

Sample NYEIS Rendering Provider and Service Coordinator User Account Creation

For a User Account created for a **Rendering Provider** who provides general EI services (such as Physical Therapy related services) and also provides **Service Coordination**; the goal is to set up the individual's NYEIS user account so they can

1. be assigned as a child's Service Coordinator,
 2. be assigned to general services associated with their Qualified Profession / License,
 3. view/access all of their assigned children (as Service Coordinator and Rendering Provider).
- The individual's user account is created. Notice the user role is **PROV_ServiceCoordinator** and the Provider Name is the **individual's name** and not an agency name.
 - In order for an individual to be assignable as a service coordinator for any agency they work for, they must be assigned a **User Role of PROV_ServiceCoordinator**, have a **User Type of Service Coordinator**, and have the **Provider Name field associated with their name**. Refer to **Unit 10 Municipal Administration, User Accounts** for instructions and guidelines regarding user account creation.

User Home: Sally Toonces ?

[Edit](#) [Delete](#) [Reactivate](#)

Contact Details			
User Name:	saltoon	Business Email:	
Location:	The State	Personal Phone:	
Business Phone:		Personal Email:	
Business Phone Extension:		Municipality:	Statewide
Business Fax:		Geographic Area:	
Business Mobile:		User Type:	Service Coordinator
Business Pager:		Provider Name:	Sally Toonces

Further Details			
Default Printer:	[Change]	Account Expiry Date:	
Creation Date:	12/16/2010	Redirect Tasks To:	
Role :	PROV_ServiceCoordinator	Login Failures:	0
Login Restrictions:	No	Account Enabled:	Yes Enable Disable
Sensitivity:	1	Password Expires:	
Status:	Active	Call Center User:	No
User Homepage: EIS_Application_providerServiceCoordinatorHome			

Languages Spoken

[Edit](#) [Delete](#) [Reactivate](#)

- If the individual (Sally Toonces) will also render services (such as Physical Therapy), they must have the associated License and Professional Discipline/Qualified Personnel information recorded on their provider home page.

Provider Licenses & Certifications: Sally Toonces - 5120 ?

[New](#)

Action	License Number	License Name	License Type	From Date	To Date
Edit	69594949	Physical Therapist	Professional License	3/16/2010	

Professional Discipline/Qualified Personnel: Sally Toonces - 5120 ?

[New](#)

Action	Profession/QP	From Date	To Date
Edit	Physical Therapist	12/14/2010	
Edit	Service Coordinator	1/1/2010	

- The individual must also be registered on the agency's Employees/Contractors page of each agency that the individual will provide Service Coordination and/or render services for. Refer to **Unit 9 Provider Management** for information about adding a provider to the agency's Provider Employees/Contractor List.
- Notice also that Sally is an active employee because there isn't a date recorded in the "To Date" field. If a date is recorded, and the date is in the past, it essentially tells the system that the employee is not actively employed by the agency and thus should not be selectable for any services when the Agency is selected for a Service Authorization.

Employee/Contractor List: Toonces Academy - 1280

Action	Name	Profession/QP	Personnel Type	Service Coordinator	State ID	NPI	From Date	To Date
View Edit	Amy Dennin	Physician Other Than Pediatrician	Contractor	No	4867	222222222	6/20/2011	
View Edit	Arnie Poolmer	Licensed Master Social Worker	Contractor	Yes	24065	4546546	8/1/2011	
View Edit	Carol Fritz	Occupational Therapist	Employee	Yes		32514	8/1/2011	
View Edit	Carter, Melanie	Vision Certified Low Vision Specialist (ACVREP)	Employee	No		454563	1/20/2011	
View Edit	Cransberry, Angela	Teacher of Students with Disabilities (Birth - Grade 2)	Employee	No			8/8/2011	
View Edit	Dandy, Jim	Teacher of Special Education	Employee	No			4/1/2011	3/31/2014
View Edit	Deborah Yom	Occupational Therapist	Employee	No	2560	8765	1/3/2011	12/31/2012
View Edit	Dogwood, Tina	Licensed Practical Nurse	Employee	No		89798789	6/10/2011	
View Edit	Elijah Jefferson	Teacher of Special Education	Employee	No			1/10/2011	
View Edit	Goldman, Sandy		Employee	No			1/29/2011	12/31/2012
View Edit	Harder, Jessica		Employee	Yes			7/21/2011	
View Edit	Henry Hines LLC	Teacher of Deaf and Hearing Impaired	Employee	No		1234621234	6/24/2010	
View Edit	Herb Bertoots	Pediatrician	Employee	No		1234621234	9/27/2010	
View Edit	John Smith	Service Coordinator	Contractor	Yes	11777	920034	4/19/2011	
View Edit	Knight, Shirley	Occupational Therapist	Employee	No		3243554	3/19/2011	
View Edit	Lovelace, Heather	Audiologist	Employee	No		583838	1/31/2011	
View Edit	Nightly, Liza	Speech Language Pathologist	Employee	No		1891167	1/1/2010	
View Edit	Sally Toonces	Service Coordinator	Employee	Yes		43838823-1	12/14/2010	
View Edit	Sally Toonces	Physical Therapist	Employee	Yes		43838823-1	12/14/2010	

After all of these conditions are met, the individual will be:

- assignable as the Service Coordinator on any Service Coordination Service Authorization when the agency that the individual is employed/contracted by is selected as the Provider of Record for the SA.

Select Provider & Location

[Close](#)

Search Criteria					
Provider Name:	<input type="text" value="toonces"/>	NPI:	<input type="text"/>		
DBA Name:	<input type="text"/>	State Provider ID:	<input type="text"/>		
Special Population Served:	<input type="text"/>	Municipality:	<input type="text"/>		
Qualified Personnel Type:	<input type="text"/>	City:	<input type="text"/>		
Language:	<input type="text"/>	Zip:	<input type="text"/>		
Site:	<input type="text"/>				

[Search](#) [Reset](#)

Search Results (Number of Items: 1)

Action	Provider Name	State Provider ID	Site	Address Line 1	City
Select	Toonces Academy	1280	Toonces Center for Development_Johnson St	12 Johnson St	Albany

[Close](#)

Assign Initial Service Coordinator

Save Cancel

Initial Service Coordinator

Name:

Service Coordination Details

Start Date: 11/5/2011

End Date: 12/20/2011

*Number of Units: 0

Comments

Service Coordinator Search

Show Search Criteria Cancel

Search Results

Action	Name	Agency Name	Caseload
Select	Arnie Poolmer	Toonces Academy	0
Select	Cindy Smith	Toonces Academy	6
Select	Sally Toonces	Toonces Academy	6
Select	Carol Fritz	Toonces Academy	0
Select	John Smith	Toonces Academy	3
Select	Jessica Harder	Toonces Academy	4
Select	Carol Fitz	Toonces Academy	1

Show Search Criteria Cancel

- b) assignable as the Rendering Provider for any Service Authorization when the agency that the individual is employed/contracted by is selected as the Provider of Record for the SA.

List Agency Provider Employees PT - Basic - 235020

Assign Provider as Rendering Provider Cancel

Rendering Provider Details

Rendering Provider Name:	Stanford, Betty	NPI:	65765876
State ID:		Address:	31 River rd Albany (Albany) New York 10001
Employer Name:	Toonces Academy	Employer NPI:	1239485799
Employer State ID:	1280	Employer Address:	1 Main Street Troy (Rensselaer) New York 10001

Agency Provider Employees

Action	Employer Name	Employee Name	NPI	State ID	Qualified Personnel
Select	Toonces Academy	Stanford, Betty	65765876		Physical Therapist
Select	Toonces Academy	Sally Toonces	43838823-1		Physical Therapist, Service Coordinator

- I log into NYEIS as Sally Toonces. Notice her User Homepage displays her user role (Provider Service Coordinator Management).
- Also notice her home page links. (If Sally had a different user role, such as PROV_RenderProvStaff, there would be fewer links providing less access to NYEIS features).

NYEIS QA: (State DOH use only -- no real live data)

Home | Inbox | My Calendar | My Cases | Search | About | Log Out

New Task | New Activity

Provider Service Coordinator Management

Welcome to the New York Early Intervention System

My Shortcuts	Search
Create Referral	Child
MDE	Service Authorizations
My Provider Homepage	Service Providers
Export IFSP Data	Third Party Insurance
Import IFSP Data	Vendors

My Tasks	My Calendar
Task	Subject

- Sally clicks the My Provider Homepage link and sees that it is her provider homepage, and not the home page of any agency that she is employed / contracted by. (If, in her NYEIS user account, I had selected an agency name in the "Provider Name" field, the My Provider Homepage would be the agency's home page, and not hers).

Provider Home: Sally Toonces - 5120

Edit | Change Status | Print Provider Profile

Details

Name:	Sally Toonces	Registered Name:	Sally Toonces
Provider Type:	Individual	Business E-Mail:	
NPI:	43838823-1	State ID:	
Current Approval Status:		Current Status Date:	
Current Contract?:	No		

Contact

Address:	17 Yellow Ln Albany (Albany) New York 10001	Phone Number:	
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Payment Details

Payment Method:	
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Comments

Edit | Change Status | Print Provider Profile

- Clicking on the My Cases link displays all children that Sally has been assigned as Service Coordinator for. Note: It does not display children that Sally has been assigned to as a rendering provider (such as Physical Therapy) on.

My Cases

Case List

Case Reference	Primary Client	Case Status	Case Status Date	Start Date
19728	Sheena Anderson	IFSP 12 Month Review Approved	8/9/2011	7/15/2010
91654	Sam Brown	Service Coordinator Assigned	7/22/2011	4/1/2011
46080	Kimberly Speed	Initial IFSP Submitted	10/12/2011	12/21/2010
61449	Kimberly Bonner	Service Coordinator Assigned	6/25/2011	3/29/2011

- In order to access the records of children that she has been assigned to render a service for, Sally performs a child search. She can search by name, or use the wildcard character (%) to list all children.

 Child Search 

Search Criteria			
Reference Number:	<input type="text"/>		
Last Name:	<input data-bbox="386 428 734 457" type="text" value="%"/>	First Name:	<input type="text"/>
Date of Birth:	<input type="text"/> 	Address Line 1:	<input type="text"/>
City:	<input type="text"/>	Family Telephone Number:	<input type="text"/>
SSN:	<input type="text"/>	Child Birth Last Name:	<input type="text"/>
Mother's Last Name:	<input type="text"/>	Father's Last Name:	<input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Reset"/>			

Search Results (Number of Items: 4)						
Reference Number	First Name	Last Name	Address Line 1	City	Date of Birth	Municipality
500037	Kim	Speed	81 Main Street	Albany	9/1/2009	Albany
500037	Kimberly	Speed	81 Main Street	Albany	9/1/2009	Albany
500396	Stan	Cooper	16 Woodbridge St	Albany	1/1/2011	Albany
500055	Tom	Tom	111 tom st	albany	1/1/2010	Albany

- Note that neither the PROV_ServiceCoordinator user role nor the PROV_RenderProvStaff user role is subscribed to Work Queues.

My Work Queues: Sally Toonces 

Action	Name	Subscription Date	# of Tasks

- If the individual's NYEIS user account is not set up correctly, they will not be assignable as a Service Coordinator.
- Notice that Sally's NYEIS user account below is set up with a user role of PROV_RenderProvStaff (instead of PROV_ServiceCoordinator) and User Type of Provider (instead of Service Coordinator).



Edit Delete Reactivate

Contact Details

User Name:	saltoon	Business Email:	
Location:	The State	Personal Phone:	
Business Phone:		Personal Email:	
Business Phone Extension:		Municipality:	Statewide
Business Fax:		Geographic Area:	
Business Mobile:		User Type:	Provider
Business Pager:		Provider Name:	Sally Toonces

Further Details

Default Printer:	[Change]	Account Expiry Date:	
Creation Date:	12/16/2010	Redirect Tasks To:	
Role :	PROV RenderProvStaff	Login Failures:	0
Login Restrictions:	No	Account Enabled:	Yes Enable Disable
Sensitivity:	1	Password Expires:	
Status:	Active	Call Center User:	No
User Homepage:	EIS_Application_providerRenderingProviderHome		

Languages Spoken

Edit Delete Reactivate

- Notice that Sally's name does not appear in the list of selectable Service Coordinators when her user account is set up this way.



Save Cancel

Initial Service Coordinator

Name: _____

Service Coordination Details

Start Date:	6/13/2011	End Date:	7/28/2011
*Number of Units:	0		

Comments

https://nyeis-qa.health.state.ny.us/?pp_childConcernRoleID=-3330412199318388736&pp_agencyProvid - Win...

Service Coordinator Search

Show Search Criteria Cancel

Action	Name	Agency Name	Caseload
Select	Amie Poolmer	Toonces Academy	0
Select	Cindy Smith	Toonces Academy	6
Select	Carol Fritz	Toonces Academy	0
Select	John Smith	Toonces Academy	3
Select	Jessica Harder	Toonces Academy	4
Select	Carol Fitz	Toonces Academy	1

Show Search Criteria Cancel