Unit 11:
System Administration

Version 4.6

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Document Revision History

Date	Release	Description
6/14/2016	4.6	• Added new section for managing Announcements
10/15/2014	4.01	Added Edit Reason mgmt. section
5/13/2014	4.01	Added new steps for managing via Property Administration: • Municipal claim denial reasons • The user roles authorized to Modify an 'Approved' MDE (Unsubmit MDE) • The earliest allowed 'Effective Start Date' for Case Reactivation • The User Roles that can reactivate a closed IFSP or SA • The User Roles that can perform edits on a reactivated IFSP or SA • The User Roles that have 'EIO/D' Privileges
6/4/2012	1.6	• No changes
10/24/2011	1.5	• No changes
6/28/2011	1.4	• Moved **User Account Administration** topic to Unit 10 – Municipal Administration.
3/28/2011	1.3	• No changes
1/31/2011	1.2	• No changes
11/22/2010	1.1	• No changes
10/1/2010	1.0	• October 2010 NYEIS launch.

Table of Contents

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System Administration

Unit Overview

System Administration provides an overview of the configuration and setup features that allow the system to run effectively. The Administrative functions are the responsibility of both the Municipality and State Administrative roles.

The Municipality Administrator will be responsible for managing and setting up their Users as well as any Provider Users that deliver services in their municipality.

The State Administrator will be responsible for managing and setting up State Users. The State Administrator is also responsible for maintaining the Code Tables, including ICD Code Tables, DME Code Tables and Rate Tables, loading templates, and configuring the User Roles that are allowed to reactivate closed cases or modify/amend reactivated cases, as well as setting the earliest allowed date for case reactivation.

NYEIS is a centralized System. The Administration features such as Code Tables, apply to all Municipalities.

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SECURITY

User security profiles are defined by a hierarchy of secured elements called Security Identifiers (SIDs). These SIDs are the building blocks to a User's security profile. They are used to secure business functions, fields on a page and programs offered by the organization, including products, service plans and appeals.

The Security Configuration of the System is setup prior to System Launch. Maintenance of the security configuration will not be performed by the Municipality Administrator. The Municipality Administrator will only need to select the Level of access (user role) for each User.

Exception
Currently not available to all NYEIS User roles.

Creating Security Identifiers

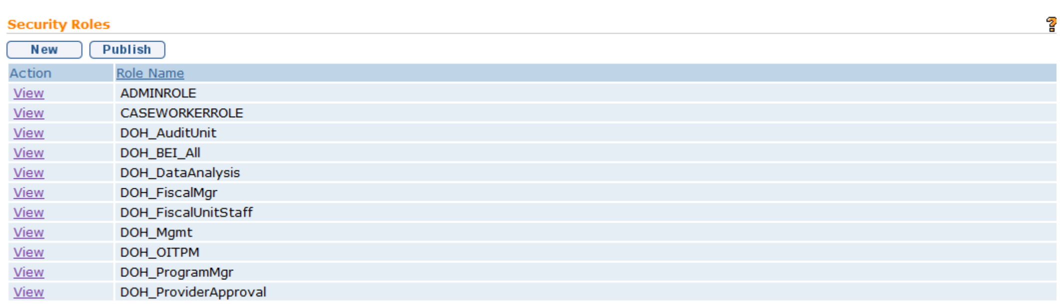
A Security Identifier (SIDs) represents a protected resource. Every secured element is given a SID that is unique across the entire system. SIDs can be assigned to business processes, to specific fields in the system and to the programs offered by the organization.

Important Information
Security Identifiers are created by the application development team through a simple script as new functionality/security is added to the System.

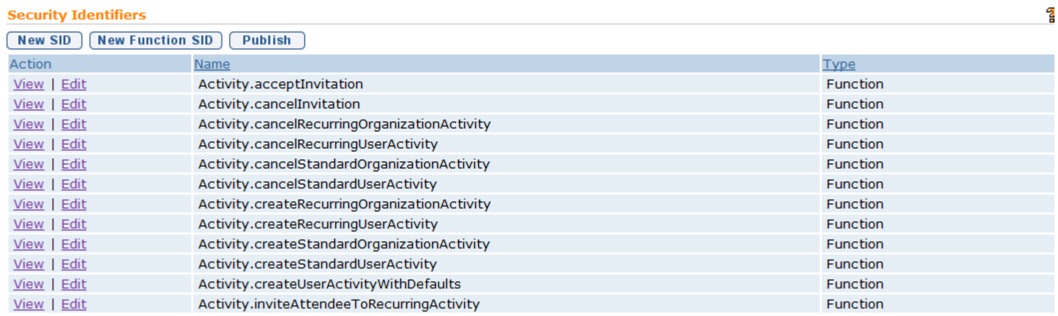
1. Display Administration Home page.

2. Click Code Tables link from My Shortcuts section. Code Tables page displays.

3. Click Security from the Navigation Bar. Security Roles page displays.



4. Click **Security Identifiers** from the Navigation Bar. **Security Identifiers** page displays.



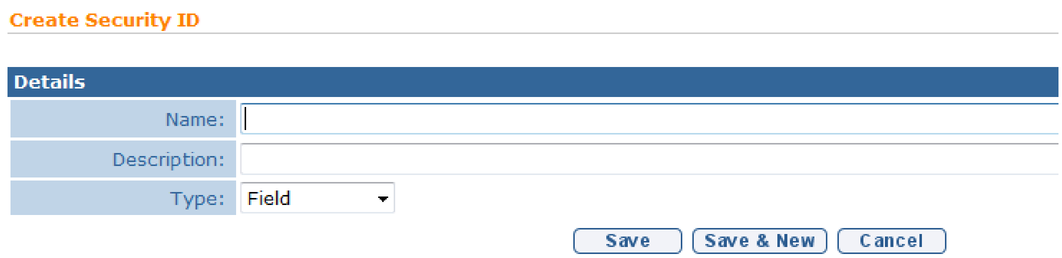
Security Identifiers

New SID | New Function SID | Publish

Action	Name	Type
View | Edit	Activity.acceptInvitation	Function
View | Edit	Activity.cancelInvitation	Function
View | Edit	Activity.cancelRecurringOrganizationActivity	Function
View | Edit	Activity.cancelRecurringUserActivity	Function
View | Edit	Activity.cancelStandardOrganizationActivity	Function
View | Edit	Activity.cancelStandardUserActivity	Function
View | Edit	Activity.createRecurringOrganizationActivity	Function
View | Edit	Activity.createRecurringUserActivity	Function
View | Edit	Activity.createStandardOrganizationActivity	Function
View | Edit	Activity.createStandardUserActivity	Function
View | Edit	Activity.createUserActivityWithDefaults	Function
View | Edit	Activity.inviteAttendeeToRecurringActivity	Function

5. Click one of the following:

New SID button. **Create Security ID** page displays.



Or

New Function SID button. **Create Function ID** page displays.

6. Enter information in the **Details** section by pressing the **Tab** key to move from field-to-field.

7. Click **Save** button. **Security Identifiers** page displays.

   Or

   Click **Save & New** button to save current identifier and create a new identifier.

8. Click **Publish** button from the **Security Identifiers** page to update Security Identifiers. **Publish Security Changes** page displays with the following message, ***Are you sure you want to publish any changes made to security?*** Click **Yes** button.

Notes:

- To display SID detail, click **View** link under **Action** column from the **Security Identifiers** page. Click **Delete** or **Edit** button to change SID.

- To edit SID, click **Edit** link under **Action** column from the **Security Identifiers** page.

Exception
Currently not available to Muni User roles.

Creating Security Groups

A Security Group is the grouping of Security Identifiers (SIDs). This Level in the security hierarchy allows an administrator to group the large number of SIDs into a smaller number of manageable groups. Any Users who have a specific Security Group assigned to their security role will have access to all the resources represented by the SIDs belonging to the Security Group.

1. Display Administration Home page.

2. Click Code Tables link from My Shortcuts section. Code Tables page displays.

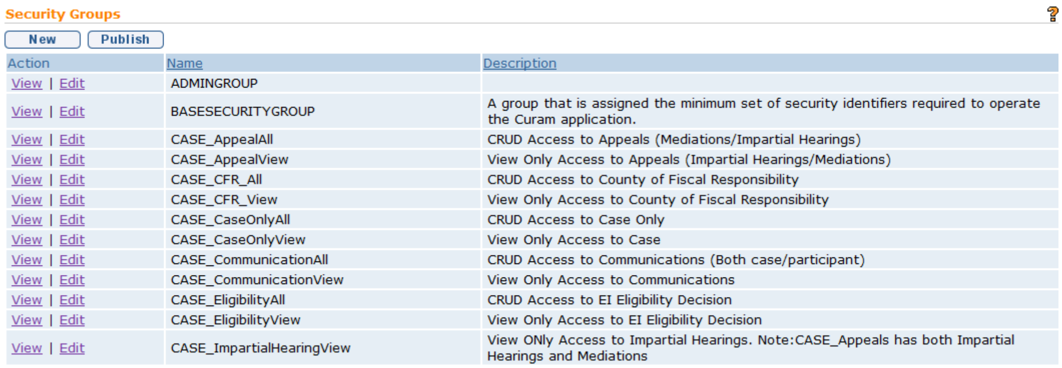
3. Click Security from the Navigation Bar. Security Roles page displays.

Security Roles

New   Publish

Action	Role Name
View	ADMINROLE
View	CASEWORKERROLE
View	DOH_AuditUnit
View	DOH_BEI_All
View	DOH_DataAnalysis
View	DOH_FiscalMgr
View	DOH_FiscalUnitStaff
View	DOH_Mgmt
View	DOH_OITPM
View	DOH_ProgramMgr
View	DOH_ProviderApproval
View	DOH_ProviderMonitoring

4. Click **Security Groups** from the Navigation Bar. **Security Groups** page displays.

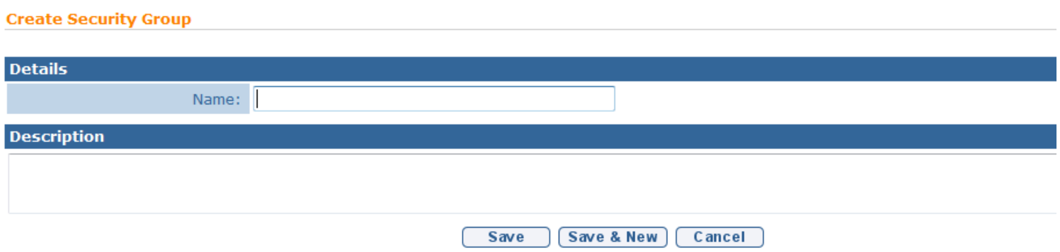


Security Groups

New | Publish

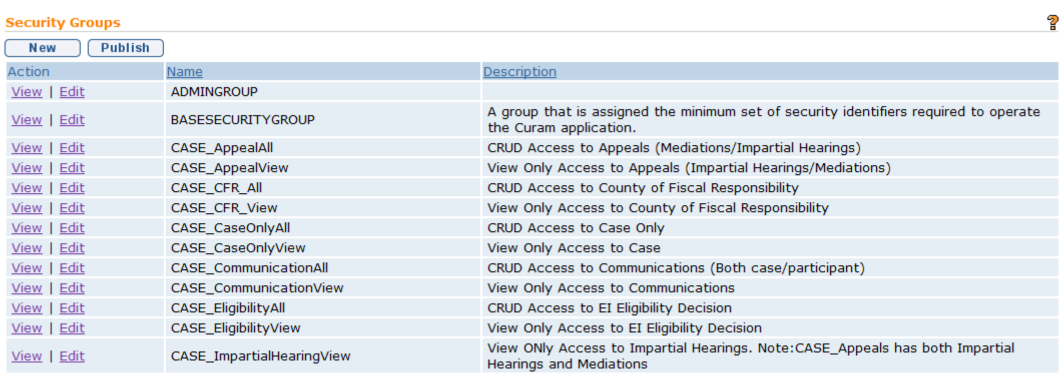
Action	Name	Description
View | Edit	ADMINGROUP	
View | Edit	BASESECURITYGROUP	A group that is assigned the minimum set of security identifiers required to operate the Curam application.
View | Edit	CASE_AppealAll	CRUD Access to Appeals (Mediations/Impartial Hearings)
View | Edit	CASE_AppealView	View Only Access to Appeals (Impartial Hearings/Mediations)
View | Edit	CASE_CFR_All	CRUD Access to County of Fiscal Responsibility
View | Edit	CASE_CFR_View	View Only Access to County of Fiscal Responsibility
View | Edit	CASE_CaseOnlyAll	CRUD Access to Case Only
View | Edit	CASE_CaseOnlyView	View Only Access to Case
View | Edit	CASE_CommunicationAll	CRUD Access to Communications (Both case/participant)
View | Edit	CASE_CommunicationView	View Only Access to Communications
View | Edit	CASE_EligibilityAll	CRUD Access to EI Eligibility Decision
View | Edit	CASE_EligibilityView	View Only Access to EI Eligibility Decision
View | Edit	CASE_ImpartialHearingView	View ONly Access to Impartial Hearings. Note:CASE_Appeals has both Impartial Hearings and Mediations

5. Click **New** button. **Create Security Group** page displays.



6. Enter information in the **Details** and **Description** sections.

7. Click **Save** button. **Security Groups** page displays. *Click **Save & New** button to save current group and create a new group.*

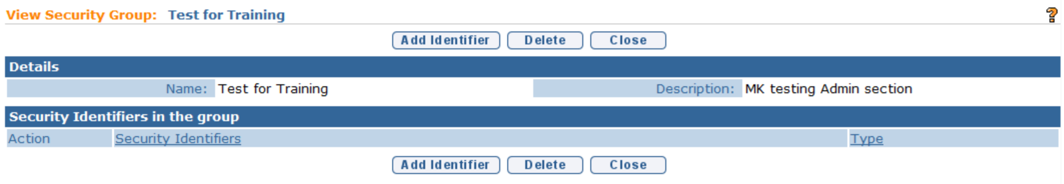


Security Groups

New | Publish

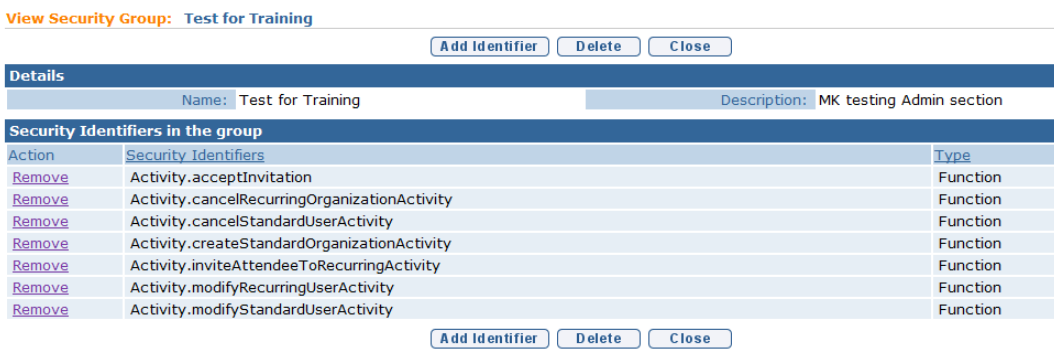
Action	Name	Description
View | Edit	ADMINGROUP	
View | Edit	BASESECURITYGROUP	A group that is assigned the minimum set of security identifiers required to operate the Curam application.
View | Edit	CASE_AppealAll	CRUD Access to Appeals (Mediations/Impartial Hearings)
View | Edit	CASE_AppealView	View Only Access to Appeals (Impartial Hearings/Mediations)
View | Edit	CASE_CFR_All	CRUD Access to County of Fiscal Responsibility
View | Edit	CASE_CFR_View	View Only Access to County of Fiscal Responsibility
View | Edit	CASE_CaseOnlyAll	CRUD Access to Case Only
View | Edit	CASE_CaseOnlyView	View Only Access to Case
View | Edit	CASE_CommunicationAll	CRUD Access to Communications (Both case/participant)
View | Edit	CASE_CommunicationView	View Only Access to Communications
View | Edit	CASE_EligibilityAll	CRUD Access to EI Eligibility Decision
View | Edit	CASE_EligibilityView	View Only Access to EI Eligibility Decision
View | Edit	CASE_ImpartialHearingView	View ONly Access to Impartial Hearings. Note:CASE_Appeals has both Impartial Hearings and Mediations

8. Click **<u>View</u>** link under **Action** column for the Security Group created. **View Security Group** page displays.

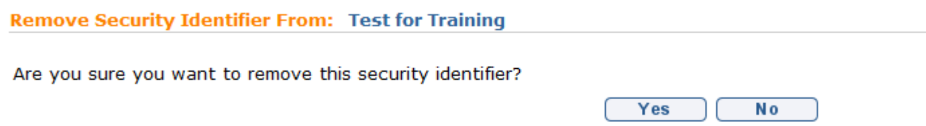


9. Click the **Add Identifier** button. **Add Security Identifier To** page displays with a list of Security Identifiers in the System.

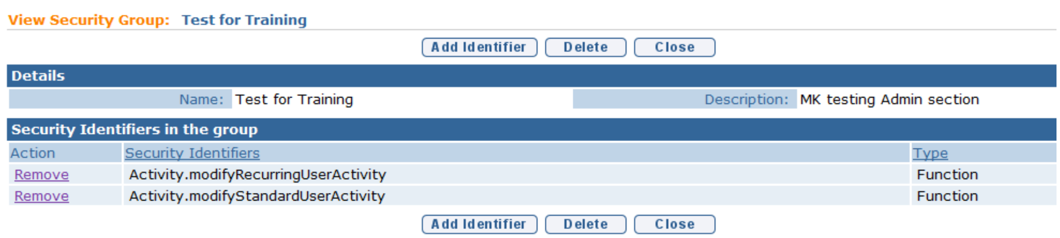
10. Select one or many Security Identifiers to add to the Security Group. To select more than one Security Identifier, hold down the **Ctrl** key and click on each Identifier. When complete, click **Save** button. **View Security Group** page displays with the Security Identifiers listed.



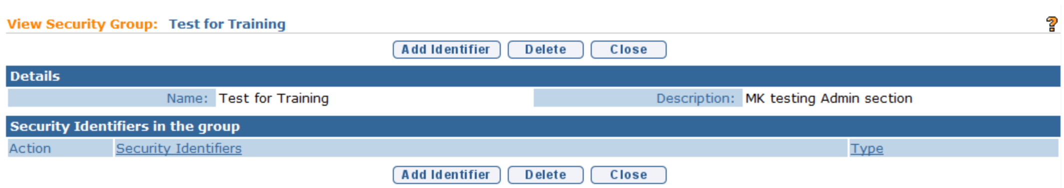
11. To remove an incorrect Security Identifier from the Security Group, click **<u>Remove</u>** link next to the Security Identifier to be removed. **Remove Security Identifier From** page displays with the message ***Are you sure you want to remove this security identifier?***



Click **Yes** button. Identifier is removed. **View Security Group** page displays.



12. Repeat adding Security Identifiers until complete. When finished, click **Close** button. **Security Group**s page displays.



13. Click **Publish** button to update Security Groups.

<u>Notes</u>:

- To display Group detail, click **<u>View</u>** link under **Action** column from the **Security Groups** page. Apply necessary changes.

- To edit the name or description of the Security Group, click **<u>Edit</u>** link under **Action** column from the **Security Groups** page.

- In order for the Security Group to become active in the System, the User *must* click the **Publish** button as defined in the steps above.

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

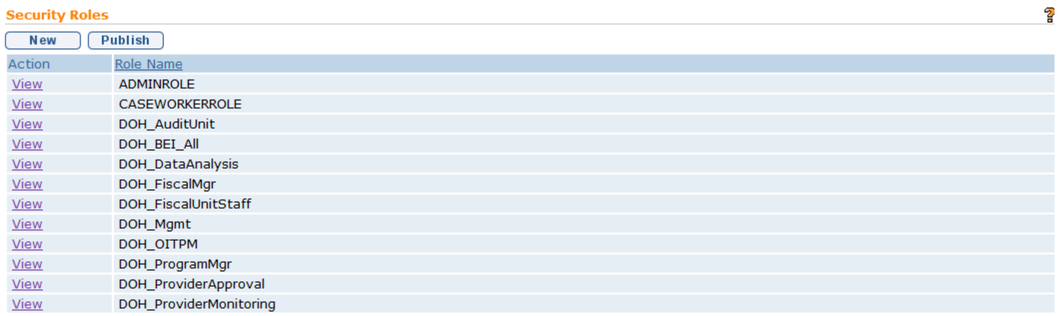
Creating Security Roles

A User has one and only one Security Role. A Security Role may be made up of a number of Security Groups which specify the Security Identifiers available to the User.

1. Display **Administration Home** page.

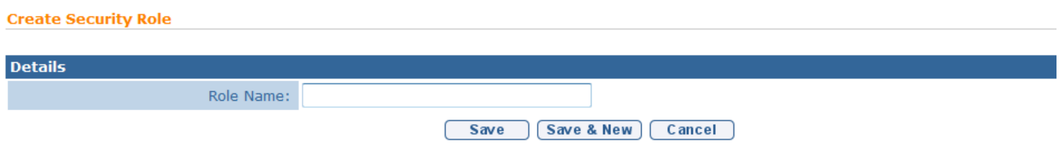
2. Click **<u>Code Tables</u>** link from **My Shortcuts** section. **Code Tables** page displays.

3. Click **Security** from the Navigation Bar. **Security Roles** page displays.



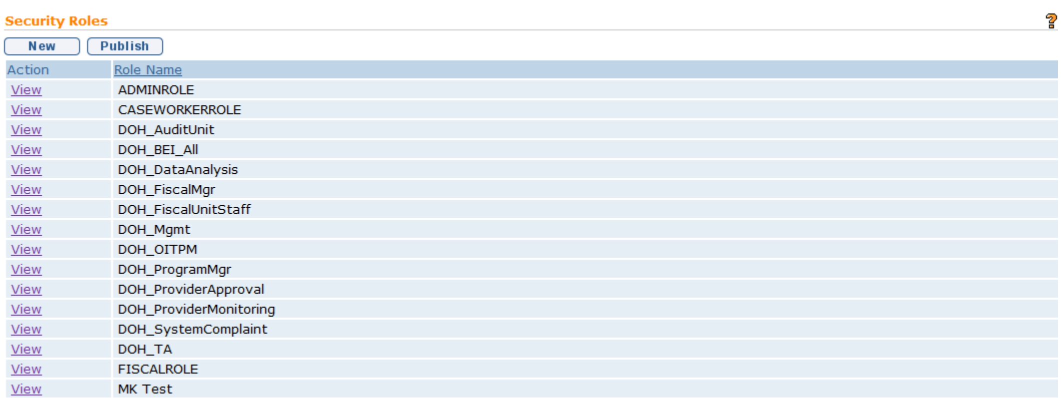
Action	Role Name
View	ADMINROLE
View	CASEWORKERROLE
View	DOH_AuditUnit
View	DOH_BEI_All
View	DOH_DataAnalysis
View	DOH_FiscalMgr
View	DOH_FiscalUnitStaff
View	DOH_Mgmt
View	DOH_OITPM
View	DOH_ProgramMgr
View	DOH_ProviderApproval
View	DOH_ProviderMonitoring

4. Click **New** button. **Create Security Role** page displays.



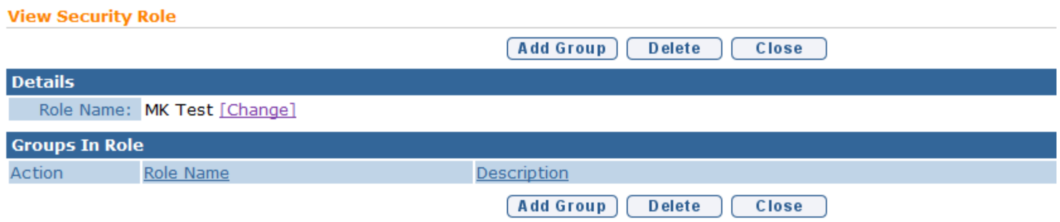
5. Type information in **Role Name** in **Details** sections.

6. Click **Save** button. **Security Roles** page displays. *Click **Save & New** button to save current role and create another new role.*

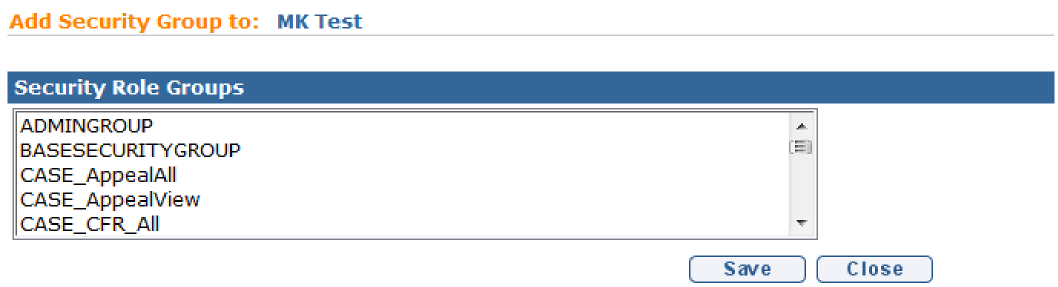


Action	Role Name
View	ADMINROLE
View	CASEWORKERROLE
View	DOH_AuditUnit
View	DOH_BEI_All
View	DOH_DataAnalysis
View	DOH_FiscalMgr
View	DOH_FiscalUnitStaff
View	DOH_Mgmt
View	DOH_OITPM
View	DOH_ProgramMgr
View	DOH_ProviderApproval
View	DOH_ProviderMonitoring
View	DOH_SystemComplaint
View	DOH_TA
View	FISCALROLE
View	MK Test

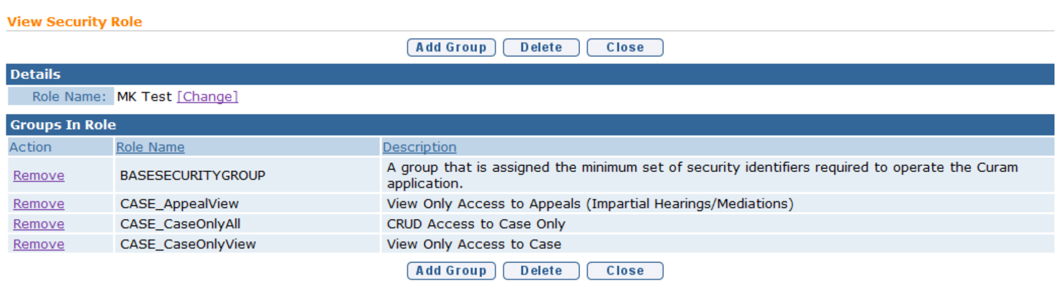
7. Click **<u>View</u>** link under **Action** column for the Security Role created. **View Security Role** page displays.



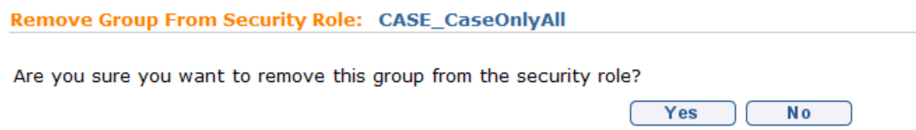
8. Click **Add Group** button. **Add Security Group To** page displays with a list of all the Security Groups in the System.



9. Select one or many Security Groups to add to the Security Role. To select more than one Security Group, hold down the **Ctrl** key and click on each Group. When complete, click **Save** button. **View Security Role** page displays with the Security Groups listed.



10. To remove an incorrect Security Group from the Security Role, click **<u>Remove</u>** link next to the Security Group. **Remove Group From Security Role** page displays with the message ***Are you sure you want to remove this group from the security role?***

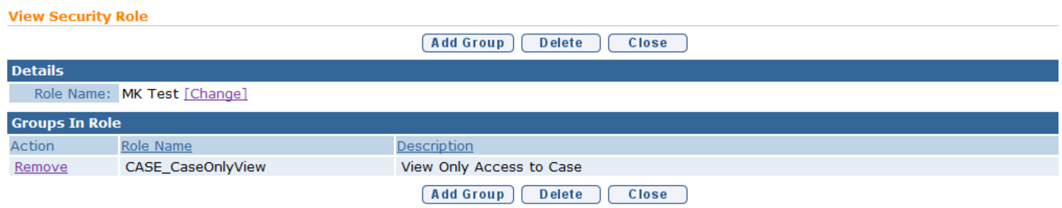


Remove Group From Security Role: CASE_CaseOnlyAll

Are you sure you want to remove this group from the security role?

Yes No

Click **Yes** button. Group is removed. **View Security Role** page displays.



View Security Role

Add Group Delete Close

Details

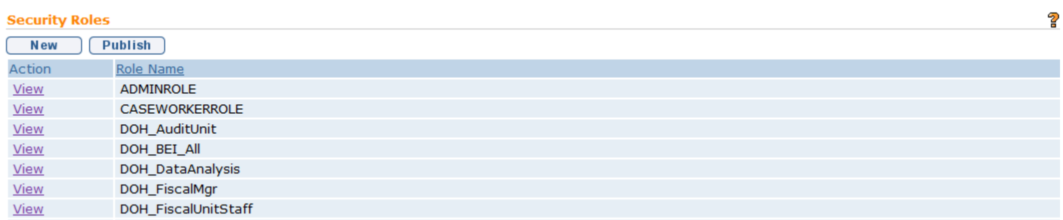
Role Name: MK Test [Change]

Groups In Role

Action	Role Name	Description
Remove	CASE_CaseOnlyView	View Only Access to Case

Add Group Delete Close

11. Repeat the adding Security Groups until the Security Role has been configured. When finished, click **Close** button. **Security Roles** page displays.



Security Roles

New Publish

Action	Role Name
View	ADMINROLE
View	CASEWORKERROLE
View	DOH_AuditUnit
View	DOH_BEI_All
View	DOH_DataAnalysis
View	DOH_FiscalMgr
View	DOH_FiscalUnitStaff

12. Click **Publish** button to update Security Roles.

<u>Notes</u>:

- To display Role detail, click **<u>View</u>** link under **Action** column from the **Security Roles** page. Apply necessary changes.

- In order for the Security Role to become active in the System, the User *must* click the **Publish** button as defined in the steps above.

USER ACCOUNT ADMINISTRATION

Every person who will access NYEIS must have a NYEIS User Account. The State Administrator will be responsible for creating and managing all State User Accounts. The Municipality Administrator (i.e., MUNI_ProgramUserAdmin or MUNI_IT_SystemAdmin) will be responsible for creating and managing

- All Municipal User Accounts
- Providers User Accounts for providers that deliver services in their municipality.

See **Unit 10 – Municipal Administration, *User Account Administration*** for instructions.

CODE TABLES

Code Tables are used for viewing and editing selections for a drop down field. The main purpose for an Administrator to go into these Code Tables will be to edit or add items to a Code Table. The Municipality will have access to view codeTables but only the State will be able to edit the code Table.

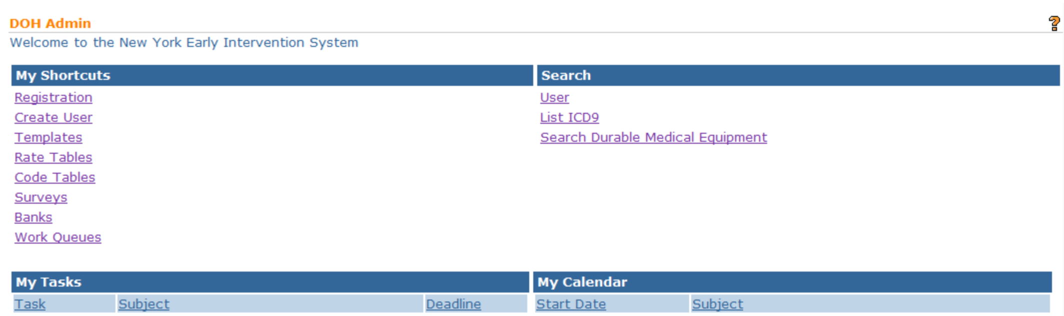
Important Information
The System can not show specific codes to one Municipality and not another.

Changes made to Code Table Items are not updated in the System until the changes are *published* (or the System server is rebooted).

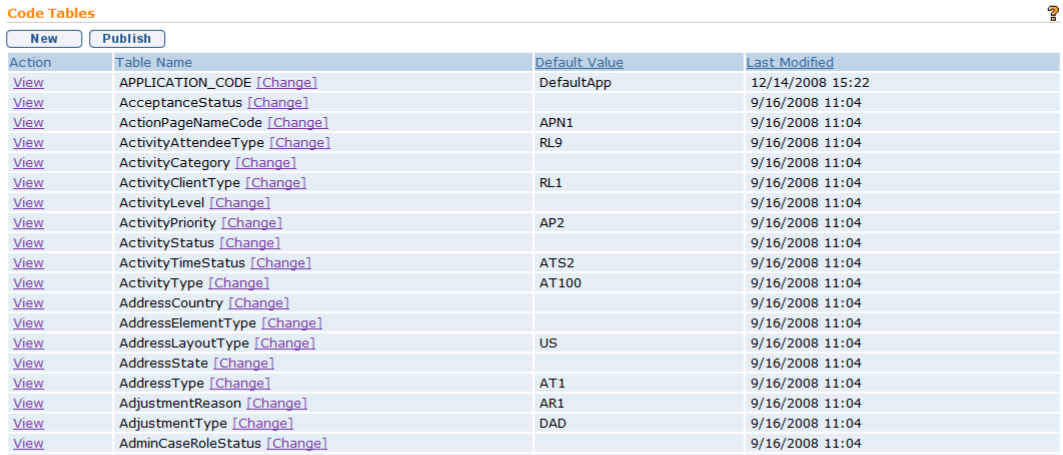
<u>Exception</u>
Currently not available to all NYEIS User roles.

Viewing/Editing Code Table Items

1. Display **Administration Home** page.



2. Click **<u>Code Tables</u>** link from **My Shortcuts**. **Code Tables** page displays with a list of all active Code Tables in the System.

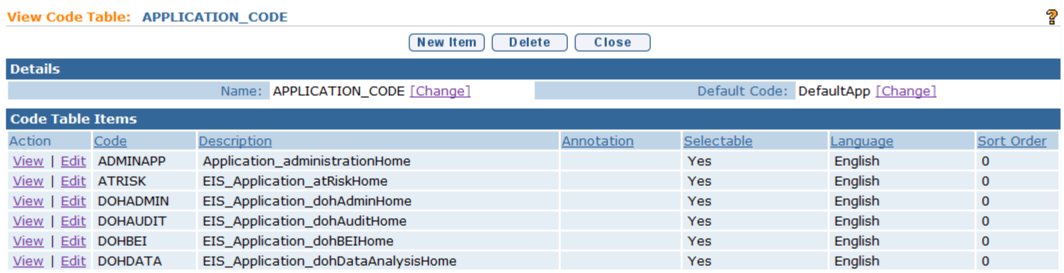


Code Tables

New | Publish

Action	Table Name	Default Value	Last Modified
View	APPLICATION_CODE [Change]	DefaultApp	12/14/2008 15:22
View	AcceptanceStatus [Change]		9/16/2008 11:04
View	ActionPageNameCode [Change]	APN1	9/16/2008 11:04
View	ActivityAttendeeType [Change]	RL9	9/16/2008 11:04
View	ActivityCategory [Change]		9/16/2008 11:04
View	ActivityClientType [Change]	RL1	9/16/2008 11:04
View	ActivityLevel [Change]		9/16/2008 11:04
View	ActivityPriority [Change]	AP2	9/16/2008 11:04
View	ActivityStatus [Change]		9/16/2008 11:04
View	ActivityTimeStatus [Change]	ATS2	9/16/2008 11:04
View	ActivityType [Change]	AT100	9/16/2008 11:04
View	AddressCountry [Change]		9/16/2008 11:04
View	AddressElementType [Change]		9/16/2008 11:04
View	AddressLayoutType [Change]	US	9/16/2008 11:04
View	AddressState [Change]		9/16/2008 11:04
View	AddressType [Change]	AT1	9/16/2008 11:04
View	AdjustmentReason [Change]	AR1	9/16/2008 11:04
View	AdjustmentType [Change]	DAD	9/16/2008 11:04
View	AdminCaseRoleStatus [Change]		9/16/2008 11:04

3. Click **View** link under **Action** column. **View Code Table** page displays.



View Code Table: APPLICATION_CODE

New Item | Delete | Close

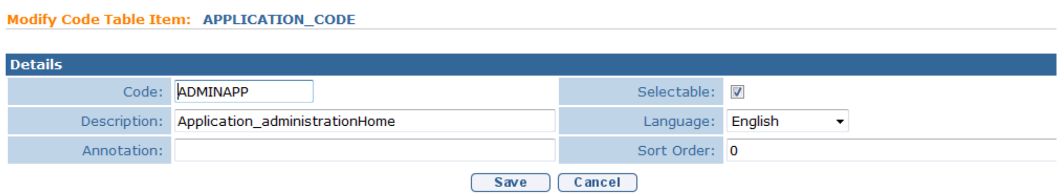
Details

Name: APPLICATION_CODE [Change]   Default Code: DefaultApp [Change]

Code Table Items

Action	Code	Description	Annotation	Selectable	Language	Sort Order
View | Edit	ADMINAPP	Application_administrationHome		Yes	English	0
View | Edit	ATRISK	EIS_Application_atRiskHome		Yes	English	0
View | Edit	DOHADMIN	EIS_Application_dohAdminHome		Yes	English	0
View | Edit	DOHAUDIT	EIS_Application_dohAuditHome		Yes	English	0
View | Edit	DOHBEI	EIS_Application_dohBEIHome		Yes	English	0
View | Edit	DOHDATA	EIS_Application_dohDataAnalysisHome		Yes	English	0

4. Click **Edit** link under **Action** column for item to edit in **Code Table Items** section. **Modify Code Table Item** page displays with a **Details** section.



Modify Code Table Item: APPLICATION_CODE

Details

Code:	ADMINAPP	Selectable:	☑
Description:	Application_administrationHome	Language:	English
Annotation:		Sort Order:	0

Save | Cancel

5. Apply changes. Press **Tab** key to navigate from field-to-field.

Important Information

Code Table Items are the codes and values for a particular Code Table.

➲ **Code** field is the name of Code Table Item that is stored in the System database when that Code Table Item is selected in a drop down field.

➲ **Description** field is the actual text that will display in the drop down for the Code Table Item.

- ➲ **Annotation** field is free text space for adding notes on a Code Table Item.
- ➲ **Selectable** field identifies if a Code Table Item is displayed in the drop down list on User pages. Items that are set to **No** are not displayed in drop down values. This allows Code Table Items to be deactivated but still maintain their history in the System.
- ➲ **Language** field defines User's language.
- ➲ **Sort Order** field allows a User to set a number to the order of the displayed item in the drop down.

6. Click **Save** button. *Click **Cancel** button to cancel operation and return to previous page.* **View Code Table** page displays with saved changes.

7. Click **Close** button. **Code Tables** page displays.

Code Tables

New Publish

Action	Table Name	Default Value	Last Modified
View	APPLICATION_CODE [Change]	DefaultApp	12/14/2008 15:22
View	AcceptanceStatus [Change]		9/16/2008 11:04
View	ActionPageNameCode [Change]	APN1	9/16/2008 11:04
View	ActivityAttendeeType [Change]	RL9	9/16/2008 11:04
View	ActivityCategory [Change]		9/16/2008 11:04
View	ActivityClientType [Change]	RL1	9/16/2008 11:04
View	ActivityLevel [Change]		9/16/2008 11:04
View	ActivityPriority [Change]	AP2	9/16/2008 11:04
View	ActivityStatus [Change]		9/16/2008 11:04
View	ActivityTimeStatus [Change]	ATS2	9/16/2008 11:04
View	ActivityType [Change]	AT100	9/16/2008 11:04
View	AddressCountry [Change]		9/16/2008 11:04

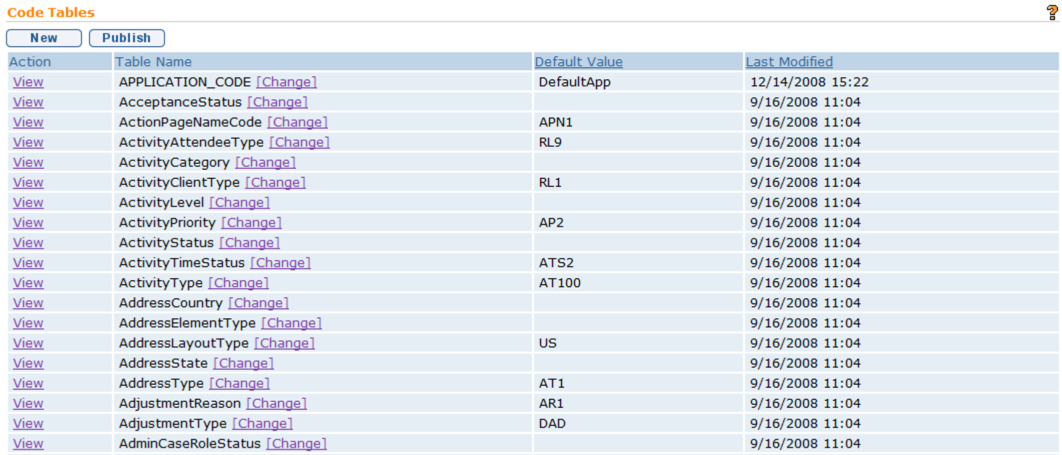
8. Click **Publish** button to apply all changes.

Exception
Currently not available to all NYEIS User roles.

Adding Code Table Items

1. Display **Administration Home** page.

2. Click **Code Tables** link from **My Shortcuts**. **Code Tables** page displays with a list of all active Code Tables in the System.

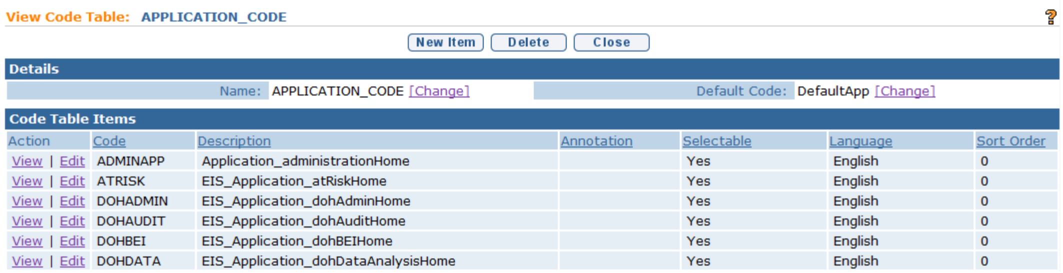


Code Tables

New | Publish

Action	Table Name	Default Value	Last Modified
View	APPLICATION_CODE [Change]	DefaultApp	12/14/2008 15:22
View	AcceptanceStatus [Change]		9/16/2008 11:04
View	ActionPageNameCode [Change]	APN1	9/16/2008 11:04
View	ActivityAttendeeType [Change]	RL9	9/16/2008 11:04
View	ActivityCategory [Change]		9/16/2008 11:04
View	ActivityClientType [Change]	RL1	9/16/2008 11:04
View	ActivityLevel [Change]		9/16/2008 11:04
View	ActivityPriority [Change]	AP2	9/16/2008 11:04
View	ActivityStatus [Change]		9/16/2008 11:04
View	ActivityTimeStatus [Change]	ATS2	9/16/2008 11:04
View	ActivityType [Change]	AT100	9/16/2008 11:04
View	AddressCountry [Change]		9/16/2008 11:04
View	AddressElementType [Change]		9/16/2008 11:04
View	AddressLayoutType [Change]	US	9/16/2008 11:04
View	AddressState [Change]		9/16/2008 11:04
View	AddressType [Change]	AT1	9/16/2008 11:04
View	AdjustmentReason [Change]	AR1	9/16/2008 11:04
View	AdjustmentType [Change]	DAD	9/16/2008 11:04
View	AdminCaseRoleStatus [Change]		9/16/2008 11:04

3. Click **View** link under **Action** column. **View Code Table** page displays.



View Code Table: APPLICATION_CODE

New Item | Delete | Close

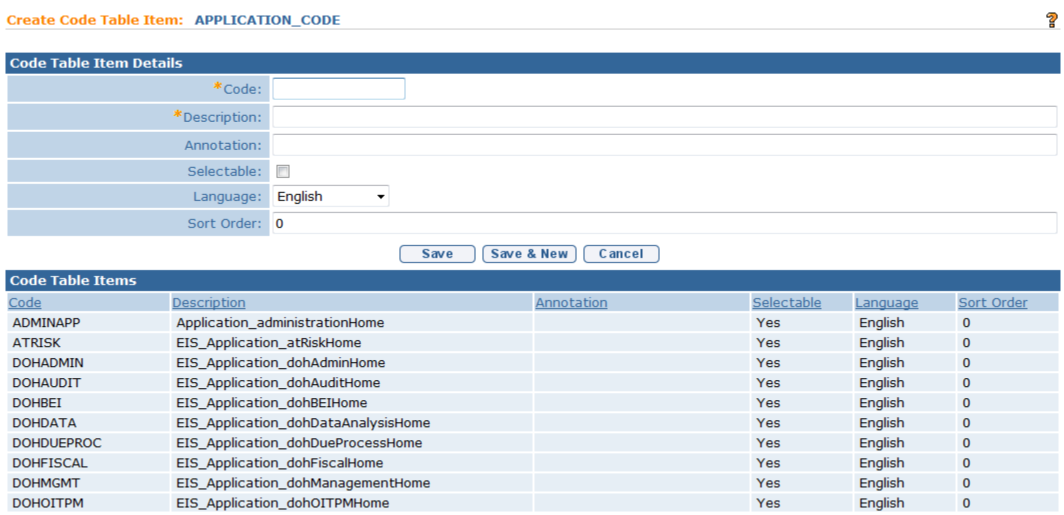
Details

Name: APPLICATION_CODE [Change]   Default Code: DefaultApp [Change]

Code Table Items

Action	Code	Description	Annotation	Selectable	Language	Sort Order
View | Edit	ADMINAPP	Application_administrationHome		Yes	English	0
View | Edit	ATRISK	EIS_Application_atRiskHome		Yes	English	0
View | Edit	DOHADMIN	EIS_Application_dohAdminHome		Yes	English	0
View | Edit	DOHAUDIT	EIS_Application_dohAuditHome		Yes	English	0
View | Edit	DOHBEI	EIS_Application_dohBEIHome		Yes	English	0
View | Edit	DOHDATA	EIS_Application_dohDataAnalysisHome		Yes	English	0

4. Click **New Item** button. **Create Code Table Item** page displays.



Create Code Table Item: APPLICATION_CODE

Code Table Item Details

*Code:	
*Description:	
Annotation:	
Selectable:	
Language:	English
Sort Order:	0

Save | Save & New | Cancel

Code Table Items

Code	Description	Annotation	Selectable	Language	Sort Order
ADMINAPP	Application_administrationHome		Yes	English	0
ATRISK	EIS_Application_atRiskHome		Yes	English	0
DOHADMIN	EIS_Application_dohAdminHome		Yes	English	0
DOHAUDIT	EIS_Application_dohAuditHome		Yes	English	0
DOHBEI	EIS_Application_dohBEIHome		Yes	English	0
DOHDATA	EIS_Application_dohDataAnalysisHome		Yes	English	0
DOHDUEPROC	EIS_Application_dohDueProcessHome		Yes	English	0
DOHFISCAL	EIS_Application_dohFiscalHome		Yes	English	0
DOHMGMT	EIS_Application_dohManagementHome		Yes	English	0
DOHOITPM	EIS_Application_dohOITPMHome		Yes	English	0

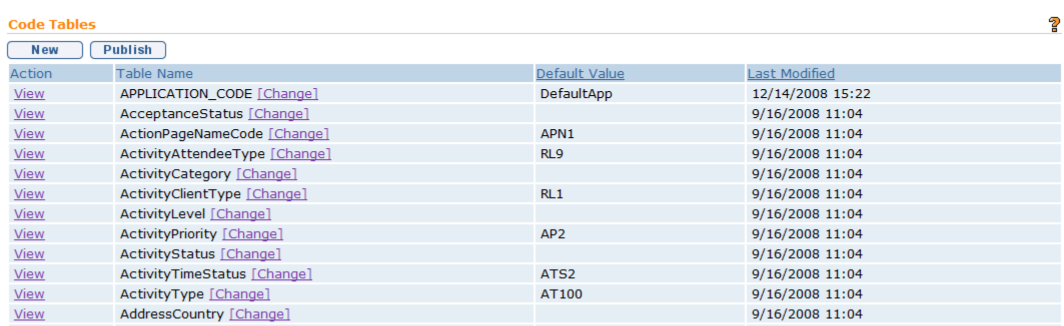
5. Type **Code** in **Code Table Item Details** section. Type **Description**. Press **Tab** key to navigate from field-to-field. *Fields requiring data entry are marked with an asterisk. A field can also be required based on logic that will not have an asterisk.*

Important Information Code Table Items are the codes and values for a particular Code Table. ➲ **Code** field is the name of Code Table Item that is stored in the System database when that Code Table Item is selected in a drop down field. ➲ **Description** field is the actual text that will display in the drop down for the Code Table Item. ➲ **Annotation** field is free text space for adding notes on a Code Table Item. ➲ **Selectable** field identifies if a Code Table Item is displayed in the drop down list on User pages. Items that are set to **No** are not displayed in drop down values. This allows Code Table Items to be deactivated but still maintain their history in the System. ➲ **Language** field defines User's language. ➲ **Sort Order** field allows a User to set a number to the order of the displayed item to in the drop down.

6. Click **Save** button to save new Code Table Item. *Click **Cancel** button to cancel operation and return to previous page.* **View Code Table** page displays.
   Or

   Click **Save and New** button to continue to add additional items.

7. Click **Close** button to close **View Code Table** page. **Code Tables** page displays.


Code Tables

New Publish

Action	Table Name	Default Value	Last Modified
View	APPLICATION_CODE [Change]	DefaultApp	12/14/2008 15:22
View	AcceptanceStatus [Change]		9/16/2008 11:04
View	ActionPageNameCode [Change]	APN1	9/16/2008 11:04
View	ActivityAttendeeType [Change]	RL9	9/16/2008 11:04
View	ActivityCategory [Change]		9/16/2008 11:04
View	ActivityClientType [Change]	RL1	9/16/2008 11:04
View	ActivityLevel [Change]		9/16/2008 11:04
View	ActivityPriority [Change]	AP2	9/16/2008 11:04
View	ActivityStatus [Change]		9/16/2008 11:04
View	ActivityTimeStatus [Change]	ATS2	9/16/2008 11:04
View	ActivityType [Change]	AT100	9/16/2008 11:04
View	AddressCountry [Change]		9/16/2008 11:04

8. Click **Publish** button to apply all changes.

RATE TABLES

Rate Tables are used to maintain rates that vary over time. The Municipality will have access to view Rate Tables but only the State will be able to edit the Rate Table.

Exception
Currently not available to all NYEIS User roles.

Viewing Rate Tables

1. Display **Administration Home** page.

2. Click **Rate Tables** link from **My Shortcuts**. **Rate Tables** page displays.

Rate Tables

New

Action	Name
View	CPT Rate Table
View	Voucher Rate Table
View	Products Rate Table

3. Click **View** link under **Action** column for Rate Table to select. **Rate Table** page displays.

Rate Table: CPT Rate Table

Close

Action	Name	Effective Date	Status
View | Edit | Clone	CPT Rate Table	12/10/2008	Superseded
View | Edit | Clone	CPT Rate Table	1/1/2007	Active

Close

4. Click **View** link under **Action** column to view table. **View Rate Table** page displays.

View Rate Table: CPT Rate Table

Edit Delete Close

Details

Effective Date: 1/1/2007 Rate Table Type: CPT Rate Table

Rate Table

	Statewide
90804 - Indiv psychotherapy, office/outpt, 20-30 min	100.0
90805 - Indiv psychotherapy, office/outpt, 20-30 min w med eval	200.0
90806 - Indiv psychotherapy, office/outpt, 45-50 min	150.0
90807 - Indiv psychotherapy, office/outpt, 45-50 min w med eval	150.0
90808 - Indiv psychotherapy, office/outpt, 75-80 min	200.0
90809 - Indiv psychotherapy, office/outpt, 75-80 min w med eval	100.0
90810 - Indiv psychotherapy, non-verbal, office/outpt, 20-30 min	100.0
90811 - Indiv psychotherapy, non-verbal, office/outpt, 20-30 min w med eval	100.0
90813 - Indiv psychotherapy, non-verbal, office/outpt,45-50 min w med eval	100.0
90814 - Indiv psychotherapy, non-verbal, office/outpt, 75-80 min	100.0
90815 - Indiv psychotherapy, non-verbal, office/outpt, 75-80 min w med eval	100.0

5. Review details of Rate Table.

6. Click **Close** button. **Rate Table** page displays. Click **Close** button. **Rate Tables** page displays.

7. Click **Home** from the Menu Bar. **Administration Home** page displays**.**

Exception
Currently not available to all NYEIS User roles.

Editing Rate Tables

Only the State can edit a Rate Table.

1. Display **Administration Home** page.

2. Click **Rate Tables** link from **My Shortcuts**. **Rate Tables** page displays.

Rate Tables

New

Action	Name
View	CPT Rate Table
View	Voucher Rate Table
View	Products Rate Table

3. Click **View** link under **Action** column. **Rate Table** page displays.

Rate Table: CPT Rate Table

Close

Action	Name	Effective Date	Status
View | Edit | Clone	CPT Rate Table	12/10/2008	Superseded
View | Edit | Clone	CPT Rate Table	1/1/2007	Active

Close

4. Click **Edit** link under **Action** column to view table. **Modify Rate Table** page displays.

Modify Rate Table: CPT Rate Table

Edit Header Close

Details

Effective Date:	12/10/2008	Rate Table Type:	CPT Rate Table

Comments

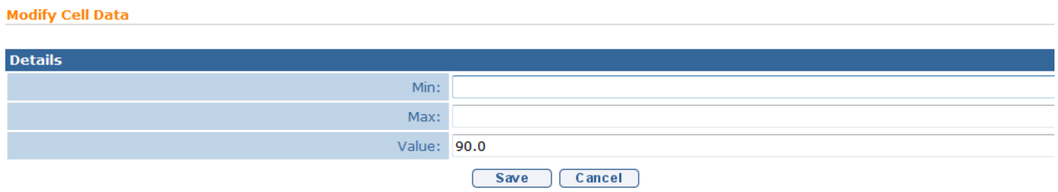
Rate Table

	Statewide
Assistive Tech - Basic	

Details and **Comments** sections *can not* be changed from this page. **Rate Table** section *can* be changed.

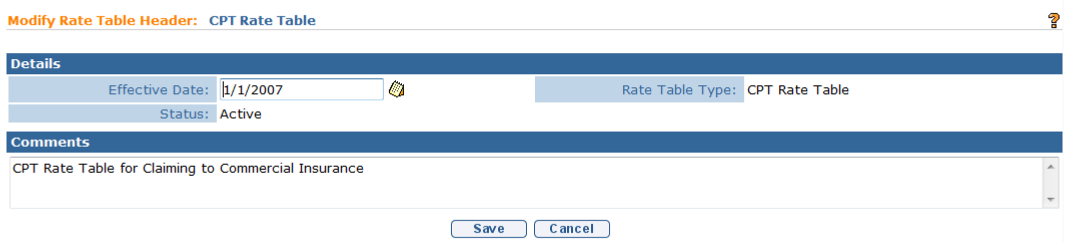
5. Use arrows, plus/minus signs and other symbols in the **Rate Table** section to change Rate Table. *Position mouse over symbol to display help text which describes the action.*

Updating the Rate Amount for a specific service is the most common type of change. For example, updating the rate Albany County pays for Service Coordination. Service Coordination is a row in the rate table and Albany is a column. To update the rate, select the rate cell to edit. Click **+** button. **Modify Cell Data** page displays.



Type revised amount in the **Value** field. Click **Save** button. **Modify Rate Table** page displays.

6. Click **Edit Header** button from **Modify Rate Table** page. **Modify Rate Table Header** page displays.



7. Change **Effective Date** field in **Details** section. Edit **Comments**.

> **Important Information**
> The **Rate Table** type can not be changed because it will affect data using this Rate Table.

8. Click **Save** button. *Click **Cancel** button to cancel operation and return to previous page.* **Modify Rate Table** page displays.

9. Click **Close** button. **Rate Table** page displays. Click **Close** button. **Rate Tables** page displays.

10. Click **Home** from the Menu Bar. **Administration Home** page displays.

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

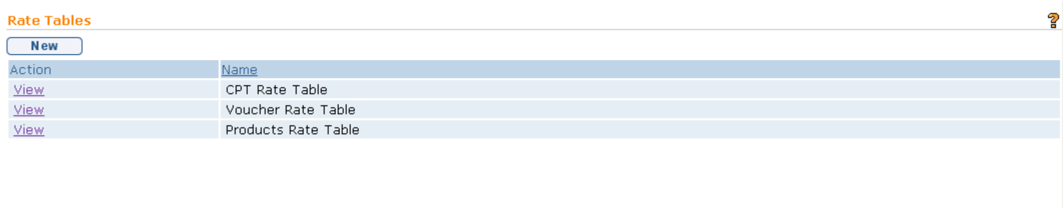
Cloning Rate Tables

Cloning Rate Tables allows a User to create a new Rate Table and an effective date it for the change. The Clone function copies the existing Rate Table into a new Rate Table. The User can edit the rate values for the specific rates that are changing. Cloning Rate Tables is used when a retroactive rate adjustment is required.

1. Display **Administration Home** page.

2. Click **<u>Rate Tables</u>** link from **My Shortcuts**. **Rate Tables** page displays.

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


Rate Tables

New

Action	Name
View	CPT Rate Table
View	Voucher Rate Table
View	Products Rate Table

4. Click **<u>Clone</u>** link under **Action** column. **Clone Rate Table** page displays.


Clone Rate Table

Details

Effective Date:	4/1/2008	Rate Table Type:	Voucher Rate Table

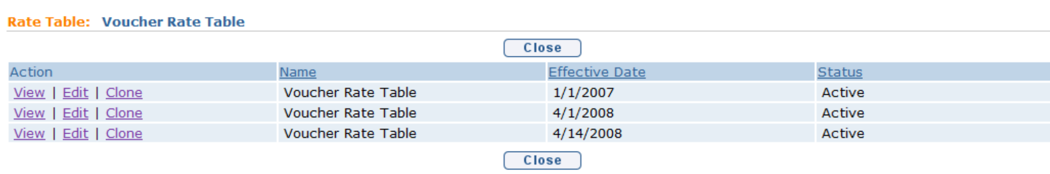
Comments

Rate Table for assigning $ amount to claims for State Voucher

Save | Cancel

5. Change **Effective Date** field in the **Details** section with the date the new Rate goes into effect. Edit **Comments**.

6. Click **Save** button. *Click **Cancel** button to cancel operation and return to previous page.* **Rate Table** page displays with cloned table listed.


Rate Table: Voucher Rate Table

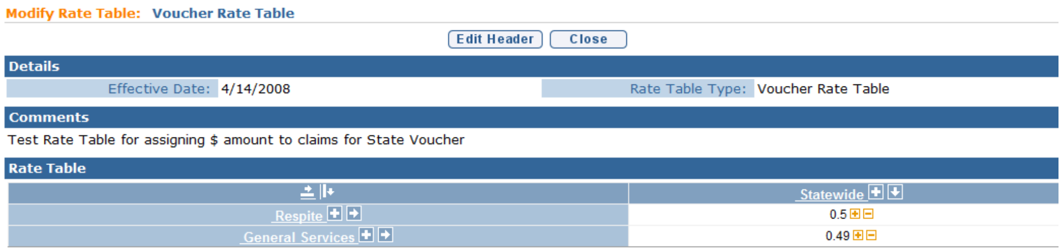
Close

Action	Name	Effective Date	Status
View | Edit | Clone	Voucher Rate Table	1/1/2007	Active
View | Edit | Clone	Voucher Rate Table	4/1/2008	Active
View | Edit | Clone	Voucher Rate Table	4/14/2008	Active

Close

7. Review **Effective Date** and **Status** column for cloned version.

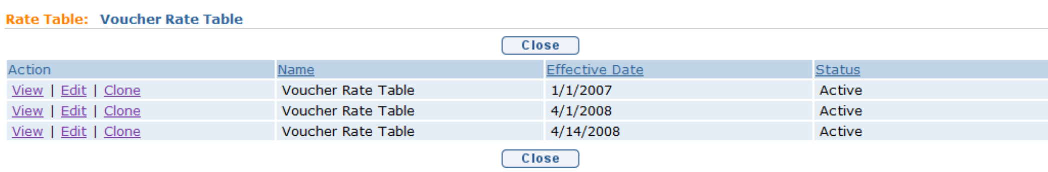
8. Click the **<u>Edit</u>** link for the Cloned table. **Modify Rate Table** page displays.



9. To update the Rate, select the **Rate** cell to edit. Click **+** button. **Modify Cell Data** page displays.

10. Type revised amount in the **Value** field. Click **Save** button. **Modify Rate Table** page displays. Continue making any additional changes.

11. Click **Close** button. **Rate Table** page displays with a list of Rate Tables that are effective dated for the current Rate Table Cloned.



12. Click **Close** button. **Rate Tables** page displays.

13. Click **Home** from the Menu Bar. **Administration Home** page displays.

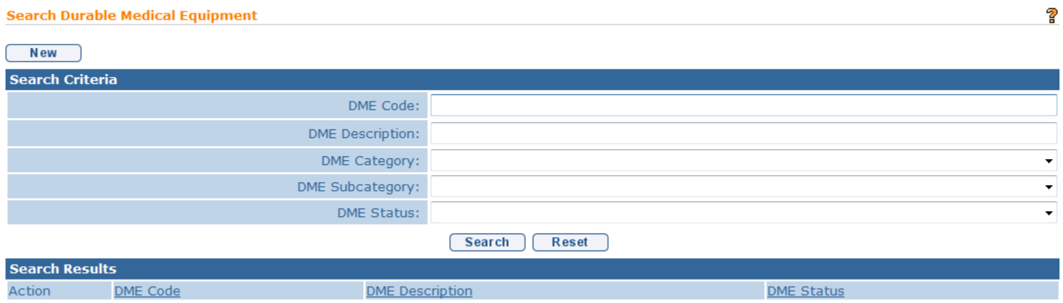
DURABLE MEDICAL EQUIPMENT TABLE

The Durable Medical Equipment Table stores all the DME Codes in a Code Table that can be selected for AT Device Service Authorization. This Code Table has additional columns (Category and Subcategory) to help with searching for the correct DME Code.

Searching Durable Medical Equipment

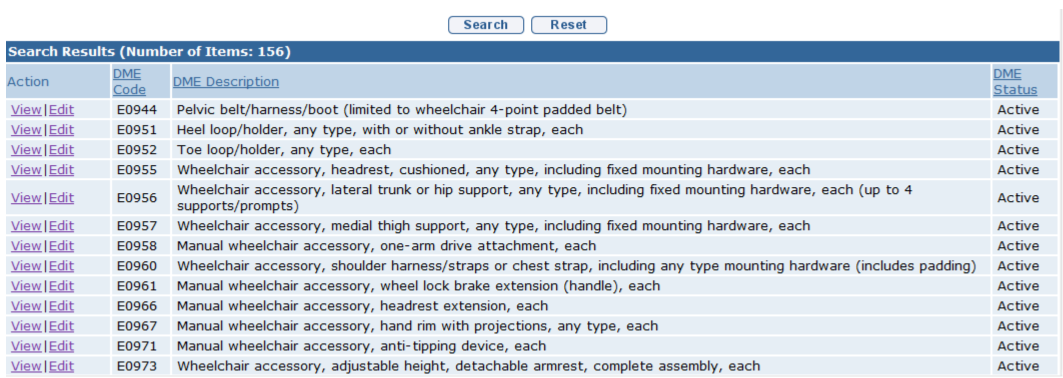
1. Display **Administration Home** page.

2. Click **<u>Search Durable Medical Equipment</u>** link from **Search** section. **Search Durable Medical Equipment** page displays.



3. Type known Durable Medical Equipment data in **Search Criteria** section.

4. Click **Search** button. Records matching entered data display in **Search Results** section. Examine displayed records to determine if a matching DME record is listed. *To search again, click **Reset** button.*



Search Reset

Search Results (Number of Items: 156)

Action	DME Code	DME Description	DME Status
View | Edit	E0944	Pelvic belt/harness/boot (limited to wheelchair 4-point padded belt)	Active
View | Edit	E0951	Heel loop/holder, any type, with or without ankle strap, each	Active
View | Edit	E0952	Toe loop/holder, any type, each	Active
View | Edit	E0955	Wheelchair accessory, headrest, cushioned, any type, including fixed mounting hardware, each	Active
View | Edit	E0956	Wheelchair accessory, lateral trunk or hip support, any type, including fixed mounting hardware, each (up to 4 supports/prompts)	Active
View | Edit	E0957	Wheelchair accessory, medial thigh support, any type, including fixed mounting hardware, each	Active
View | Edit	E0958	Manual wheelchair accessory, one-arm drive attachment, each	Active
View | Edit	E0960	Wheelchair accessory, shoulder harness/straps or chest strap, including any type mounting hardware (includes padding)	Active
View | Edit	E0961	Manual wheelchair accessory, wheel lock brake extension (handle), each	Active
View | Edit	E0966	Manual wheelchair accessory, headrest extension, each	Active
View | Edit	E0967	Manual wheelchair accessory, hand rim with projections, any type, each	Active
View | Edit	E0971	Manual wheelchair accessory, anti-tipping device, each	Active
View | Edit	E0973	Wheelchair accessory, adjustable height, detachable armrest, complete assembly, each	Active

5. To view or edit a DME Code from the **Search Results** list:

   a. **View** - Select the **<u>View</u>** link under the **Action** column for the DME Code to view. **View DME** page displays. Click **Close** button when finished viewing. **Search Durable Medical Equipment** page displays.

   b. **Edit** - Click **<u>Edit</u>** link. **Modify DME** page displays. Apply necessary changes. Click **Save** button. **Search Durable Medical Equipment** page displays.

6. Click **Home** from the Menu Bar. **Administration Home** page displays.

> **Important Information**
> Only the State Administrator can edit a DME Code because it is used for processing by all Municipalities.

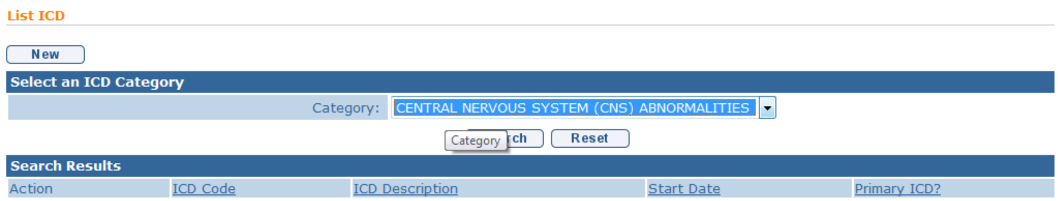
ICD Codes

The ICD Codes table stores all the ICD Codes that can be selected for NYEIS Processing. This Code Table has additional columns (Category and EI Eligible ICD) to help with searching for the correct ICD Code.

Searching ICD Codes

1. Display **Administration Home** page.

2. Click **List ICD9** link from **Search** section. **List ICD** search page displays.



List ICD

New

Select an ICD Category

Category: CENTRAL NERVOUS SYSTEM (CNS) ABNORMALITIES

Category ch   Reset

Search Results

Action	ICD Code	ICD Description	Start Date	Primary ICD?

3. Select **Category** from drop down in **Select an ICD Category** section.

4. Click **Search** button. ICD Codes with the Category selected are displayed in **Search Results** section. Examine displayed records to determine if the appropriate ICD Code is listed. *To search again, click **Reset** button.*

List ICD

New

Select an ICD Category

Category: Digestive System Diseases

Search   Reset

Search Results (Number of Items: 656)

Action	ICD Code	ICD Description	Start Date	EI Eligible ICD?
View Edit	792.10	792.10 - Abn find-stool contents	1/1/2000	No
View Edit	792.40	792.40 - Abn findings-saliva	1/1/2000	No
View Edit	793.30	793.30 - Nonsp abn fd-bilry tract	1/1/2000	No
View Edit	793.40	793.40 - Nonsp abn find-gi tract	1/1/2000	No
View Edit	793.60	793.60 - Nonsp abn fnd-abdom area	1/1/2000	No
View Edit	794.80	794.80 - Abn liver function study	1/1/2000	No
View Edit	551.30	551.30 - Diaphragm hernia w gangr	1/1/2000	No
View Edit	552.00	552.00 - Unil femoral hern w obst	1/1/2000	No
View Edit	552.01	552.01 - Rec unil fem hern w obst	1/1/2000	No
View Edit	552.02	552.02 - Bil femoral hern w obstr	1/1/2000	No
View Edit	552.03	552.03 - Rec bil fem hern w obstr	1/1/2000	No
View Edit	552.10	552.10 - Umbilical hernia w obstr	1/1/2000	No
View Edit	552.20	552.20 - Obstr ventral hernia NOS	1/1/2000	No
View Edit	552.21	552.21 - Obstr incisional hernia	1/1/2000	No
View Edit	552.29	552.29 - Obstr ventral hernia NEC	1/1/2000	No
View Edit	552.30	552.30 - Diaphragm hernia w obstr	1/1/2000	No

5. To view or edit an ICD Code from **Search Results**:

   a. **View** - Select the **View** link under the **Action** column for the ICD Code to view. **View ICD** page displays. Click **Close** button when finished viewing. **List ICD** page displays.

   b. **Edit** - Click **Edit** link. **Modify ICD** page displays. Apply necessary changes. Click **Save** button. **List ICD** page displays.

6. Click **Home** from the Menu Bar. **Administration Home** page displays.

> **Important Information**
> Only the State Administrator can edit an ICD Code because it is used for processing by all Municipalities.

SURVEYS

> **Important Note:**
>
> This functionality is not currently active

TEMPLATES

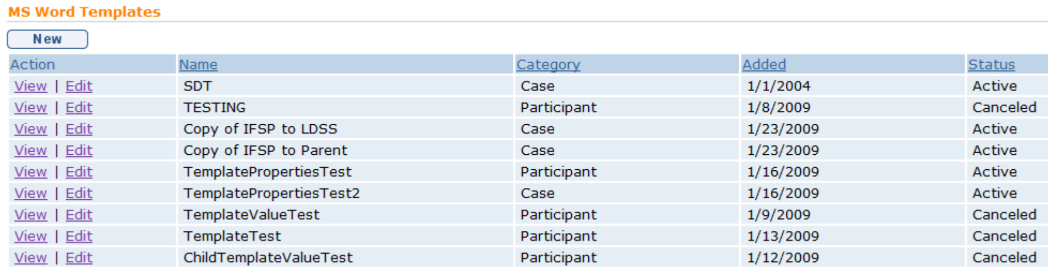
> **Exception**
> Currently not available to Muni User roles.

Adding a Template to the System

Adding a Template to the System is an administration function. The template *must* be created in MS Word with the proper macro setup that integrates the fields on the document to the data in NYEIS. Once a template is added to the System, it is available statewide to be used as a Communication for a Child, Provider, IFSP or Service Authorization. These Communications can be forms or letters.

1. Display **Administration Home** page.

2. Click **Templates** link from **My Shortcuts** section. **MS Word Templates** page displays.

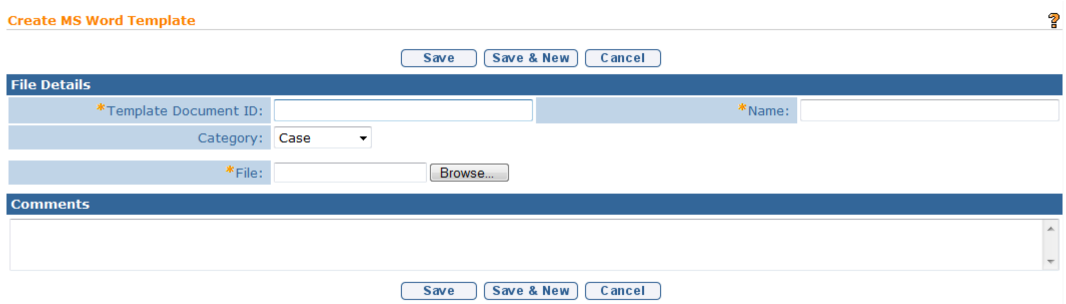


MS Word Templates

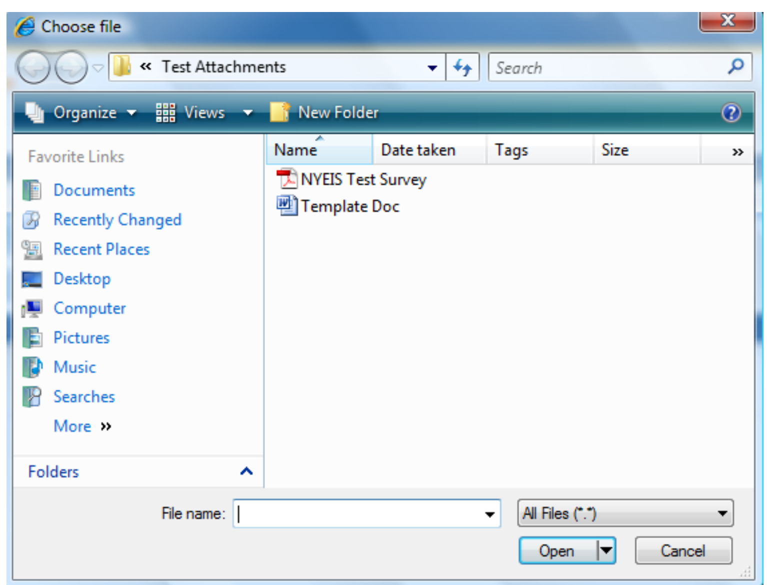
New

Action	Name	Category	Added	Status
View | Edit	SDT	Case	1/1/2004	Active
View | Edit	TESTING	Participant	1/8/2009	Canceled
View | Edit	Copy of IFSP to LDSS	Case	1/23/2009	Active
View | Edit	Copy of IFSP to Parent	Case	1/23/2009	Active
View | Edit	TemplatePropertiesTest	Participant	1/16/2009	Active
View | Edit	TemplatePropertiesTest2	Case	1/16/2009	Active
View | Edit	TemplateValueTest	Participant	1/9/2009	Canceled
View | Edit	TemplateTest	Participant	1/13/2009	Canceled
View | Edit	ChildTemplateValueTest	Participant	1/12/2009	Canceled

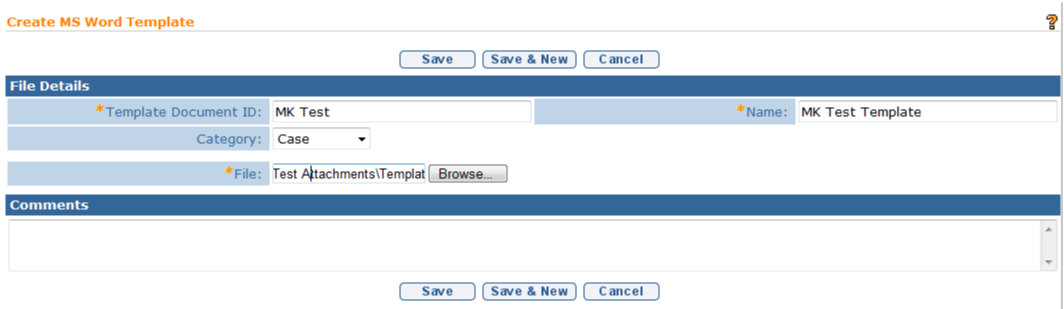
3. Click **New** button. **Create MS Word Template** page displays.



4. In the **File Details** section, enter **Template Document ID** and **Name**. Click **Browse** button in the **File Details** section. **Choose File** dialog box displays.



5. Locate and select MS Word template to upload. Click **Open** button. **File** field is populated with file name.



6. Type information in the **Comments** section.

7. Click **Save** button. Template is saved. **MS Word Templates** page displays with new template.

<u>**Notes**</u>:

- Be sure to select **Category** (**Participant** or **Case)** from **File Details** section. If **Participant** is selected, the template is available as a Communication for a Provider or Child. If **Case** is selected, the template is available as a Communication for an Integrated Case, IFSP or SA.

- To cancel operation and not save changes, click **Cancel** button from the **Create MS Word Template** page.

- To view Template information, click <u>**View**</u> link under **Action** column from the **MS Word Template** page. **MS Word Template** page displays. Click **Delete** button to remove template and set **Status** to **Canceled**.

- To edit template information, click <u>**Edit**</u> link under **Action** column from the **MS Word Template** page.

BANKS

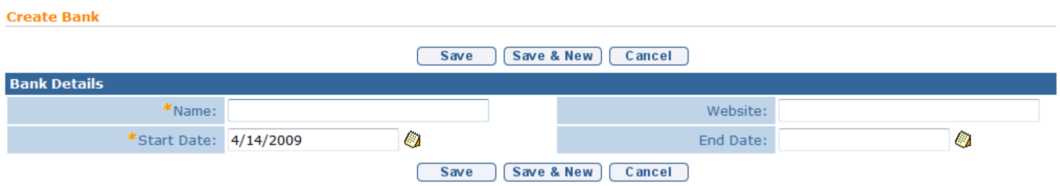
This is typically a Municipal Administrator function and is provided for those with *sufficient* privileges to perform the activities. This section covers a circumstance where an additional Bank has to be added when a Provider’s bank is not available in the System.

Important Information
An Administrator *must* also add a Bank Branch for a new bank. *See* **Bank Branch** for further information.

1. Display **Administration Home** page.

2. Click **<u>Banks</u>** link from **My Shortcuts** section. **Banks** page displays with a list of Banks.

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



Navigate from field-to-field using the **Tab** key to enter information. *Required fields are marked with an asterisk. A field can also be required based on logic that will not have an asterisk.*

4. Click **Save** button to save current bank and return to **Banks** page.

   Or

   Click **Save & New** button to save current bank and add additional banks.

<u>Notes</u>:

- To view Bank information, click **<u>View</u>** link under **Action** column from the **Banks** page. **Bank Home** page displays. Click **Delete** button to remove bank and set **Status** to **Canceled**.

- To edit Bank information, click **<u>Edit</u>** link under **Action** column from the **Banks** page.

Creating a Bank Branch

This is typically a Municipal Administrator function and is provided for those with *sufficient* privileges to perform the activities. This section covers a circumstance where an additional Bank Branch needs to be added in order for a Provider to have their Bank account assigned to the correct Bank/Bank branch.

Important Information
This section can occur after a new Bank has been added. The User would then add the Bank Branches.

1. Display **Administration Home** page.

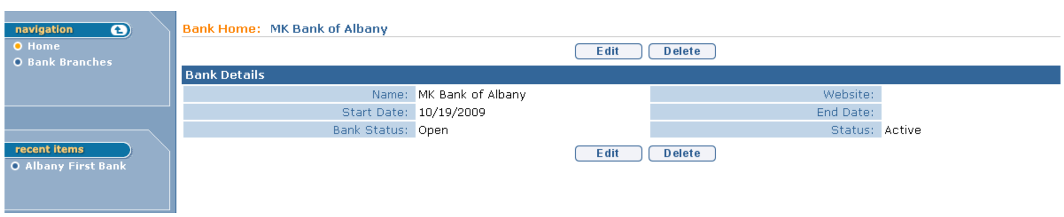
2. Click **<u>Banks</u>** link from **My Shortcuts** section. **Banks** page displays.


Banks

New

Action	Name	Status
View | Edit	Citizens Bank	Active
View | Edit	Downtown Bank	Canceled
View | Edit	Evergreen Bank	Canceled
View | Edit	First Mortgage	Canceled
View | Edit	First National Bank	Active
View | Edit	Midway Savings Bank	Active
View | Edit	Midway Trustee Bank	Active

3. Click **<u>View</u>** link under **Action** column next to the Bank to add a Bank Branch. **Bank Home** page is displayed.



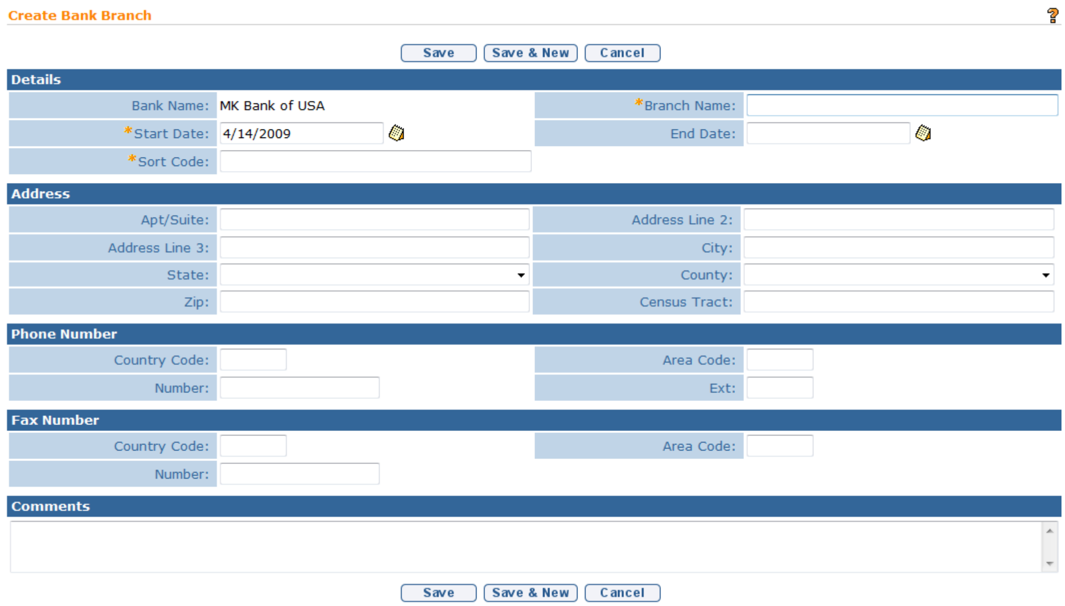
4. Click **Bank Branches** from the Navigation Bar. **Bank Branches** page displays.


Bank Branches: MK Bank of USA

New

Action	Name	Sort Code	Status

5. Click **New** button. **Create Bank Branch** page displays.



6. Navigate from field-to-field using the **Tab** key to enter information. *Required fields are marked with an asterisk. A field can also be required based on logic that will not have an asterisk.*

Address for the Bank Branch *must* be entered.

7. Click **Save** button to save current Bank Branch and return to **Bank Branches** page.

   Or

   Click **Save & New** button to save current Bank Branch and add additional Bank Branches.

Notes:

- To view Bank Branch information, click **View** link under **Action** column from the **Bank Branches** page. **Bank Branch** page displays. Click **Delete** button to remove Bank Branch and set **Status** to **Canceled**.

- To edit Bank Branch information, click **Edit** link under **Action** column from the **Bank Branches** page.

Property Administration - Custom Parameters

Note: The following items are managed exclusively by DOH Administrative Staff

Property Administration is a State Administrative function and is provided for those with *sufficient* privileges to manage the following:

- Municipal claim denial reasons
- The user roles authorized to Modify an 'Approved' MDE (Unsubmit MDE)
- The earliest allowed 'Effective Start Date' for Case Reactivation
- The User Roles that can reactivate a closed IFSP or SA
- The User Roles that can perform edits on a reactivated IFSP or SA
- The User Roles that have 'EIO/D' Privileges

Managing Municipal Claim Denial Reasons that can be selected when muni denies an invoice or claim

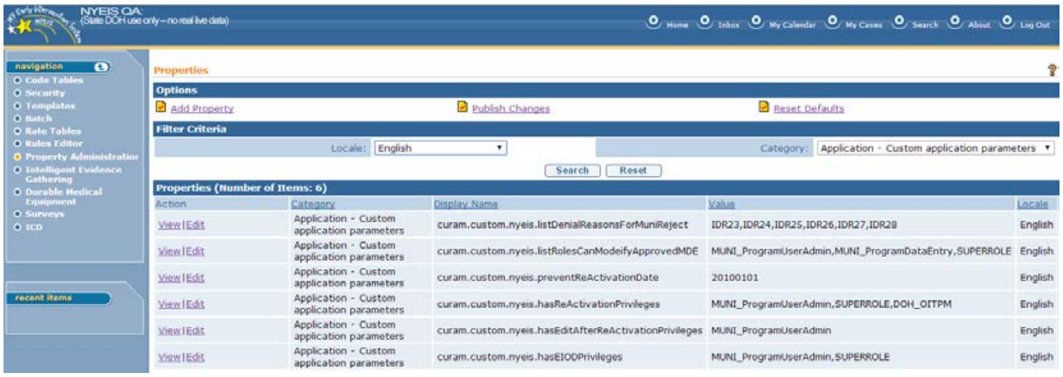
Important Note: Claim denial reasons are displayed in code form as IDR values. To see the corresponding description associated with a given code. See Code Tables->Click **View** corresponding to **EIS_InvoiceDenialReason**. To see the corresponding HIPAA denial code to which an IDR code is associated, see Code Tables-> Click **View** corresponding to **EIS_NYEISHIPAADenialMap**

1. Display **DOH_OITPM Home** Page

2. Click **Code Tables** link from **My Shortcuts** section. **Code Tables** page displays.

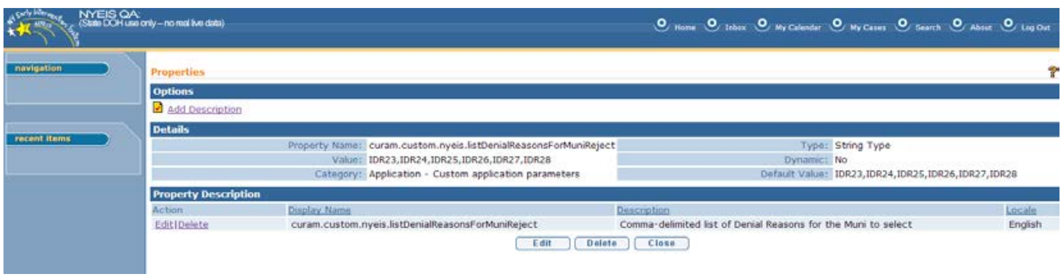
3. Click **Property Administration** from **Left-Hand Navigation** section. **Properties** Page displays

4. From **Locale** drop-down, select **English.** From **Category** drop-down, select **Application - Custom application parameters.** Click **Search.** Results populate page:

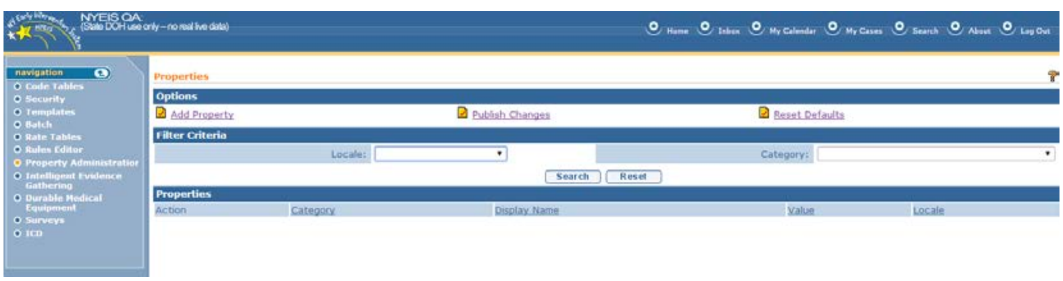


5. Click **Edit** link corresponding to the parameter with Display Name: **curam.custom.nyeis.listDenialReasonsForMuniReject. Edit Property** page displays**.**

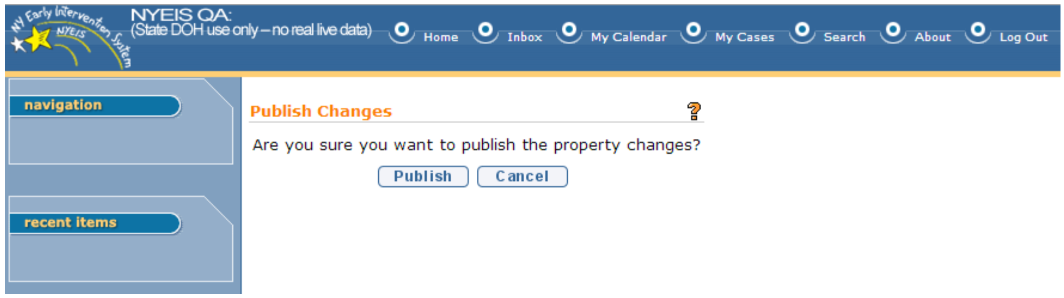
6. Use the Tab button to navigate from field to field. Make changes as needed and as per current policy by adding/removing the IDR Codes User Roles recorded in the **Value** field, separated by commas. Changing the values recorded in **Default Value** to match the roles being changed is not required. When finished, click **Save**. **Properties** page displays:



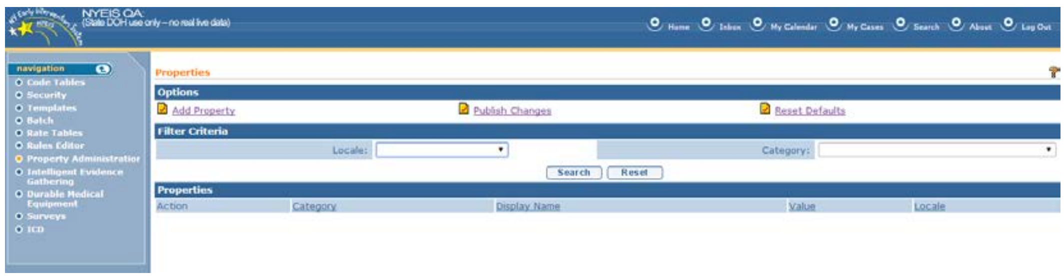
7. Review changes. Click **Edit** to make additional corrections, if needed. Click **Close** when review is complete. **Properties** page displays:



8. Click **<u>Publish Changes</u>**. **Publish Changes** confirmation page displays:



9. Click **<u>Publish</u>**. Changes take effect immediately. **Properties** page displays:



Managing the User Roles Authorized to modify an 'Approved' MDE (Unsubmit MDE).

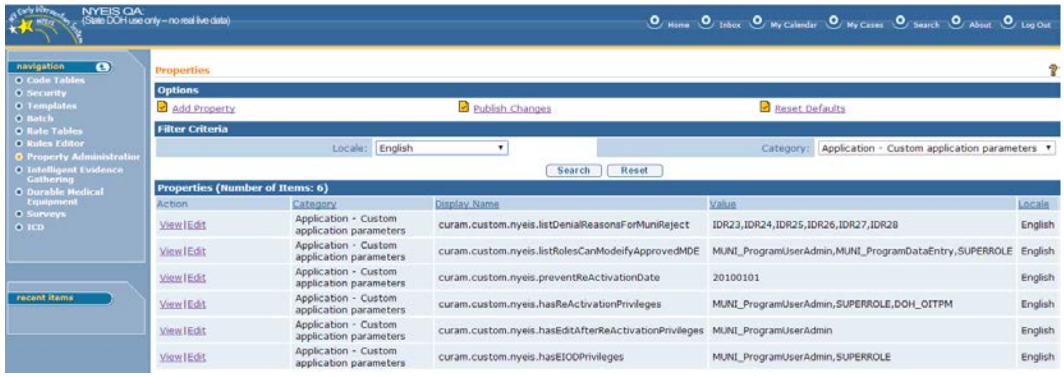
The following steps detail how to manage the list of user roles authorized to make use of the 'Modify Approved MDE' button seen at the top of a completed MDE. If actioned, 'Modify Approved MDE' serves to return the completed evaluation back to the assigned provider who conducted the MDE, so that corrections can be made by the Assigned Provider and subsequently submitted back to the Muni for review.

1. Display **DOH_OITPM Home** Page

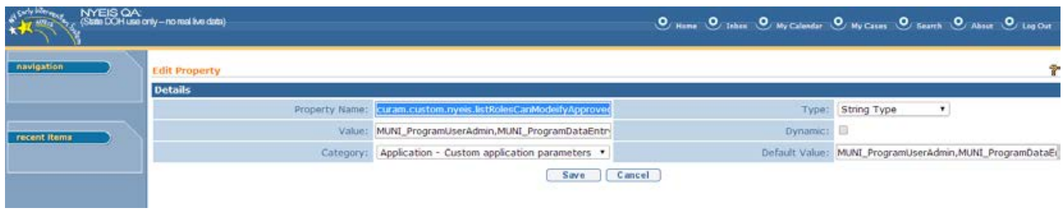
2. Click **<u>Code Tables</u>** link from **My Shortcuts** section. **Code Tables** page displays.

3. Click **<u>Property Administration</u>** from **Left-Hand Navigation** section. **Properties** Page displays

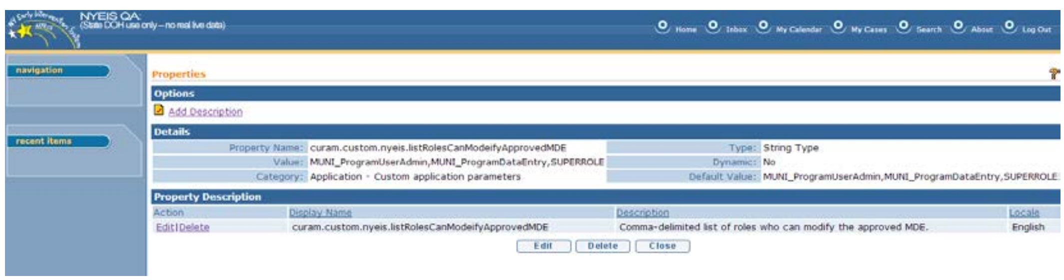
4. From **<u>Locale</u>** drop-down, select **English.** From **<u>Category</u>** drop-down, select **Application - Custom application parameters.** Click **<u>Search.</u>** Results populate page:



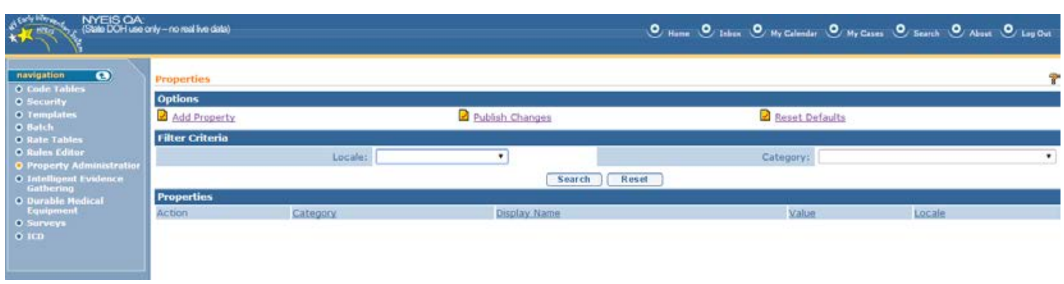
5. Click **Edit** link corresponding to the parameter with Display Name: **curam.custom.nyeis.listRolesCanModeifyApprovedMDE [sic]. Edit Property** page displays**.**



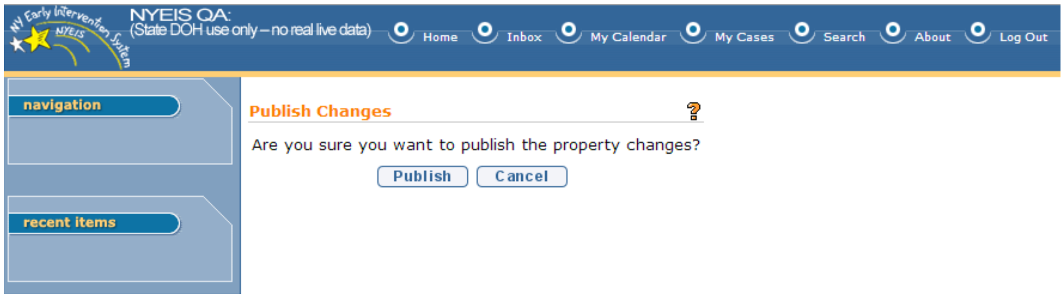
6. Use the Tab button to navigate from field to field. Make changes as needed and as per current policy by modifying the User Roles recorded in the **Value** field, separated by commas. Changing the values recorded in **Default Value** to match the roles being changed is not required. When finished, click **Save**. **Properties** page displays:



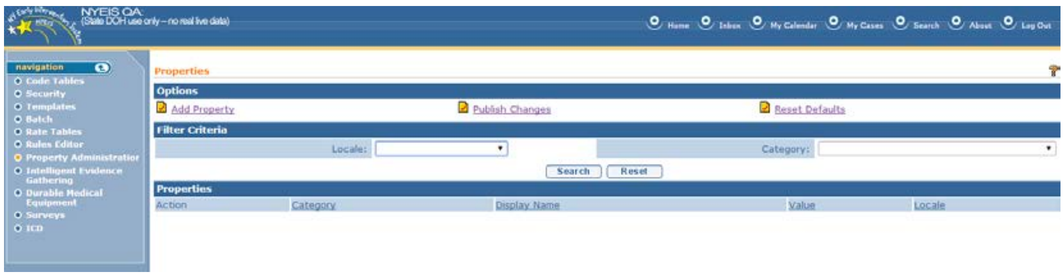
7. Review changes. Click **Edit** to make additional corrections, if needed. Click **Close** when review is complete. **Properties** page displays:



8. Click **Publish Changes**. **Publish Changes** confirmation page displays:



9. Click **Publish**. Changes take effect immediately. **Properties** page displays:



Managing the earliest allowed 'Effective Start Date' for Case Reactivation

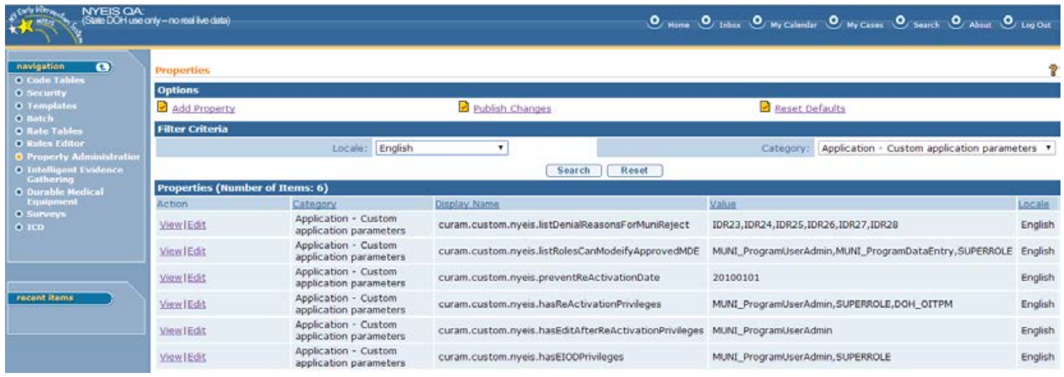
The following steps detail how to view/change the earliest allowed Effective Start Date an IFSP can have to be considered eligible for 'Case Reactivation' by the 'Authorized User'. IFSP's with a effective start date *earlier* than the date recorded in this property value will not be able to be reactivated by the 'Authorized User'.

1. Display **DOH_OITPM Home** Page

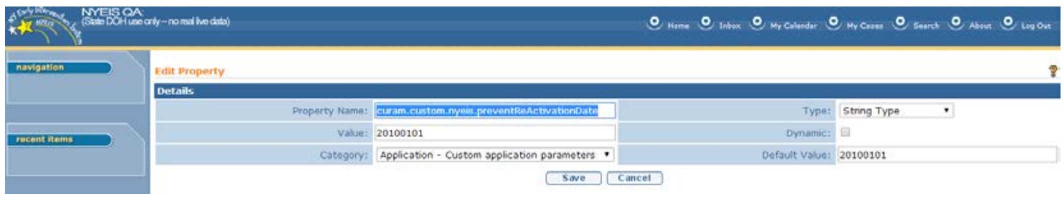
2. Click **Code Tables** link from **My Shortcuts** section. **Code Tables** page displays.

3. Click **Property Administration** from **Left-Hand Navigation** section. **Properties** Page displays

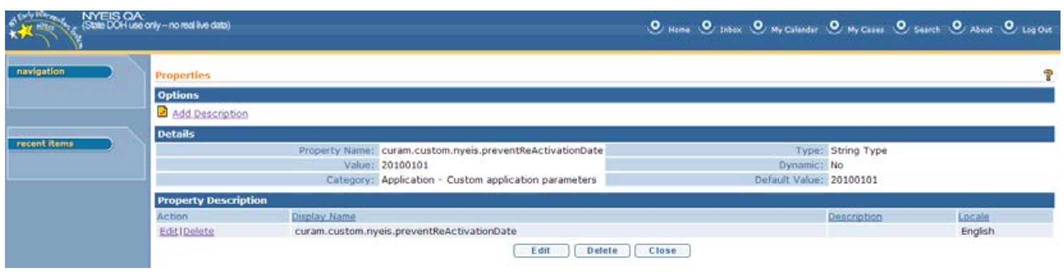
4. From **Locale** drop-down, select **English.** From **Category** drop-down, select **Application - Custom application parameters.** Click **Search.** Results populate page:



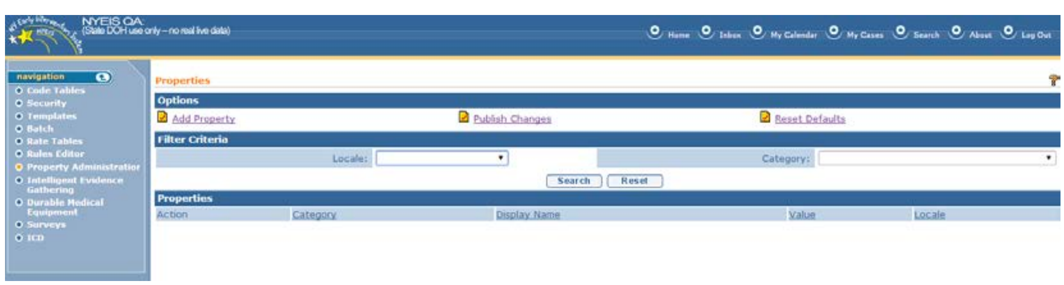
5. Click **<u>Edit</u>** link corresponding to the parameter with Display Name: **curam.custom.nyeis.preventReActivationDate. Edit Property** page displays**.**



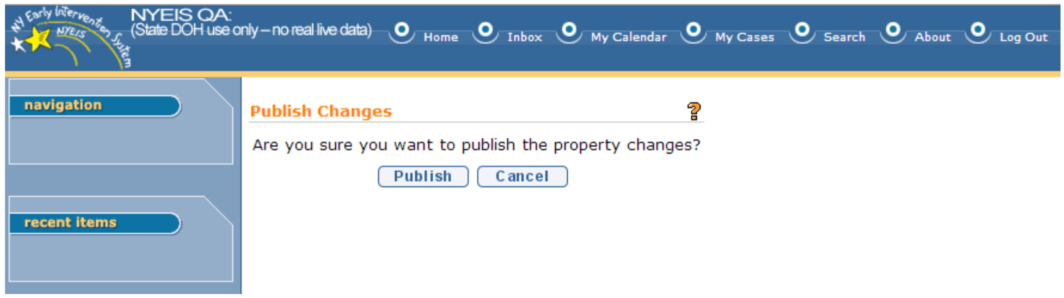
6. Use the Tab button to navigate from field to field. Make date changes as needed and as per current policy by modifying the date recorded in the **Value** field. Record this date as yyyy/mm/dd format. Changing the date recorded in **Default Value** to match the date being changed is not required. When finished changing date, click **<u>Save</u>**. **Properties** page displays:



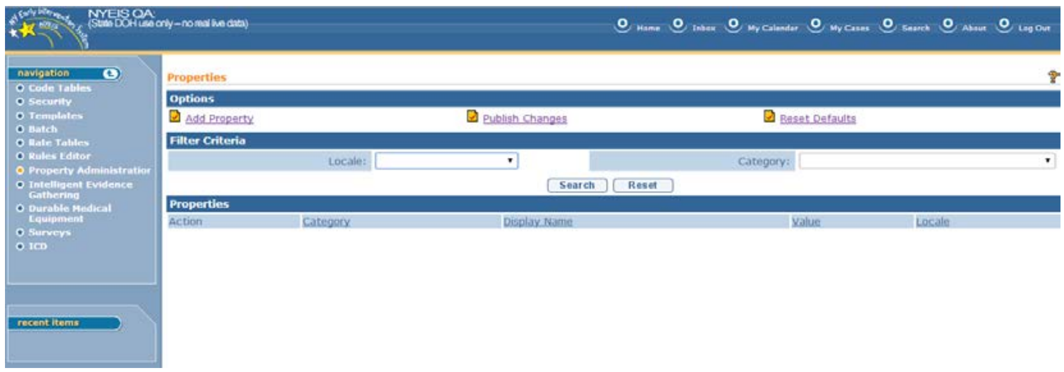
7. Review changes. Click **<u>Edit</u>** to make additional corrections, if needed. Click **<u>Close</u>** when review is complete. **Properties** page displays:



8. Click **Publish Changes**. **Publish Changes** confirmation page displays:



9. Click **Publish**. Changes take effect immediately. **Properties** page displays:



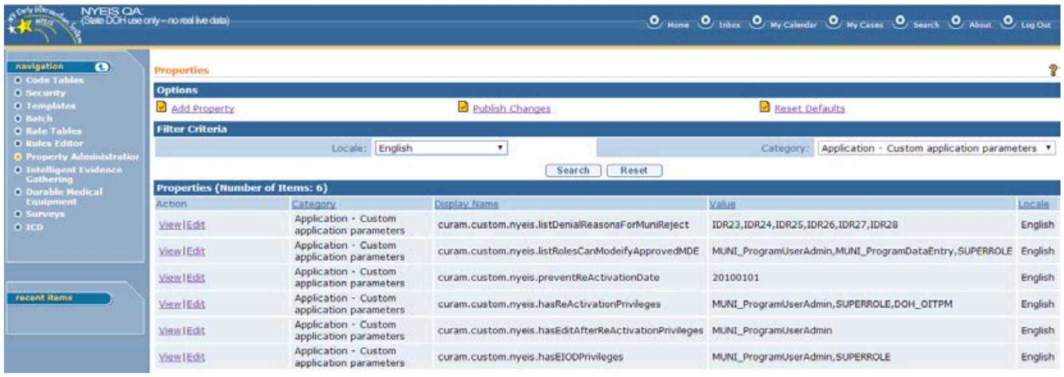
Managing the list of User Roles that are allowed to Edit a "Reactivated" IFSP or SA

1. Display **DOH_OITPM Home** Page

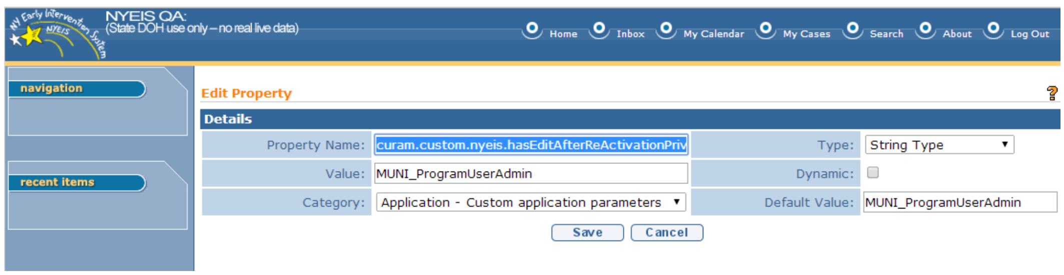
2. Click **Code Tables** link from **My Shortcuts** section. **Code Tables** page displays.

3. Click **Property Administration** from **Left-Hand Navigation** section. **Properties** Page displays

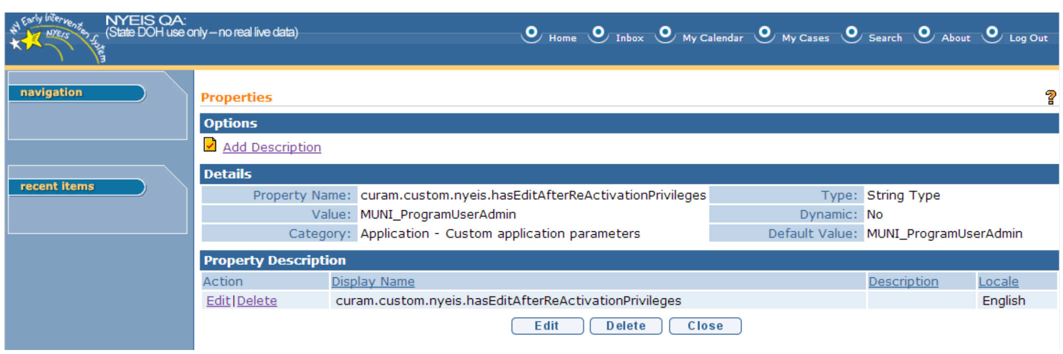
4. From **Locale** drop-down, select **English.** From **Category** drop-down, select **Application - Custom application parameters.** Click **Search.** Results populate page:



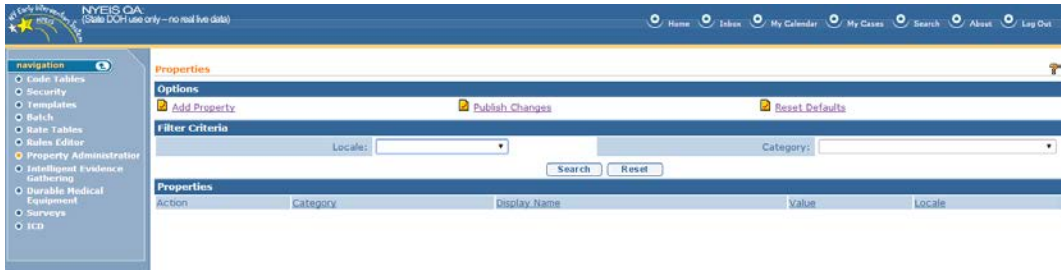
5. Click **Edit** link corresponding to the parameter with Display Name: **curam.custom.nyeis.hasReactivationPrivileges. Edit Property** page displays**:**



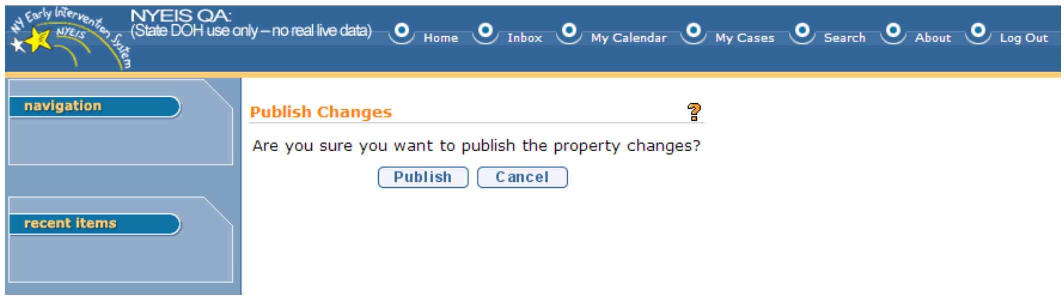
6. Use the Tab button to navigate from field to field. Make changes as needed and as per current policy by modifying the User Roles recorded in the **Value** field, separated by commas. Changing the values recorded in **Default Value** to match the role being changed is not required. When finished, click **Save**. **Properties** page displays:



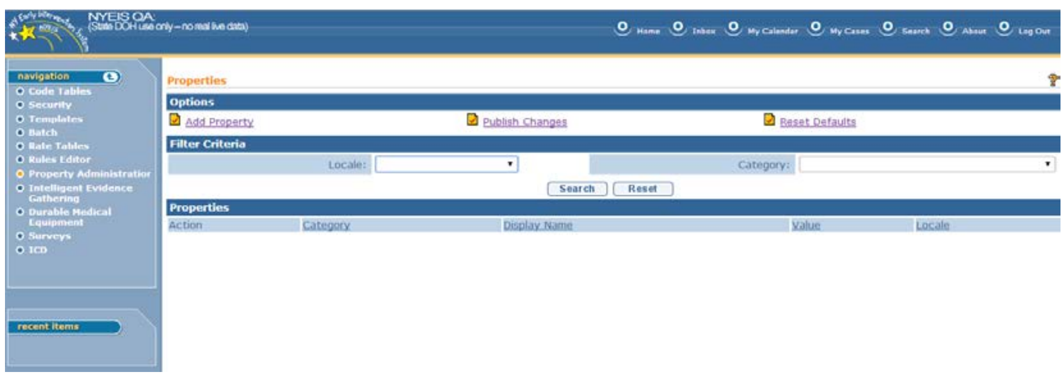
7. Review changes. Click **Edit** to make additional corrections, if needed. Click **Close** when review is complete. **Properties** page displays:



8. Click **<u>Publish Changes</u>**. **Publish Changes** confirmation page displays:



9. Click **<u>Publish</u>**. Changes take effect immediately. **Properties** page displays:



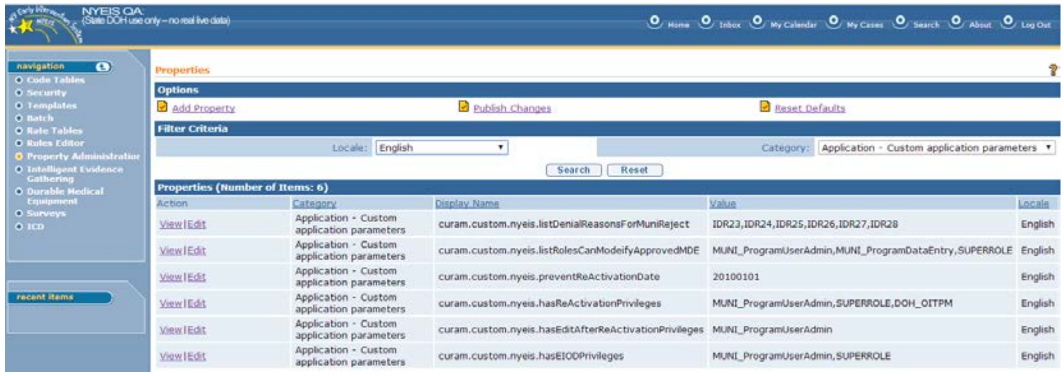
Managing the list of user roles that are eligible to reactivate a closed IFSP or SA.

1. Display **DOH_OITPM Home** Page

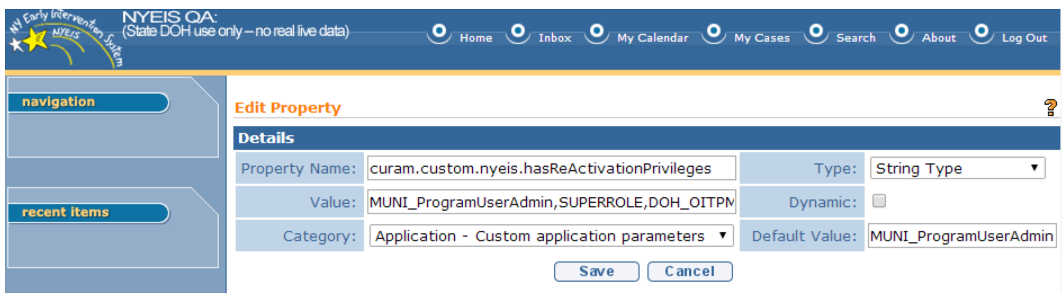
2. Click **<u>Code Tables</u>** link from **My Shortcuts** section. **Code Tables** page displays.

3. Click **<u>Property Administration</u>** from **Left-Hand Navigation** section. **Properties** Page displays

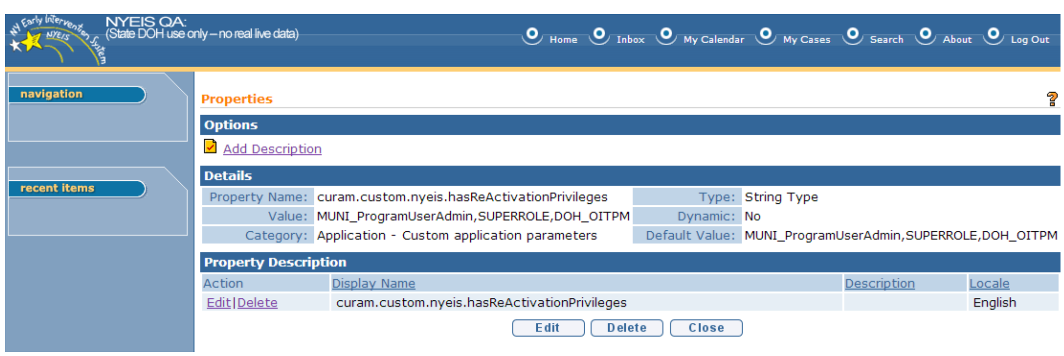
4. From **Locale** drop-down, select **English.** From **Category** drop-down, select **Application - Custom application parameters.** Click **Search.** Results populate page:



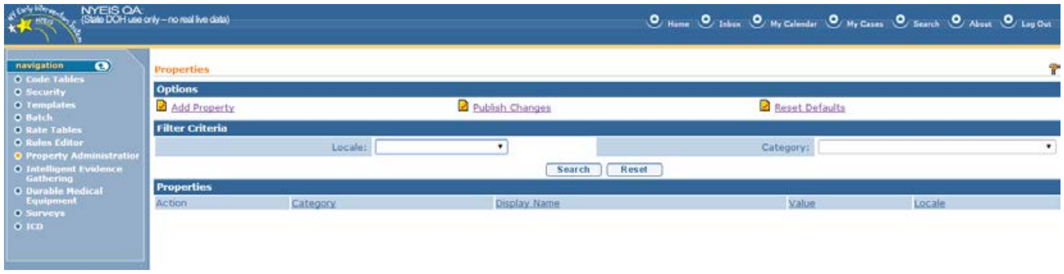
5. Click **Edit** link corresponding to the parameter with Display Name: **curam.custom.nyeis.hasReActivationPrivileges. Edit Property** page displays**:**



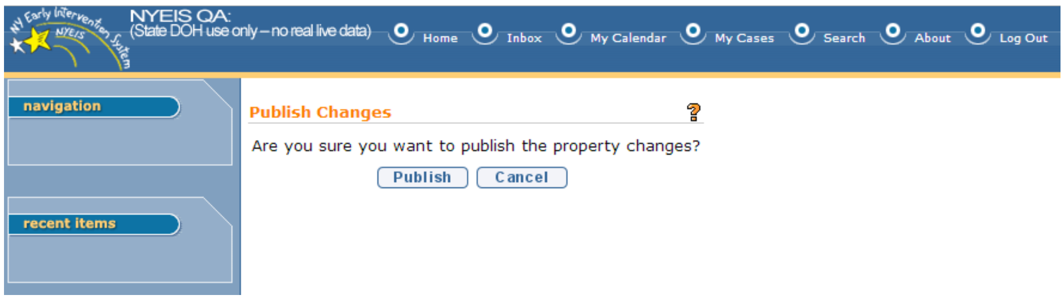
6. Make changes as needed and as per current policy by modifying the User Roles recorded in the **Value** field, separated by commas. Changing the values recorded in **Default Value** to match the roles being changed is not required. When finished, click **Save**. **Properties** page displays:



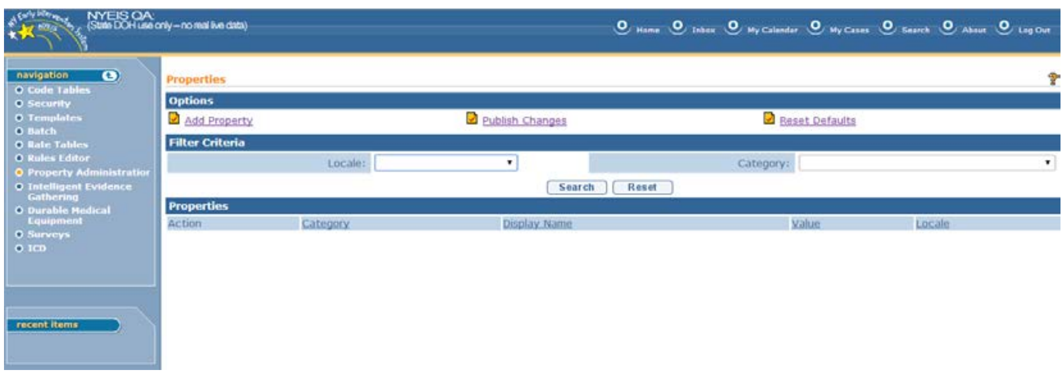
7. Review changes. Click **Edit** to make additional corrections, if needed. Click **Close** when review is complete. **Properties** page displays:



8. Click **<u>Publish Changes</u>**. **Publish Changes** confirmation page displays:



9. Click **<u>Publish</u>**. Changes take effect immediately. **Properties** page displays:



Modifying the list of User Roles that have 'EIO/D privileges'

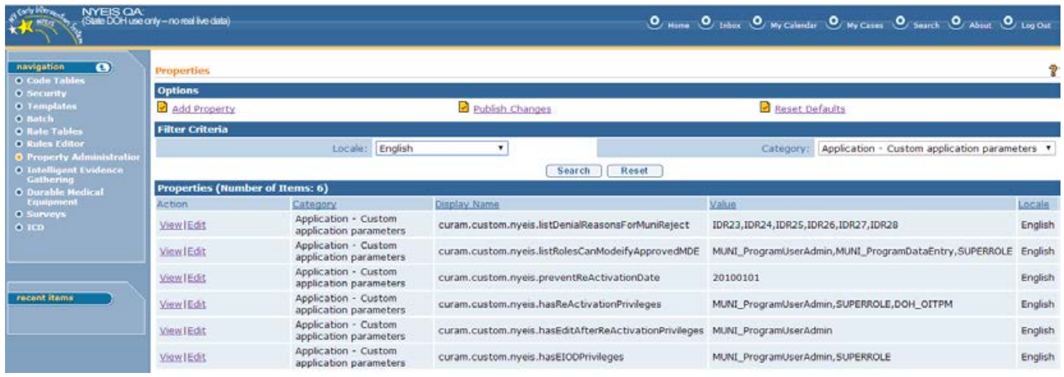
The following steps detail the steps for adding/removing roles that are to have EIOD privileges. Users with EIOD privileges are not subject to the amendment process when making changes to cases that have been previously approved.Instead, changes made to cases by users with EIOD privileges are immediately seen.

1. Display **DOH_OITPM Home** Page

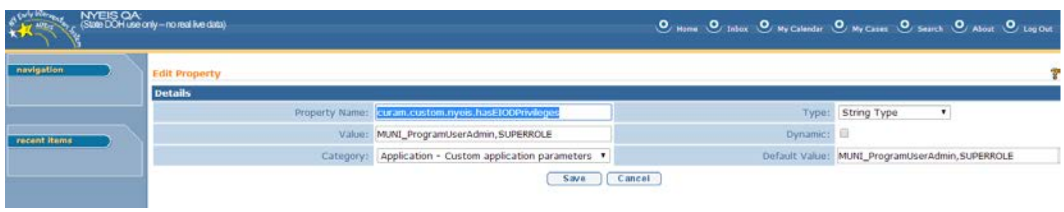
2. Click **<u>Code Tables</u>** link from **My Shortcuts** section. **Code Tables** page displays.

3. Click **<u>Property Administration</u>** from **Left-Hand Navigation** section. **Properties** Page displays

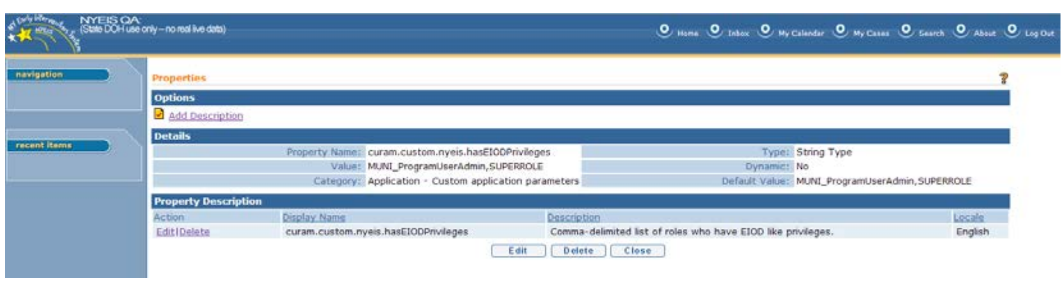
4. From **<u>Locale</u>** drop-down, select **English.** From **<u>Category</u>** drop-down, select **Application - Custom application parameters.** Click **<u>Search.</u>** Results populate page:



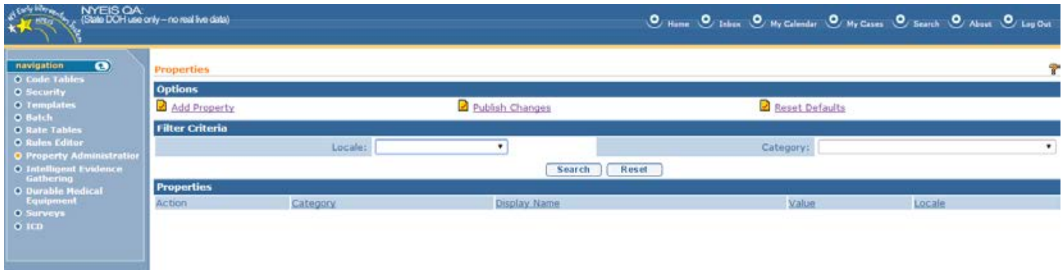
5. Click **<u>Edit</u>** link corresponding to the parameter with Display Name: **curam.custom.nyeis.hasEIODPrivileges. Edit Property** page displays**:**



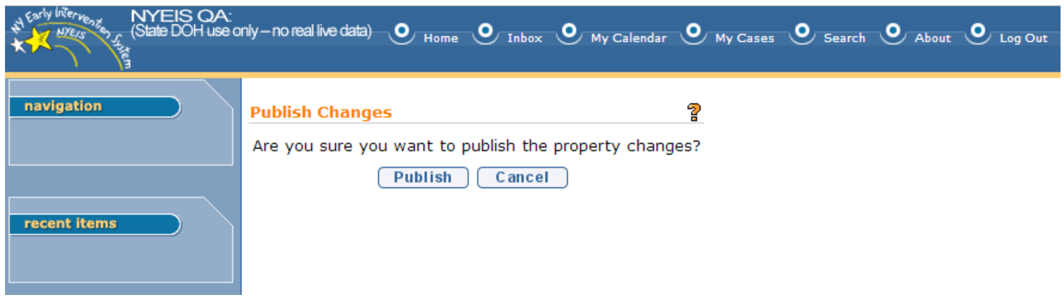
6. Navigate field-to-field using the TAB key. Make changes as needed and as per current policy by modifying the User Roles recorded in the **Value** field, separated by commas. Changing the values recorded in **Default Value** to match the roles being changed is not required. When finished, click **<u>Save</u>**. **Properties** page displays:



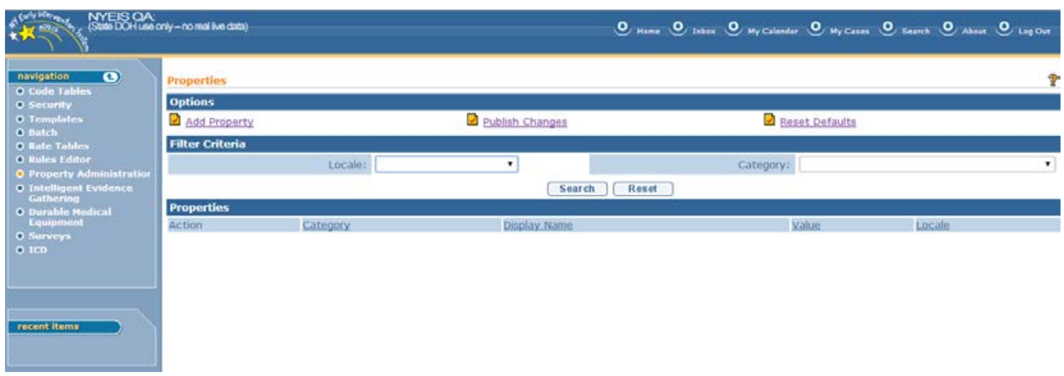
7. Review changes. Click **<u>Edit</u>** to make additional corrections, if needed. Click **<u>Close</u>** when review is complete. **Properties** page displays:



8. Click **Publish Changes**. **Publish Changes** confirmation page displays:



9. Click **Publish**. Changes take effect immediately. **Properties** page displays:



‘Reason for Edit’ Codes and their associated descriptions:

‘Edit reasons’ are selected by an end-user when editing a reactivated IFSP or SA. The reasons selected will populate the IFSP or SA ‘Modification History’ entry that reflects the edit made to the reactivated case.

Some of the Business Rules relating to reason codes are as follows:

The Edit reason codes have to be unique

The Edit reason codes will not be allowed to be reused or repurposed

The Edit reason codes will not be allowed to be physically deleted

The Edit reason codes can be logically deleted (set to inactive so the user will no longer be able to select a “logically deleted” reason)

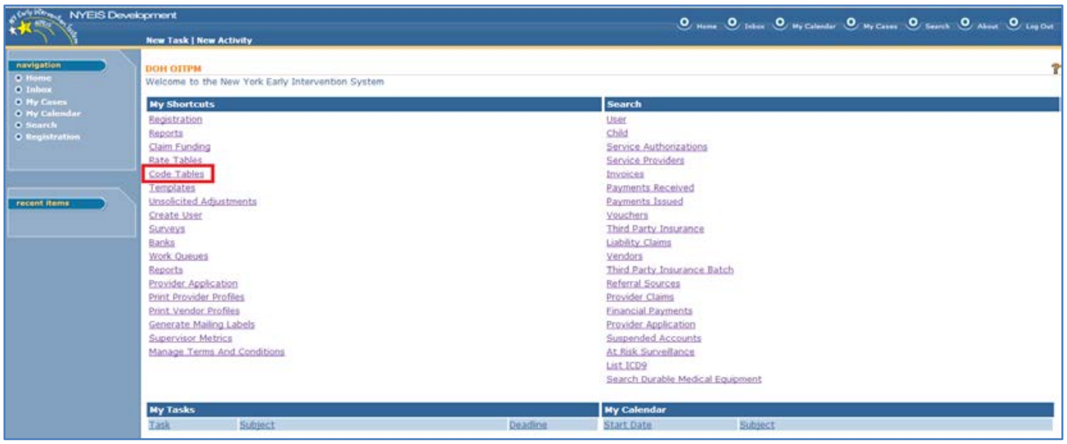
Current list of Selectable Edit Reasons, and their associated codes:

Code	Description	Selectable	Language	Sort Order
CRRE01	Adding Service Authorization Previously Not Recorded to reflect services actually delivered	Yes	English	1
CRRE02	SA Service Type incorrect, add SA to reflect correct service type for services actually agreed to, authorized and delivered	Yes	English	2
CRRE03	Correction to service dates to reflect actual dates of service delivery agreed to, authorized and delivered	Yes	English	3
CRRE04	Correction to service frequency to reflect actual frequency of services agreed to, authorized and delivered	Yes	English	4
CRRE05	Addition of co-visits to reflect co-visits that were agreed to, authorized and delivered	Yes	English	5
CRRE06	Addition of make-up visits to reflect make-up visits that were agreed to authorized and delivered	Yes	English	6
CRRE07	Correction of Qualified Personnel agreed to, and authorized to deliver services	Yes	English	7
CRRE08	Correction of Qualified Personnel agreed to and authorized to participate in co-visits	Yes	English	8
CRRE09	Amendment to Child's Level of Functioning	Yes	English	9
CRRE10	Amendment to Child's Outcomes	Yes	English	10
CRRE11	Amendment to Child's Natural Environment	Yes	English	11
CRRE12	Other IFSP demographic correction/addition/change	Yes	English	12

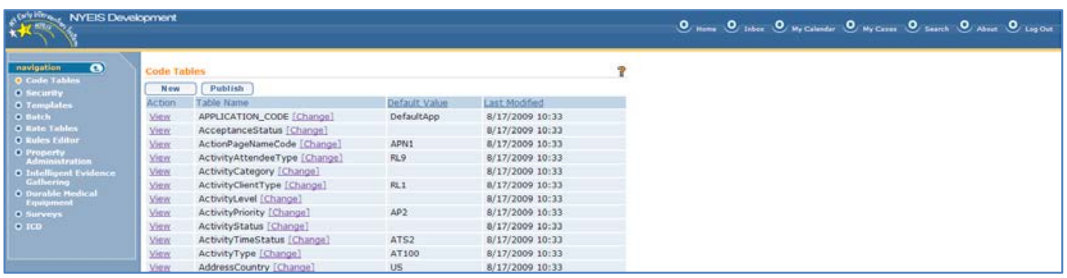
	(must provide detailed information in comments)			
CRRE13	Other SA correction/change (must provide detailed information in comments)	Yes	English	13

To Access the 'Reason for Edit' code table:

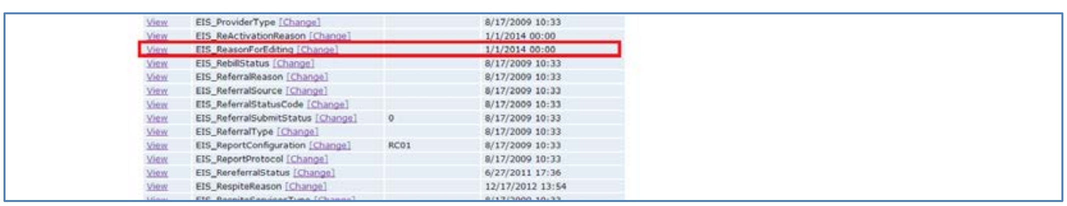
1 – From DOH_OITPM 'Home' page, select 'Code Tables:



2- Page: 'Code Tables' displays:



3- Click 'View' link corresponding to Table name 'EIS_ReasonForEditing':



4 – Page: ‘View Code Table: EIS_ReasonForEditing’ displays:

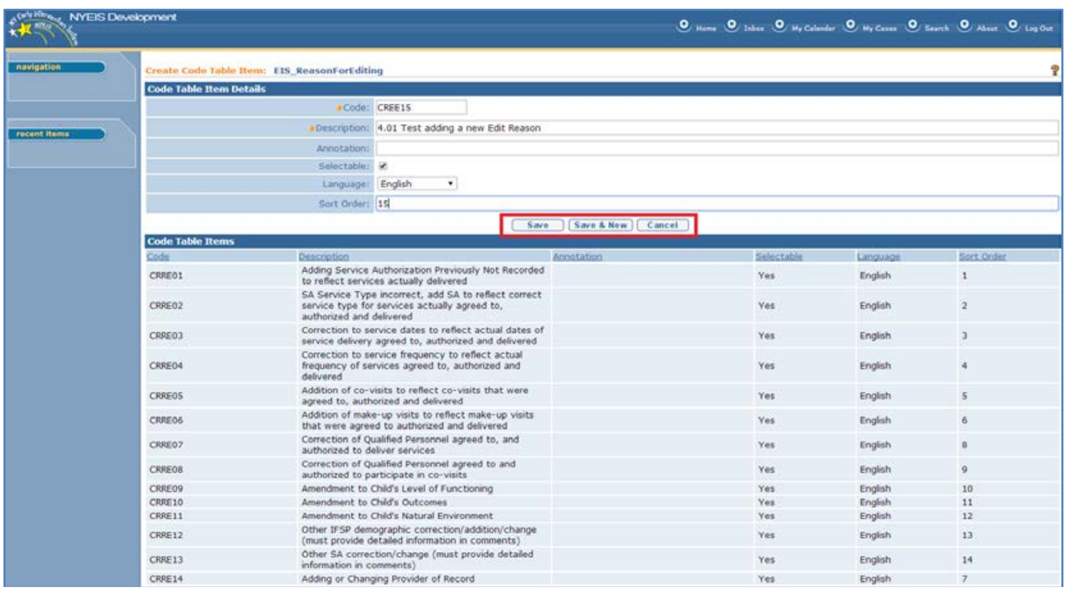
Action	Code	Description	Annotation	Selectable	Language	Sort Order
View | Edit	CRRE01	Adding Service Authorization Previously Not Recorded to reflect services actually delivered		Yes	English	1
View | Edit	CRRE02	SA Service Type incorrect, add SA to reflect correct service type for services actually agreed to, authorized and delivered		Yes	English	2
View | Edit	CRRE03	Correction to service dates to reflect actual dates of service delivery agreed to, authorized and delivered		Yes	English	3
View | Edit	CRRE04	Correction to service frequency to reflect actual frequency of services agreed to, authorized and delivered		Yes	English	4
View | Edit	CRRE05	Addition of co-visits to reflect co-visits that were agreed to, authorized and delivered		Yes	English	5
View | Edit	CRRE06	Addition of make-up visits to reflect make-up visits that were agreed to authorized and delivered		Yes	English	6
View | Edit	CRRE07	Correction of Qualified Personnel agreed to, and authorized to deliver services		Yes	English	8
View | Edit	CRRE08	Correction of Qualified Personnel agreed to and authorized to participate in co-visits		Yes	English	9
View | Edit	CRRE09	Amendment to Child's Level of Functioning		Yes	English	10
View | Edit	CRRE10	Amendment to Child's Outcomes		Yes	English	11
View | Edit	CRRE11	Amendment to Child's Natural Environment		Yes	English	12
View | Edit	CRRE12	Other IFSP demographic correction/addition/change (must provide detailed information in comments)		Yes	English	13
View | Edit	CRRE13	Other SA correction/change (must provide detailed information in comments)		Yes	English	14
View | Edit	CRRE14	Adding or Changing Provider of Record		Yes	English	7

Adding new Edit reasons for selection in ‘Reason for Editing’

The following steps detail adding new edit reasons into the Code Table, for selection by end-users when editing reactivated cases:

1 – Click ‘New Item’ Button located at the top of ‘EIS_ReasonForEditing’:

2 – Page: ‘Create Code Table Item’ displays:



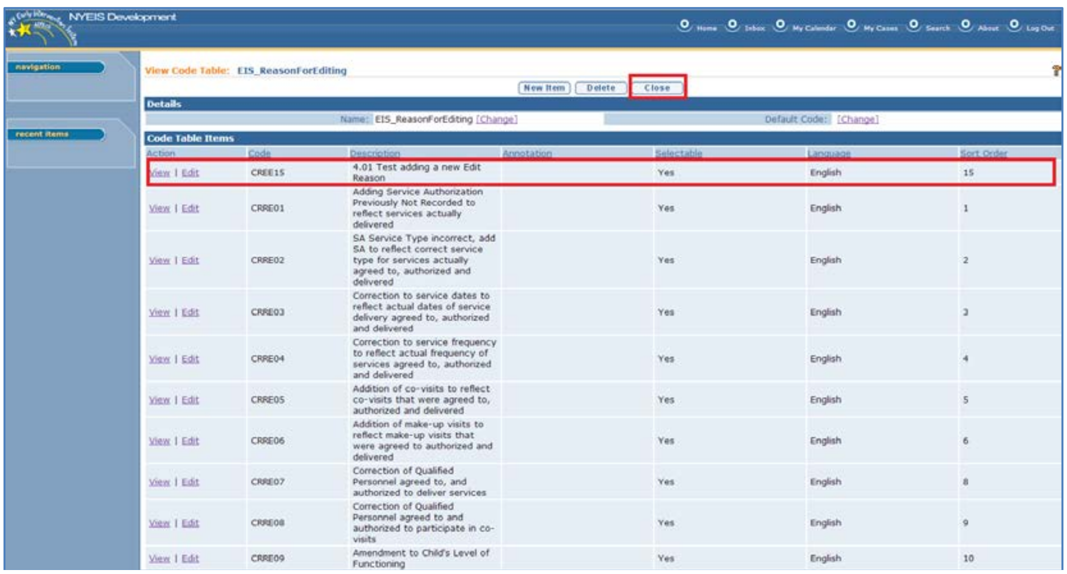
Create the new code and description by entering data in the following fields. Use the TAB key to navigate from field to field:

a) ‘**Code**’ is required. Existing Edit reasons use ‘CREE’ as a prefix, followed by a number (ex: ‘CREE09’).

b) ‘**Description**’ is required. Text entered in here is what will display in the list of edit reasons from which a user can select.
c) ‘**Annotation**’ **–** Leave blank
d) ‘**Selectable**’ – Place a check mark in the check box if the code is to be immediately available for selection. (Uncheck this for existing edit reasons to remove the Edit reason from selection list without actually deleting the code/description)
e) **Langauge –** Leave at default: ‘English’
f) **Sort order –** The system will list the edit reasons displayed according to the sort order specified in this field.

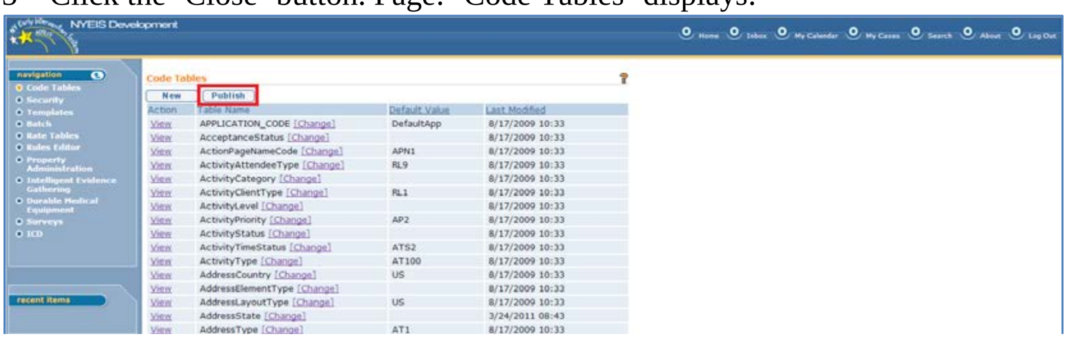
3 – When finished, click ‘**Save**’ if done adding new edit reasons, or ‘**Save and New**’ if adding multiple reasons. Click **‘Cancel’** to abort the process

4 – Page: ‘**View Code Table: EIS_ReasonForEditing’** displays. The list will contain the new reason:



Action	Code	Description	Annotation	Selectable	Language	Sort Order
View | Edit	CREE15	4.01 Test adding a new Edit Reason		Yes	English	15
View | Edit	CRRE01	Adding Service Authorization Previously Not Recorded to reflect services actually delivered		Yes	English	1
View | Edit	CRRE02	SA Service Type incorrect, add SA to reflect correct service type for services actually agreed to, authorized and delivered		Yes	English	2
View | Edit	CRRE03	Correction to service dates to reflect actual dates of service delivery agreed to, authorized and delivered		Yes	English	3
View | Edit	CRRE04	Correction to service frequency to reflect actual frequency of services agreed to, authorized and delivered		Yes	English	4
View | Edit	CRRE05	Addition of co-visits to reflect co-visits that were agreed to, authorized and delivered		Yes	English	5
View | Edit	CRRE06	Addition of make-up visits to reflect make-up visits that were agreed to authorized and delivered		Yes	English	6
View | Edit	CRRE07	Correction of Qualified Personnel agreed to, and authorized to deliver services		Yes	English	8
View | Edit	CRRE08	Correction of Qualified Personnel agreed to and authorized to participate in co-visits		Yes	English	9
View | Edit	CRRE09	Amendment to Child's Level of Functioning		Yes	English	10

5 – Click the ‘Close’ button. Page: ‘Code Tables’ displays:



Action	Table Name	Default Value	Last Modified
View	APPLICATION_CODE [Change]	DefaultApp	8/17/2009 10:33
View	AcceptanceStatus [Change]		8/17/2009 10:33
View	ActionPageNameCode [Change]	APN1	8/17/2009 10:33
View	ActivityAttendeeType [Change]	RL9	8/17/2009 10:33
View	ActivityCategory [Change]		8/17/2009 10:33
View	ActivityClientType [Change]	RL1	8/17/2009 10:33
View	ActivityLevel [Change]		8/17/2009 10:33
View	ActivityPriority [Change]	AP2	8/17/2009 10:33
View	ActivityStatus [Change]		8/17/2009 10:33
View	ActivityTimeStatus [Change]	ATS2	8/17/2009 10:33
View	ActivityType [Change]	AT100	8/17/2009 10:33
View	AddressCountry [Change]	US	8/17/2009 10:33
View	AddressElementType [Change]		8/17/2009 10:33
View	AddressLayoutType [Change]	US	8/17/2009 10:33
View	AddressState [Change]		3/24/2011 08:43
View	AddressType [Change]	AT1	8/17/2009 10:33

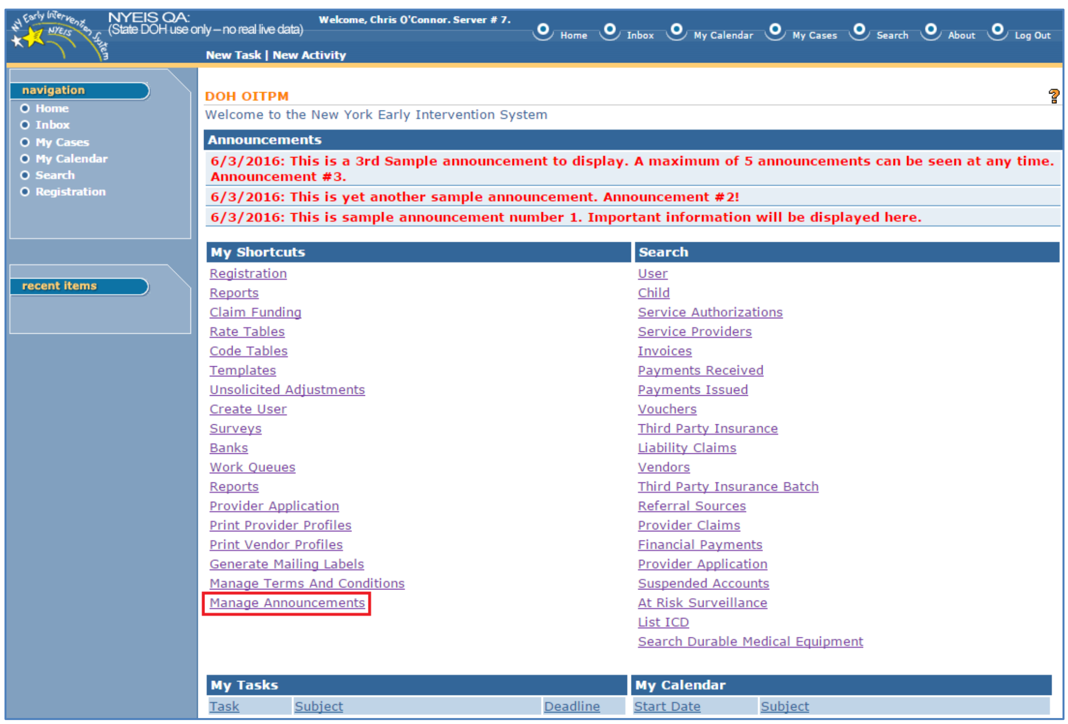
6- Click the ‘Publish’ button. Page: ‘Publish Code Table Changes’ displays

7- Click the ‘Yes’ button to publish changes.

ANNOUNCEMENT ADMINISTRATION

The announcements cluster - seen on the home pages of all NYEIS users - can be managed by users in the DOH_OITPM Role or Level III users via The **Manage Announcements** page.

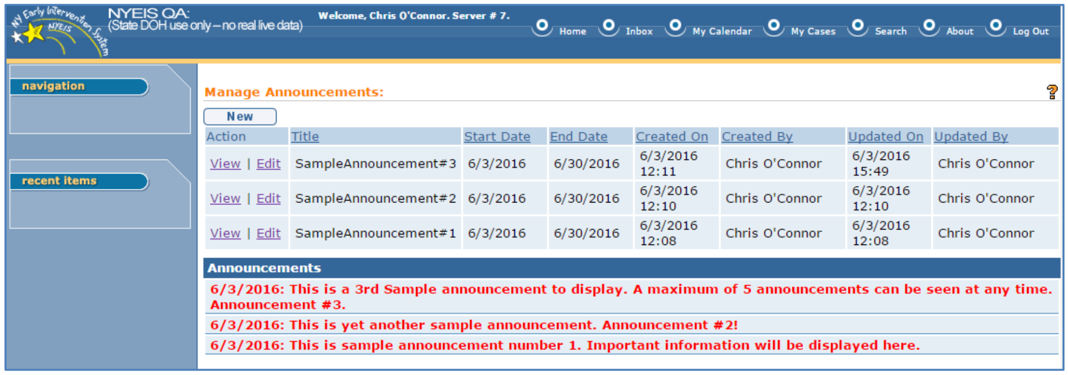
The **Manage Announcements** page allows for the sorting, viewing and editing of individual announcements, their titles, and effective start and end date ranges.



To Access the ‘Manage Announcements’ Page:

1. Click **Manage Announcements** under the **My Shortcuts** column of the DOH_OITPM or Level III Home Page

2. Manage Announcements Page displays:

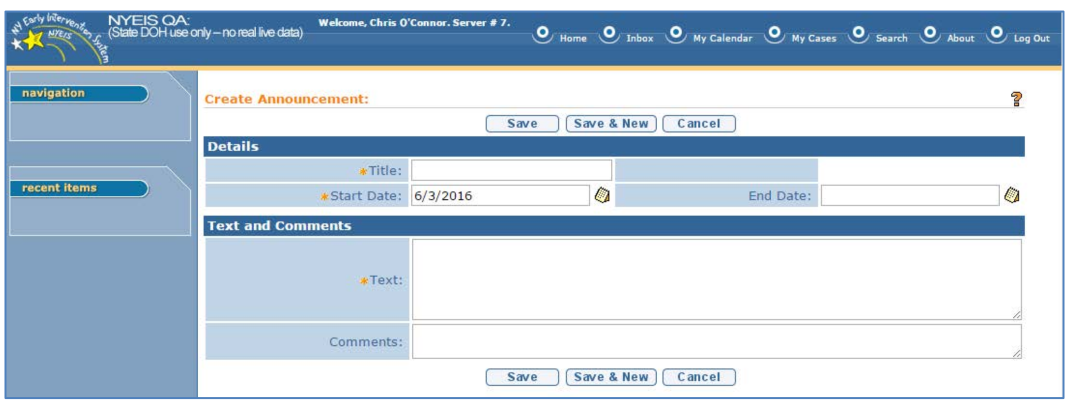


From this page, the OITPM or Level III Admin user has the ability to View existing announcements, create new announcements, as well as manage all current and prior announcements.

As with many columns in NYEIS, clicking on the column headers for '**Title**', '**Start Date**', '**End Date**', '**Created On**', '**Created By**', '**Updated On**', or '**Updated by**' will re-sort the column from Ascending alphabetically/numerically to descending alphabetically/numerically.

Creating a new Announcement

1. Click the **New** Button. **Create Announcement** page displays:



2. Use the **TAB** key to move from field to field to enter data:
   a. **Title** (Required field) – The Announcement title will only be seen from the **Manage Announcements** page, and accepts a maximum of 20 characters. You must record at least one (non-space) character in the Title field.

   b. **Start Date** (Required field) – Use this date field to set the effective start date for when the announcement should be displayed. You can type the date in manually (mm/dd/yyyy) or use the calendar icon to select a date from the pop-up calendar

c. **End Date** (Optional) – Use this field to set the effective end date for the Announcement. Once an Announcement's end date has been reached, it will no longer be seen in the **Annoucements** section of all NYEIS Home pages.

d. **Text** (Required) **–** Enter the text you wish to be displayed in the Announcemnts section of the NYEIS Home pages for all users, up to a maximum of 400 characters.

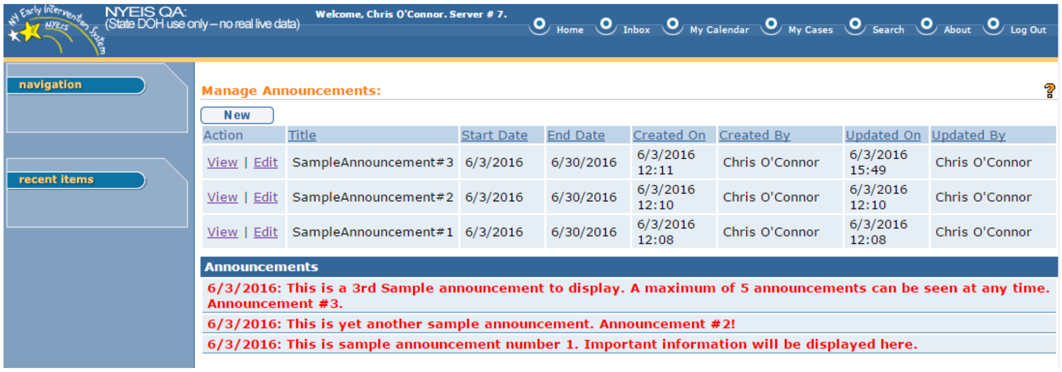
e. **Comments** (Optional) **–** Record any comments that you wish in this field, up to 100 characters. Text recorded in this field is only seen within **Manage Announcements** and is not broadcasted to all users' Home Pages.

3. Click **Save** to save the record and return to the **Manage Announcements** Page, or click **Save & New** to save the record and remain on this page to record another announcement. Or, Click **Cancel** to abort the creation of the new Announement and return to the **Manage Announcements** Page.

Important Notes:

- You can record a future start date for the start of the announcement, but you cannot back-date the Announcement Start Date.
- Announcements with no specified end date will remain visible in the Annoucements section of all NYEIS Home Pages until they are otherwise managed from the **Manage Announcements** page.
- The First and Last Name of the NYEIS user rcording or editing the announcement will be captured in the 'Created By' or 'Updated By' fields, along with the date/time of the creation or updating.
- A history of any specifc edits made by the users will not be tracked. Only the individual to have created or last individual to have updated the record is maintained.

Viewing/Editing Existing Announcements



Action	Title	Start Date	End Date	Created On	Created By	Updated On	Updated By
View | Edit	SampleAnnouncement#3	6/3/2016	6/30/2016	6/3/2016 12:11	Chris O'Connor	6/3/2016 15:49	Chris O'Connor
View | Edit	SampleAnnouncement#2	6/3/2016	6/30/2016	6/3/2016 12:10	Chris O'Connor	6/3/2016 12:10	Chris O'Connor
View | Edit	SampleAnnouncement#1	6/3/2016	6/30/2016	6/3/2016 12:08	Chris O'Connor	6/3/2016 12:08	Chris O'Connor

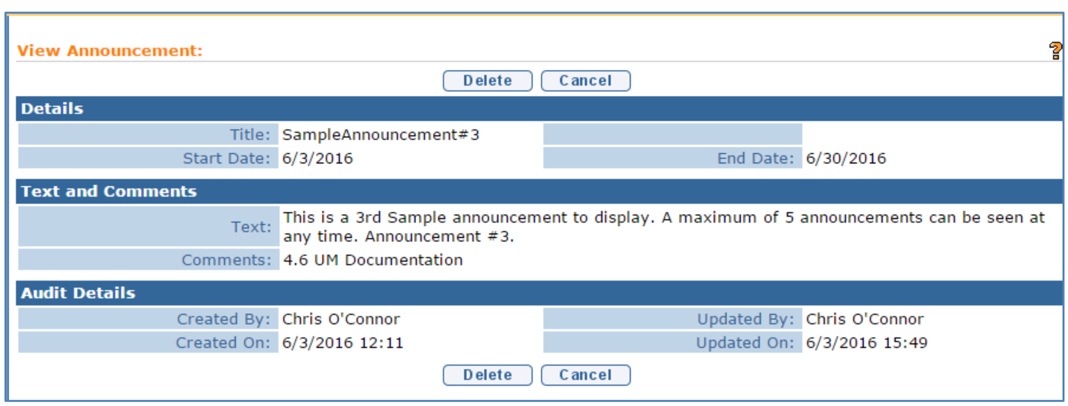
For those users authorized to access the page:

- All current and prior Annoucement records maintained within the **Manage Announcements** page can be viewed to either delete the record in its entirety or obtain additional detail.

- All current and prior Annoucement records maintained within the **Manage Announcements** page can also be edited to manage the start/end dates, title, announcement, or comments.

Viewing Existing Announcements

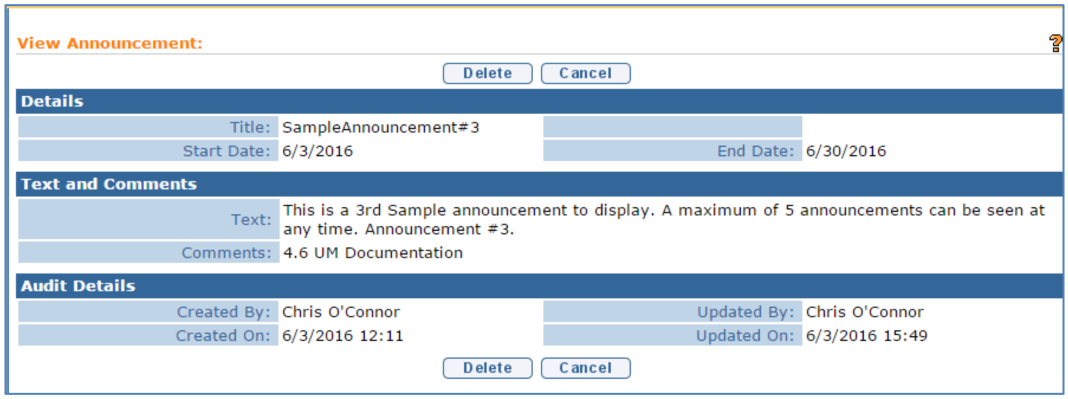
1. From the **Manage Announcements** Page, click the **View** link for any existing announcement you wish to view
2. View Announcement Page displays:



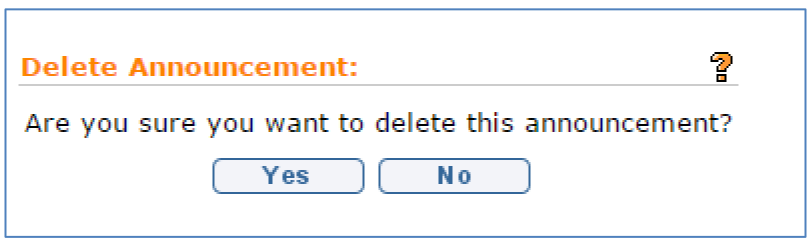
3. Review the detail then click **Cancel** to return to the **Manage Announcements** page

Deleting Existing Announcements

1. From the **Manage Announcements** Page, click the **View** link for any existing announcement you wish to Delete
2. View Announcement Page displays:

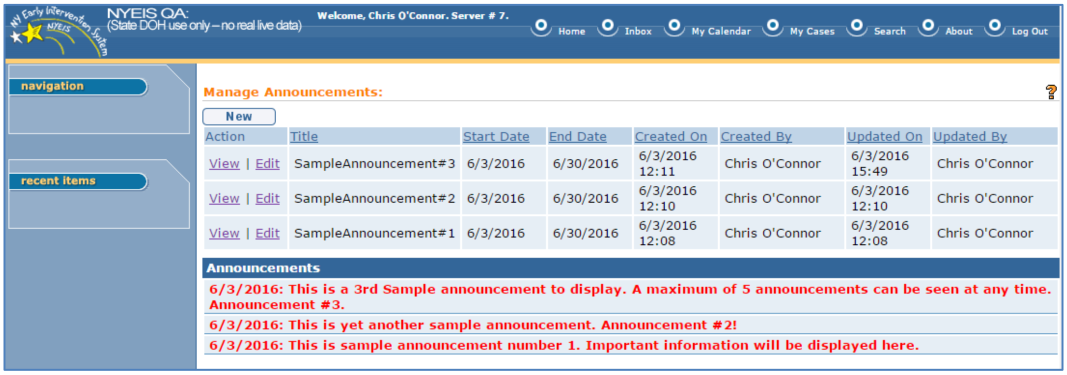


3. Click the **Delete** button
4. **Delete Announcement** Page displays:

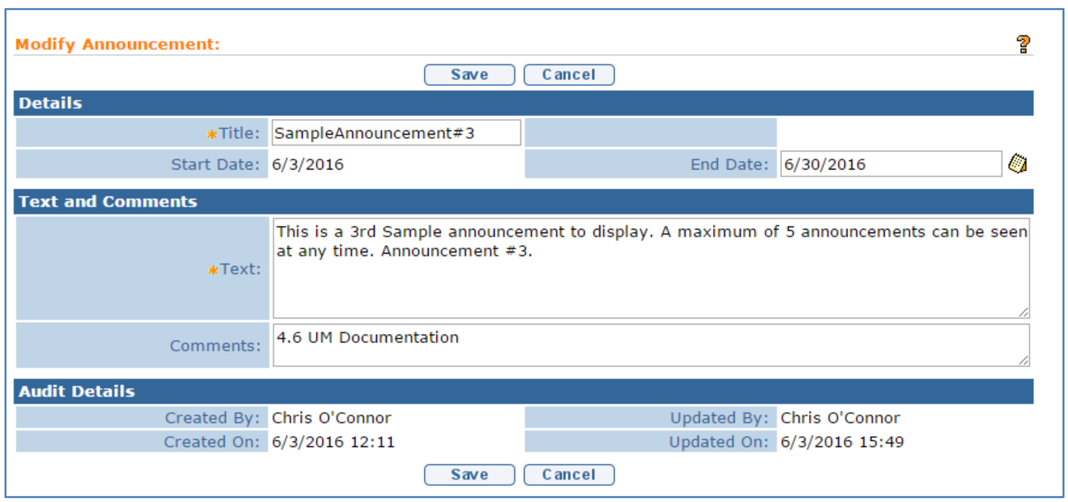


5. Click '**Yes**' to delete the announcement. **Manage Announcements** Page displays. Click '**No**' to cancel the deletion operation and return to the **Manage Announcements** Page.

Editing Existing Announcements



1. Click the Edit link for the Announcement you wish to manage
2. Modify Announcement page displays:



3. Use the TAB key to navigate from field to field and make changes as needed:
   a. **Title** (Required) – Will accept a minimum of 1 character and a max of 20 characters
   b. **Start Date** (Required field) – Modify this date field to change the effective start date for when the announcement should be displayed. You can type the date in manually (mm/dd/yyyy) or use the calendar icon to select a date from the pop-up calendar
   c. **End Date** (Optional) – Modify this field to change the effective end date for the Announcement. Once an Announcement's end date has been reached, it will no longer be seen in the **Annoucements** section of all NYEIS Home pages.

d. **Text** (Required) **–** Change the text you wish to be displayed in the Announcemnts section of the NYEIS Home pages for all users, up to a maximum of 400 characters.

e. **Comments** (Optional) **–** Modify any comments that you wish in this field, up to 100 characters. Text recorded in this field is only seen within **Manage Announcements** and is not broadcasted to all users' Home Pages.

4. When finished with edits, click **Save**. **Manage Announcements** page displays. Alternatively, click **Cancel** to abort any in-progress edits and return to the **Manage Announcements** page.

Important Notes:

- If the end date for an announcement has passed and you remove the end date or advance the end date into the future, the announcement will again be visible to all NYEIS users until its revised end date is reached.
- The current State Roles capable of **Creating and Editing** Annoucements are: **DOH_OITPM** and **SUPERROLE** Users
- The current State Roles capable of **Viewing** Announcements are **DOH_AuditUnit, DOH_Mgmt, DOH_ProgramMgr, DOH_FiscalMgr, DOH_FiscalUnitStaff, DOH_ProviderApproval**
- You cannot edit the start date to being earlier than the current date of the edit being peformed
- You cannot edit the end date to being earlier than the start date