

Understanding User Roles

As a user of the El-Hub, you are assigned one or more roles depending on your job duties. User roles define what modules you have access to in the El-Hub and what information you can view and/or edit within each module.

How To

- Identify your User Roles
- · Define each User Role
- · Add or change User Roles (for Superusers)

The EI-Hub is designed to allow users to have multiple roles. This will allow you to navigate between different roles and different agencies with one Health Commerce System (HCS) account if needed.

To Identify your assigned User Role(s):

1. Select a module from the El-Hub Landing Page.

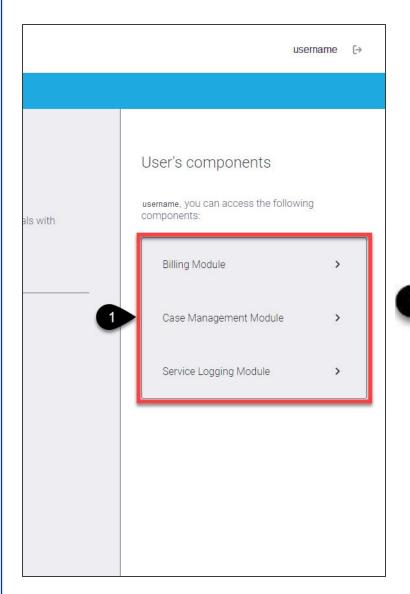
The right side of your landing page will only display links to the modules in which you are assigned a User Role.

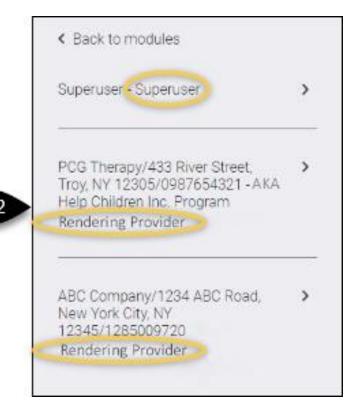
2. If you have more than one role within a module, you will be prompted with a list of the roles you are assigned (circled in yellow).

To access each module, you will need to select a role from this list depending on the information you need access to at that time.

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- Assigning User Roles
- Roles for Municipalities
- · Roles for Providers











Assigning User Roles

Administrative Municipal (County) and Agency User Roles will assign roles to agency users based on system functions needed to perform the duties associated with their role in the EI Program. If you are not a Superuser or an independent provider and need to add or change your roles in the EI-Hub, speak to your supervisor.

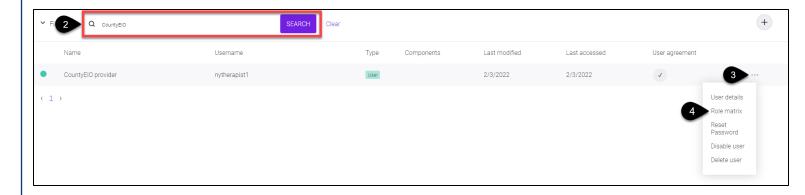
Step/Action for El-Hub Administrators

- 1. From the El-Hub landing page, **select 'User Management'** at the top of the page.
- 2. In the User Management page, search for the user you are assigning by typing in all or part of their name or their system username and **select 'Search'**
- 3. **Select the three dots** to the right of the user agreement column
- 4. Select 'Role Matrix' from the drop-down menu
- 5. On the next page, use the drop-down menus to select the following:
 - The component you wish to give the user access to (Case Management, Billing, Service Logging)
 - The user's Account Type (e.g. County, Provider)
 - The user's role within the assigned account type
 - The name of the county or agency for the user
- Additional roles can be added for each user by selecting the '+' sign next to any role. Selecting the '-' sign will delete that role for the user
- 7. Select 'Save'













Municipal Case Management User Role Definitions

This is not a comprehensive list of capabilities, only examples of critical functions for each user type.



Municipal El Manager (Superuser)

Administration of El programs

Able to:

- •Access all municipal Case Management functions
- Complete financial functions
- Add new municipal users
- Add Role Administrators for Agencies
- •Run reports & view municipal data

EIO/D

Maintain municipal compliance with program regulations

Able to:

- •Create and manage referrals
- Issue SAs & create waivers

- Assign EIO/D or ISC
- Approve IFSPs and provider work

Municipal Transfer

Manage county transfers and transfer reports

Able to:

- Request transfer of a child from another municipality
- Approve transfer of children to other municipalities
- Accept transfer children from other municipalities
- •Edit the Child Transfer report



Municipal Service Providers

Municipal users who provide services (such as Service Coordinators) will be assigned a Provider role consistent with their duties as detailed on the next page.

Municipal All Fiscal

High-level oversight of the local EIP and fiscal policies

Able to:

- Complete fiscal data entry and process vendor transactions
- •Facilitate the processing of claims
- View certain provider reports
- •Run financial reports

Municipal Data Entry

Enter and maintain child records

Able to:

Enter child information

Upload attachments & run reports

Create vouchers

Municipal View Only

Administration or QA staff with no editing permissions

Able to:

- View child & family information
- •Run reports

View claims data

Municipal At-Risk Management

Enter and maintain child records for children identified for At-Risk track

Able to:

- Monitor child status in At-Risk track
- Update child data

- Access child information
- Add or remove children from At-Risk track





Provider Case Management User Role Definitions

This is not a comprehensive list of capabilities, only examples of critical functions for each user type.



Universal Provider (Superuser)

Oversee all agency functions

Able to:

- Create & manage agency users
- Accept/reject SAs

- Assign rendering providers
- Access child information
- Access to agency financial information

ISC/OSC

Delivery of El Service Coordination

Able to:

- •Update child and family information, •Create and submit IFSP and including insurance
- Assign evaluation team

- Service Authorizations to FIO/D
- Enter transition information

Rendering Provider

Direct delivery of El services

Able to:

- Access role-based reports & appropriate child information
- Manage aspects of their provider profile

Junior Rendering Provider

Deliver El services under supervision or direction of a licensed practitioner

Able to:

- Access role-based reports & appropriate child information
- Manage aspects of their provider profile

Independent Provider

Administrative tasks required for a provider with a basic or appendix one agreement

Able to:

- Accept/reject Service Authorizations
- Access child information

- Access to billing & claiming functions
- Manage provider profile & agreement

Provider Compliance & QA

View-only access to ensure accuracy & quality of provider records in the El-Hub

Able to:

- View case data
- View service logging data

View agency provider data

Provider Fiscal Manager

Day-to-day fiscal activities required for providers and agencies

Able to:

- •Ensure invoices & claims are processed properly
- Upload billing files & edit claims
- •View child information & run reports

Provider Data **Entry**

Perform data entry tasks for agencies

Able to:

- Create new users
- Enter child, family, & case information

Upload batch files & run reports





Revision History

Version Number	Release Date	Author	Revision Summary
v.0.1.0	2.18.2022	Evan Thibeau	First Draft Release
v.0.2.0	4.22.2022	Evan Thibeau	Updated draft w/ current screenshots
v.0.3.0	7.13.2022	Evan Thibeau	Additional changes made regarding Service Coordinator Roles Added
v.0.4.0	8.12.2022	Evan Thibeau	Final Revisions
v.0.5.0	9.9.2022	Evan Thibeau	Final Version for Approval

