Unit 1:
Getting Started

Version 4.6

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Document Revision History

Date	Release	Description
6/14/2016	4.6	• Updated **NYEIS Standard Page Layout** section to reflect new W**elcome Banner** and new **Announcements** cluster • Added Steps for logout of NYEIS and HCS
4/26/2016	4.5.2	• System performance improvements have been applied to the My Workspace/Inbox and Municipal Supervisor Metrics pages to improve system response time.
2/26/2016	4.5.1	• No changes
12/15/2015	4.5	• No changes
12/30/2014	4.01	• Updated HCS screenshots to v4 • Updated steps for bookmarking NYEIS user manual in HCS 'My Favorites' • Updated NYEIS Help Desk Phone number • Updated NYEIS home page screen shots • Removed references to using Boolean search commands, which are automatically used • Updated steps for printing • Updated information about trailing notifications • Added important note about forwarding tasks • Updated Provider search feature to reflect new agreements • Updated max file size for uploaded attachments
6/4/2012	1.6	• Added **Multi-Delete Notifications** subtopic.
10/24/2011	1.5	• Updated **Notifications** subtopic • Updated **Searches** subtopic. • Added note to **Attachments** subtopic regarding maximum file size. • Updated **System Requirements** subtopic.
6/24/2011	1.4	• Removed note to **Attachments** section informing that the functionality is disabled until an Anti-Virus scanning application is added to NYEIS. • Added sample **Referral Work Queue** screen showing that work queue cases are now sorted oldest first, via a new date sort column. • Replaced EIOD's **My Cases** screen with one having the new date sort column. • Replaced **Address Validation** screen, deleting Address line 3 and adding description of Address lines 1 and 2.

		• Replaced **Child Search** screens adding Father's Name and renaming Mother's Name and Birth Last Name more clearly.
3/31/2011	1.3	• Added **Adding the NYEIS Production Link to Your HCS My Applications** subtopic. Includes steps and screen shots for adding the NYEIS Production link to the HCS My Applications. • Added updated screen shots of Child Home page. Child Information cluster renamed "Child Name". • Added **System Requirements** section. • Added note to **Attachments** section informing that the functionality is disabled until an Anti-Virus scanning application is added to NYEIS.
1/31/2011	1.2	• **Added** Accessing NYEIS **and** Accessing the NYEIS User Manual Online **sections. Includes information about Terms and Conditions.** • **Edited** Searching **subtopic with additional information about Provider Status.** • **Edited Address Validation screen shots and guidance to reflect new required search fields: City, State and Zip.** • **Updated** User Home Page **screen shots that now depict number of Reserved and Assigned tasks.**
11/22/2010	1.1	• Added **Searching** section.
10/1/2010	1.0	• October 2010 NYEIS launch.

Table of Contents

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Getting Started

Unit Overview

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

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

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

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

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

SYSTEM REQUIREMENTS

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

Desktop Operating System: Windows XP or higher

Browser: Microsoft Internet Explorer (versions 9.0 and higher)

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

Notes:

- Apple Mac OS is not supported.
- Microsoft Word is required for Communications Templates. 🕮 *See* **Unit 4 – Case Management**, ***Creating MS Word Communication*** for further information.
- Microsoft Excel is one of the Fiscal Payment file formats. 🕮 *See* **Unit 8 – Provider Invoicing, *Provider Electronic (837) Claiming*** and/or **Unit 12 – Municipal Financial**, ***Sending Payment File to Municipal Financial*** for further information.

Adding the NYEIS Production Link to Your HCS My Applications

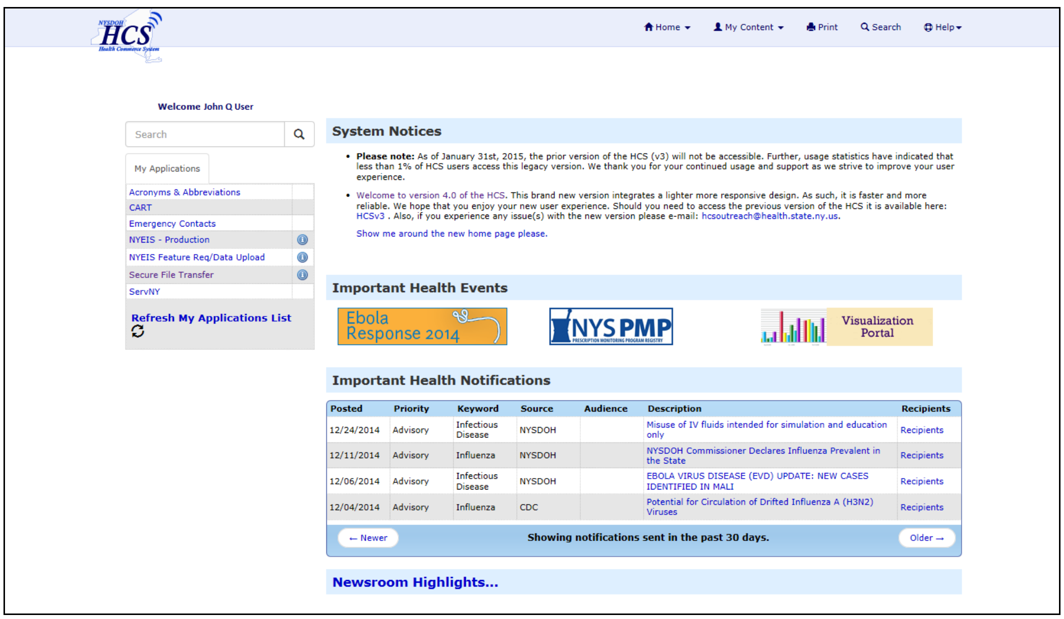
If it's your first time logging into NYEIS you will need to add the NYEIS-Production link to the My Applications section.

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

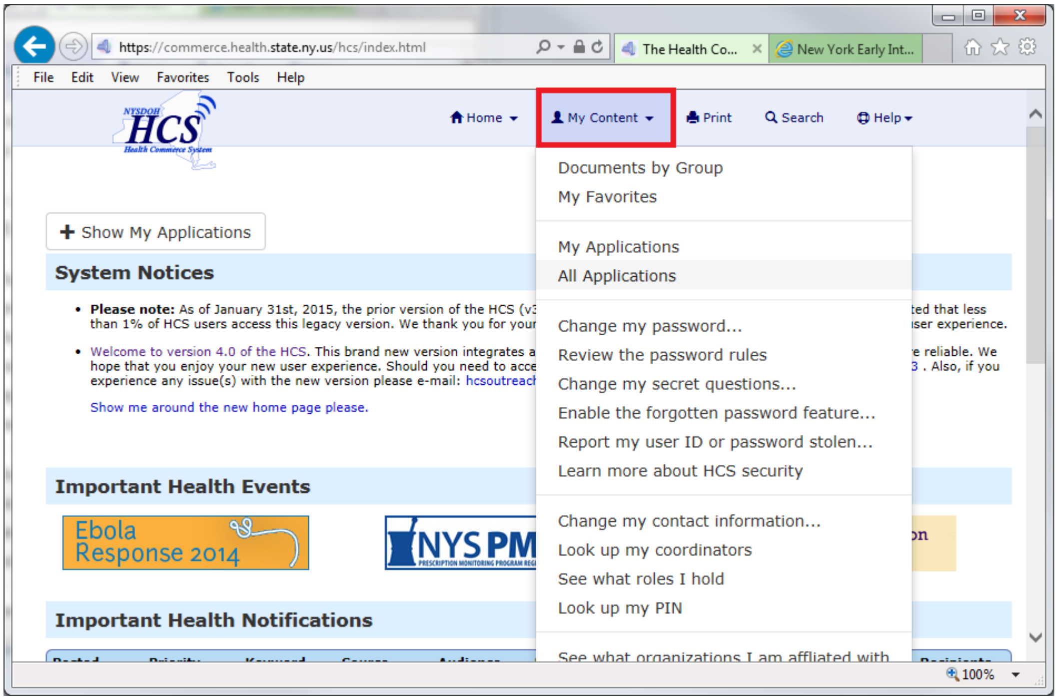
  https://commerce.health.state.ny.us

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

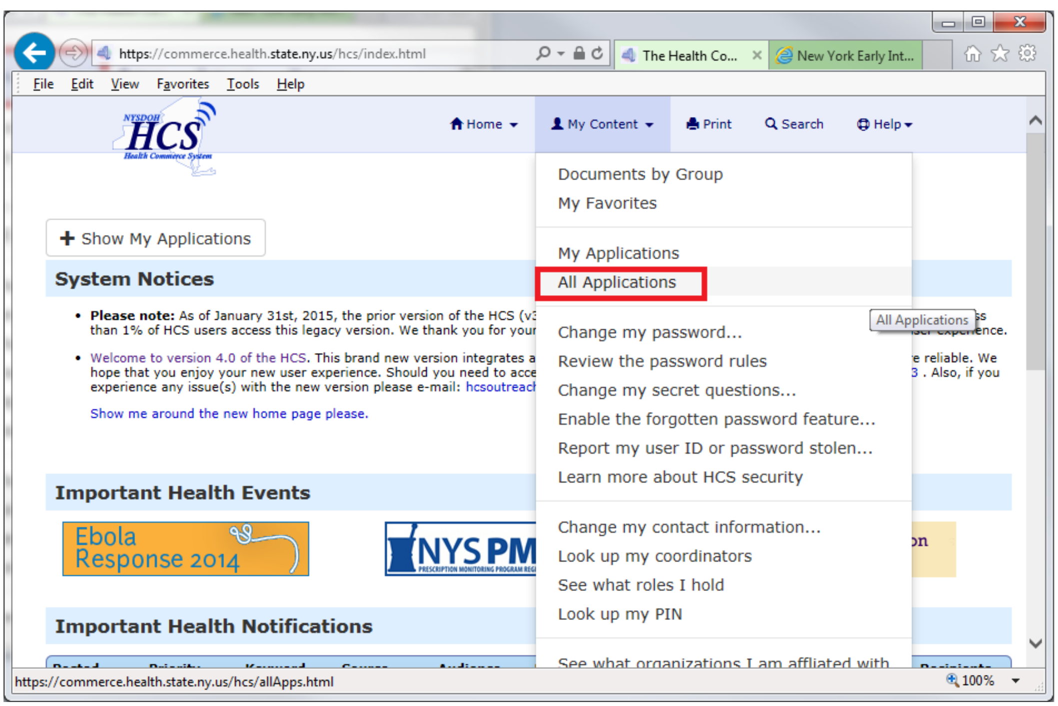
- Enter in your Health Commerce System account username and password. Click the **Sign In** button. The **Health Commerce System Portal** page displays.



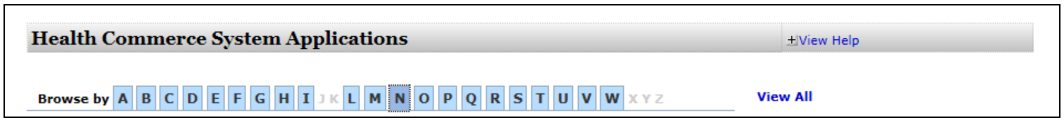
- Click the ‘My Content’ option from the Portal page Menu Bar. A list of choices appears in the window.



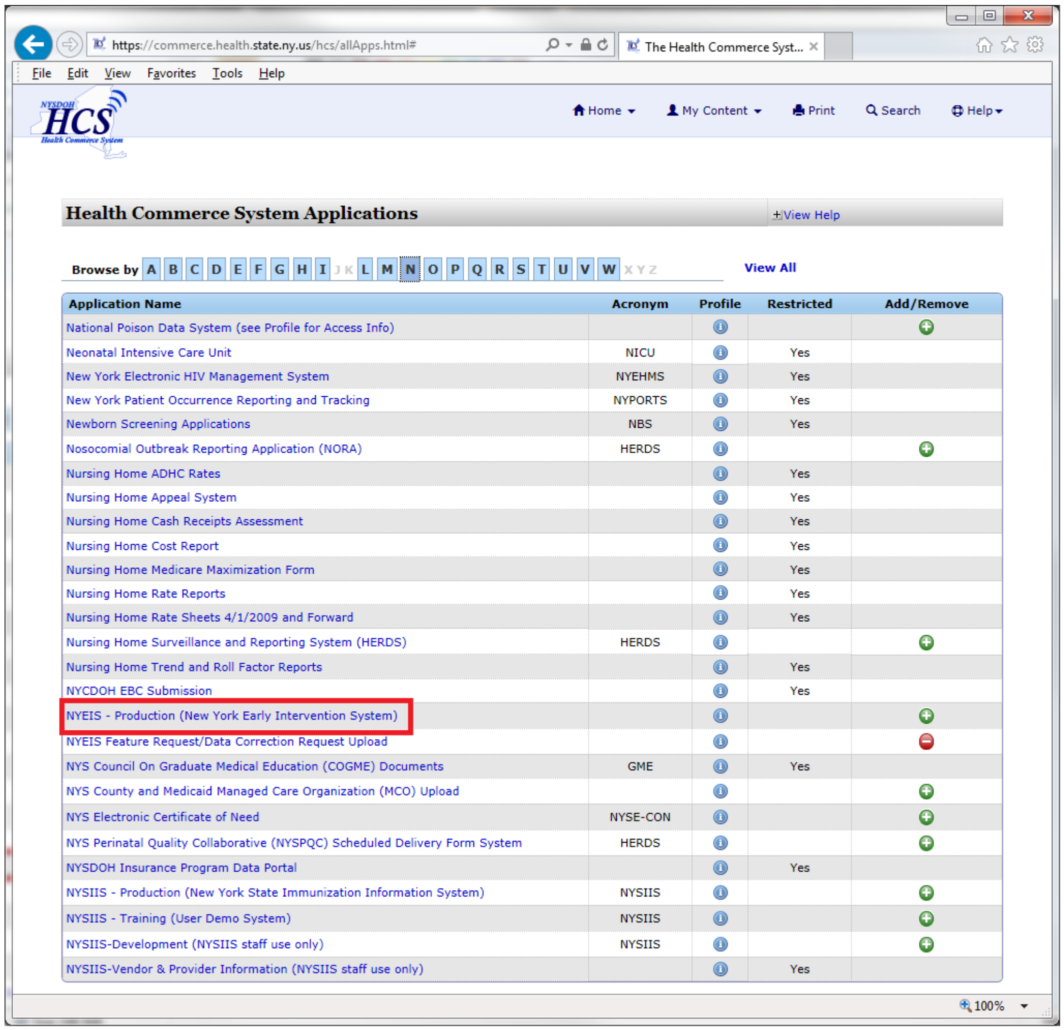
- Select the option ‘All Applications’.



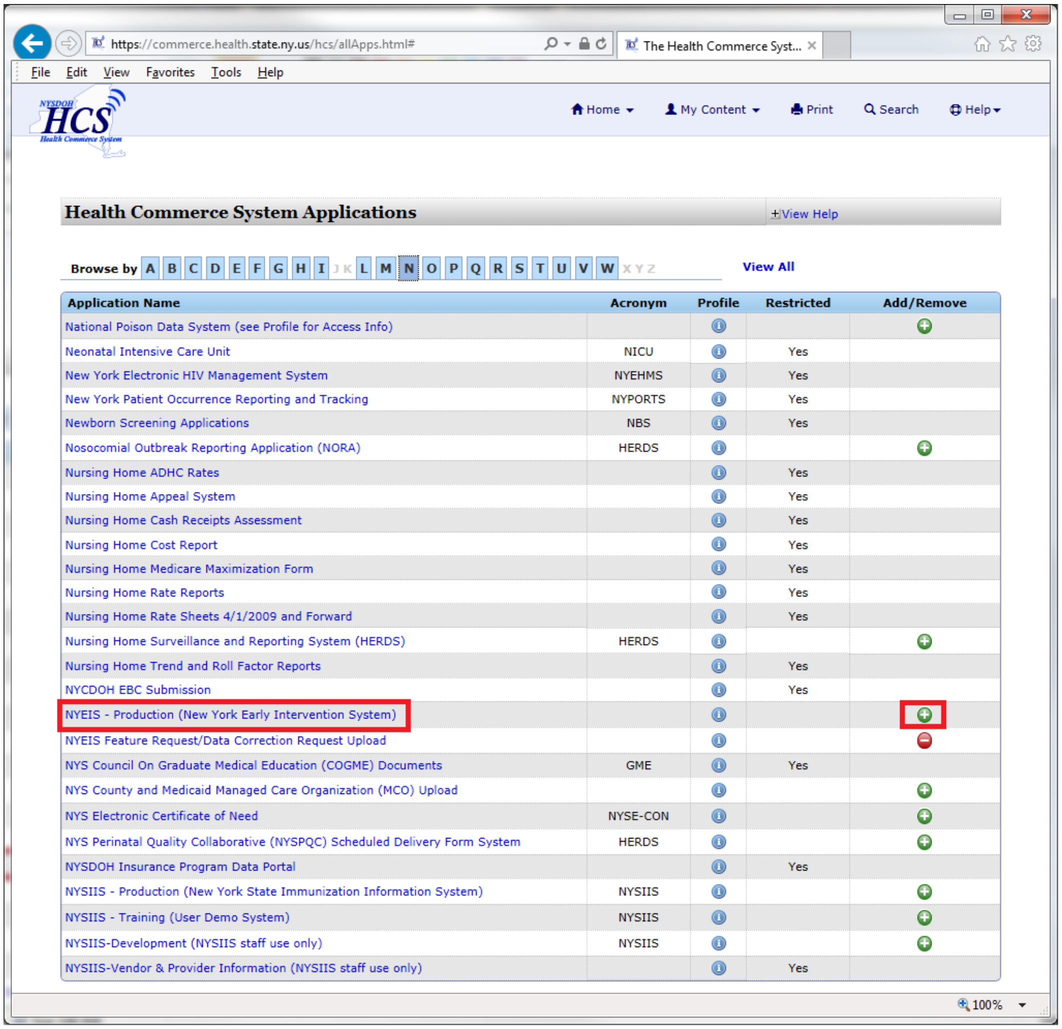
- You are then taken to a page with an index tab that will allow you to browse by application name.



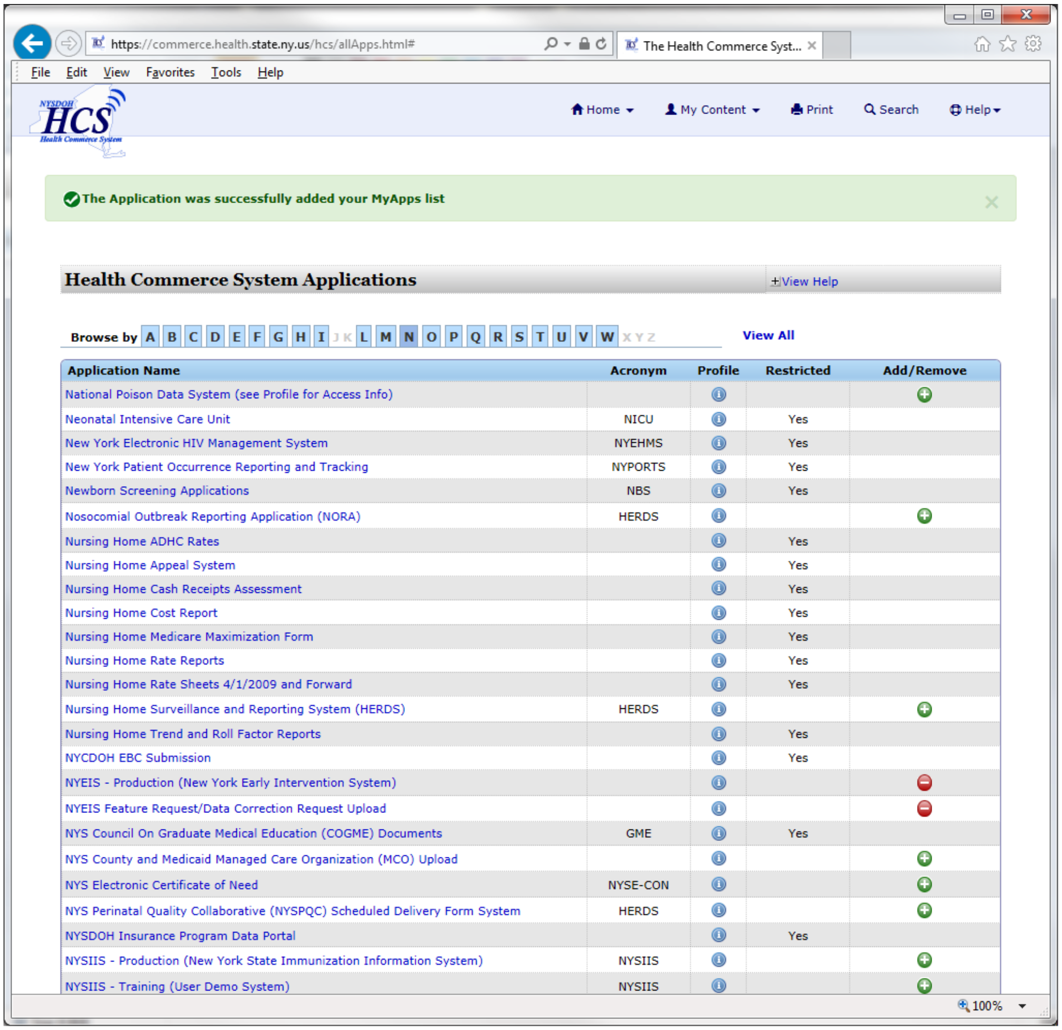
- Click on the ‘N’ tab to navigate to the NYEIS application:



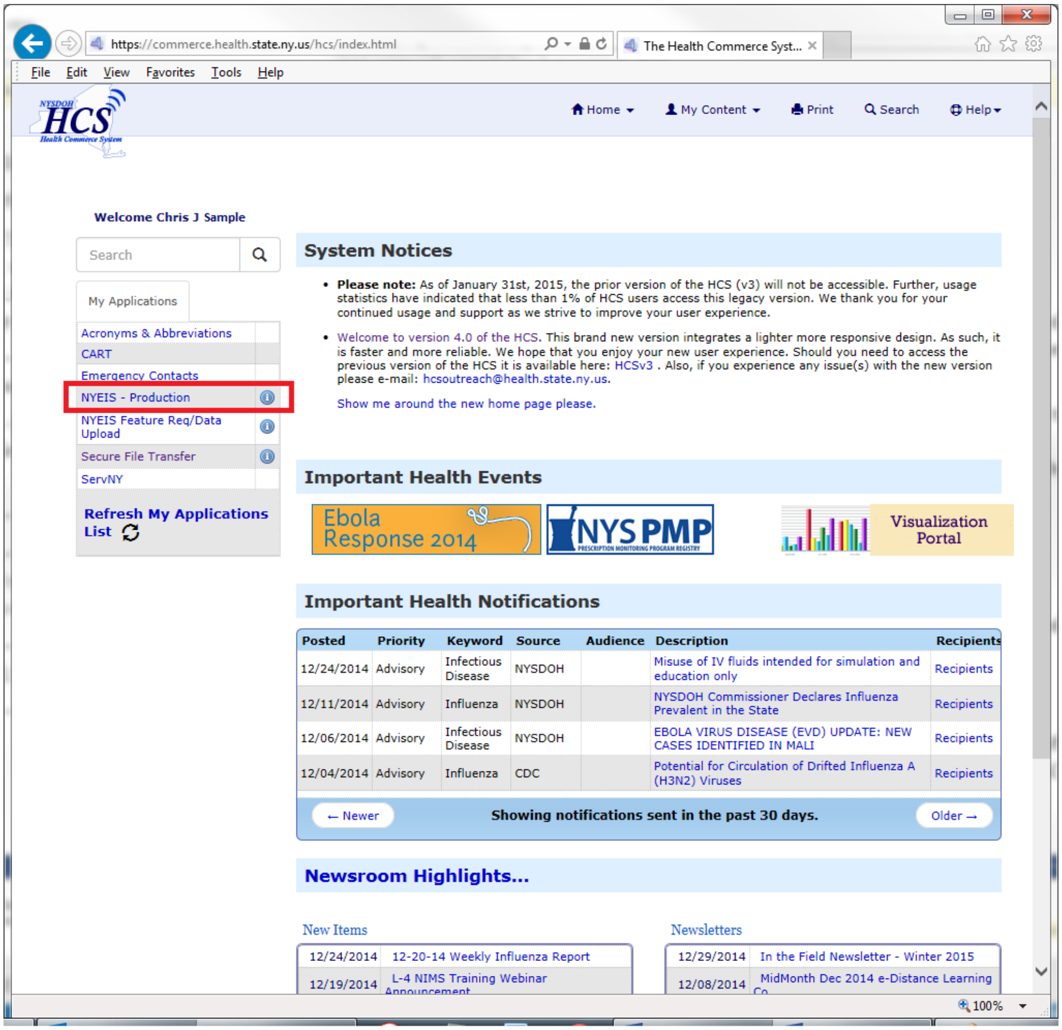
- Click the green “+” sign in the **Add/Remove** column.



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



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



ACCESSING NYEIS

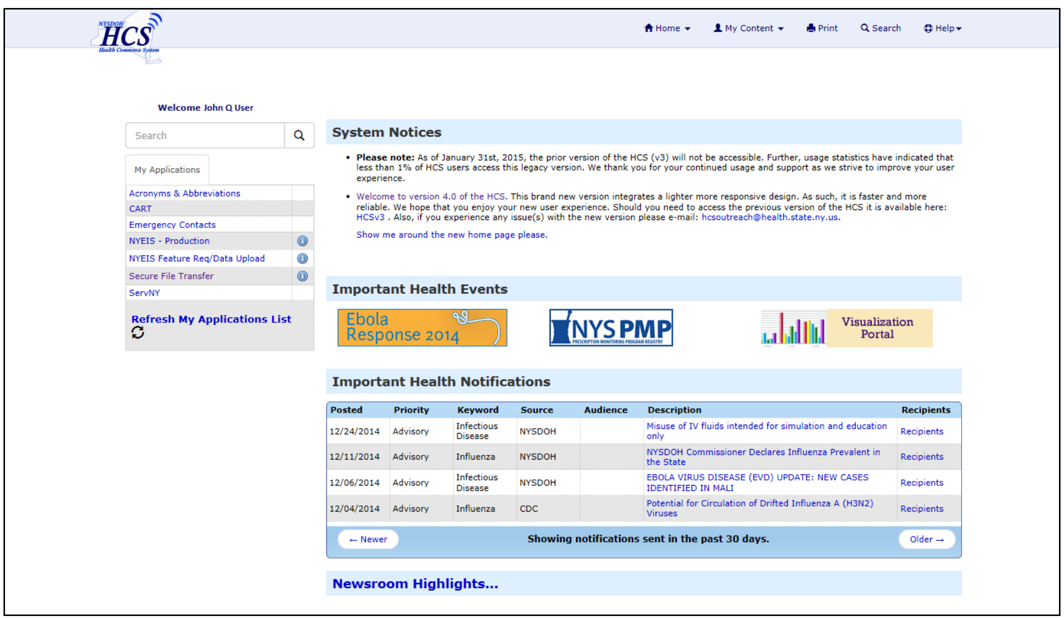
NYEIS is accessed through the Department of Health, Health Commerce System portal.

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

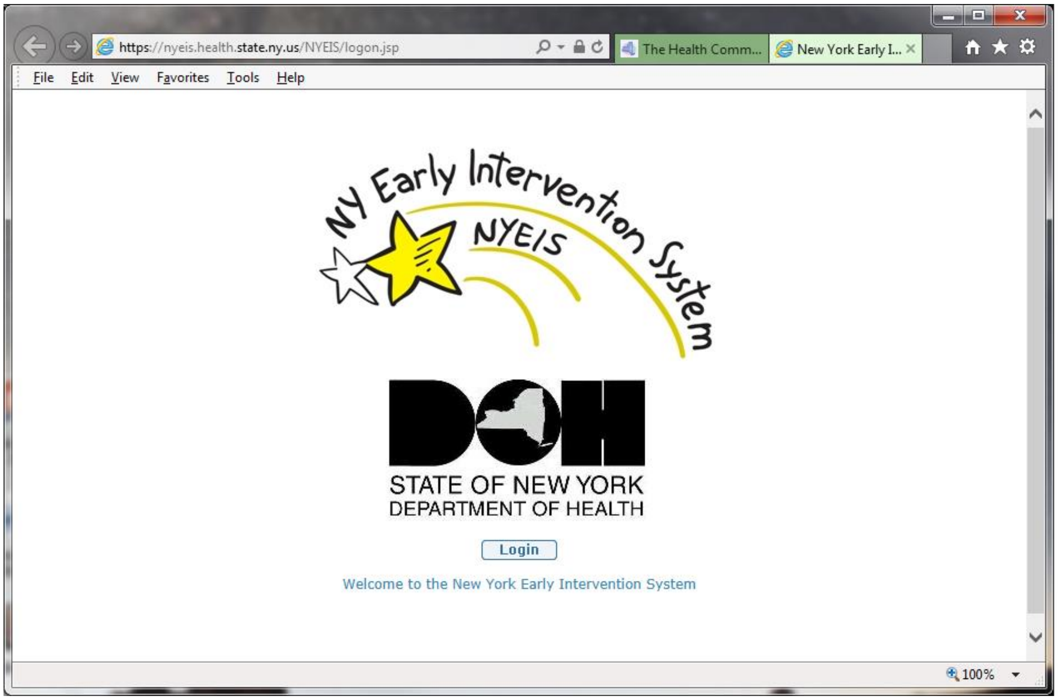
   https://commerce.health.state.ny.us

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

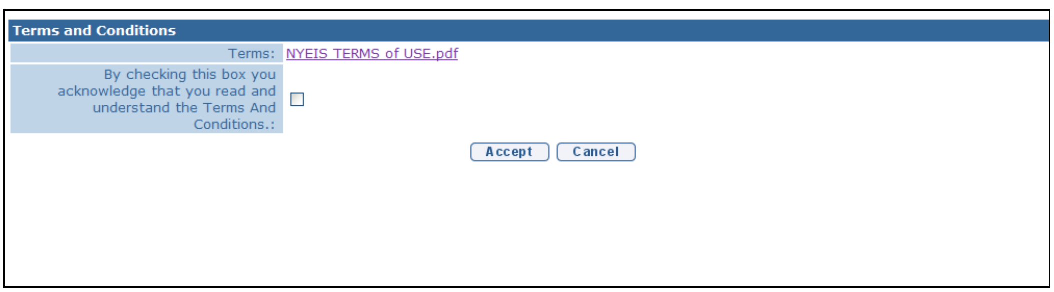
2. Enter in your Health Commerce System account username and password. Click the **Sign In** button. The **Health Commerce System Portal** page displays.



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



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



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

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

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

Important Information to Providing Agencies regarding HCS User Account Management:

- Please note that each providing agency should have established an individual(s) within the organization to serve as a liaison between the agency and the HCS for matters relating to agency employee HCS account management. One individual must be designated an HCS Director and an additional one or two individuals may be designated HCS Coordinators.

  - When a user who is employed by only one agency leaves the agency, the HCS Director or Coordinator from the agency should contact the CAMU Help Desk at 1-866-529-1890 so that the HCS login can be terminated.

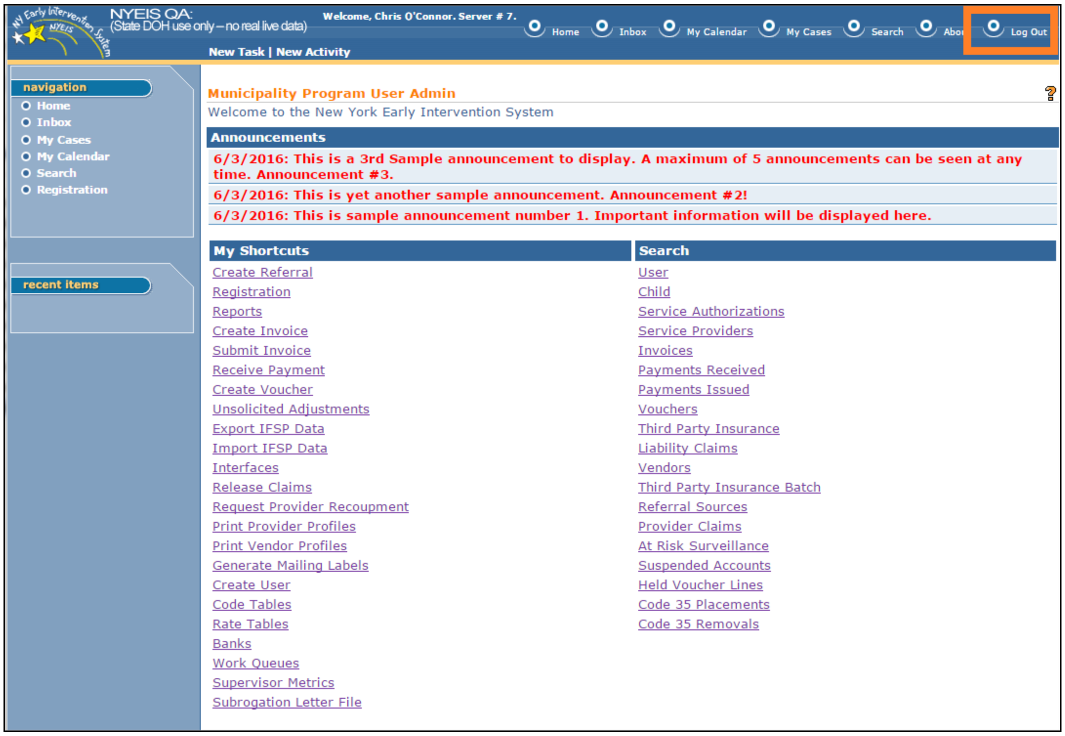
  - If this employee ever returns to work for an agency in the future, they will likely receive a new HCS user ID. In this specific circumstance, the employee should contact the NYEIS Help Desk to have their previous NYEIS user ID updated to match the latest HCD user ID.

  - In other cases, where employees leave one agency to work for another or are employed by multiple agencies, the HCS account does not need to be terminated. **It is important for HCS Directors and Coordinators to understand this distinction**, as the inappropriate termination of a HCS user ID can ultimately lead to delays in user’s access to NYEIS. Also, the user upon changing agencies should call CAMU Help Desk at 1-866-529-1890 so that CAMU can update their agency information.

LOGOUT PROCEDURES FOR NYEIS AND HCS

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

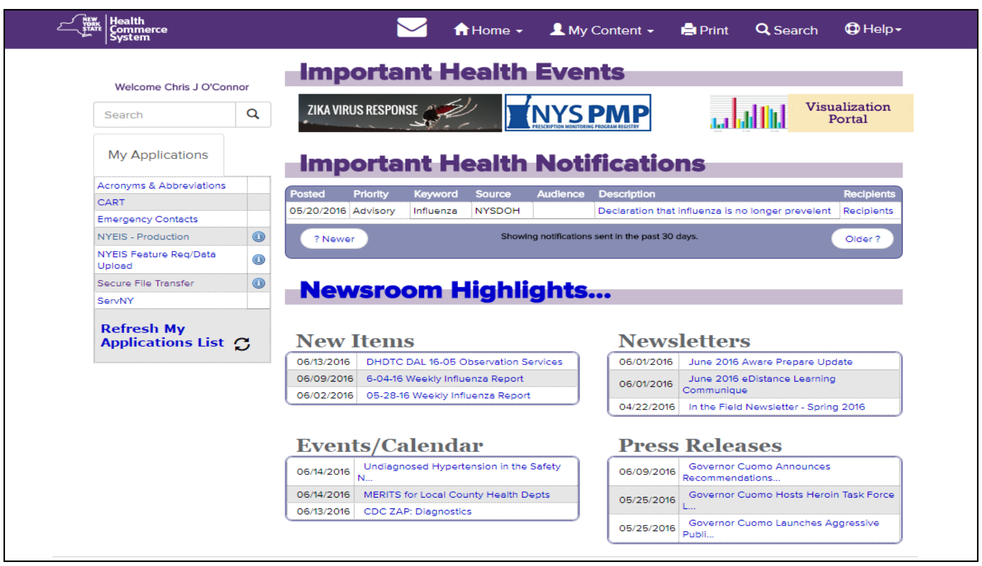
1) Click the **Logout** Button located at the end of the upper menu bar:



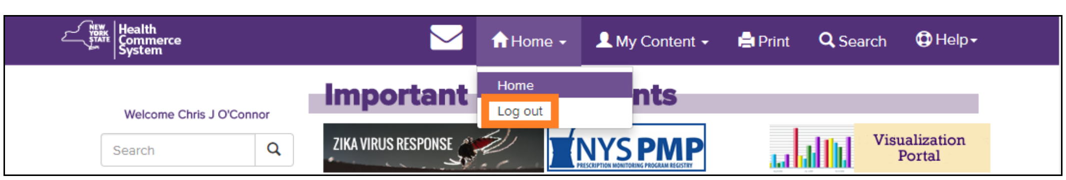
2) The NYEIS logout splash window appears. Click the '**Log Out**' button:

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

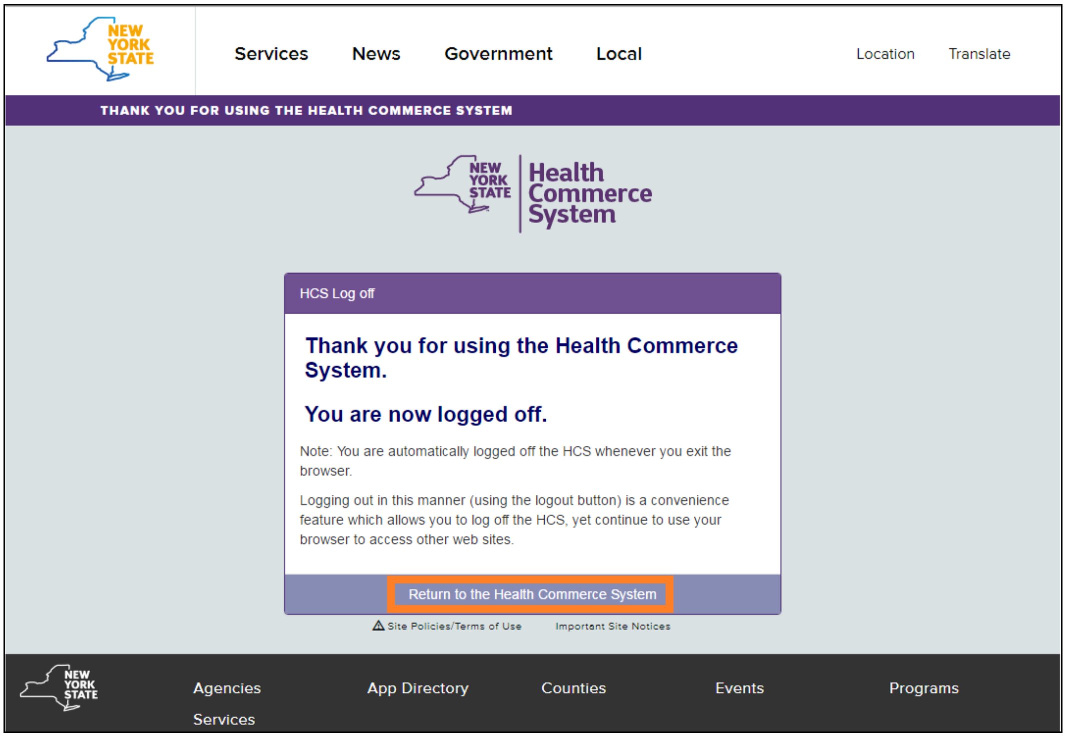
4) If following step 3 the browser does not switch back to the HCS tab by default, select the browser tab for the (still active) HCS session:



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



6) A page displays confirming successful logout.



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

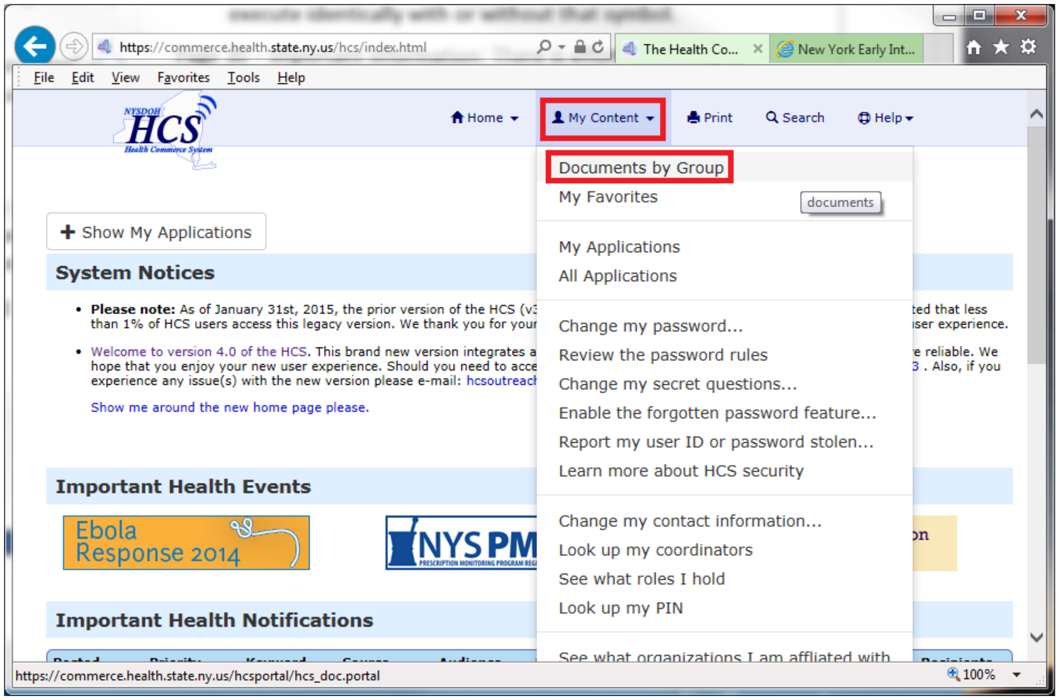
7) If your HCS session has ended, close the browser. If desired, click '**Return to The Health Commerce System**' to log back in to HCS.

Accessing the NYEIS User Manual Online

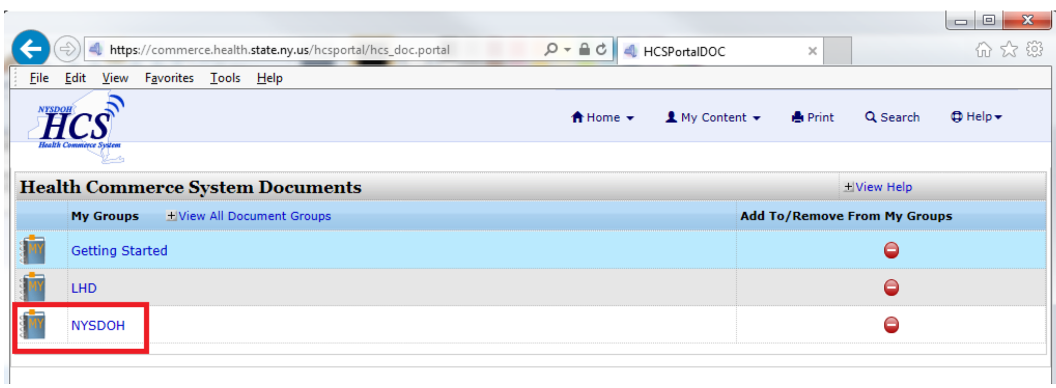
Users can access the current version of the NYEIS User Manual stored on the Department of Health, Health Commerce System.

Adding the NYEIS User Manual to your "My Favorites" Shortcuts

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

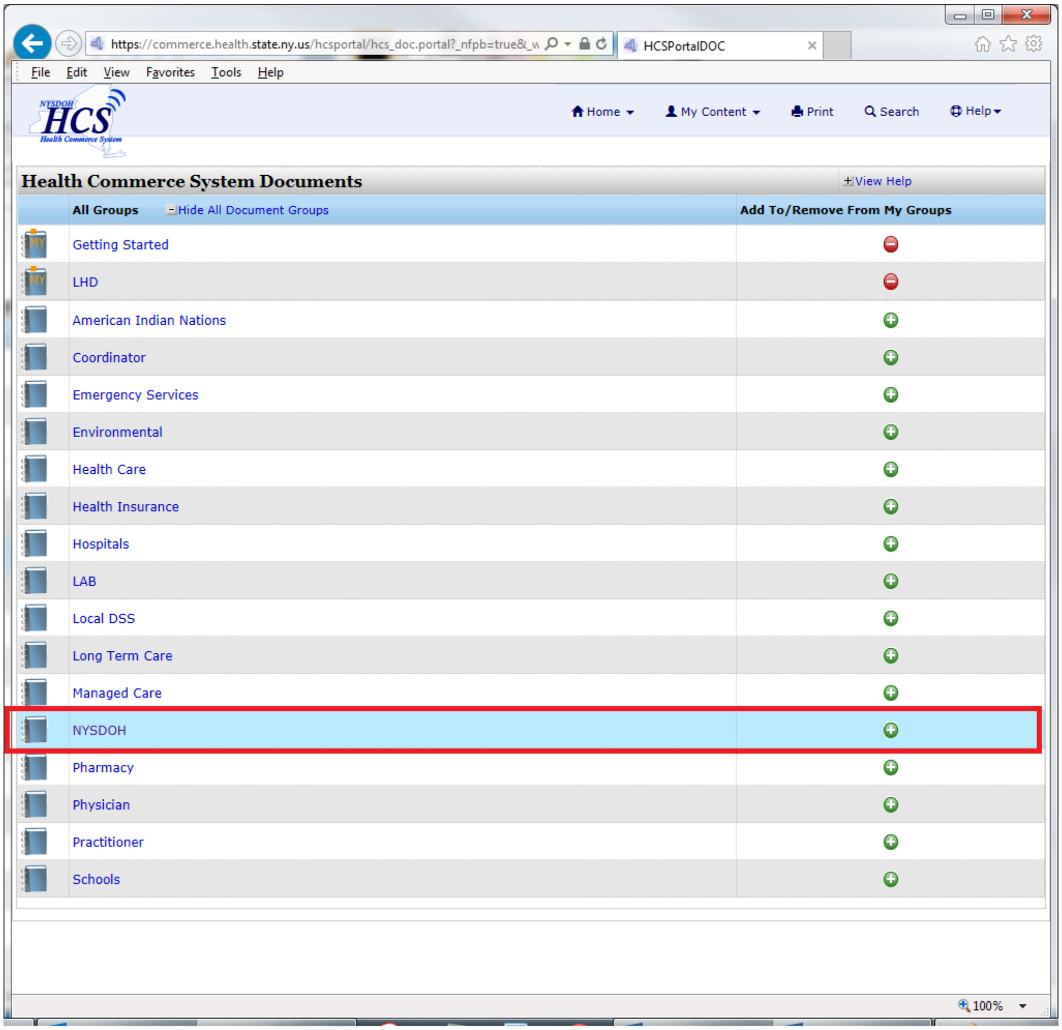


2. **Health Commerce System Documents** page displays.

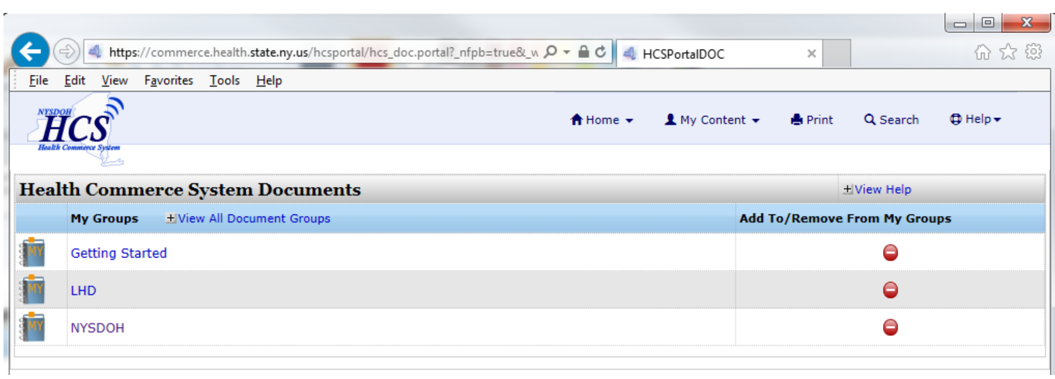


3. Select the NYSDOH group from the **My Groups** section

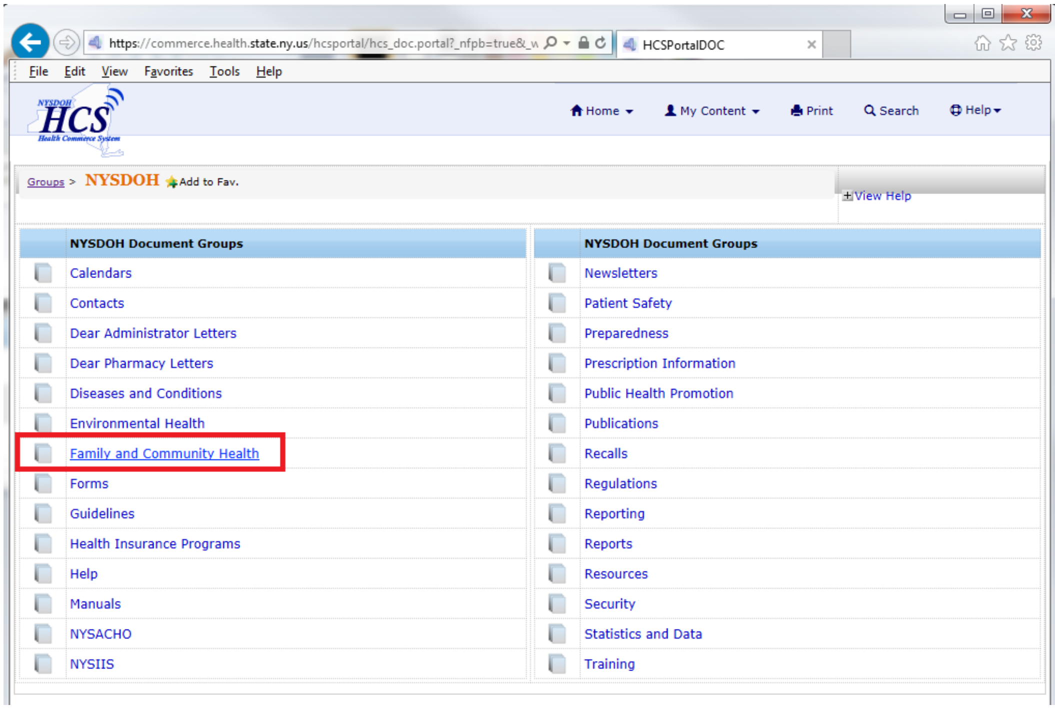
   a. If you do not see your Group in the drop down, click the **View All Document Groups** link. Select the green '+' next to your group.



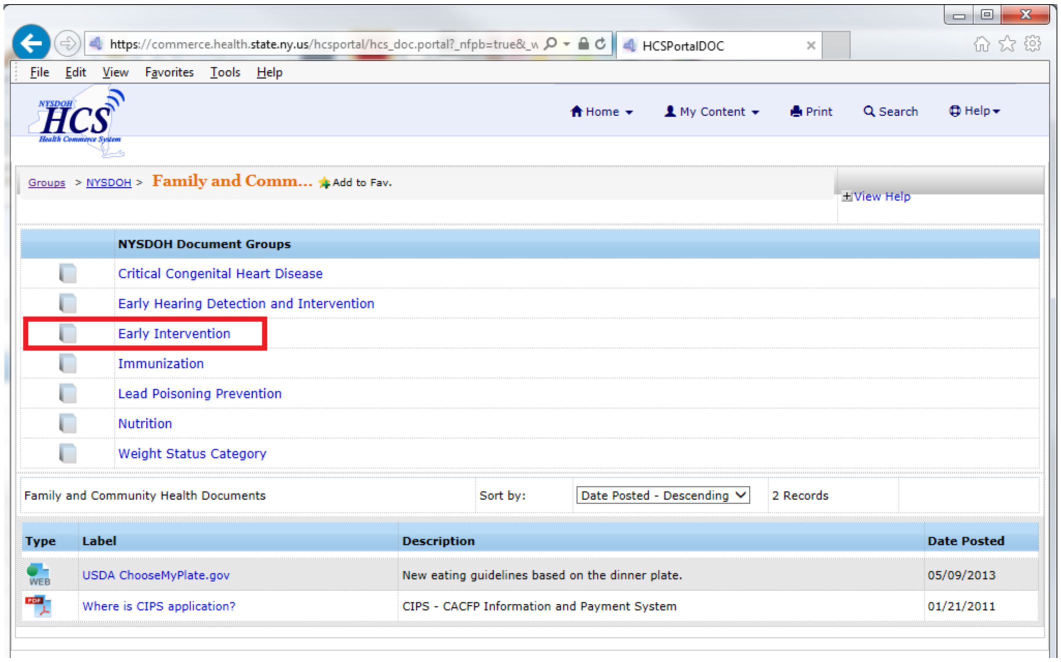
b. The selection will be displayed in your **My Groups** list.



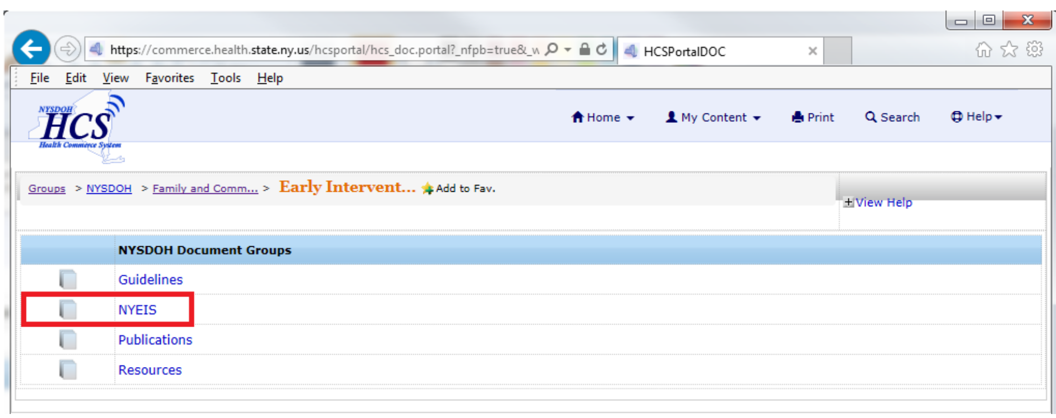
4. Select your **My Groups** link (either **LHD** or **NYSDOH**). Select **Family and Community Health.**


https://commerce.health.state.ny.us/hcsportal/hcs_doc.portal?_nfpb=true&_w
HCSPortalDOC
File Edit View Favorites Tools Help
NYSDOH HCS Health Commerce System
Home
My Content
Print
Search
Help
Groups > NYSDOH Add to Fav.
View Help
NYSDOH Document Groups
Calendars
Contacts
Dear Administrator Letters
Dear Pharmacy Letters
Diseases and Conditions
Environmental Health
Family and Community Health
Forms
Guidelines
Health Insurance Programs
Help
Manuals
NYSACHO
NYSIIS
NYSDOH Document Groups
Newsletters
Patient Safety
Preparedness
Prescription Information
Public Health Promotion
Publications
Recalls
Regulations
Reporting
Reports
Resources
Security
Statistics and Data
Training

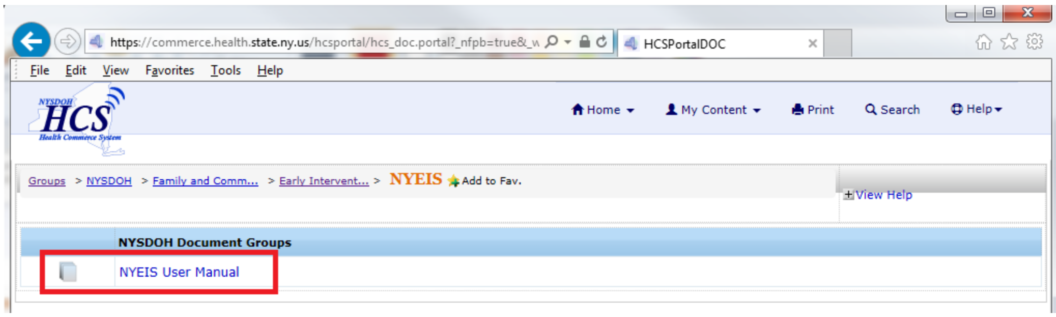
5. Select the **Early Intervention** folder.



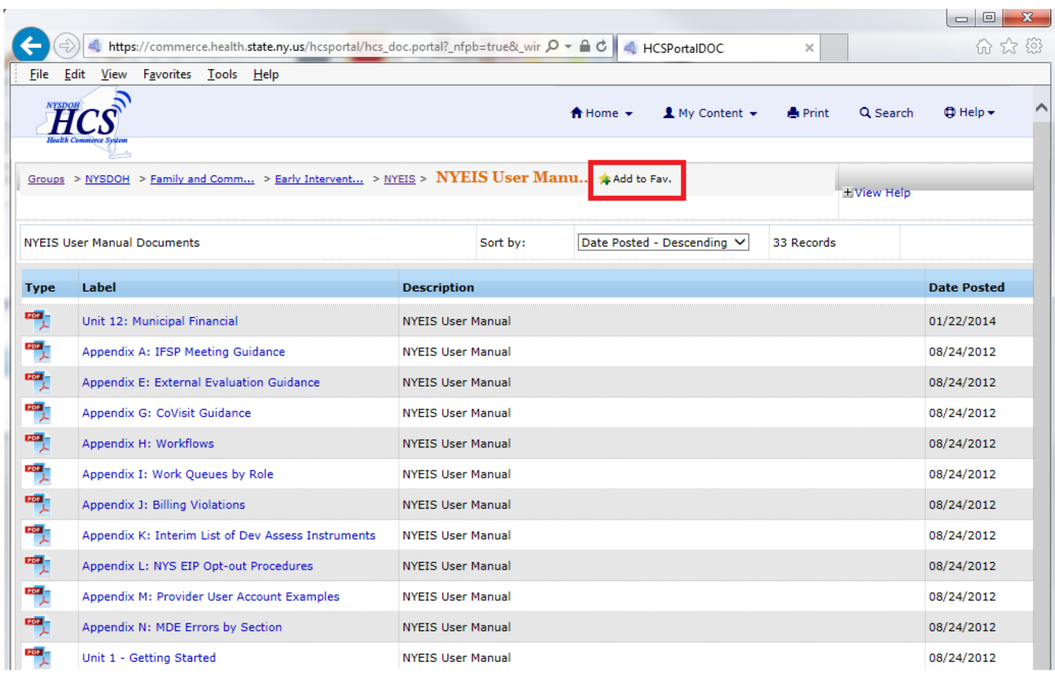
6. Select the **NYEIS** folder.



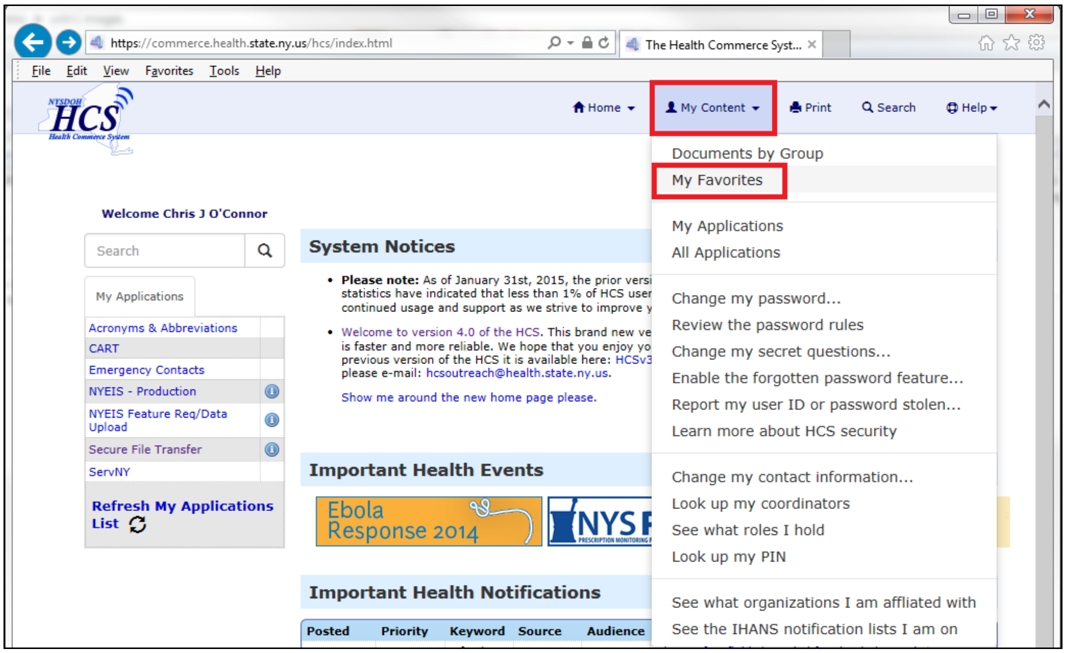
7. Select the **NYEIS User Manual** folder.

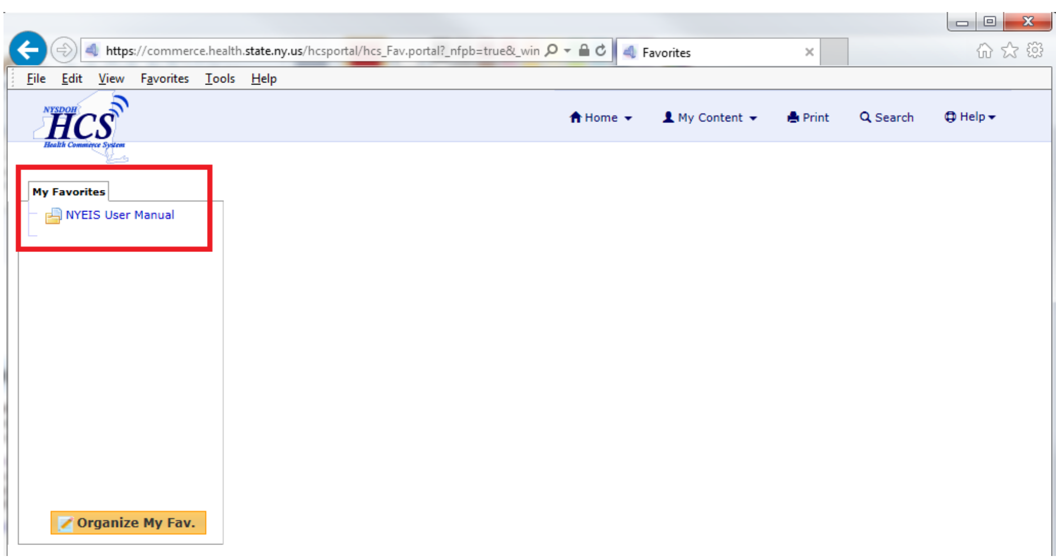


8. You are now viewing the NYEIS User Manual Chapters. The path you followed to get here is referenced along the top of the page. Click on '**Add to Fav'** at the end of that displayed path to access the user Manual chapters more easily from HCS Home:



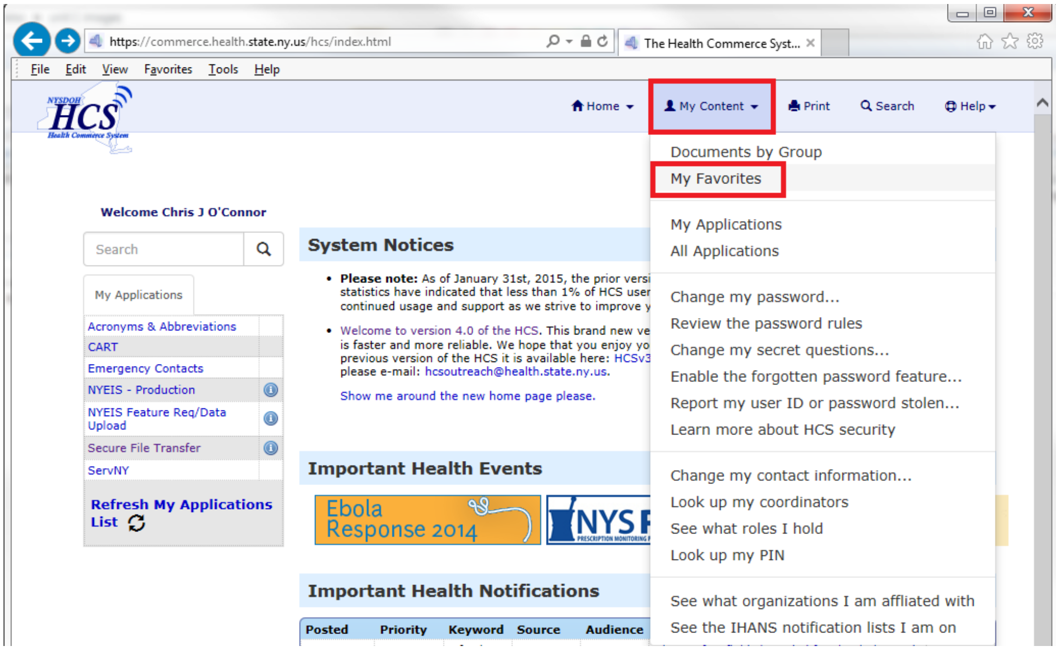
9. A link to the User Manual is added to your **My Favorites** tab. To access your Favorites, click the **My Content** link on the top of HCS Home, then click **My favorites**



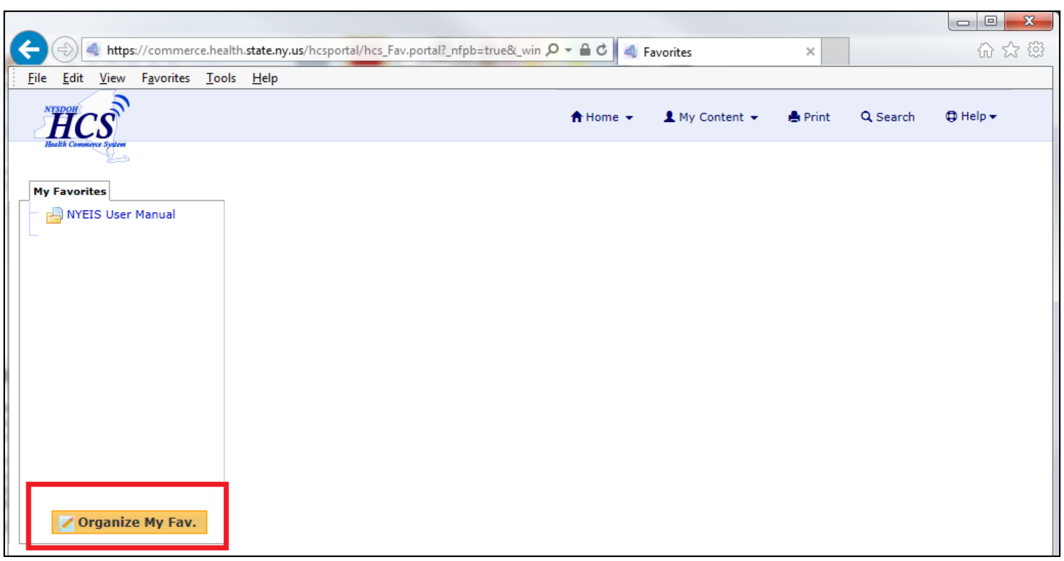


Deleting an Existing "My Favorites" Shortcut

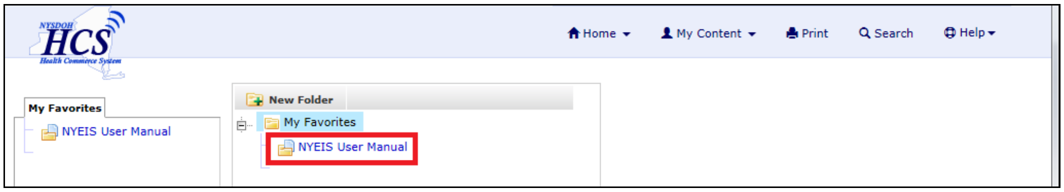
1. Log onto the Health Commerce System. Click on the **My Content** menu on top of HCS home, then select **My favorites:**



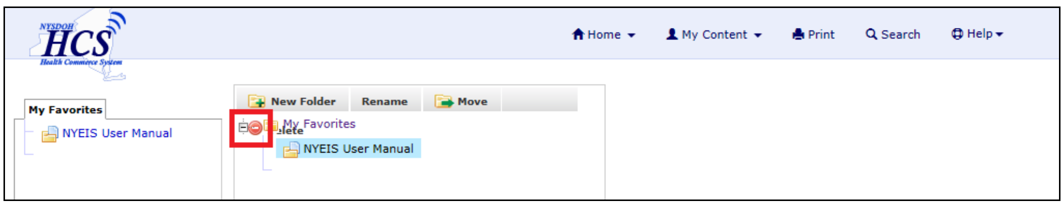
2. Click on the **Organize My Favorites** button on the left hand side of the page. Click **Organize My Fav**. Button.



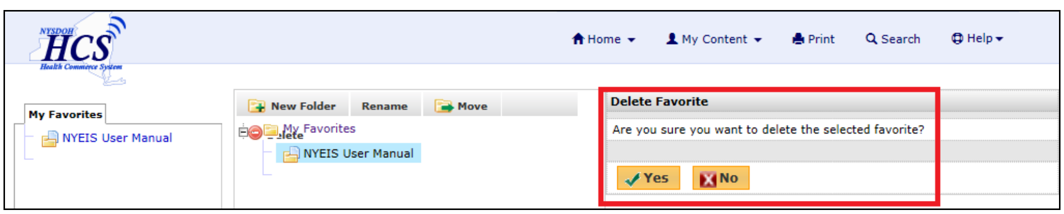
3. Click on the actual name of the NYEIS User Manual shortcut in the **Organize My Favorites** section of the page.



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



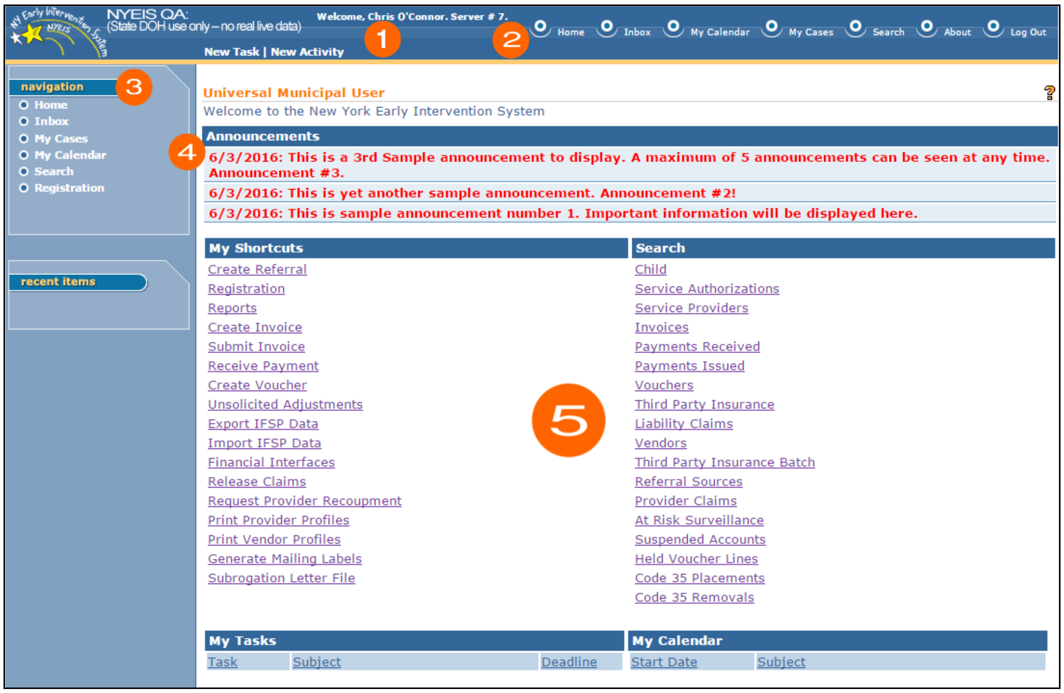
5. Click on **Yes** in the Delete Favorites section of the page to confirm that you want to delete the shortcut. The shortcut has now been deleted.



THE NYEIS STANDARD PAGE LAYOUT

Note:

- Functionality varies with user role.



❶ **Welcome Message** – Seen on all pages, this area reflects the name of the user signed onto the workstation and the server number for their current browsing session

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

Home - returns User to personal Home Page (first page a User comes to when logged in to NYEIS).
Inbox - navigates User to a page containing personal tasks and notifications.
My Calendar - displays a list of events as links. Click link to display User event.
My Cases – navigates users with an assigned role of either EIO/Ds or Service Coordinator to their assigned Cases.
Search - displays a search page.
About - displays NYEIS release version.
Log Out - exits New York Early Intervention System.

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

❹ **Announcements Cluster –** Displays important announcements, up to a current maximum of five announcements. All announcements will include a date of posting and a message up to 400 characters.

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

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

BUTTONS

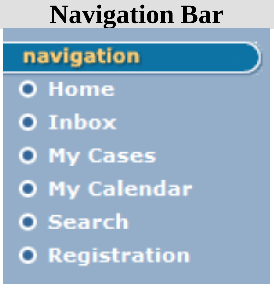
Cancel Leaves current page and returns to the previous page *without* saving any changes made.	Cancel Cancel
Date Lookup A field displaying a **Calendar** button to the right. If **Calendar** button is clicked, a calendar pop-up page displays. Select month, day and year. If entering a date, it *must*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

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

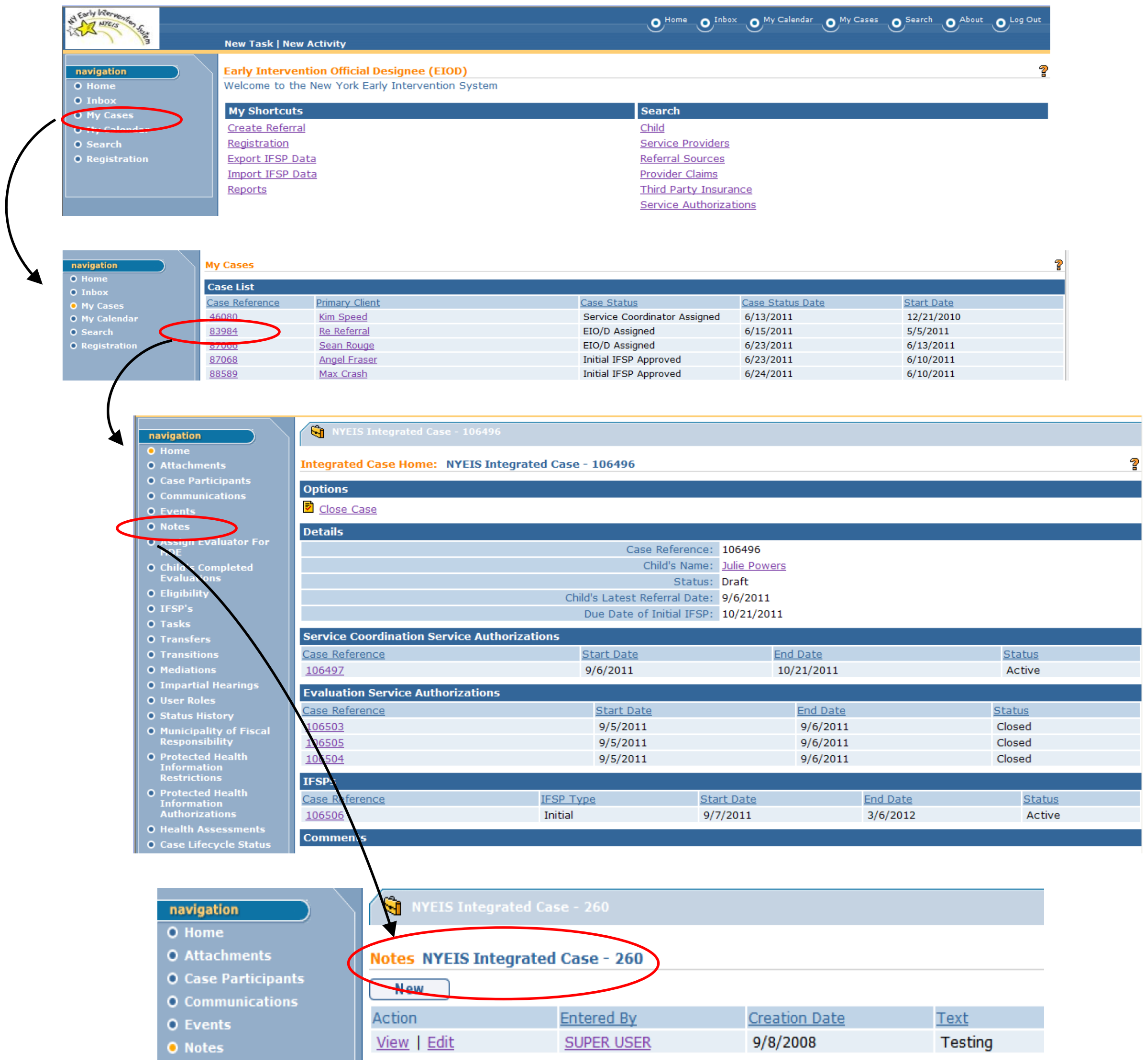
Navigation Bars

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

Below are examples of three specific Navigation Bars:

New York Early Intervention System Navigation Bar	NYEIS Integrated Case Navigation Bar	NYEIS Provider Homepage Navigation Bar
		

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



Common Buttons/Links:

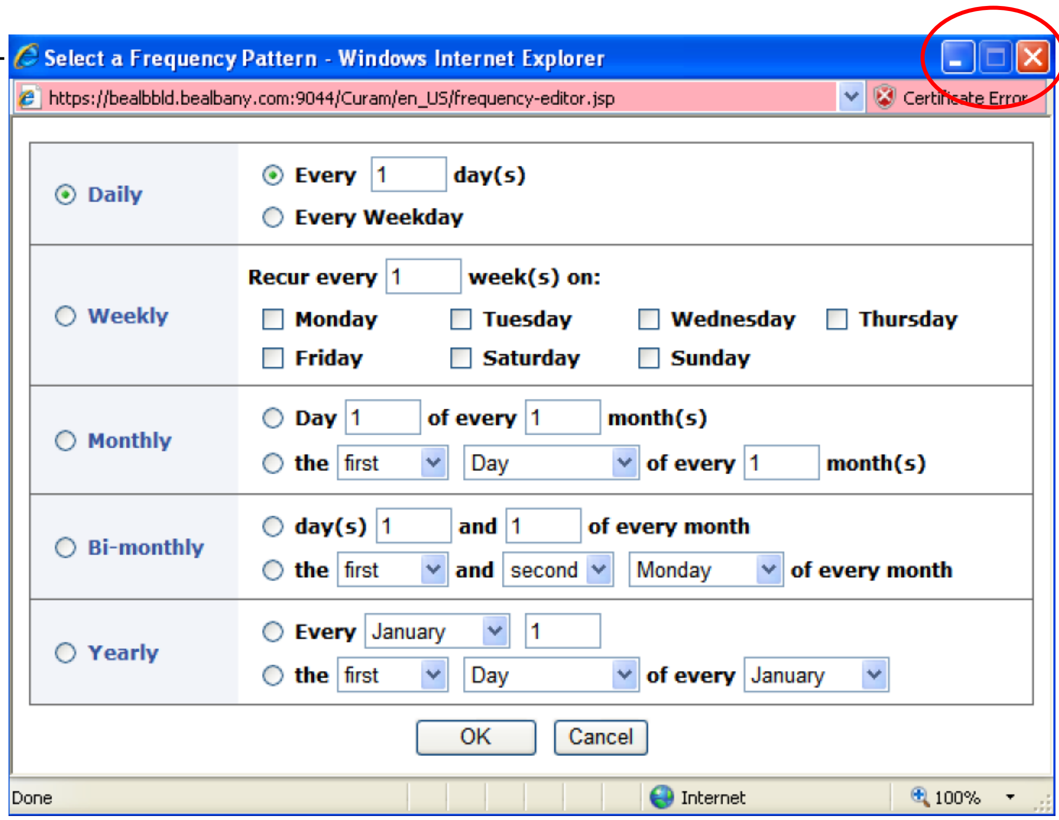
- **Delete** link to eliminate the record. A confirmation page will always be displayed prior to the data being removed when deleting information. Delete
- **Edit** link to change information. Edit
- **New** button goes to a create page. New
- **Next** button navigates to the next page of Application.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

Windows Basics

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

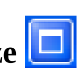
This is an example of a pop-up screen from the NYEIS calendar function.

❶ ❷



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

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

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

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

Multiple Selection Options

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

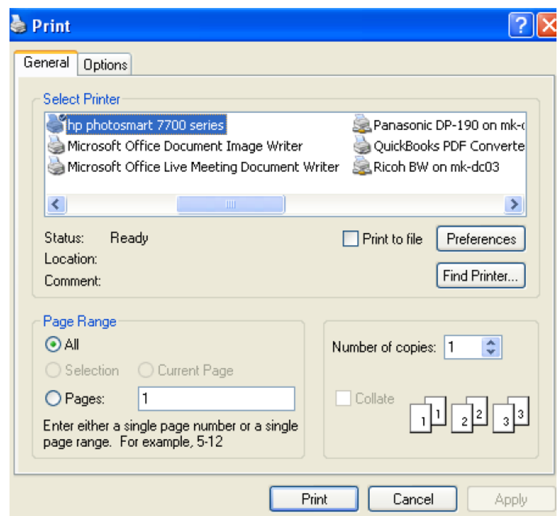
Using the Scroll Bar

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

Printing Screens

Any page within the Application can be printed.

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



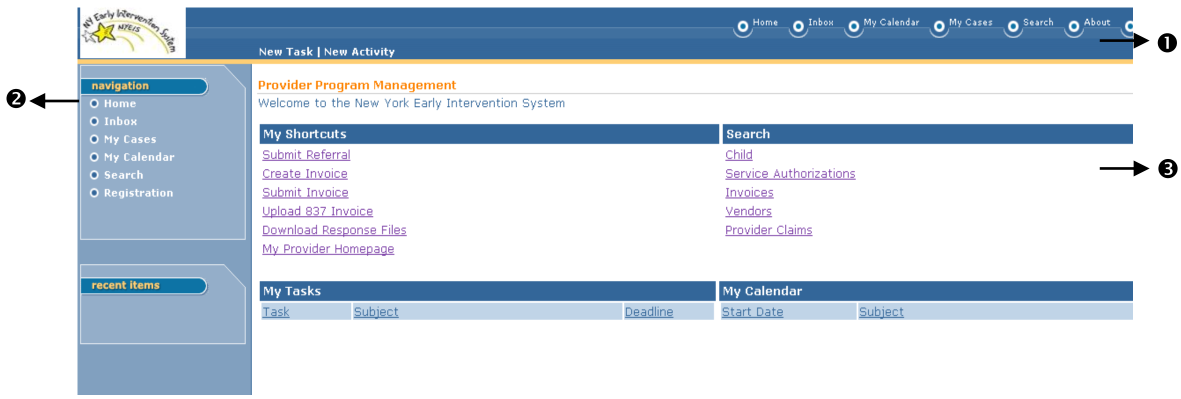
<u>Notes</u>:

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

USER HOME PAGE VIEWS

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

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



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

> **Home** - returns User to personal Home Page (first page a User comes to when logged in to NYEIS).
> **Inbox** - navigates User to a page containing personal tasks.
> **My Calendar** - displays a list of events as links. Click link to display. User event. *Applicants will not be able to use the Calendar.*
> **My Cases** – navigates users with an assigned role of either EIO/Ds or Service Coordinator to their assigned Cases.
> **Search** - displays a search page.
> **About** - displays NYEIS release version.
> **Log Out** - exits NYEIS.

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

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

My Shortcuts - navigates User to different areas of the Application.
Search - navigates User to a specific Search page.
My Tasks - displays a list of User tasks as links. Select link to display the specific Task page. Tasks are work activities that have to be completed.
My Calendar - displays a list of events as links. Click link to display User event.

Related User Role Access Rights

Providers

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

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

Municipalities

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

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

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

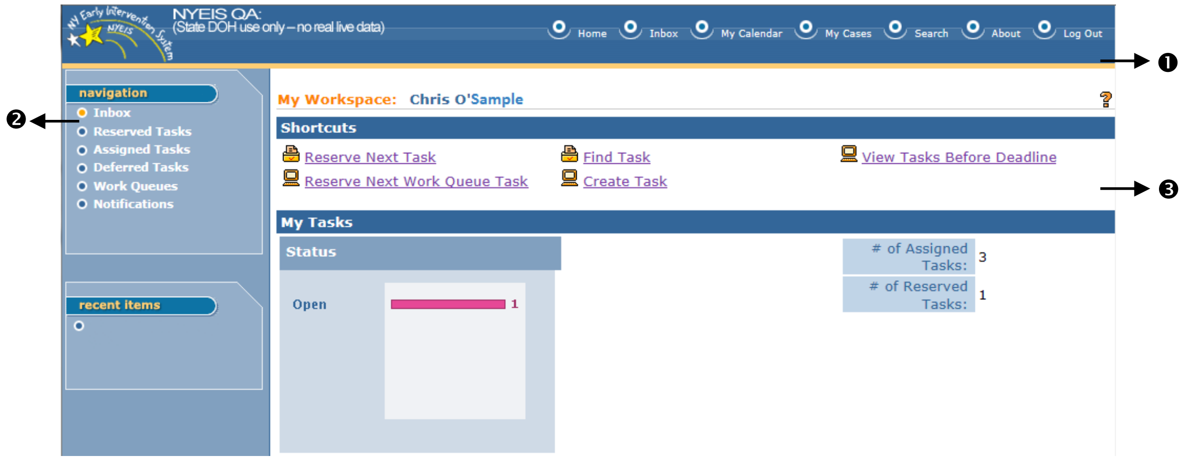
Department of Health

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

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

MY WORKSPACE PAGE OVERVIEW

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



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

Home - returns User to personal Home Page (first page a User comes to when logged in to NYEIS).
Inbox - navigates User to a page containing personal tasks.
My Calendar - displays a list of events as links. Click link to display User event.
My Cases - navigates users with an assigned role of either EIO/D or Service Coordinator to their assigned Cases.
Search - displays a search page.
About - displays NYEIS release version.
Log Out - exits NYEIS.

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

Inbox - navigates to the My Workspace page.
Reserved Tasks - navigates to the Reserved Tasks page. Displays a list of tasks that a User has previously reserved (e.g., Submitted Referral). If a Task has been reserved by a User, no other User can work on that Task.
Assigned Tasks - navigates to Assigned Tasks page. Displays tasks and assignments received from other Users (e.g., Initial Service Coordinator assignment).

Deferred Tasks - navigates to the Deferred Tasks page. Displays deferred tasks.
Work Queues - navigates to the My Work Queues page. Displays work queues that the User is subscribed to. The User *must* be subscribed to an appropriate Work Queue to reserve tasks in that Queue.
Notifications - navigates to the My Alerts page. Displays a list of alerts/notifications sent to the User (e.g., service coordination assignment, service authorizations that have been issued).

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

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

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

Exception
Currently not available to all NYEIS User roles.

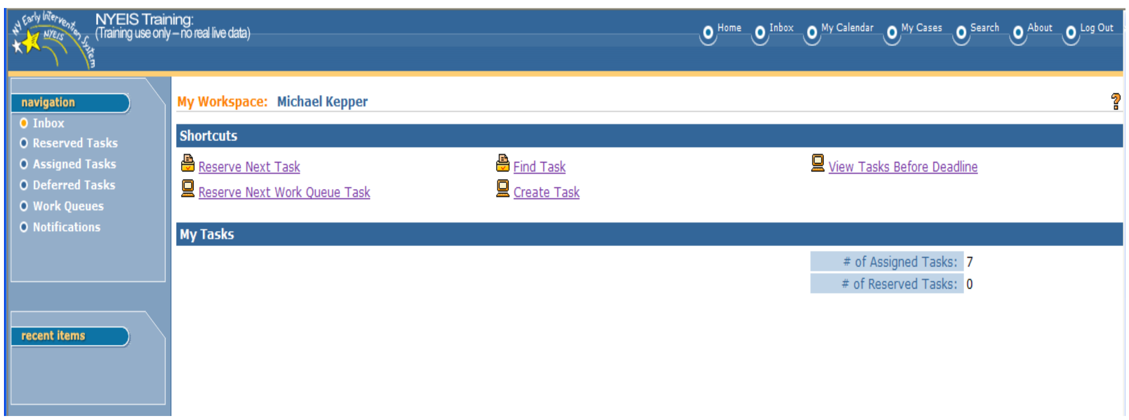
Reserve Next Task	Reserves next task assigned to User.
Reserve Next Work Queue Task	Provides the option for a User to select a work queue subscribed to and reserve the next task from that selected work queue.
Find Task	Search for a specific task by **Task ID**, **Case Reference Number** and **Participant**. [Some Participant types are not applicable. *See* **Working with Tasks**, ***Task Participant Types*** for further information.]
Create Task	Tasks can be created for yourself or for another User. [Some Participant types are not applicable. *See* **Working with Tasks**, ***Task Participant Types*** for further information. A User can create a deadline which displays a due date in the User's

	Workspace or when the System creates a task with specific date criteria (e.g., evaluation due by date, the due date displays).]
<u>**View Tasks Before Deadline**</u>	Enter a date to view tasks on or before a specified date.

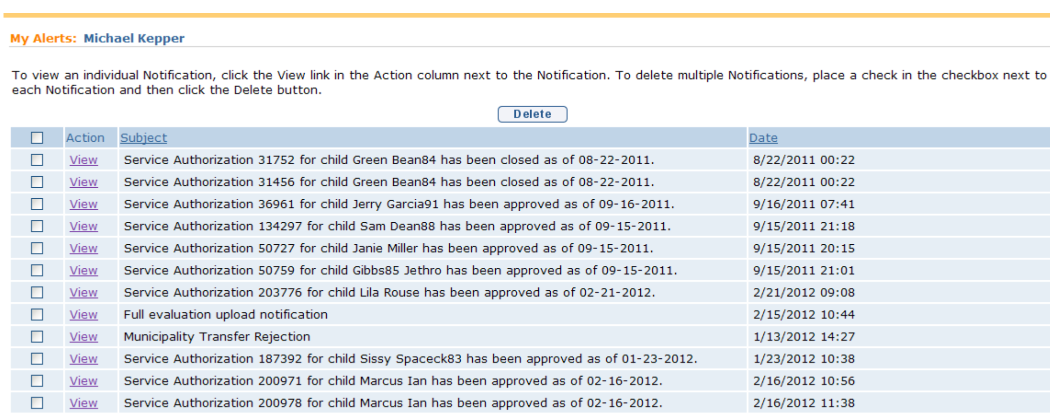
My Tasks - displays the **Task Status** box which lists Tasks by status (e.g., Open). Also displays the current number of Assigned Tasks and Reserved Tasks associated with the User.

Viewing Notifications

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



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


My Alerts: Michael Kepper

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

Delete

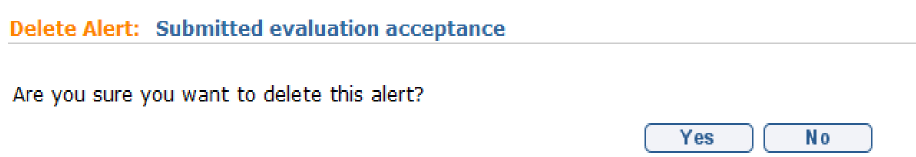
☐	Action	Subject	Date
☐	View	Service Authorization 31752 for child Green Bean84 has been closed as of 08-22-2011.	8/22/2011 00:22
☐	View	Service Authorization 31456 for child Green Bean84 has been closed as of 08-22-2011.	8/22/2011 00:22
☐	View	Service Authorization 36961 for child Jerry Garcia91 has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

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

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

   Or

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



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

Important Information

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

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

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

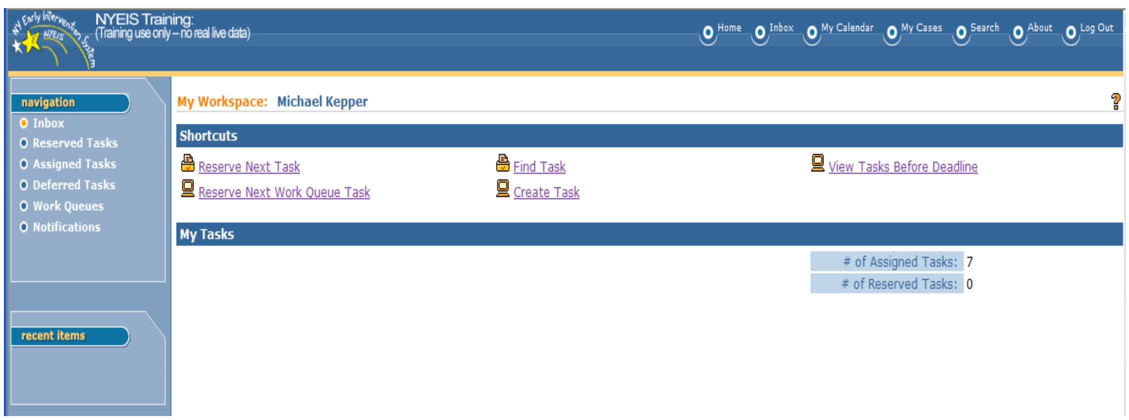
Note:

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

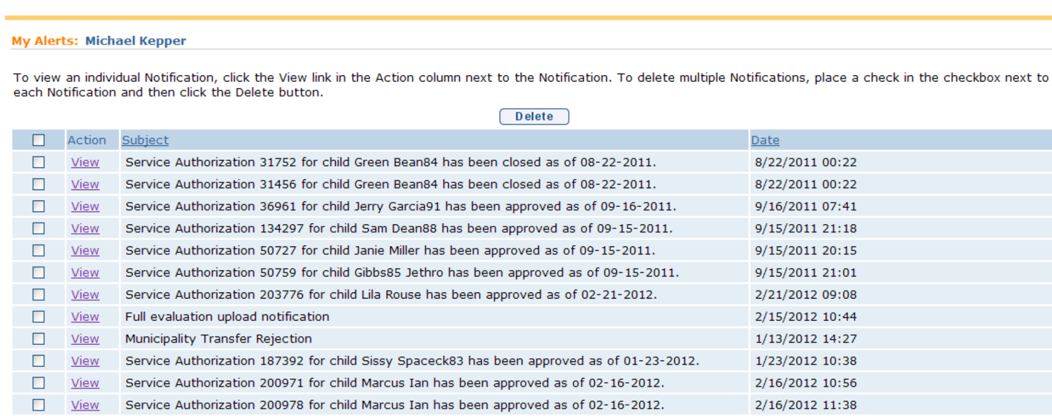
Multi-delete Notifications

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

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



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



My Alerts: Michael Kepper

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

Delete

☐	Action	Subject	Date
☐	View	Service Authorization 31752 for child Green Bean84 has been closed as of 08-22-2011.	8/22/2011 00:22
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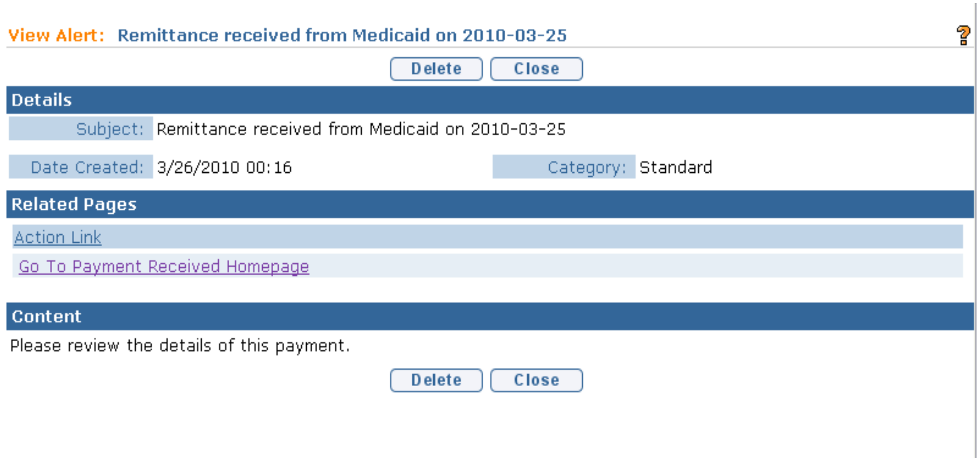
☐	View	Service Authorization 200978 for child Marcus Ian has been approved as of 02-16-2012.	2/16/2012 11:38

3. Click **<u>View</u>** link under **Action** column to display Notification. **View Alert** page displays.

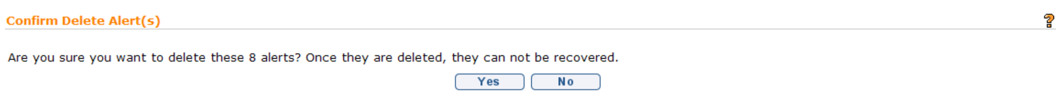


4. Review Notification. Click **Close** button. **My Alerts** page displays with Notification in list.

5. Repeat Step 4 as needed to view Notifications.

6. Click the check box next to each Notification on the Notification list page that is to be deleted.

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



8. The **My Alerts** page displays.

WORKING WITH TASKS

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

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

Task Participant Types

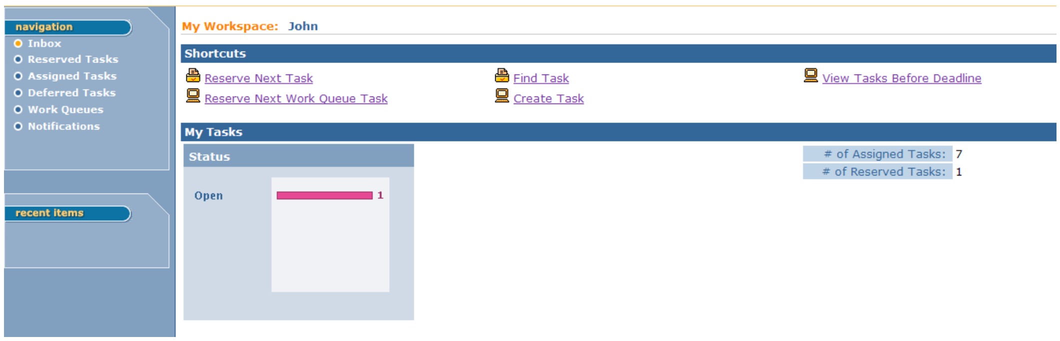
Below defines the different Participant Types that are defined in the Participant drop down:

Employer = [Agency Provider] in NYEIS that is employing other Service Providers
Information Provider = Referral Source
Person = Child
Product Provider = Registered Individual or Agency Service Provider
Representative = Not Applicable
Service Supplier = Not Applicable
Utility = Not Applicable

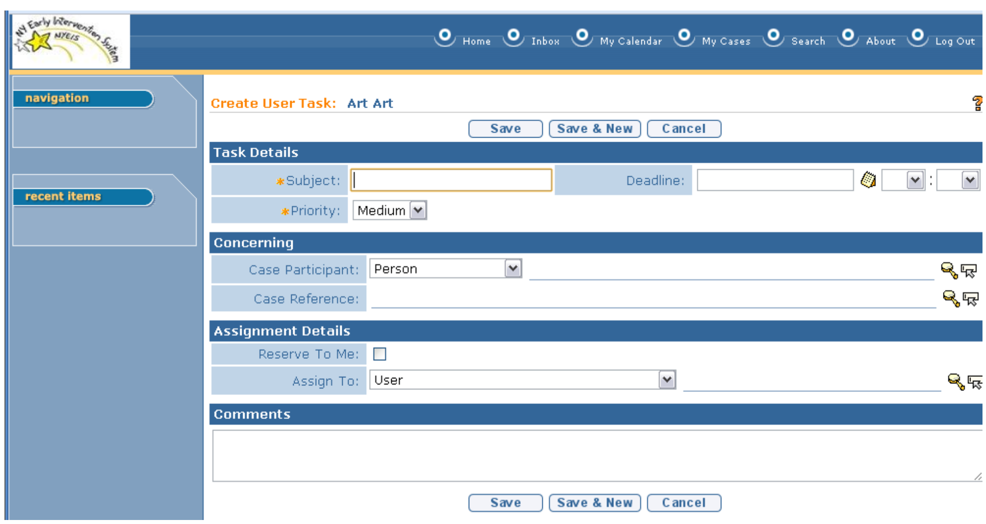
Creating a Task

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

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



2. Click **<u>Create Task</u>** link under **Manage** section. **Create User Task** page displays.



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

3. Type **Subject** and **Deadline** including date and time. Type any other relevant information. Type **Comment** *(Optional)*.

4. Click **Save** button. **My Workspace** page displays.

Notes:

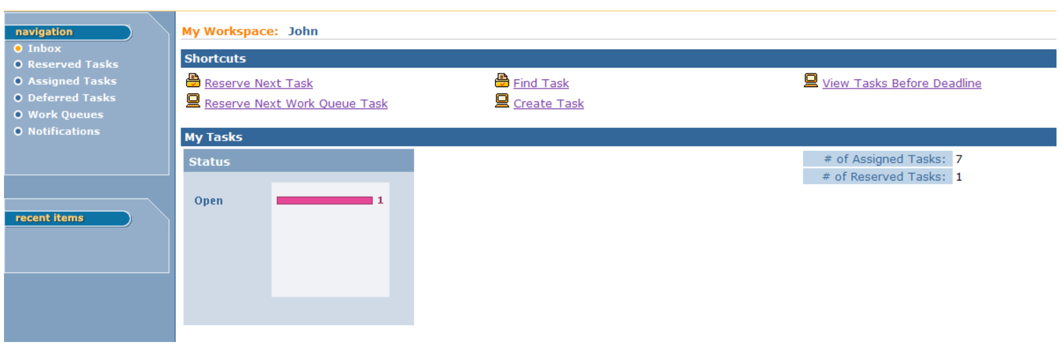
- When a Task is created in a specific area of a Case, the new Task will be found in the location where the Task was generated (e.g., Child Home page, IFSP, Service Authorization). For example, a task created in the **Provider Home** page will not be able to be viewed from the task link on the **Child Home** page.

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

Viewing a Task

These instructions apply to both categories of Tasks.

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

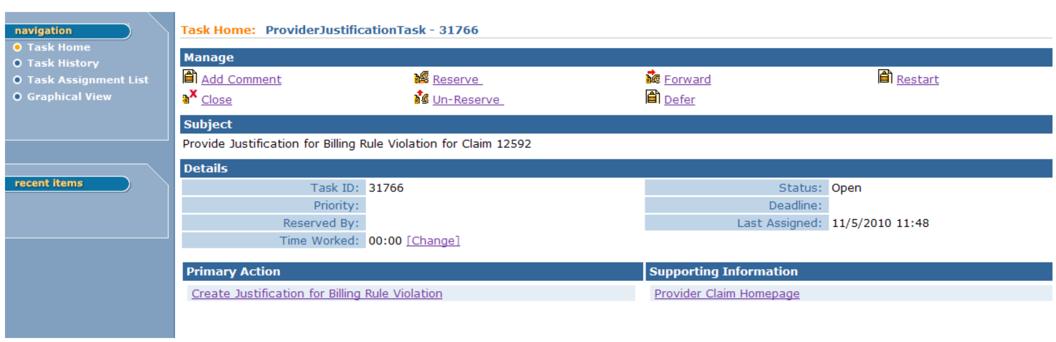


To view tasks Assigned to you, click on the **Assigned Tasks** link on the left-hand navigation bar of '**My Workspace**'. **Assigned Tasks** page displays. Follow from step 3 below. To view tasks you have reserved, follow from step 2 below.

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

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

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



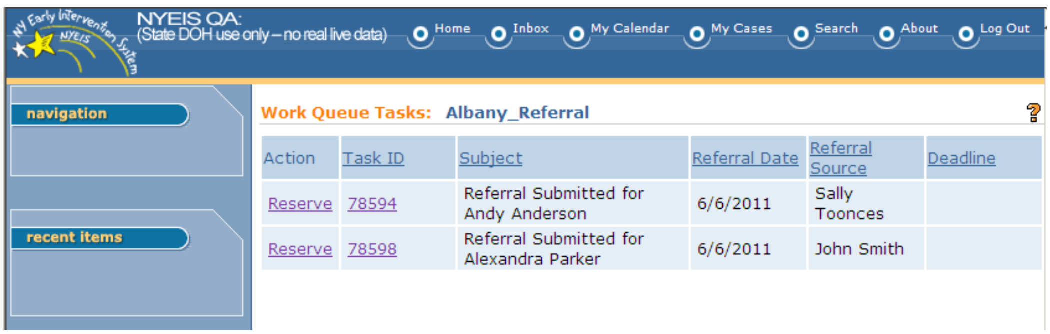
Note:

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

Viewing Tasks in a Work Queue

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

Most System-Created Tasks are created in the user's Work Queues. Users need to periodically review their work queues to determine what tasks need to be accomplished. Work queues are established for similar types of tasks. One such work queue is the Referral Work Queue. It lists the tasks associated with reviewing and registering a submitted referral into NYEIS. Users have the option to reserve a task to prevent other users from working on it. Alternatively, clicking the task ID number allows you to view and work the task without first reserving it.



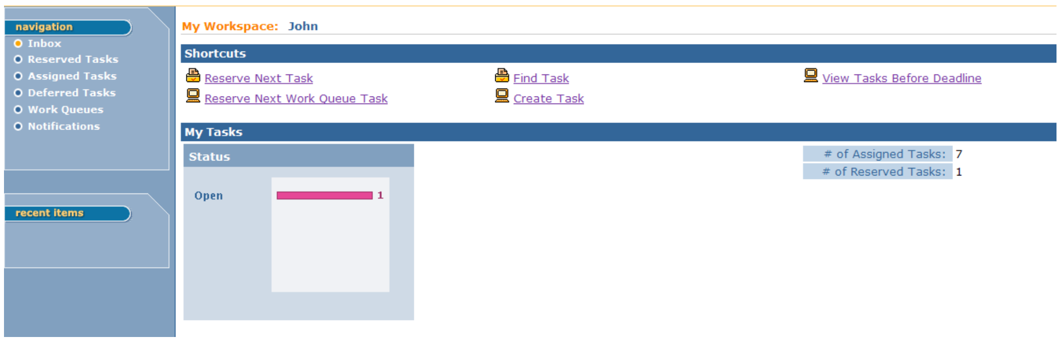
Important Information
Reserving a task is helpful when multiple users within an organization have access to the same work queue, and there is a desire for no other user to work a given task. Once reserved, the task is removed from the work queue and accessible via the **Reserved Tasks** link on **My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

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

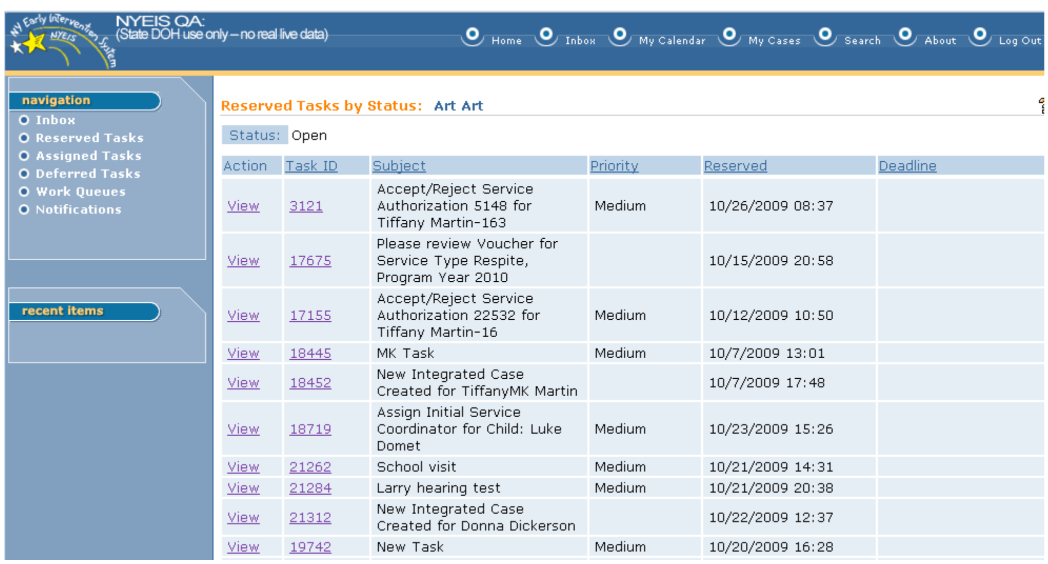
Review Task History

These instructions apply to both categories of Tasks.

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



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



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

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

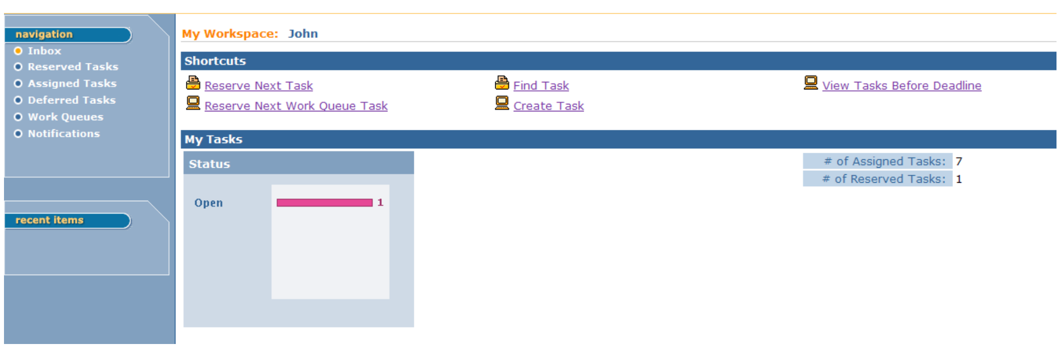
   Task History – displays a summary list of all actions related to Task.
   Task Assignment List – displays Users/work queues that have touched Task.
   Graphical View – displays a picture of the action taken in Task. (Requires Adobe SG Viewer to view).

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

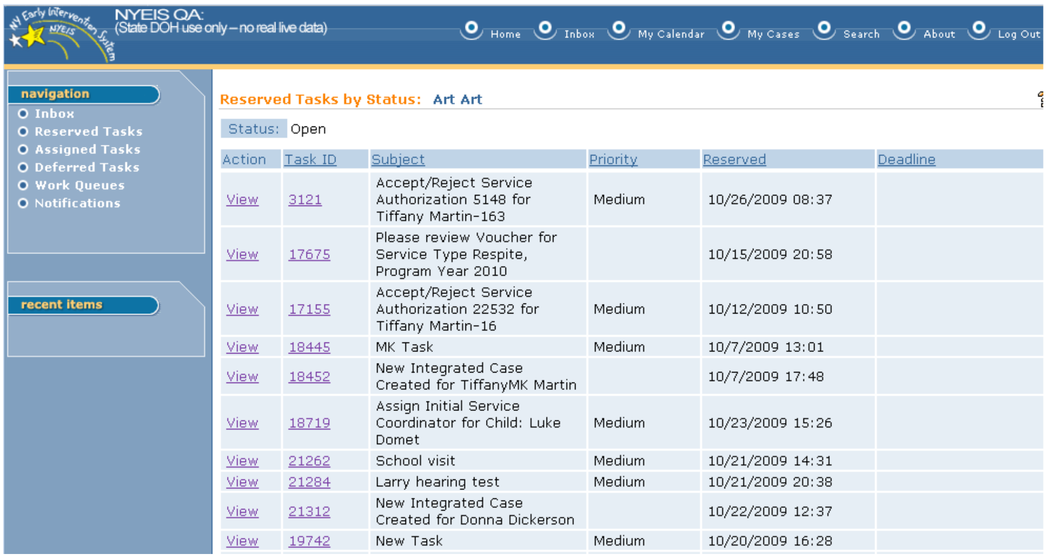
Adding Comments to a Task

These instructions apply to both categories of Tasks.

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

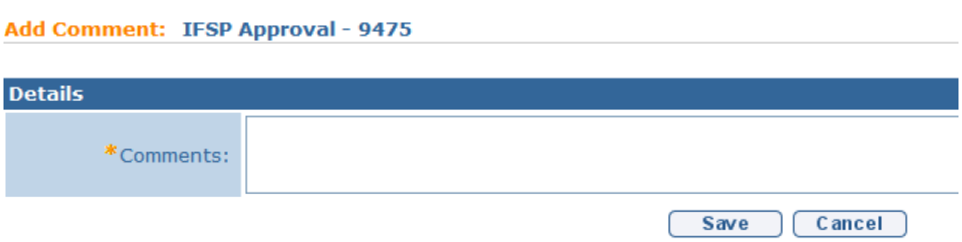


2. Click on the **Open** colored bar from **My Tasks – Status** box. *The number of tasks to open displays to the right of the colored bar.* **Reserved Tasks by Status** page displays.



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

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



5. Type **Comments**.

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

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

Closing a Task

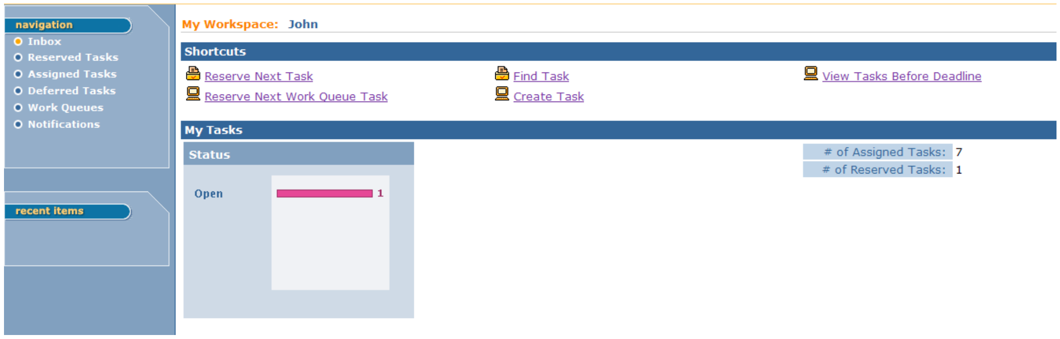
These instructions apply primarily to User-Created Tasks. Most System-Created Tasks require a User to complete the Primary Action link on the Task Homepage in order to close the task. There are a limited number of System-Created Tasks that can be closed by the method outlined in this subtopic, they are:

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

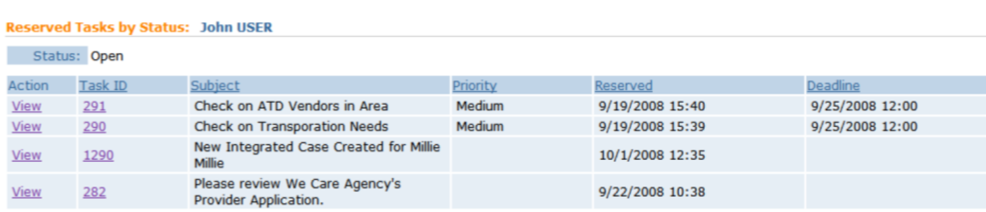
The System-Created Case Closure Task can be manually closed if the User needs to stop the case closure workflow. For example, when a child's parent does not consent to transfer the case records to a different agency, the system initiates the Case Closure workflow to close the child's Integrated Case.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

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

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



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

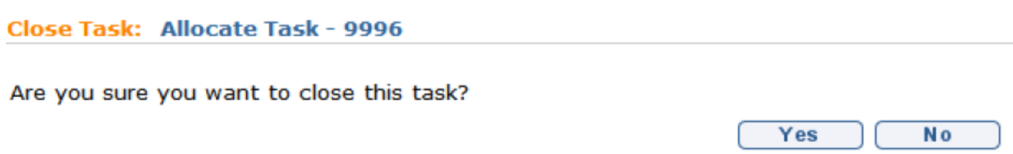

Reserved Tasks by Status: John USER

Status: Open

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

3. Click **<u>View</u>** or **<u>Task ID</u>** link. **Task Home** page displays.

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



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

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

Reserving a Task

These instructions apply to both categories of Tasks.

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

2. Click **<u>Reserve</u>** link from **Manage** section. **Reserve Task** page displays.

3. Type **Comment** *(Optional)*.

4. Click **Reserve** or **Reserve&View** button. **Task Home** page displays with Task reserved.

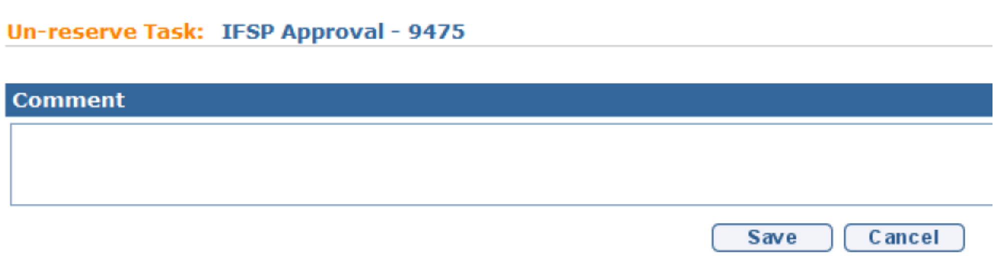
5. Click **Task History** from the Navigation Bar to view the history of the task.

Un-Reserving a Task

These instructions apply to both categories of Tasks.

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

2. Click **<u>Un-Reserve</u>** link from **Manage** section. **Un-reserve Task** page displays.



3. Type **Comment** *(Optional)*.

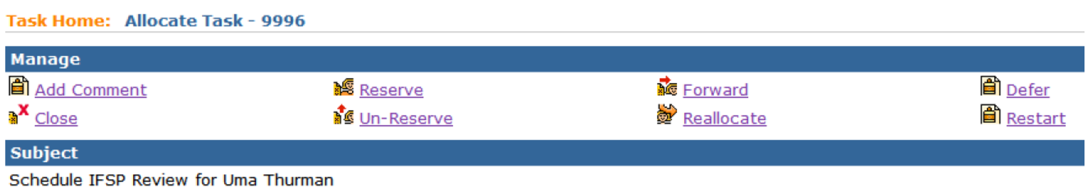
4. Click **Save** button. **Task Home** page displays. Task is un-reserved. *If the Task came from a Work Queue, then the Task returns to that Work Queue. If the Task came from another User, then the Task returns to the User's assigned Tasks.*

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

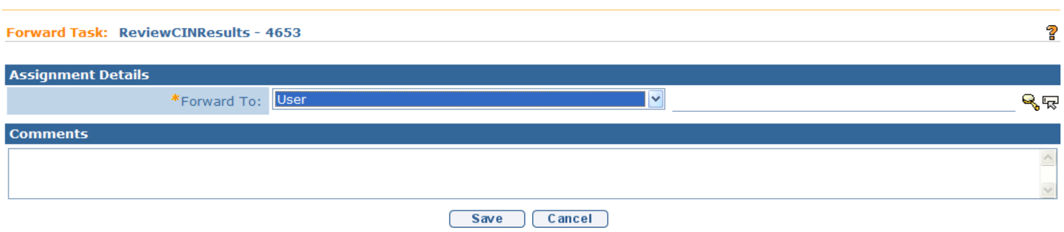
Forwarding a Task

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

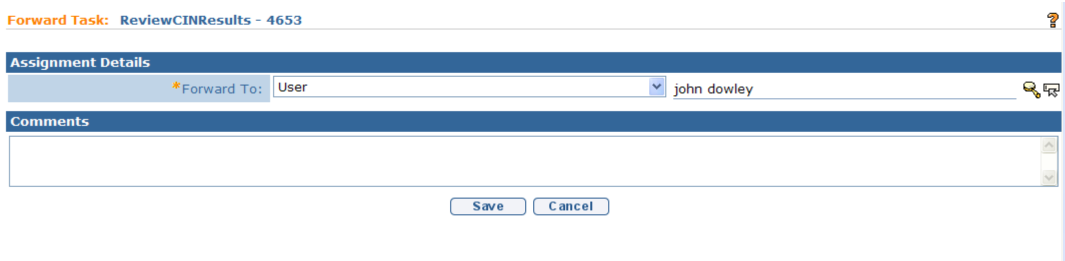
1. Display **Task Home** page. *See* **Working with Tasks, *Viewing Tasks*** for further information.



2. Click **<u>Forward</u>** link under **Manage** section. **Forward Task** page displays.



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



4. Type **Comments** *(Optional)*.

5. Click **Save** button. **Task Home** page displays. Task is forwarded.

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

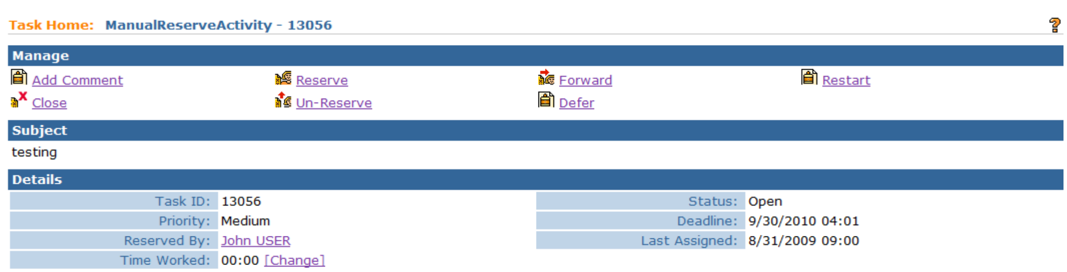
Important Information

Although the system permits the *forwarding* of tasks, the recipient of the forwarded task may not have sufficient privileges to actually work the task. For example, Tasks that generate to an EIOD's 'Assigned Tasks' are often only able to be completed by the child's EIOD. Careful consideration should be given anytime a task is being forwarded. In most circumstances, the only appropriate forwarding of tasks from Municipal Staff to Providers is when the task is being sent to the child's assigned Service Coordinator. If you are unsure that the task should be forwarded, please contact the NYEIS Help Desk for further assistance.

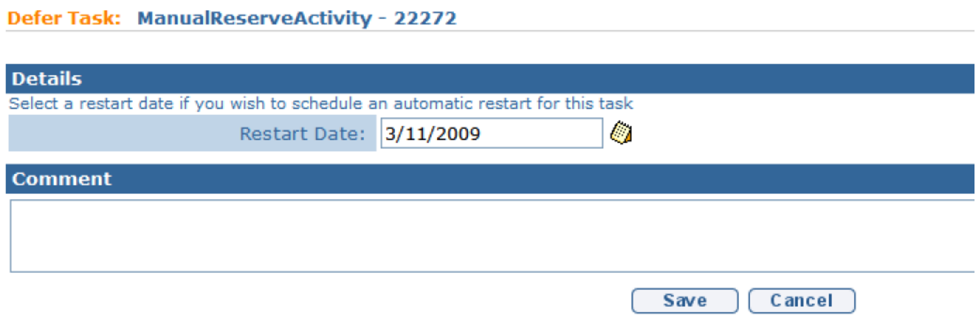
Deferring a Task

These instructions apply to both categories of Tasks.

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



2. Click **<u>Defer</u>** link under **Manage** section. **Defer Task** page displays.



3. Enter **Restart Date** from **Details** section. *Date fields must be formatted as **mm/dd/yyyy** format.* This automatically restarts the task on defined date.

4. Type **Comment** *(Optional).*

5. Click **Save** button. **Task Home** page displays. Task **Status** is set to **Deferred**.

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

<u>Note</u>:

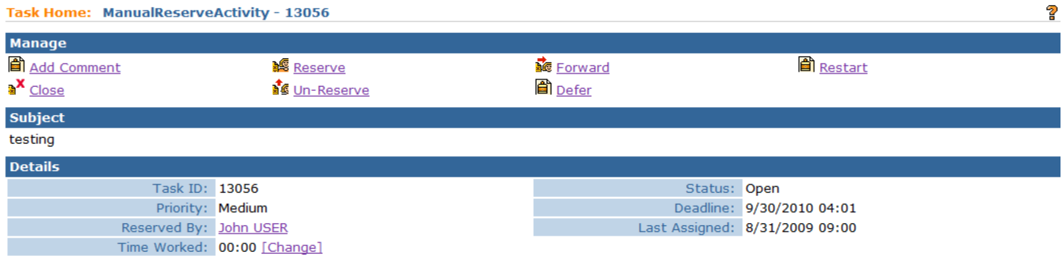
- Deferring a Task that has an Escalation rule (i.e., System alerts the assigned User or another User if that task is not completed by a specific date) associated with it will not cause the escalation action to stop or be paused.

Restarting a Task

These instructions apply to both categories of Tasks.

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

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



2. Click **<u>Restart</u>** link under **Manage** section. **Restart Task** page displays.

3. Type **Comment** *(Optional)*.

4. Click **Save** button. **Task Home** page displays. Task **Status** is set to **Open**.

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

Task Management

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

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

PAGE STRUCTURE OVERVIEW

NYEIS pages have similar page layout structures when viewing data.

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

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

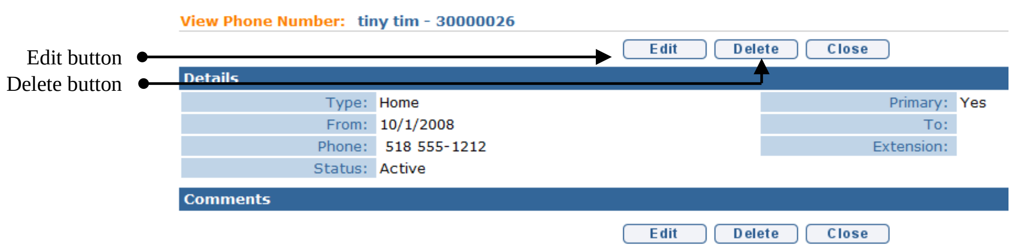
Below describes each of the page structures available.

List Page

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

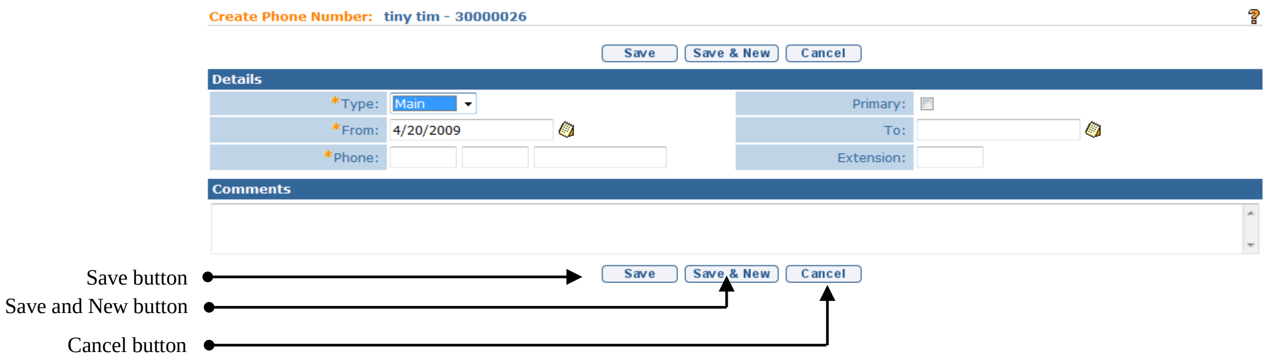
View Detail Page

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



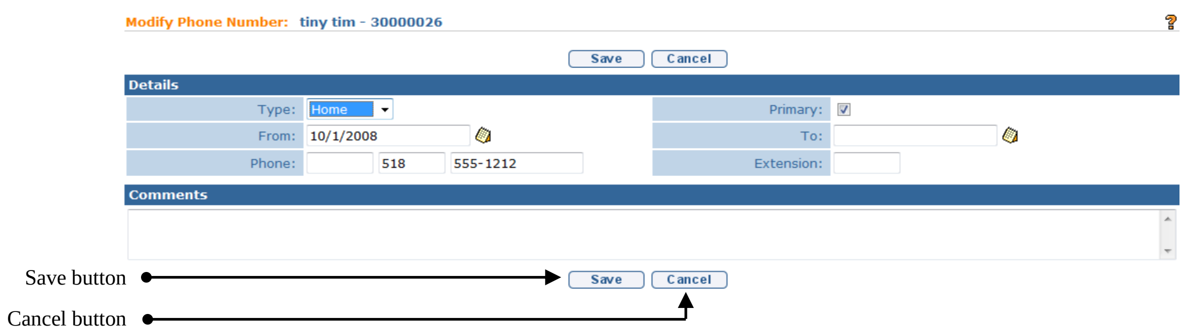
Create Page

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



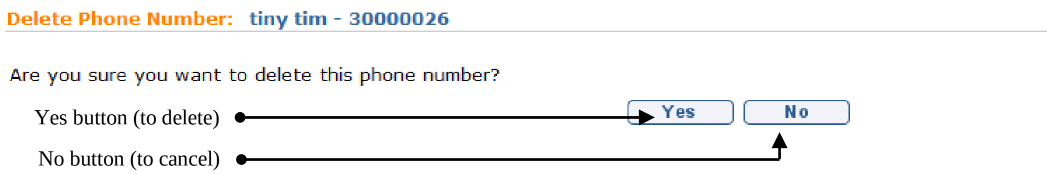
Modify Page

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



Delete Page

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

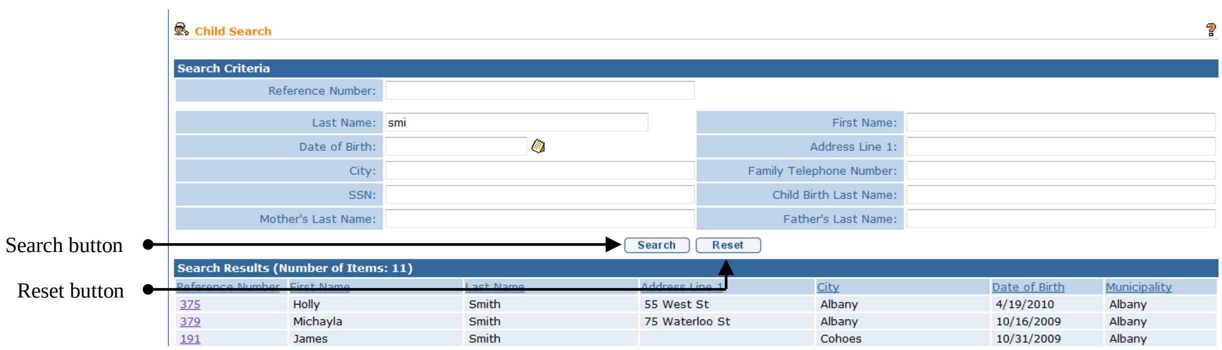


Important Information

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

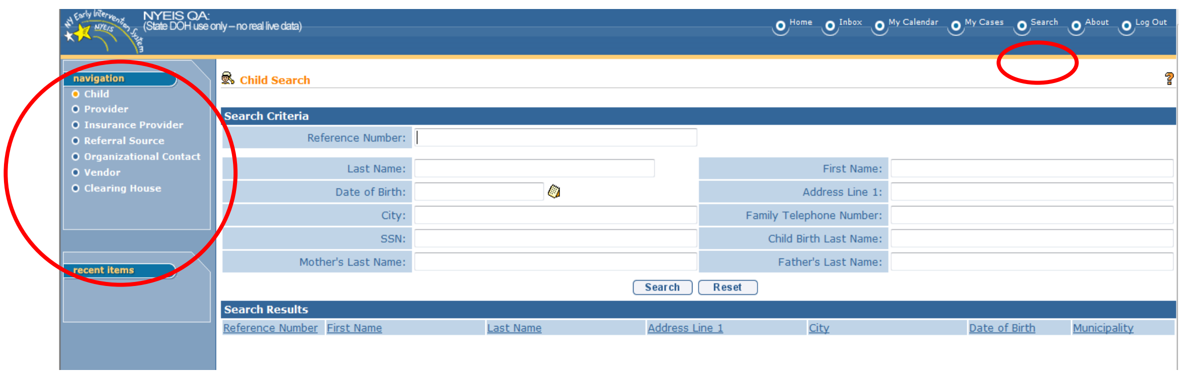
Search Page

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



<u>Notes</u>:

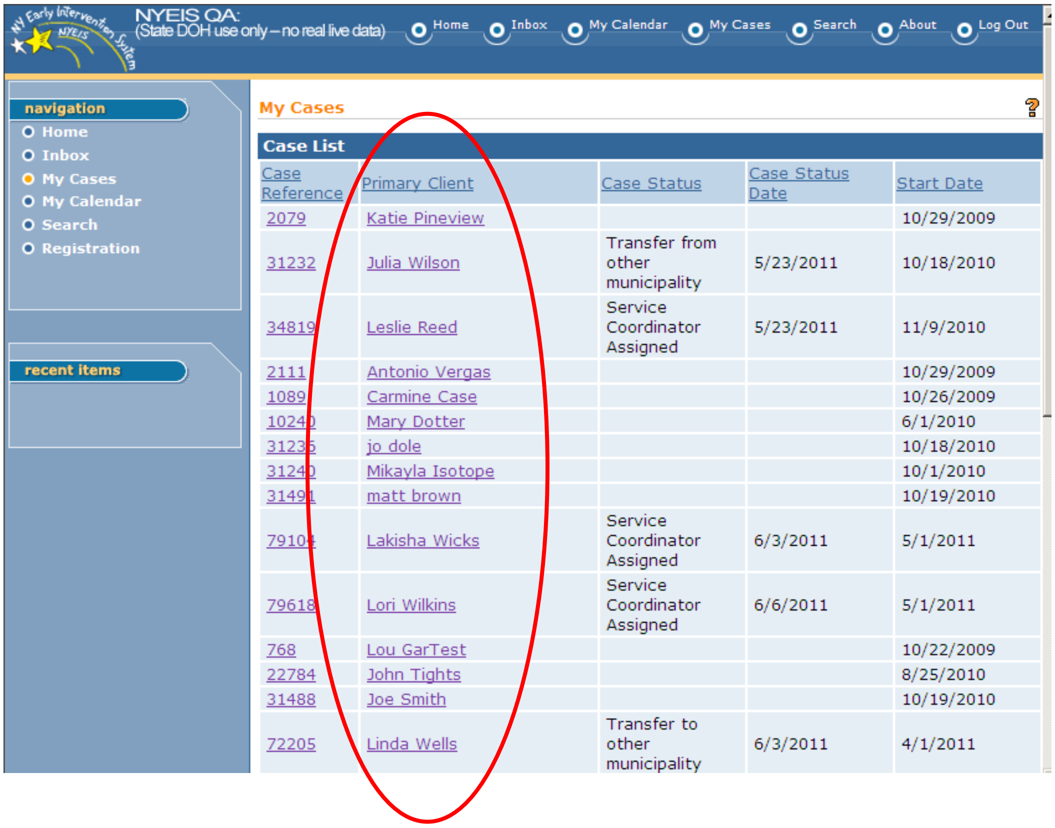
- When **<u>Search</u>** is selected from the **Menu Bar** on the **User's Homepage**, the default **Search** page is Child Search. Other search options are available from the Left-hand Navigation Bar.
- Search Page links may also be found on the User's **Home Page** in the **Search** Cluster. The Search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



SORTING

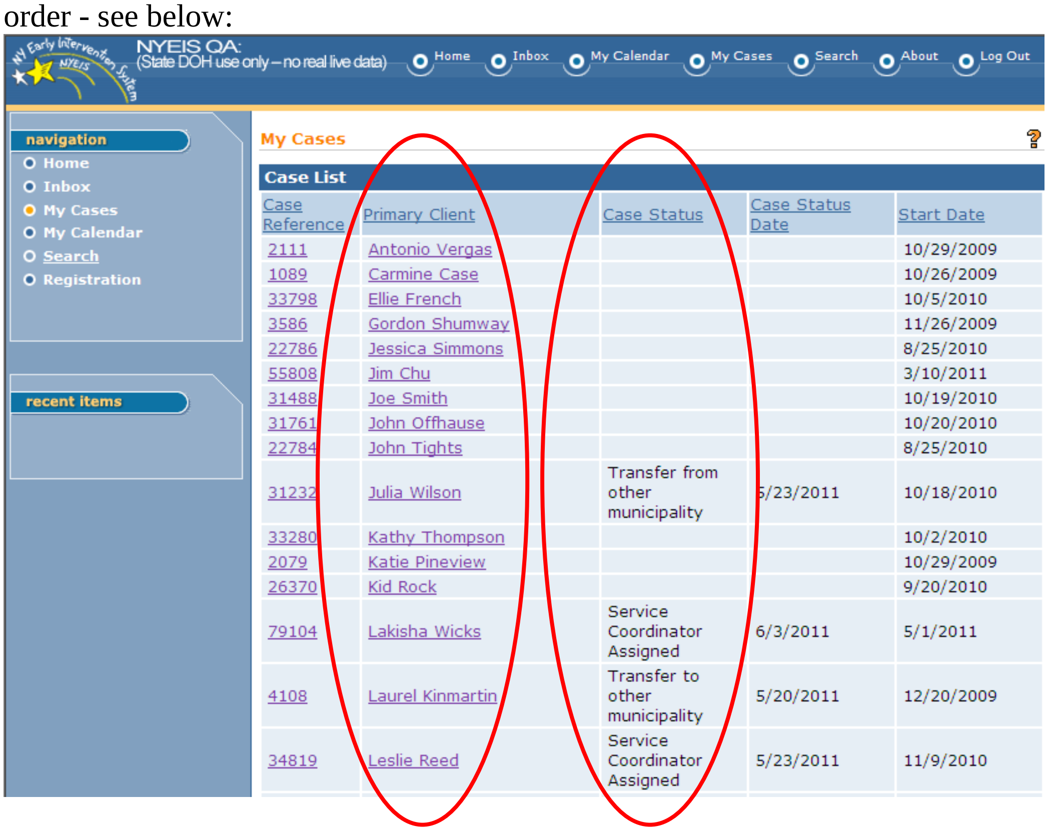
When data is displayed in a column format it can be sorted by clicking on any column heading to sort in either ascending or descending order.

<u>Example</u> - My Cases page. Sorting by **Primary Client**.



Case Reference	Primary Client	Case Status	Case Status Date	Start Date
2079	Katie Pineview			10/29/2009
31232	Julia Wilson	Transfer from other municipality	5/23/2011	10/18/2010
34819	Leslie Reed	Service Coordinator Assigned	5/23/2011	11/9/2010
2111	Antonio Vergas			10/29/2009
1089	Carmine Case			10/26/2009
10240	Mary Dotter			6/1/2010
31236	jo dole			10/18/2010
31240	Mikayla Isotope			10/1/2010
31491	matt brown			10/19/2010
79104	Lakisha Wicks	Service Coordinator Assigned	6/3/2011	5/1/2011
79618	Lori Wilkins	Service Coordinator Assigned	6/6/2011	5/1/2011
768	Lou GarTest			10/22/2009
22784	John Tights			8/25/2010
31488	Joe Smith			10/19/2010
72205	Linda Wells	Transfer to other municipality	6/3/2011	4/1/2011

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



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

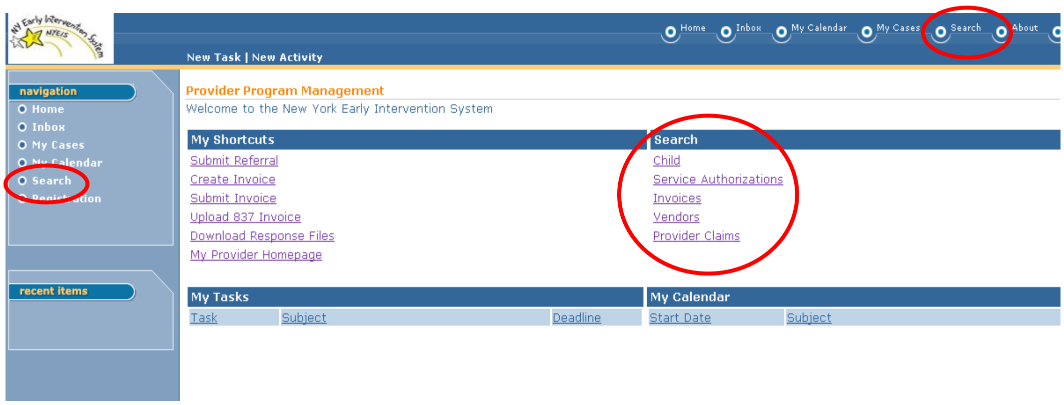
SEARCHING

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

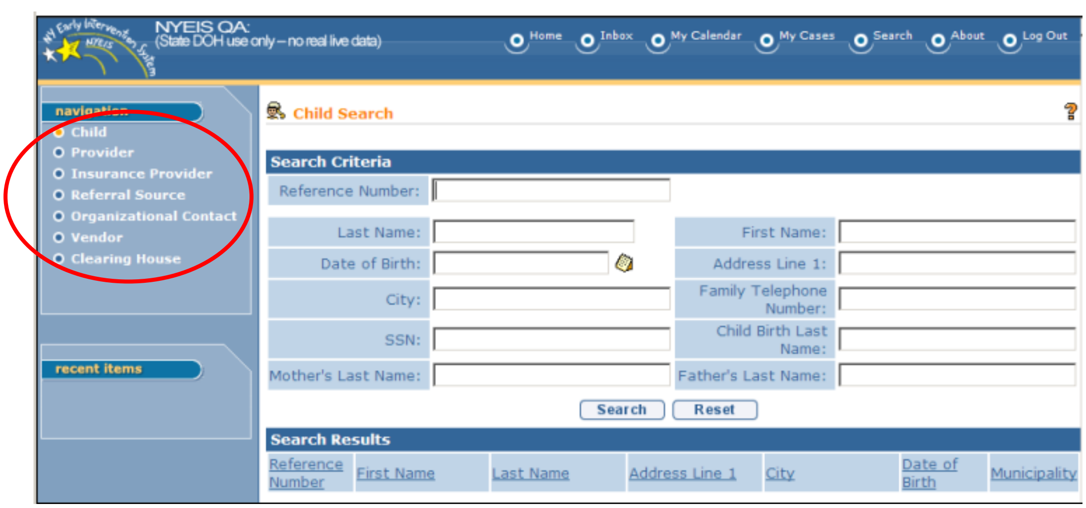
Search Page links may also be found on the User's **Home Page** in the **Search** Cluster. The Search Page links displayed are those most typically used based upon the User's Role.

Important Information

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



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



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

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

Use the following tips to improve your search success:

Child search

1. Use the reference number (if available) first. Each child has a unique reference number. If you do not see any results, go to step 2.

2. Enter the last name and search. If you do not see the results you seek, try using a portion of the last name (e.g., *ken* for "Kennedy") in case it has been misspelled. Sort the column labeled "Last Name" in the search results cluster by clicking the header.

3. As a last resort you can use the wild card character % in the last name field. This will show results for all children associated with a municipality when used by Municipal staff, and all children associated with a provider when used by Provider staff.

   Note:

   - Provider user roles can only see children to whom they (or their agency) have been assigned to provide services.

4. If you find results that seem to match your search criteria, click the View link in the Action column next to the child's name and view the record. Look for more information that will confirm it is the child you seek.

Provider search

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

2. Use the **Reference Number** if available; it is the most direct search method.

   Note:

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

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

   Primary Reference Number for each type of provider:
   - Approved Provider Agency = State ID
   - Approved Provider Individual = State ID
   - Agency Employee = Employee ID

   Note:

   - You will not see the results you seek if you do not know the Provider's primary NYEIS reference number.

3. **NPI** or **State ID** are also good search criteria as they are associated with a single Provider.

4. Enter the provider agency or individual's name and search. If you do not see the results you seek, try using a portion of the name (e.g., *adirondack* for "Adirondack Medical Group, Inc." or *ken* for "Kennedy") in case it has been misspelled. Sort the column labeled "Registered Name" in the search results cluster by clicking the header.

5. You can narrow the search results by selecting options available in the Municipality, Special Population Served, and/or Qualified Personnel search criteria fields.

6. Do not use the wild card character % as your only Provider search criteria. There are many provider records stored in the database and it will take quite a long time for the search results to display. In some instances it may cause the application to not respond at all.

7. If you find results that seem to match your search criteria, click the Reference Number link in the Action column next to the provider's Registered Name and view the record. Look for more information that will confirm it is the provider you seek.

Referral Source search

1. Use the **Referral Source Reference Number** if available; it is the most direct search method. Note that a Provider who is also registered as a Referral Source will have a separate **Referral Source Reference Number**. Do not use the Provider Reference Number in this search. If you do not see any results, go to step 2.

2. Enter the Vendor's name and search. If you do not see the results you seek, try using a portion of the name (e.g., *adirondack* for "Adirondack Medical Group, Inc." or *ken* for "Kennedy") in case it has been misspelled. Sort the column labeled "Registered Name" in the search results cluster by clicking the header.

3. Note that Referral Sources categorized as Type 'Parent/Family' and 'Foster Care' will only show up for Municipal Users who work for the municipality recorded as the sources county of residence.

Vendor search

1. Use the **Vendor Reference Number** if available; it is the most direct search method. Note that a provider who are also registered as a Vendor have a separate **Vendor Reference Number**. Do not use the Provider Reference Number in this search. If you do not see any results, go to step 2.

2. Enter the vendor's name and search. If you do not see the results you seek, try using a portion of the name (e.g., *adirondack* for "Adirondack Medical Group, Inc." or *ken* for "Kennedy") in case it has been misspelled. Sort the column labeled "Vendor Name" in the search results cluster by clicking the header.

3. You can narrow the search results by selecting options available in the Municipality, Vendor Transport Method, Vendor Type, and/or Vendor Vehicle Needs search criteria fields.

4. <u>Do not use the wild card character % as your only Vendor search criteria.</u> There are many vendor records stored in the database and it will take quite a long time for the search results to display. In some instances it may cause the application to not respond at all.

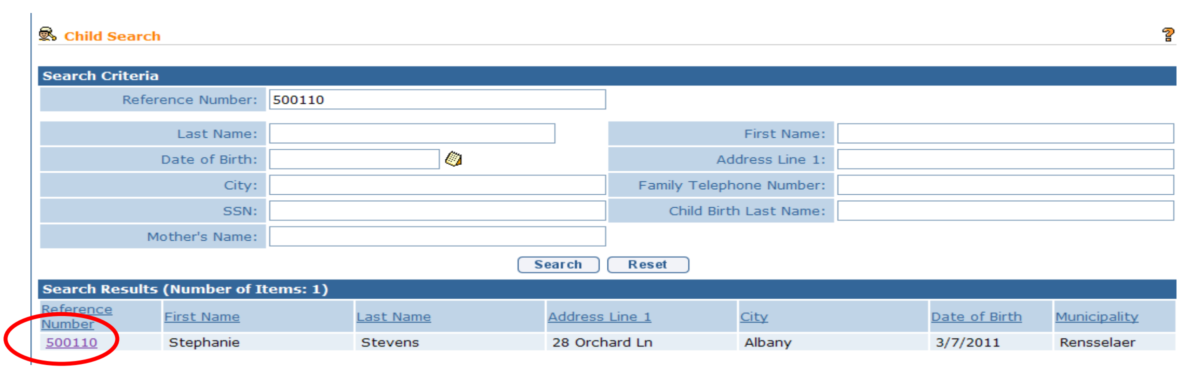
5. If you find results that seem to match your search criteria, click the Reference Number link in the Action column next to the vendor’s Registered Name and view the record. Look for more information that will confirm it is the vendor you seek.

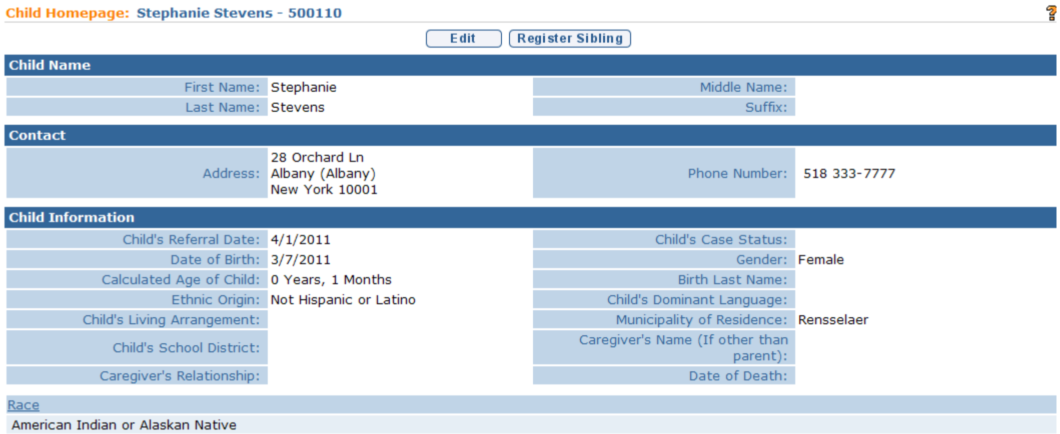
DISPLAYING CHILD HOME PAGE

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

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

2. Click <u>**Reference Number**</u> link for specific Child. **Child Homepage** displays.





Child Homepage: Stephanie Stevens - 500110

Edit | Register Sibling

Child Name

First Name:	Stephanie	Middle Name:	
Last Name:	Stevens	Suffix:	

Contact

Address:	28 Orchard Ln Albany (Albany) New York 10001	Phone Number:	518 333-7777

Child Information

Child's Referral Date:	4/1/2011	Child's Case Status:	
Date of Birth:	3/7/2011	Gender:	Female
Calculated Age of Child:	0 Years, 1 Months	Birth Last Name:	
Ethnic Origin:	Not Hispanic or Latino	Child's Dominant Language:	
Child's Living Arrangement:		Municipality of Residence:	Rensselaer
Child's School District:		Caregiver's Name (If other than parent):	
Caregiver's Relationship:		Date of Death:	

Race

American Indian or Alaskan Native

OR

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

Notes:

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

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

If the user browsing 'My Cases' is an EIO/D:

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

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

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

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

Important Notes:

- The status of a Service Coordination Service Authorization must be 'Active' in order for the child to appear in 'My Cases'. Children associated with Service Coordination Authorizations not in 'Active' status and/or whose start dates have not yet been met will not appear in 'My Cases'.

- The NYEIS Help Desk is also available to answer questions regarding children who are not seen in the 'My Cases' list.

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

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

Important Information 📖 *See* **Unit 4: Case Management** for common Navigation Bar functions.

Displaying Integrated Case Home Page

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

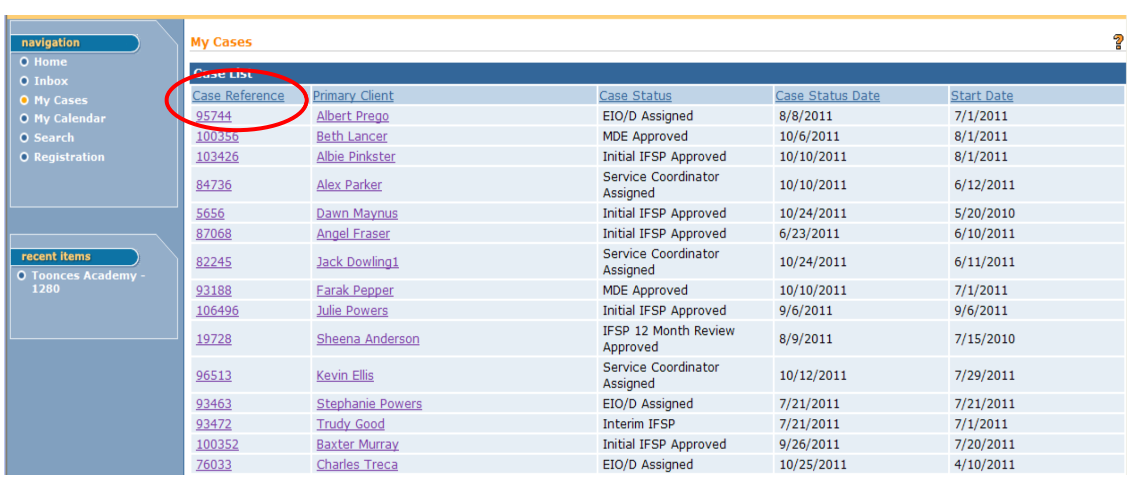
There are several ways to access the Integrated Case Home Page based on access rights. See below for the most common options to navigate to the Integrated Case.

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

Note:

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

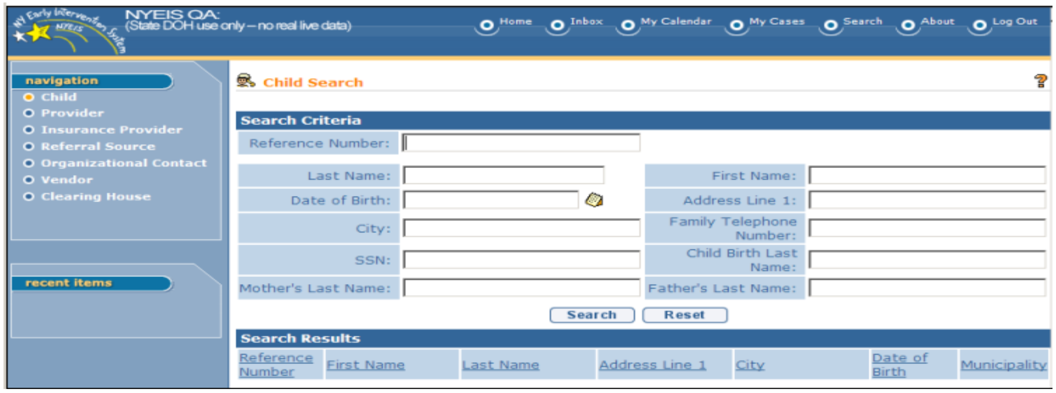
Important Information
Providers, except for those assigned the Provider Service Coordinator role, will not see a list of their cases when clicking the My Cases link on the Menu Bar. Instead, click the Search button on the Menu Bar to display the Child Search page. Enter the wildcard character (%) in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



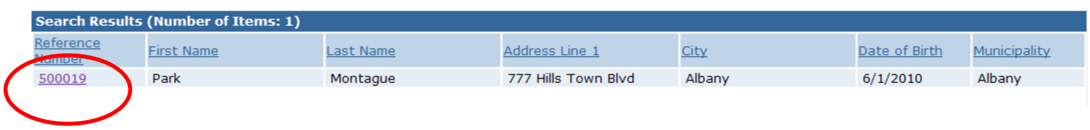
2. Click **<u>Case Reference</u>** link under **Case Reference** column. **Integrated Case Home** page displays.

OR

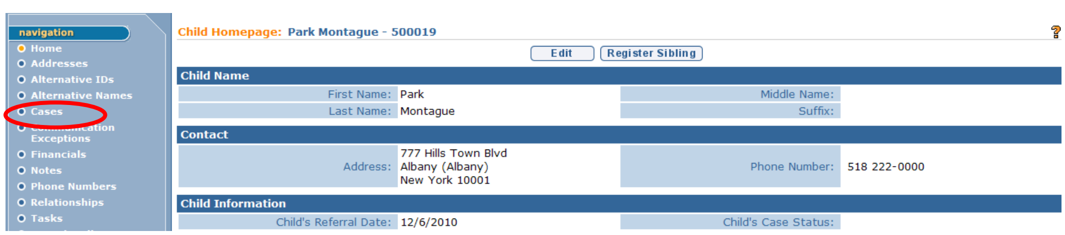
3. Click **Search** from Menu Bar of Home Page. **Child Search** page displays. 🕮 *See* **Searching** for information and tips for conducting a search for child records.



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

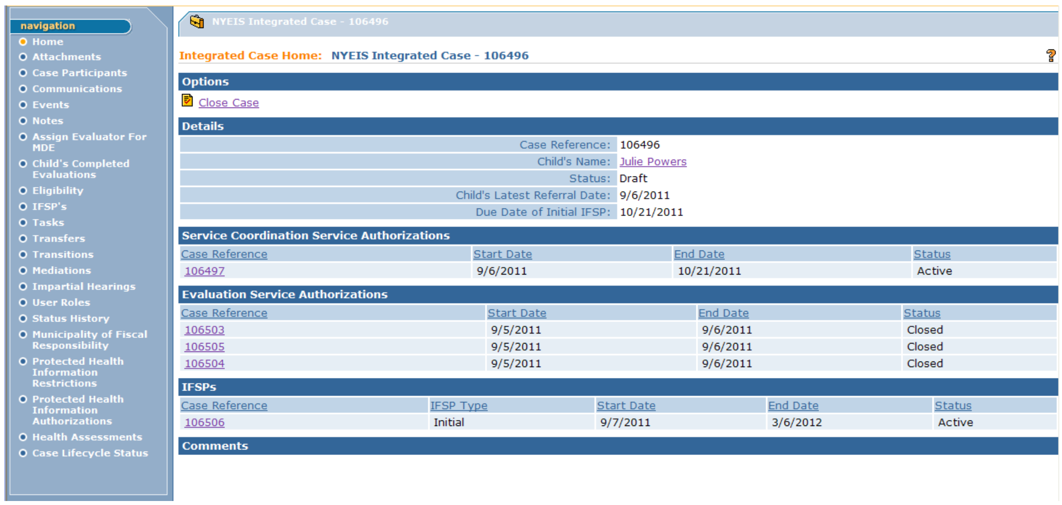


5. Click **<u>Reference Number</u>** link for specific Child. **Child Homepage** displays.



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

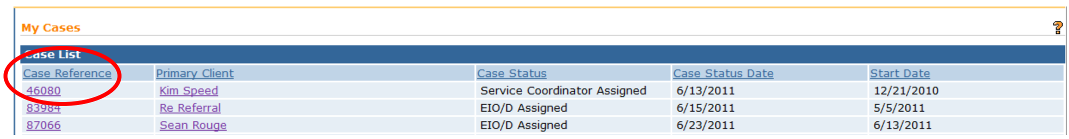
7. Click **<u>Case Reference</u>** link under **Case Reference** column. Be sure to select **NYEIS Integrated Case** for **Case Type**. **Integrated Case Home** page displays.



DISPLAYING INDIVIDUALIZED FAMILY SERVICE PLAN HOME PAGE

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

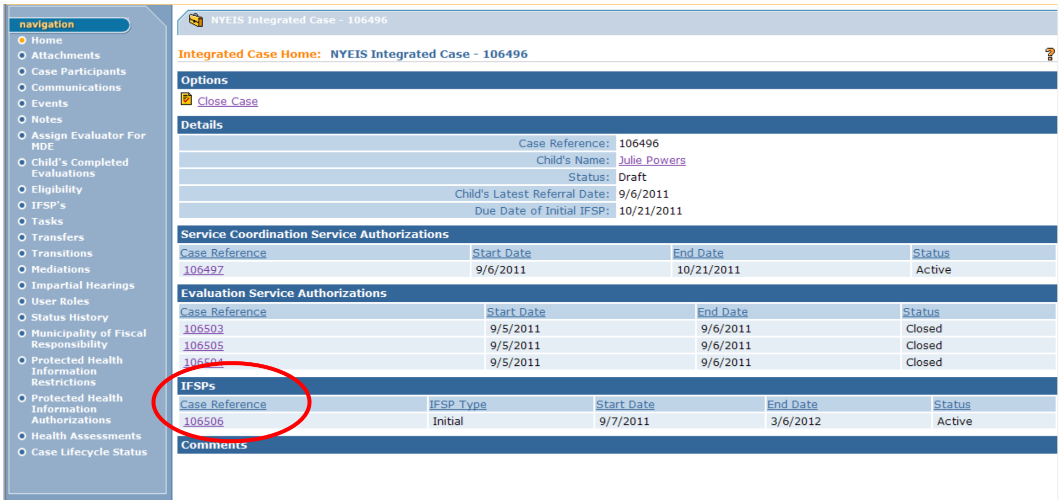
> **Important Information**
> Providers, except for those assigned the Provider Service Coordinator role, will <u>not</u> see a list of their cases when clicking the My Cases link on the Menu Bar. Instead, click the Search button on the Menu Bar to display the Child Search page. Enter the wildcard character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



2. Click **<u>Case Reference number</u>** link under **Case Reference** column to select a specific Child. **Integrated Case Home** page displays.

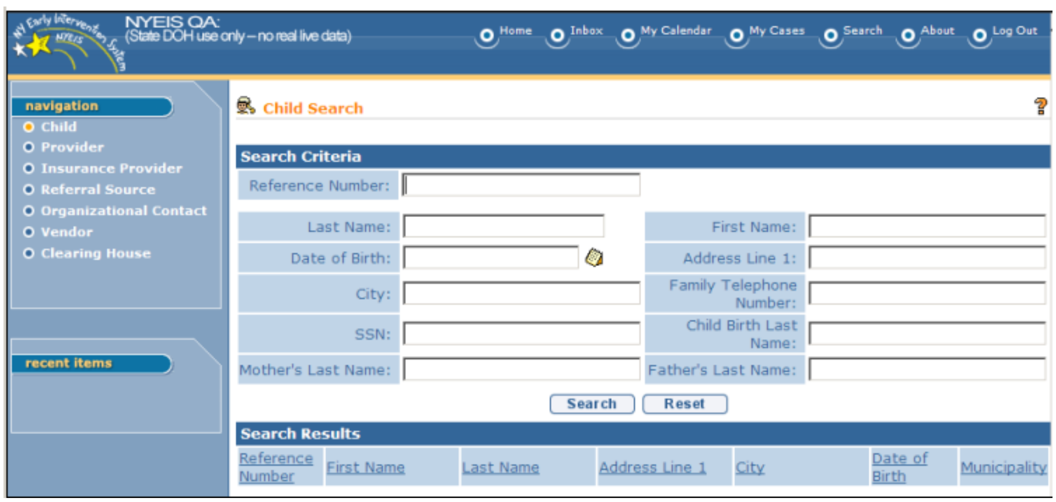
> **Important Information**
>
> Clicking the child's name link under **Primary Client** column will display the **Child Home Page**.

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



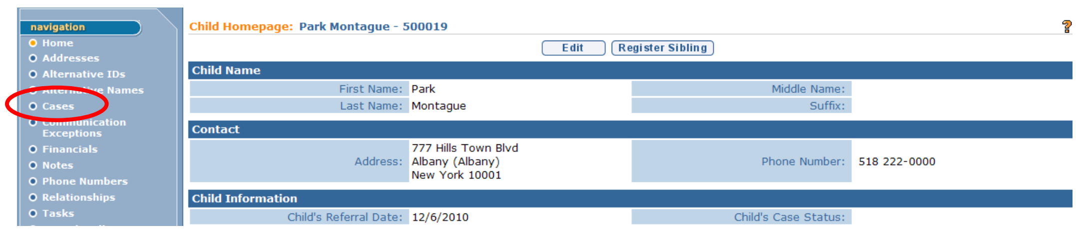
OR

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



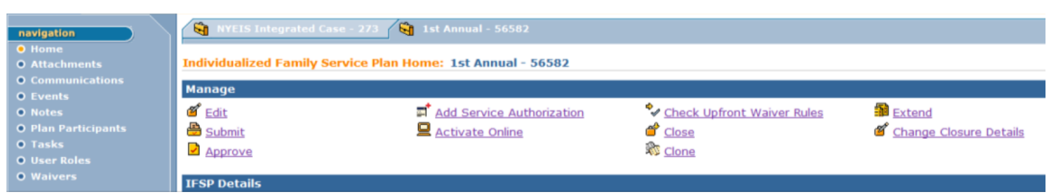
4. Type all known information in **Search Criteria** section. Click **Search** button. Records matching criteria display in **Search Results** section. *To search again, click **Reset** button.*

5. Click **__Reference Number__** link for specific Child. **Child Homepage** displays.



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

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



__Note:__

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

ATTACHMENTS

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

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

When an Attachment is created in a specific area of a Case, the new Attachment will be found in the location where the attachment was generated (e.g., Child, Integrated Case, IFSP, SA). An attachment created in an IFSP Case will not be viewed from the Child’s Integrated Case or the Child Home Page. Attachments should be attached to the Case that is most relevant to the attachment content (e.g., information on services for a Child should be attached to the IFSP attachment section).

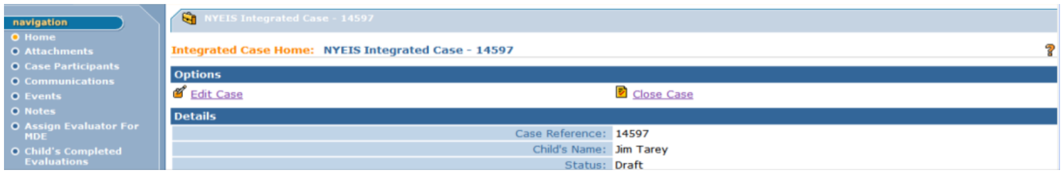
When parents do not provide consent for a general release, and deny consent or request selective consent for release of confidential information, the Child's record will not be accessed/used in NYEIS. Providers and Municipalities *must* maintain all required information off-line.

Attaching Files to a Case

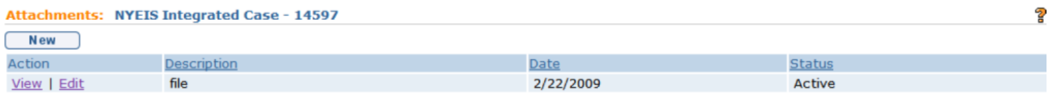
Any type of file format can be attached to a Case. The User *must* have appropriate software to open/display the file attached. Files up to 5 MB in size can be attached.

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

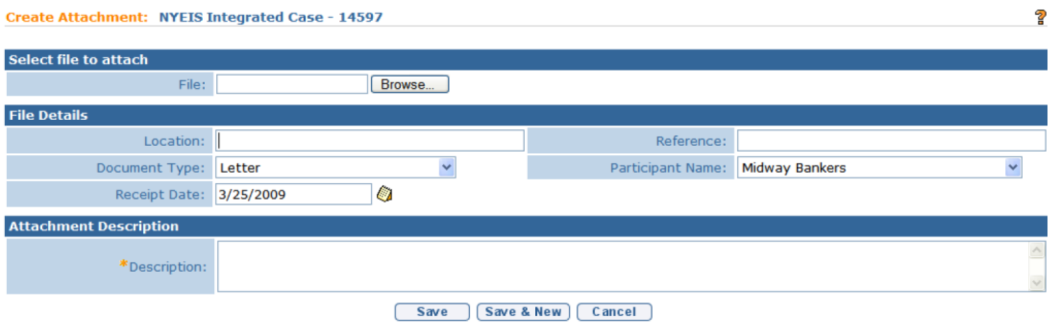
> **Important Information**
> Attachments should be placed where they are most relevant. This may be on the Child’s Integrated Case Home page, a Child’s IFSP Home page, a Service Authorization home page or on the MDE.



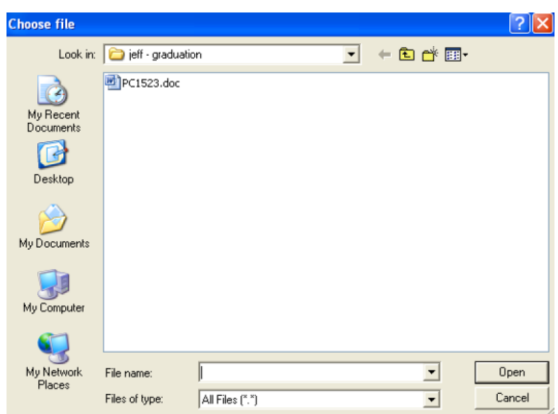
2. Click **Attachments** from the Navigation Bar. **Attachments** page displays.



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



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



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

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

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

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

   OR

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

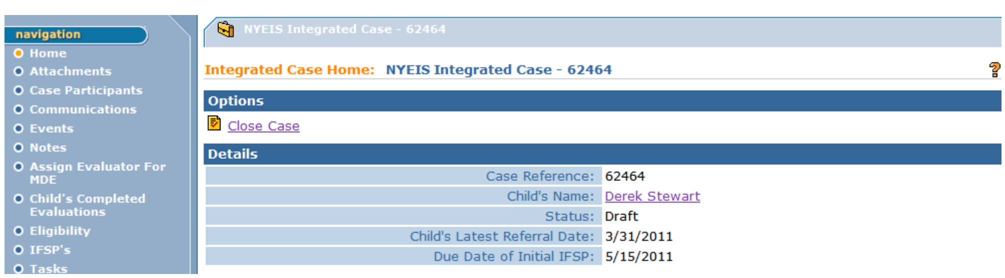
<u>**Note**</u>:

- Attachments are stored in NYEIS database.

Viewing Attachments

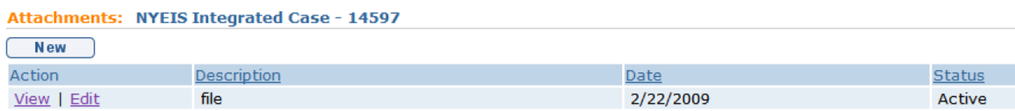
Attachments can only be viewed by a User with assigned access rights.

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

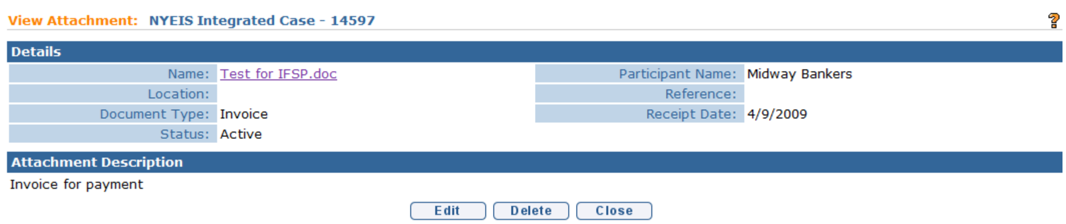


Important Information
Look for attachments where they are most relevant. This may be on the Child's Integrated Case Home page, a child's IFSP Home page, a Service Authorization home page or on the MDE.

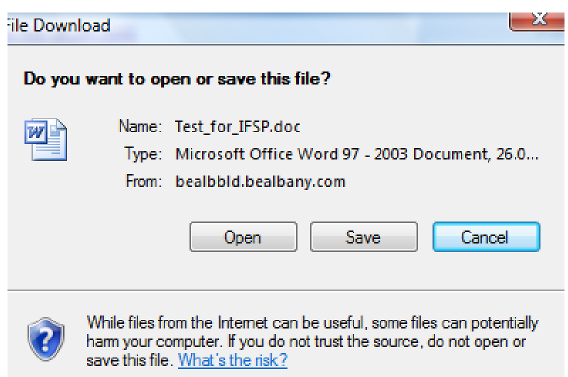
2. Click **Attachments** from the Navigation Bar. **Attachments** page displays with a list of attachments.



3. Click **<u>View</u>** link under **Action** column. **View Attachment** page displays.



4. Click ***<u>file name</u>*** link in **Name** field of **Details** section. **File Download** dialog box displays.



5. Click **Open** to quickly open and view file. *Clicking **Open** does not save the file to a location. Click **Save** button to download and save file to a desired location prior to opening.* File displays.

> **Important Information**
> Always save the changes into the NYEIS database and not to a local drive. The NYEIS database maintains the confidentiality of the Child data and is a secure location. **Do not** save any attachments that you may be authorized to view from NYEIS to an external location, unless that location is secure.

6. Click **Close** button to close file. **View Attachments** page displays.

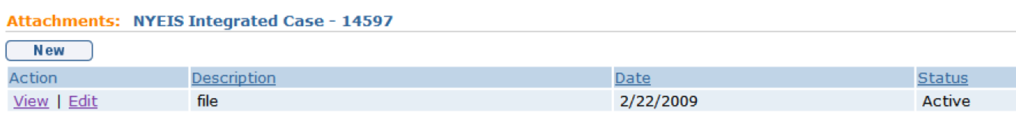
Editing/Replacing Attachments

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

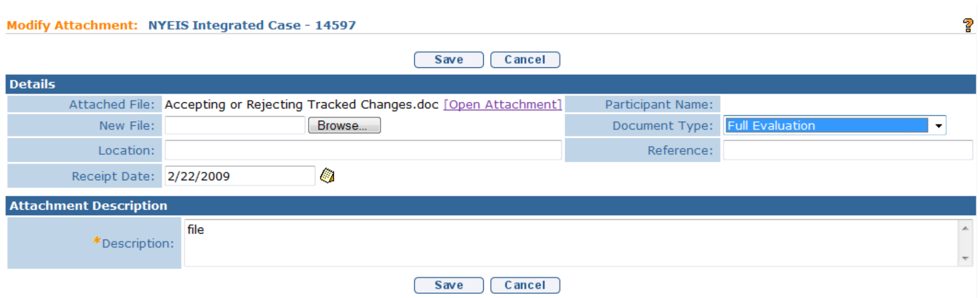
1. Display the Child's Integrated Case Home Page. *See **Displaying Integrated Case Home Page*** for further information.

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

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



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



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

> **Important Information**
> To replace existing file with a different attachment, click **Browse** button for **New File** field in **Details** section.

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

<u>Note</u>:

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

Deleting Attachments

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

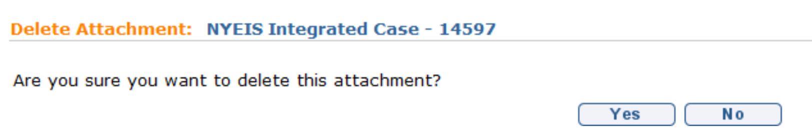
1. Display the Child's Integrated Case Home Page. 🕮 *See* **Unit 1: Getting Started, *Displaying Integrated Case Home Page*** for further information.

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

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

3. Click **<u>View</u>** link under **Action** column. **View Attachment** page displays.

4. Click **Delete** button. **Delete Attachment** page displays with message ***Are you sure you want to delete this attachment?***



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

VALIDATING ADDRESSES

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

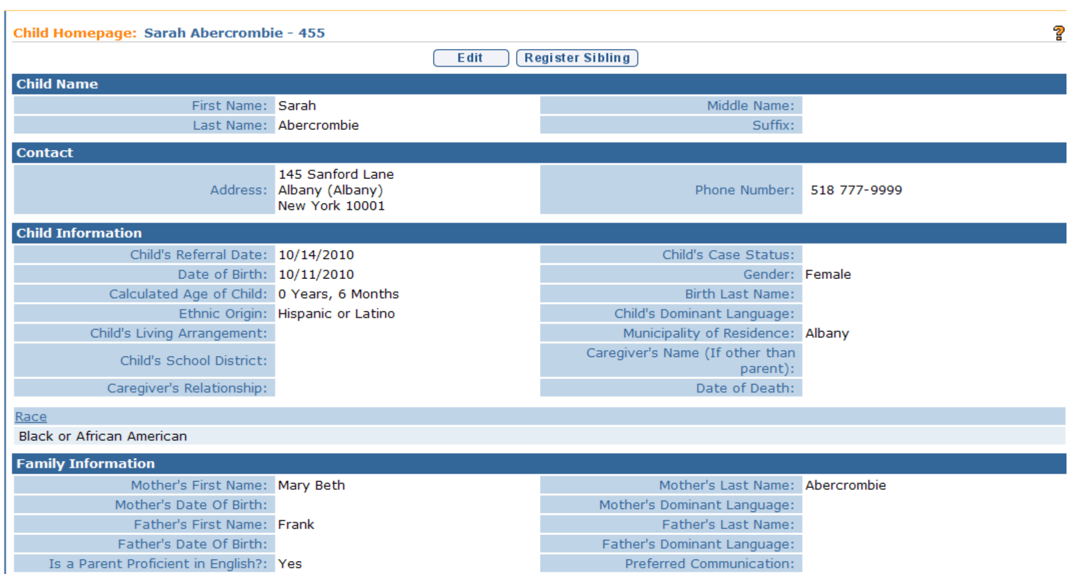
> **Important Information**
> Although you must submit the address for validation as outlined below, Address validation functionality is not currently active at this time.

1. Click **Search** from Menu Bar of Home Page. **Child Search** page displays.

2. Type all known Child data in **Search Criteria** section.

3. Click **Search** button. Records matching display in **Search Results** section.
   *To search again, click **Reset** button.*

4. Click **Reference Number** link for Child. **Child Homepage** displays.



Child Homepage: Sarah Abercrombie - 455

Edit | Register Sibling

Child Name

First Name:	Sarah	Middle Name:	
Last Name:	Abercrombie	Suffix:	

Contact

Address:	145 Sanford Lane Albany (Albany) New York 10001	Phone Number:	518 777-9999

Child Information

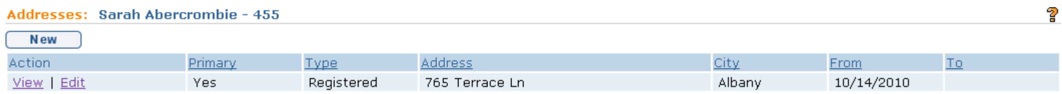
Child's Referral Date:	10/14/2010	Child's Case Status:	
Date of Birth:	10/11/2010	Gender:	Female
Calculated Age of Child:	0 Years, 6 Months	Birth Last Name:	
Ethnic Origin:	Hispanic or Latino	Child's Dominant Language:	
Child's Living Arrangement:		Municipality of Residence:	Albany
Child's School District:		Caregiver's Name (If other than parent):	
Caregiver's Relationship:		Date of Death:	

Race
Black or African American

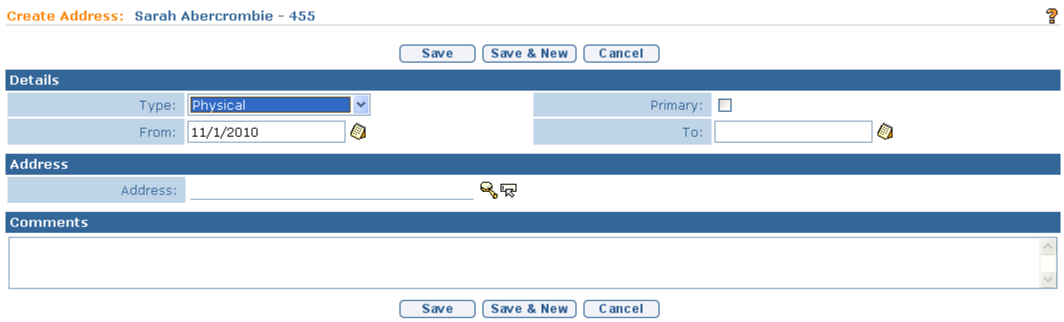
Family Information

Mother's First Name:	Mary Beth	Mother's Last Name:	Abercrombie
Mother's Date Of Birth:		Mother's Dominant Language:	
Father's First Name:	Frank	Father's Last Name:	
Father's Date Of Birth:		Father's Dominant Language:	
Is a Parent Proficient in English?:	Yes	Preferred Communication:	

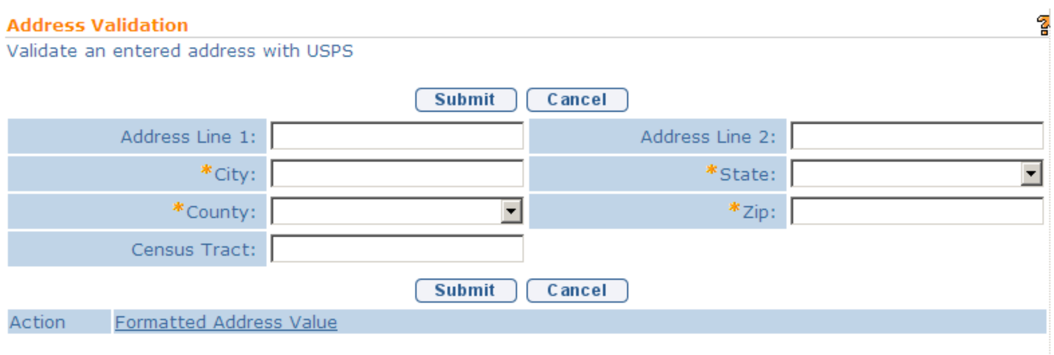
5. Click **Addresses** from the Navigation Bar. **Addresses** page displays.



6. Click **<u>New</u>** button. **Create Address** page displays.



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



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

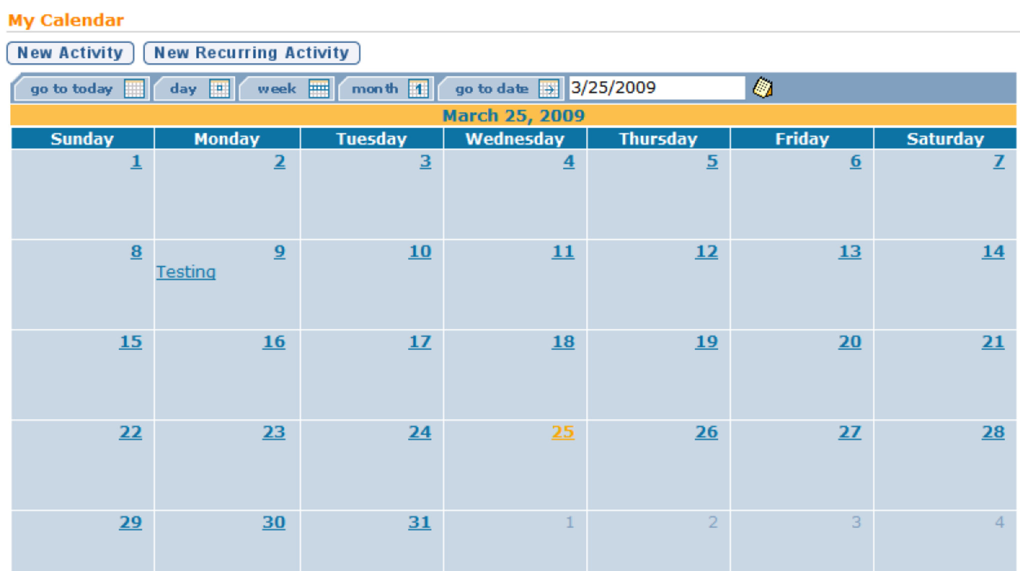
9. Click **<u>Select</u>** link under **Action** column to save validated address. **Modify Address** page redisplays with valid Address.

10. Click **Save** button. **Addresses** page displays and valid address is tied to Child's record.

DISPLAYING CALENDAR

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

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



<u>Note</u>:

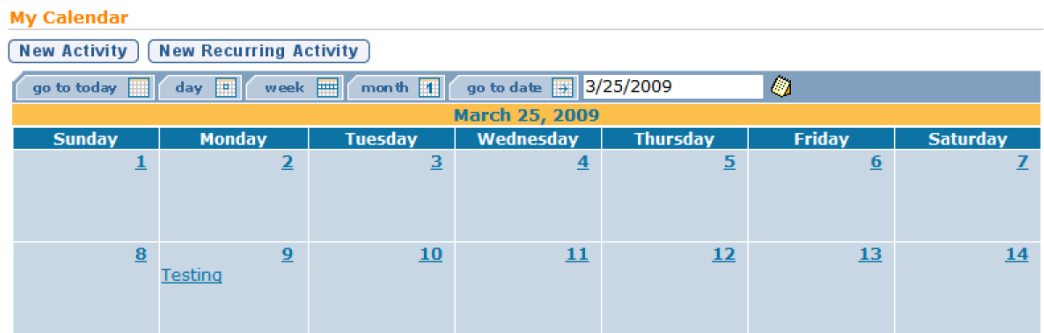
A down arrow displays on dates within the Calendar view that contain additional events that cannot be viewed. Click down arrow to view the full set of events for that specific date.

<u>Exception</u>
Currently not available to all NYEIS User roles.

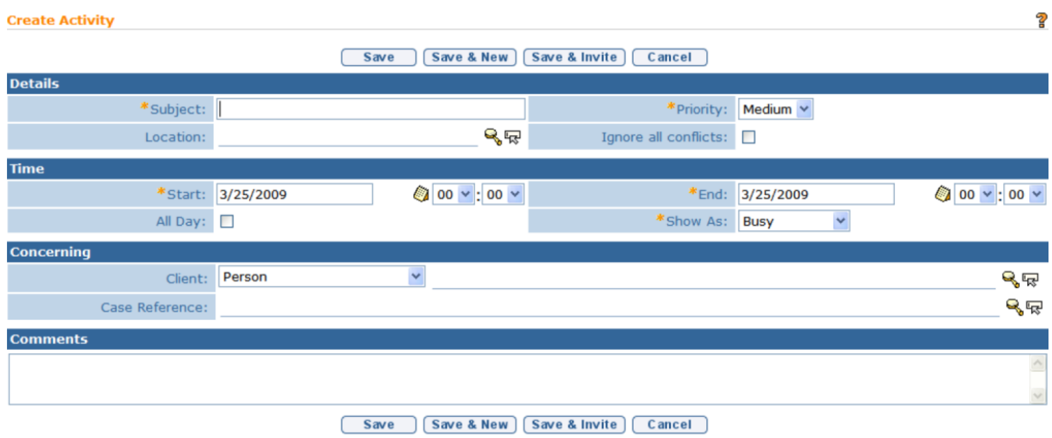
Creating a New Activity on a Calendar

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

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

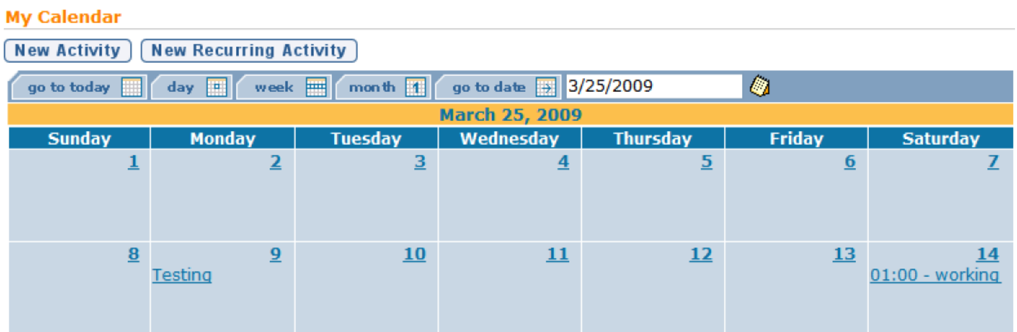


2. Click **New Activity** button. **Create Activity** page displays.



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

4. Click **Save** button to save activity and return to **Events** page. Activity displays on specified date.



OR

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

OR

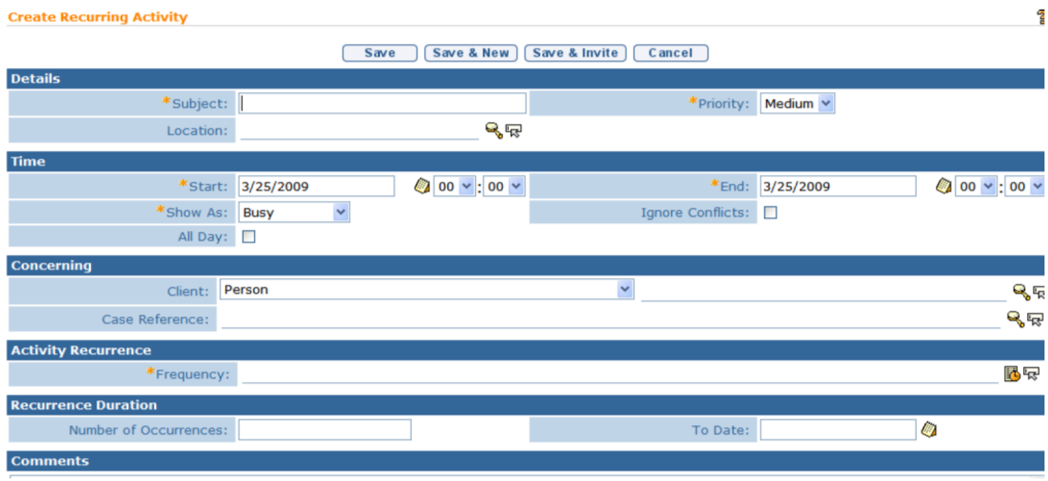
Click **Save & Invite** button to invite Attendees. *See* **Unit 4: Case Management, *Events, Inviting Attendees*** for further information.

Creating Recurring Activity on a Calendar

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

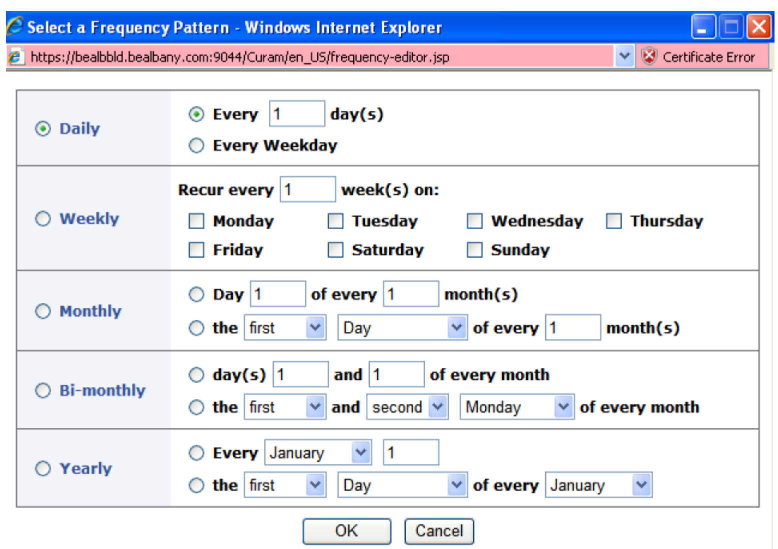
1. Click **My Calendar** from Menu Bar. **My Calendar** page displays.

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



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

4. Click **Frequency Pattern**  button for **Frequency** field in **Activity Recurrence** section. **Select a Frequency Pattern** window displays.

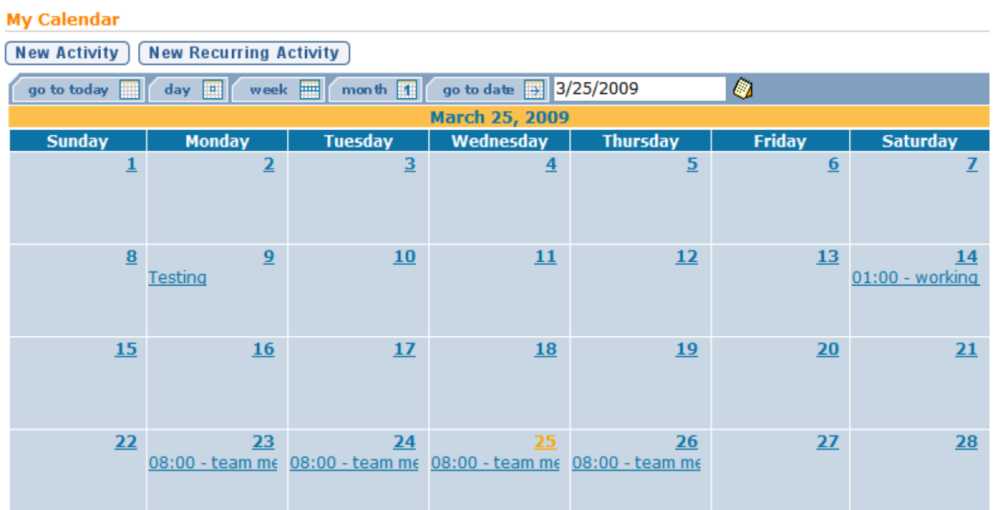


5. Select recurring pattern. Click **OK**. **Create Recurring Activity** page displays with **Frequency** field populated.

6. Specify the **Number of Occurrences** for the Event or define a **To Date** in **Recurrence Duration** section.

7. Type **Comments** *(Optional)*.

8. Click **Save** button to save activity and return to **Events** page. Activity displays on specified date.



OR

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

OR

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