evaluation Instrument
... Select ...

If Other Instrument

Clinical Opinion

ICD 10 Code & Description Search

Diagnosed Conditions
Select Some Options

Was Child's Behavior Optimal/Typical?
If No, Explain

1

2

3

Submit

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Please refer to the EI-Hub Case Management User Guide Unit 8. Child for more information.



Completing Additional Evaluation Panels

Evaluations Job Aid

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Evaluations

Evaluation Information



How To

Enter Child Medical Records

Child Medical Records: The ability to edit and view content is dependent upon user roles.

Step / Action

1. Select the **Child Medical Record** panel.
2. Select the **Add Child Medical Records** button to add **new** medical record information. Use the **Edit** or **Delete** buttons to edit or delete existing medical record information.
3. The **Child Medical Records** panel/screen populates.
4. Proceed to complete the following steps:
 - Select the 'Parent Consent on file' checkbox.
 - Select the **Entry Type** (Medical History/Assessment Info)
 - Select the appropriate facility from the **Source of History – Type of Facility** drop-down.
 - Enter the name of the **Non-EI Provider name**.
 - Select the **Provider Specialty** from the drop-down list.
 - Enter a description of the Child's medical history/results of the Child's assessment in the **History/Results of Assessment** field.
 - Begin typing an ICD10 code in the **ICD Code Search** field to activate the **ICD10 Code Search** and choose the appropriate ICD10 code from the populated list.
 - Begin typing a diagnosis in this field to activate the **Diagnosis** drop-down and choose (Select Some Options) the appropriate diagnosis description from the list.
5. Upon completion, select the **Submit** button to save your entry.

Parental Consent on File?	Type	Date of History	Source of History - Type of Facility	Provider Name	Non-EI Provider Name	Provider Type	Description of History/Results of Assessment	Diagnosis	Action
True	Assessment	11/07/2022	Primary Health Care Provider		Karen James		Idiopathic normal pressure hydrocephalus (INPH) is a potentially reversible neurodegenerative disease commonly characterized by a triad of dementia, gait, and urinary disturbance.	G91.2 - (Idiopathic) normal pressure hydrocephalus,	<button>Edit</button> <button>Delete</button>

Child and Family History

Child Medical Records

3

4

5

Information obtained with parental consent on file

*Type: Assessment

*Date: 11/07/2022

*Source of History - Type of Facility: Primary Health Care Provider

Non-EI Provider Name: Karen James

Provider Specialty: Family Practice/IM & Pediatrics

Description of History/Results of Assessment: Idiopathic normal pressure hydrocephalus (INPH) is a potentially rever

ICD10 Code Search: G91.2 - (Idiopathic) normal pressure hydrocephalus

Diagnosis (ICD10 Code Search Results): G91.2 - (Idiopathic) normal pressure hydrocephalus

Submit

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Evaluations

Evaluation Information



Current Medical Professionals Involved with Child: This panel is **optional** in the system and captures the Child's current medical provider(s) (i.e., pediatrician and/or specialist). This panel houses an NPI lookup allowing users to search for and locate a Child's current medical provider.

Step / Action

1. Select the **Current Medical Professionals Involved with Child** panel. The **Child Doctor** grid/table populates.
2. Select the **Add Child Doctor** button to add a new Practitioner. Use the **Edit** or **Delete** buttons to edit or delete an existing practitioner.
3. The **Current Medical Professionals Involved with Child** panel/screen populates.

Doctor Name	Doctor Type	Practice	Address	City	State	Zip	Phone	Fax	License	NPI	Email	Medicaid Number	Enrolled in OPRA?	Birth Date	Action
ACCETTA, JOSEPH			100 COURTHOUSE ROAD,	FRANKLIN SQUARE	NY	11010				1730278763			False		Edit Delete

Entering the NPI will yield best results. Doctor Name and/or City/State may also be entered to produce results if NPI is unknown. Click the best match for the criteria entered.

NPI	Doctor's First Name	Doctor's Last Name	City
State	... Select ...	Search	
*Doctor Name			
Date of Birth			
Practice			
NPI			
License Number			

Evaluations

Evaluation Information



How To

Enter Information for Medical Professional Involved with Child

Current Medical Professionals Involved with Child: This panel is **optional** in the system and captures the Child's current medical provider(s) (i.e., pediatrician and/or specialist). This panel allows users to search for current medical professionals by various criteria such as, provider's first name, last name, city, and state. Users are encouraged to search for providers using the 10-digit NPI number as this feature yields the most accurate results.

Step / Action

1. Search for a current practitioner using **any** of the following search criteria:
 - 10-digit NPI code
 - Doctor's First Name
 - Doctor's Last Name
 - City
 - State
2. Select the **Search** button to conduct a search based on the search criteria entered.
3. An **NPI Registry Lookup** dialogue box populates with a list of physicians that meet the search criteria entered.
4. To select a physician, hover over the physician's profile and a **Select** button appears. Click the **Select** button.

Entering the NPI will yield best results. Doctor Name and/or City/State may also be entered to produce results if NPI is unknown. Click the best match for the criteria entered.

NPI	Doctor's First Name	Doctor's Last Name	City
State ... Select ...			
Search			
*Doctor Name			
Date of Birth			
Practice			
NPI			
License Number			

ACCETTA, [REDACTED]

Select

NPI : 17[REDACTED]

Organization Name :

Taxonomy Code [REDACTED]

Location : 100 COURTHOUSE ROAD, FRANKLIN SQUARE, NY

Mailing Address : 100 COURTHOUSE ROAD, FRANKLIN SQUARE, NY

BANZON, [REDACTED]

NPI : 125[REDACTED]

Organization Name :

Taxonomy Code : [REDACTED]

Location : 113 FRANKLIN AVENUE, FRANKLIN SQUARE, NY

Mailing Address : 113 FRANKLIN AVE, FRANKLIN SQUARE, NY

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Evaluations

Evaluation Information



How To

Enter Information for Medical Professional Involved with Child

Current Medical Professionals Involved with Child: This panel is **optional** in the system and captures the Child's current medical provider(s) (i.e., pediatrician and/or specialist). This panel allows users to search for current medical professionals by various criteria such as, provider's first name, last name, city, and state. Users are encouraged to search for providers using the 10-digit NPI number as this feature yields the most accurate results.

Step / Action

1. The **Current Medical Professionals Involved with the Child** panel/screen populates with the selected physician's information.
2. After all information populates, select the **Submit** button.

1

*Doctor Name	<input type="text"/>		
Date of Birth	<input type="text"/>		
Practice	<input type="text"/>		
NPI	<input type="text"/> 1730278763		
License Number	<input type="text"/>		
Medicaid Number	<input type="text"/>		
*Taxonomy Code	<input type="text"/> 208000000X		
	Address Line 1	<input type="text"/> 100 COURTHOUSE ROAD	
City	<input type="text"/> FRANKLIN SQUARE		
State	<input type="text"/> NY		
Zip	<input type="text"/> 11010		
Phone Number	<input type="text"/>		
Fax Number	<input type="text"/>		
Email	<input type="text"/>		
<input type="checkbox"/> Enrolled In OPRA			

2

Submit

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Evaluations

Evaluation Information



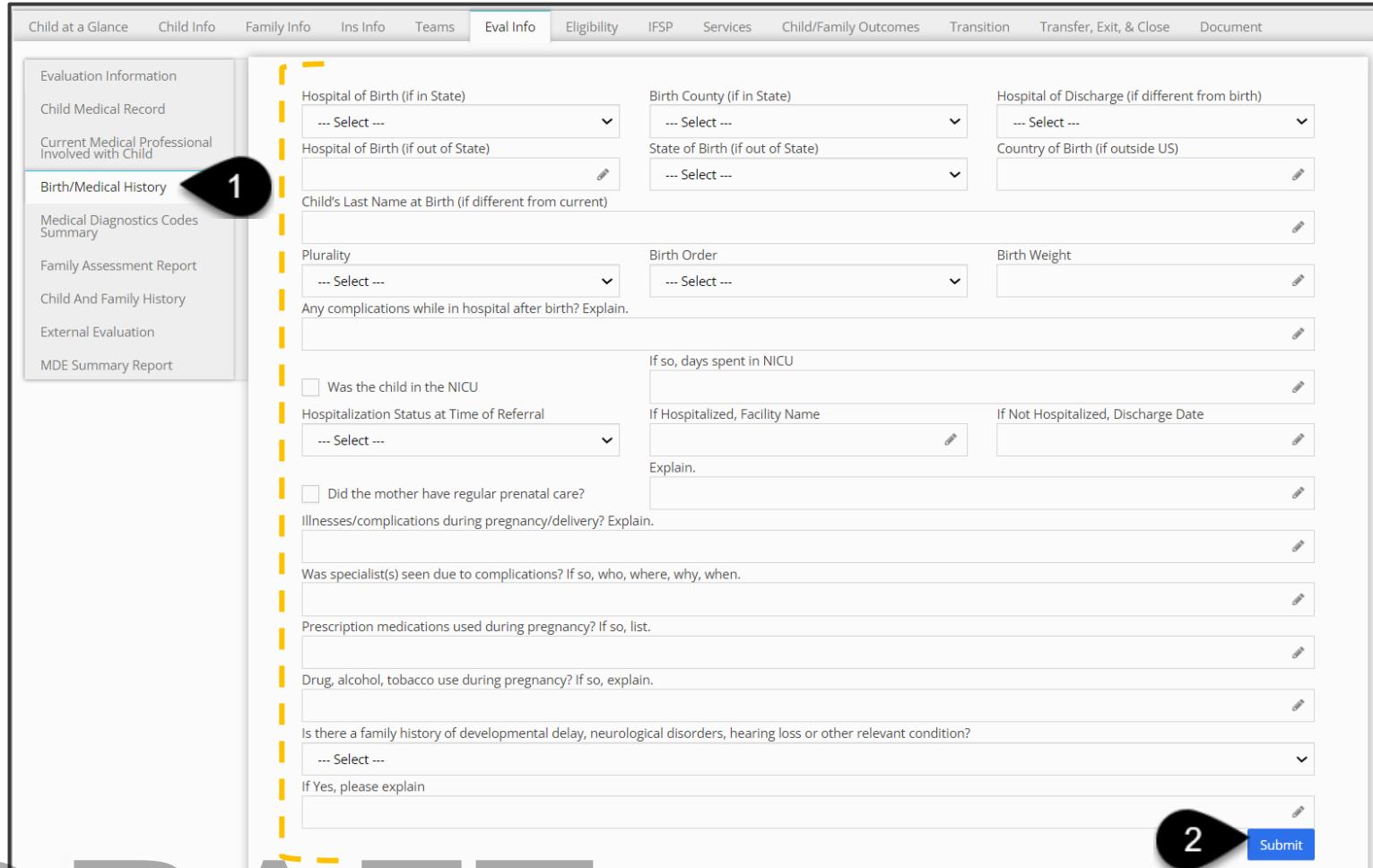
How To

Enter Birth and Medical History

Birth/Medical History Panel: This panel is **optional** in the system and captures the Child's birth history, prenatal care, premature birth complications, etc. The questions in this panel are very straightforward and answered through a series of drop-down and text-entry fields (allowing for additional inf).

Step / Action

1. Select the **Birth/Medical History** panel and proceed to select/enter information for the following, including, **but not limited to**:
 - **The Child's Hospital of Birth** (if in New York).
 - **The Child's Birth County** (if in New York).
 - **The Child's Hospital of Discharge** (if different from birth).
 - **The Child's Hospital of Birth** (if outside New York).
 - **The Child's State of Birth** (if outside New York).
 - **If the Child was in the NICU?** If so, Select the checkbox.
 - Enter **days spent in NICU**, if applicable.
 - **If the mother had regular prenatal care?** If so, explain in the text-entry box.
 - Were there **illnesses/complications during pregnancy/delivery?** If so, explain in the text-entry box.
 - **Was specialist(s) seen due to complications? If so, enter who, where, why, when** in the text-entry box.
 - Were **Prescription medications used during pregnancy?** If so, list them in the text-entry box.
2. Upon completion, select the **Submit** button.



Evaluation Information

Child Medical Record

Current Medical Professional Involved with Child

Birth/Medical History 1

Medical Diagnostics Codes Summary

Family Assessment Report

Child And Family History

External Evaluation

MDE Summary Report

Hospital of Birth (if in State) ... Select ...

Hospital of Birth (if out of State) ... Select ...

Child's Last Name at Birth (if different from current)

Plurality ... Select ...

Any complications while in hospital after birth? Explain.

Was the child in the NICU

Hospitalization Status at Time of Referral ... Select ...

Did the mother have regular prenatal care?

Illnesses/complications during pregnancy/delivery? Explain.

Was specialist(s) seen due to complications? If so, who, where, why, when.

Prescription medications used during pregnancy? If so, list.

Drug, alcohol, tobacco use during pregnancy? If so, explain.

Is there a family history of developmental delay, neurological disorders, hearing loss or other relevant condition? ... Select ...

If Yes, please explain

Birth County (if in State) ... Select ...

State of Birth (if out of State) ... Select ...

Hospital of Discharge (if different from birth) ... Select ...

Country of Birth (if outside US)

Birth Order ... Select ...

Birth Weight

If so, days spent in NICU

If Hospitalized, Facility Name

If Not Hospitalized, Discharge Date

Explain.

Submit 2

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early intervention
resources & resources

Evaluations

Evaluation Information



View Medical Diagnostic Codes

Medical Diagnostics Codes Summary Panel: This panel is **view-only** and used for billing/claiming purposes. As diagnoses are recorded for a Child throughout Case Management (e.g., after an evaluation has occurred), those diagnoses are captured in this panel's **Child Diagnosis** grid/table. The **Child Diagnosis** grid also displays the panels (Panel of Record) where the diagnoses were entered.

The screenshot shows the EI-Hub software interface with the 'Evaluation Information' panel open. The 'Child Diagnosis' grid is displayed, showing three entries. The 'Panel of Record' column is highlighted with a red dashed border. An 'Excel' button is visible in the top right corner of the grid area.

Diagnosis Code	Diagnosis Description	Diagnosis Category	Diagnosis Date	Panel of Record	Diagnosis Source
G12.9	Spinal muscular atrophy, unspecified	Atrophy	11/15/2022	External Evaluation Assessment	ExternalEvaluationAssessment
J67.6	Maple-bark-striper's lung	pneumonitis	01/12/2023	Child Medical Records	Child
Q91.4	Trisomy 13, nonmosaicism (meiotic nondisjunction)	Trisomy	01/12/2023	Referral Additional Information	Referral

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Evaluations

Evaluation Information

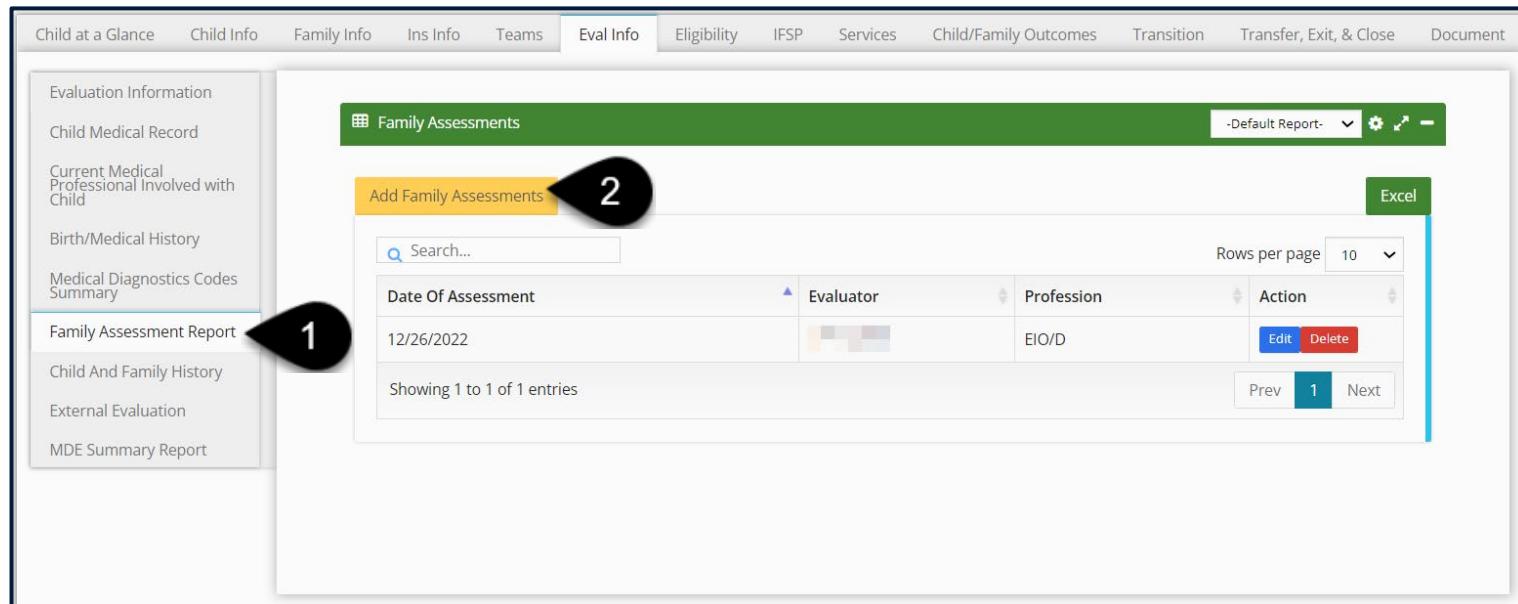


Enter a Family Assessment

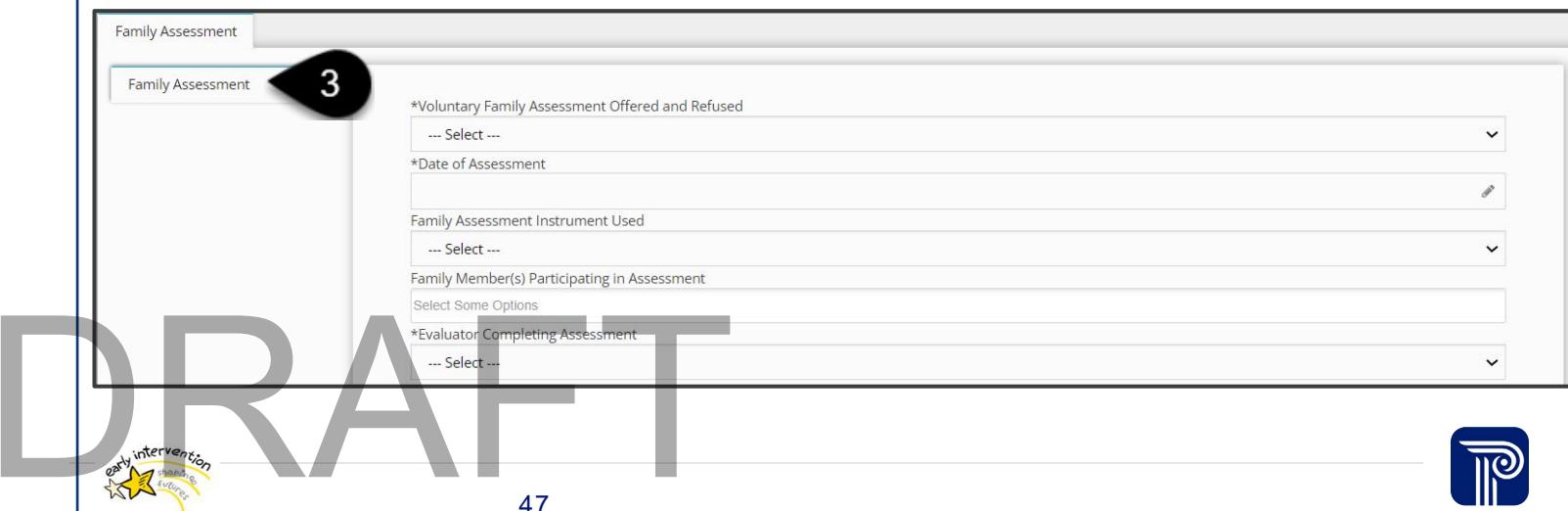
Family Assessment Report Panel: This panel is an **optional** panel in the system; This is where you enter the family assessment to capture the family's priorities, resources, concerns, needs, and routines (e.g., Does the family need respite care? What is the family's routine?).

Step / Action

1. Select the **Family Assessment Report** panel. The Family Assessment grid/table populates.
2. Select the **Add Family Assessment** button to add a Family Assessment. Select the Add Child Doctor button to add a new Practitioner. Use the Edit or Delete buttons to edit or delete an exiting practitioner
3. The **Family Assessment** panel/screen populates.



Date Of Assessment	Evaluator	Profession	Action
12/26/2022	[redacted]	EIO/D	Edit Delete



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Evaluations

Evaluation Information



Step / Action

1. Enter>Select information for the following **required** fields:
 - **Voluntary Family Assessment Offered and Refused**
 - **Date of Assessment**
 - **Evaluator Completing Assessment**
2. Select (Yes/No) to the questions listed on the top portion of the Family Assessment screen. Questions on the top portion of the screen include, but are not limited to, **Do you (the family) need help with or need information about any of the following?**:
 - **Your Child's developmental needs**
 - **Information related to your Child's developmental disability**
 - **Housing, food, clothing**
3. Enter information into the bottom portion of the Family Assessment screen, the **Family-Directed Assessment (priorities, resources, and concerns)** **Family Routines** portion. Items to be addressed include, but are not limited to:
 - **Waking / Sleep Routines**
 - **Feeding / Mealtime Routines**
 - **Diapering / Dressing Routines**
4. Upon completion, select the **Submit** button.

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early intervention
resources & services

Family Assessment

Family Assessment

1 *Voluntary Family Assessment Offered and Refused
... Select ...

*Date of Assessment

Family Assessment Instrument Used
... Select ...

Family Member(s) Participating in Assessment
Select Some Options

*Evaluator Completing Assessment
... Select ...

Discipline

2 Do you need help with or need information about any of the following? (Check all that apply)
Your child's developmental needs
... Select ...

Information related to your child's developmental disability/disability
... Select ...

3 Family-Directed Assessment (priorities, resources, and concerns)
Family Routines
Waking / Sleep Routines(i.e., Describe how your child lets you know he/she is awake.Describe nap/bedtime routines with your child, can they go to sleep independently?)

What are your priorities, resources, and concerns?

Feeding / Mealtime Routines (i.e., Describe how your child eats, drinks, lets you know they are hungry, favorite foods, foods that are difficult.)

What are your priorities, resources, and concerns?

Diapering / Dressing Routines (i.e., Describe how your child does with diapering? Putting on clothes?)

What are your priorities, resources, and concerns?

4 Submit

Evaluations

Evaluation Information



How To

Enter Child and Family History

Child and Family History Panel: This panel houses multiple entries within its grid. The panel captures the Child's current living situation and medical history (from external providers) for both the Child and Family.

Step / Action

1. Select the **Child and Family History** panel.
2. To complete the form, check the required "Information obtain[ed] with parental consent on file checkbox".
3. Proceed to enter responses into the **Child and Family Information** text-entry box including, but **not limited to**:
 - Has the Child received in the past or is currently receiving any services outside of the Early Intervention Program? If so, explain.
 - Where does the Child receive their healthcare?
 - List any medications the Child takes regularly
 - Any overnight hospital stays since birth? Explain
 - Has the Child had any surgeries? Explain.
4. Select the **Submit** button at the bottom of the page upon completion.

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

Evaluation Information
Child Medical Record
Current Medical Professional Involved with Child
Birth/Medical History
Medical Diagnostics Codes Summary
Family Assessment Report
Child And Family History 1
External Evaluation
MDE Summary Report

2 *Information obtained with parental consent on file
Has the child received in the past or is currently receiving any services outside of the Early Intervention Program? If so, explain.
Where does the child receive their healthcare?
3
When was the child last seen?
Has the child been diagnosed with a medical condition? Explain

Has the child lost any skills s/he once had?
4 Submit

Evaluations

External Evaluation Assessment

How To

View and Add External Evaluation Assessment

Notes

External evaluation and assessment is for entering assessment data completed by non-Early Intervention professionals.

Step / Action

1. Select the **Eval Info** tab.
2. Select **External Evaluation** panel.
3. Existing evaluation and authorization information can be viewed in the grid
4. Select **Add External Evaluation Assessment** button to add an External Evaluation.

External Evaluation Type	Affiliation Name	Clinician Name	QP Code	Phone Number	Diagnosis Date	Action
Other Health Assessment						Edit Delete

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Evaluations

External Evaluation Assessment

How To

View and Add External Evaluation Assessment

Notes

For further information on the use of external evaluations, please refer to the NYS Department of Health's "[Appropriate Use of External Evaluations](#)" guidelines.

Asterisks(*) indicate required fields.

General information for the External Evaluation must be entered into the **External Evaluation** panel prior to adding External Evaluation Assessment into the **External Evaluation Assessment** panel.

Users with specific roles can add an External Evaluation Assessment by entering the External Evaluation information (i.e., diagnosis, diagnosis codes, pertinent assessments) into the **External Evaluation Assessment** panel. Please note, the character limit for the comment boxes are 4,000 characters.

Step / Action

1. Use the drop-down menu to select an **External Evaluation Type**
2. Use the drop-down menus to answer (Yes/No) each question.
3. Complete relevant fields for an external evaluation. Please note, to enter a condition, begin typing a diagnosed condition in the 'Diagnosed Conditions' field to activate the drop-down and choose the appropriate diagnosis from the listed conditions.



Please refer to the EI-Hub Case Management User Guide Unit 8. Child for more information.

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External Evaluation Assessments

External Evaluation	External Evaluation Assessment
*External Evaluation Type ... Select ...	1
Please address all that apply:	
*Obtained external evaluation record with parental consent ... Select ...	
*Reviewed external evaluation record ... Select ...	
*Consulted with external evaluator by phone or through correspondence ... Select ...	
The Evaluation team must certify the following:	
Development Assessment Performed? ... Select ...	
If a developmental assessment was performed, comments are required	
Health Assessment Performed? ... Select ...	
If a health assessment was performed, comments are required	
General Comments	
Diagnosis Made By	
Date of Diagnosis	
ICD 10 Code & Description Search	
Diagnosed Conditions Select Some Options	

Evaluations

External Evaluation Assessment

How To

View and Add External Evaluation Assessment

Notes

For further information on the use of external evaluations, please refer to the NYS Department of Health's "[Appropriate Use of External Evaluations](#)" guidelines

Asterisks(*) indicate required fields.

External Evaluations can be added by **specific user roles** via the **External Evaluation Assessment** panel. General information for the External Evaluation must be entered into the **External Evaluation** panel prior to entering the External Evaluation Assessment into the **External Evaluation Assessment** panel.

Step / Action

1. Enter the Clinician and Affiliation (Clinician Organization) Name as these are required fields. The remaining fields (i.e., QP (qualified profession) Code, Address) are optional.
2. Select the **Submit** button upon completion.

1

*Affiliation Name

*Clinician Name

QP Code (Profession Code)

--- Select ---

If Not, Other Profession

Address (for the Clinician/Affiliation)

Address Line 1

Address Line 2

City

State

Zip

Phone Number

2

Submit

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Adding Ongoing Evaluation Information

Evaluations Job Aid

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Evaluations

Ongoing Evaluations

How To

Add Ongoing Evaluations

Notes

- Please note than when completing an Ongoing MDE to establish a Child's continued eligibility for the EIP, two additional criterion values have been added to the dropdown list:
 - "1.0 Standard deviation or more below the mean"
 - "Outside expected range"
- NYS EIP Regulations 69-4.3(b) require continuing eligibility to be based on: a delay consistent with the criteria established for initial eligibility; or a delay in one or more domains, such that Child's development is not within the normal range expected for their chronological age, as documented using clinical procedures, observations, assessments, and informed clinical opinion; or a score of 1.0 standard deviation or greater below the mean in one or more developmental domains; or, the continuing presence of a diagnosed physical or mental condition with a high probability of resulting in a developmental delay.

IFSP Type	IFSP Status	IFSP Reason for Delay	IFSP Method	IFSP Extension Reason	IFSP Start Date	IFSP End Date	Signed Date	Linked IFSP	Action
Initial	Draft		Telephone or video conference call		06/01/2022	07/06/2022		True	View Edit
Initial	Draft		Telephone or video conference call		05/04/2022	07/06/2022		True	View Edit

IFSP Type	IFSP Status	IFSP Start Date	IFSP End Date	Service Type	Authorization Status	Authorization #	Evaluator	Start Date	End Date	Assessment Date	Waiver Review Needed	Action
Initial	Draft	04/15/2022	09/01/2022	Physician Supplemental Evaluation	Inactive		Benjamin Babbage	04/15/2022	04/28/2022		No	View Edit Delete
Initial	Draft	04/15/2022	09/01/2022	Non-physician Supplemental Eval - Nursing	Active	A1237		04/15/2022	04/30/2022		No	View Edit

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Please refer to the EI-Hub Case Management User Guide Unit 8. Child for more information.



Evaluations

Ongoing Evaluations

How To

Add Ongoing Evaluations (Post-IFSP)

Notes

Ongoing Evaluations occur post-IFSP. Fields located within the **Evaluation Information** panel that pertain to the IFSP (i.e., IFSP Status, IFSP Start Date, IFSP End Date) will pre-populate and align to the Active IFSP selected from the IFSP grid (p. 54)

Step / Action

1. Select the **IFSP** tab from a Child's record. The **IFSP** panel opens, which houses the **IFSP** grid.
2. Locate any existing IFSP listed in the **IFSP** grid and select the **Edit** button to open the IFSP. The **IFSP** screen populates along with subsequent panels (i.e., IFSP Information, IFSP Team).
3. Select the **IFSP Ongoing Evaluations** panel, which houses the **IFSP Ongoing Evaluations** grid.
4. Select the **Add IFSP Ongoing Evaluations** button to add a new ongoing evaluation.

IFSP Type	IFSP Status	IFSP Reason for Delay	IFSP Method	IFSP Extension Reason	IFSP Start Date	IFSP End Date	Signed Date	Linked IFSP	Action
Initial	Draft		Telephone or video conference call		06/01/2022	07/06/2022		True	Edit
Initial	Draft		Telephone or video conference call		05/04/2022	07/06/2022		True	Edit

IFSP Type	IFSP Status	IFSP Start Date	IFSP End Date	Service Type	Authorization Status	Authorization #	Evaluator	Start Date	End Date	Assessment Date	Waiver Review Needed	Action
Initial	Draft	04/15/2022	09/01/2022	Physician Supplemental Evaluation	Inactive		Benjamin Babbage	04/15/2022	04/28/2022		No	Edit
Initial	Draft	04/15/2022	09/01/2022	Non-physician Supplemental Eval - Nursing	Active	A1237		04/15/2022	04/30/2022		No	Edit



Please refer to the EI-Hub Case Management User Guide Unit 8: Child for more information.



Evaluations

Ongoing Evaluations



How To

Add Ongoing Evaluations

Step / Action

1. The **Evaluation Information** screen opens. Proceed to enter the Evaluation Information. Please reference this job aid beginning on p. 10 to review how to enter and submit an Evaluation Service Authorization.

1

Evaluation Information	
Evaluator Assignment	*Pay Source Albany
Waiver	*Program ProgramName
	*Service Type --- Select ---
	IFSP Type 1st Review
	IFSP Status Active
	IFSP Start Date 06/25/2022
	IFSP End Date 12/25/2022
	*Dates of Evaluation From
	*Dates of Evaluation To
	*Agency
	Location Type --- Select ---

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Revision History

Version Number	Release Date	Author	Revision Summary
v.1	2.015.2022	Matthew O'Brien	First Draft Release
v.2	6.30.2022	Evan Thibeau	Second Draft w/ Revisions
v.3	9.20.2022	Evan Thibeau	Third Draft
v.4	10.18.2022	Paul Michael Ross	Fourth Draft w/ Revisions
v.5	12.15.2022	Courtney Pittman	Fifth Draft
v.6	1.6.2023	Courtney Pittman	Sixth Draft
v.7	1.19.2023	Courtney Pittman	Seventh Draft
v.8	3.2.2023	Courtney Pittman	Eighth Draft

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