Configuring User Roles in the EI-Hub

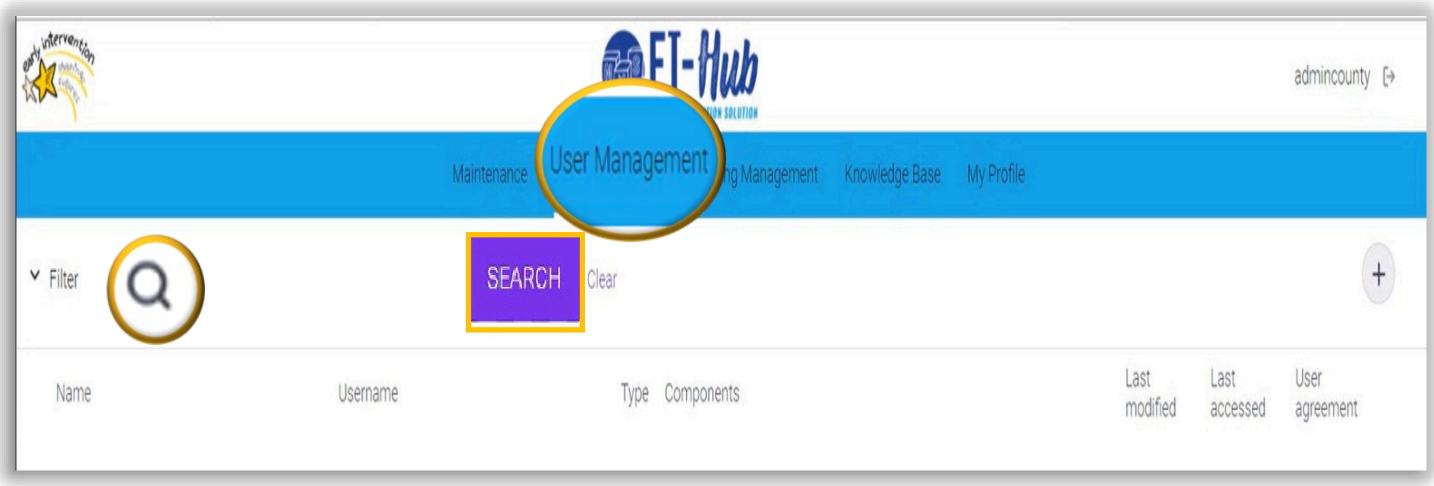
Before Getting Started:

Certain EI-Hub account types have the ability to configure user roles. These accounts are referred to as Role Administrators.

To determine if you are a Role Administrator, navigate to the My Profile option on the EI-Hub landing page. Your designated account type will be highlighted in purple. If your account type is one of the options listed below, you can setup and configure user roles in the EI- Hub.

AdminAgency | AdminCounty

Step 1: Navigate to User Management



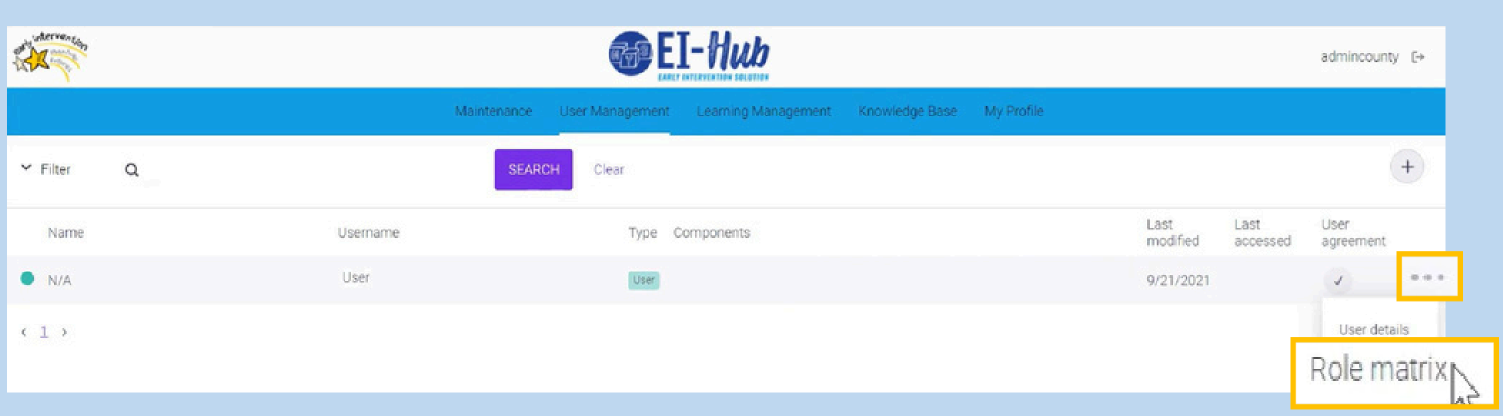
On the User Management page, Role Administrators will search for the individual user whose user role(s) they want to configure that are associated with their county or agency.

Use the search feature (🔍) to find the individual user. When searching, type the user's name or HCS ID in the search box and select/click search. A list of matching users will appear.

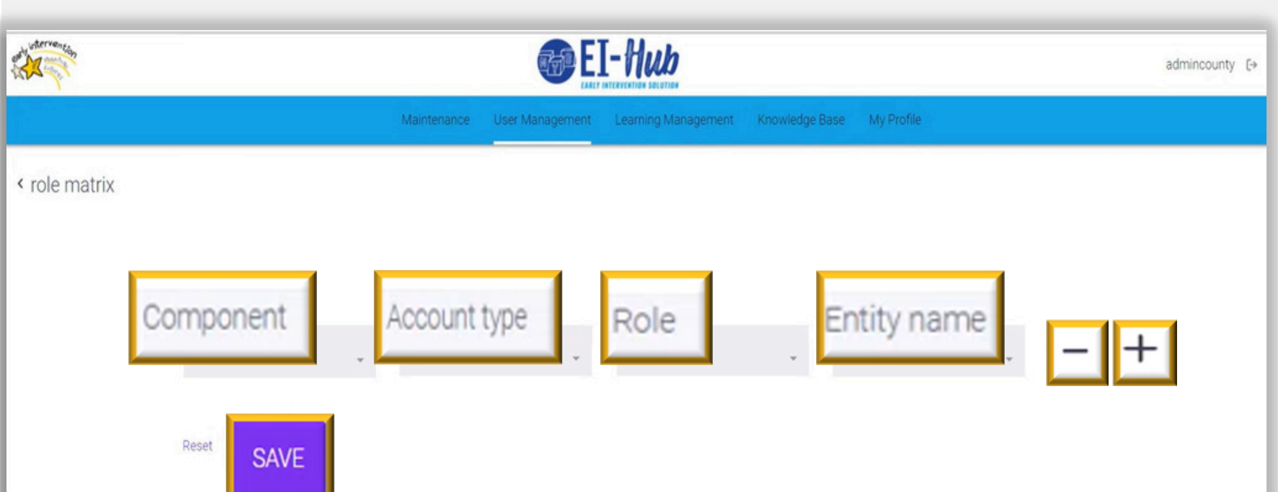
Step 2: Open the Role Matrix

After finding the individual user through the search feature, select/click the ellipsis (···) button and choose the Role Matrix option from the list of available options.

The Role Matrix is where a user's access is defined.



Step 3: Configure User Role(s)



Configurable Components:
Billing Module
Service Logging Module
Case Management Module

Select the appropriate account settings for the user in each of the four categories: 1) Component, 2) Account type, 3) Role, and 4) Entity name. Remember, each user can have multiple roles per component.

To add additional components and/or roles, select/click the plus sign (+). A new line will appear to add the additional information.
To remove components/roles, select/click the minus sign (-).

When all the appropriate components and roles have been inputted select/click Save.

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Frequently Asked Questions (FAQs)

As a Role Administrator, which user roles can I configure?

AdminAgency

This Role Administrator type is used by: Agencies and Independent Providers

- Universal Provider = UniversalProvNY
- Independent Provider = InProviderNY
- * ISC/OSC = ISC/OSC NY
- * Rendering Provider = RenderProvNY
- * Junior Rendering Provider = JrRenderProvNY
- Provider Compliance and QA = ProvQA NY
- Provider Fiscal Staff = ProvFiscalMgrNY
- Provider Data Entry Staff = ProvDataEntryNY

*= Therapist
These users must be added as a Therapist in Case Management before their user role(s) can be configured

AdminCounty

This Role Administrator type is used by: Counties/ Municipalities

- Municipal EI Manager = MuniProgAllNY
- Municipal Fiscal Staff = MuniFiscalAllNY
- Municipal Data Entry Staff = MuniDataEntryNY
- Municipal At-Risk Management = MuniAtRiskMgtNY
- Municipal View Only (user role has no editing rights) = MuniViewOnlyNY
- * EIO/D = EIO/D NY
- * ISC/OSC = ISC/OSC NY
- * Rendering Provider = RenderProvNY
- * Junior Rendering Provider = JrRenderProvNY

How do I add a user as a Therapist in the EI-Hub's Case Management component?

For instructions on how to add an individual as a Therapist in Case Management, please reference the Add Therapist Information Job Aid, available on the Learning Management System. Once a user is properly added in Case Management, they can be configured in User Management (page 1) and their information will appear under 'Entity name' within the Role Matrix.

Is my agency /county able to assign someone as a Role Administrator?

Yes, a Role Administrator can assign another user as a Role Administrator. To do this, first refer to Step 1 in the infographic to identify the appropriate user. Then, proceed to Step 2 by clicking the ellipsis and selecting the 'User Details' from the available options. An existing Role Administrator can change the user's 'Type' to either AdminAgency or AdminCounty. Please note that a Role Administrator can only assign another user the same Role Administrator type as their own.

Where can I find additional information on user roles?

For additional information and descriptions of each user role, please reference the following resources.
All training resources are available on the Learning Management System (LMS).

EI-Hub User Management Admin Guide | User Role Crosswalk | Case Management User Role Job Aid
Micro eLearning Module: Configuring User Roles | Quick Start Guide: Role Administrators

Need Help?

Contact the PCG Call Center at: NYEITraining@pcgus.com or 866-315-3747