Unit 11: System Administration

Version 4.6
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### Document Revision History

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

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.

<table>
<thead>
<tr>
<th>Action</th>
<th>Name</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Activity.acceptInvitation</td>
<td>Function</td>
</tr>
<tr>
<td>Edit</td>
<td>Activity.cancelInvitation</td>
<td>Function</td>
</tr>
<tr>
<td>View</td>
<td>Activity.cancelRecurringOrganizationActivity</td>
<td>Function</td>
</tr>
<tr>
<td>Edit</td>
<td>Activity.cancelRecurringOrganizationActivity</td>
<td>Function</td>
</tr>
<tr>
<td>View</td>
<td>Activity.cancelStandardOrganizationActivity</td>
<td>Function</td>
</tr>
<tr>
<td>Edit</td>
<td>Activity.cancelStandardOrganizationActivity</td>
<td>Function</td>
</tr>
<tr>
<td>View</td>
<td>Activity.cancelStandardUserActivity</td>
<td>Function</td>
</tr>
<tr>
<td>Edit</td>
<td>Activity.cancelStandardUserActivity</td>
<td>Function</td>
</tr>
<tr>
<td>View</td>
<td>Activity.createRecurringOrganizationActivity</td>
<td>Function</td>
</tr>
<tr>
<td>Edit</td>
<td>Activity.createRecurringOrganizationActivity</td>
<td>Function</td>
</tr>
<tr>
<td>View</td>
<td>Activity.createStandardOrganizationActivity</td>
<td>Function</td>
</tr>
<tr>
<td>Edit</td>
<td>Activity.createStandardOrganizationActivity</td>
<td>Function</td>
</tr>
<tr>
<td>View</td>
<td>Activity.createStandardUserActivity</td>
<td>Function</td>
</tr>
<tr>
<td>Edit</td>
<td>Activity.createStandardUserActivity</td>
<td>Function</td>
</tr>
<tr>
<td>View</td>
<td>Activity.createUserActivityWithDefaults</td>
<td>Function</td>
</tr>
<tr>
<td>Edit</td>
<td>Activity.createUserActivityWithDefaults</td>
<td>Function</td>
</tr>
</tbody>
</table>

5. Click one of the following:

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

![Create Security ID](image1)

**Or**

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

![Create Function ID](image2)

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.

---

**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.

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

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.**
8. Click **View** 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 **Remove** 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 Groups** page displays.

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

**Notes:**

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

- To edit the name or description of the Security Group, click **Edit** 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.
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 Code Tables link from My Shortcuts section. Code Tables 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.
7. Click **View** 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 **Remove** 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?**
Click **Yes** button. Group is removed. **View Security Role** page displays.

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

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

**Notes:**

- To display Role detail, click **View** 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).

---

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

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.

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.

8. Click Publish button to apply all changes.

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

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

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.

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.
3. Click View link under Action column for Rate Table to select. Rate Table page displays.
4. Click View link under Action column to view table. View Rate Table page displays.
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.

---

**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.

<table>
<thead>
<tr>
<th>Rate Tables</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
</tr>
<tr>
<td>View</td>
</tr>
<tr>
<td>View</td>
</tr>
<tr>
<td>View</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Rate Table: CPT Rate Table</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
</tr>
<tr>
<td>View</td>
</tr>
<tr>
<td>View</td>
</tr>
</tbody>
</table>

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

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.*

---

**Exception**

Currently not available to all NYEIS User roles.
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.

Exception
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 **Rate Tables** link from **My Shortcuts**. **Rate Tables** page displays.

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

<table>
<thead>
<tr>
<th>Rate Tables</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Action</strong></td>
<td><strong>Rate</strong></td>
</tr>
<tr>
<td>View</td>
<td>CPT Rate Table</td>
</tr>
<tr>
<td>View</td>
<td>Voucher Rate Table</td>
</tr>
<tr>
<td>View</td>
<td>Products Rate Table</td>
</tr>
</tbody>
</table>

4. Click **Clone** link under **Action** column. **Clone Rate Table** page displays.

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.

<table>
<thead>
<tr>
<th>Rate Table: Voucher Rate Table</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Action</strong></td>
<td><strong>Name</strong></td>
</tr>
<tr>
<td>View</td>
<td>Voucher Rate Table</td>
</tr>
<tr>
<td>View</td>
<td>Voucher Rate Table</td>
</tr>
<tr>
<td>View</td>
<td>Voucher Rate Table</td>
</tr>
</tbody>
</table>

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

8. Click the **Edit** 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 Search Durable Medical Equipment 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.

5. To view or edit a DME Code from the Search Results list:
   a. View - Select the View 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 Edit 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.

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.
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.

   ![List ICD](image)

   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

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**TEMPLATES**

**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.
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.

**Notes:**
- 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 **View** 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 **Edit** 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 **Banks** link from **My Shortcuts** section. **Banks** page displays with a list of Banks.

<table>
<thead>
<tr>
<th>Action</th>
<th>Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Citizens Bank</td>
<td>Active</td>
</tr>
<tr>
<td>View</td>
<td>Downtown Bank</td>
<td>Canceled</td>
</tr>
<tr>
<td>View</td>
<td>Evergreen Bank</td>
<td>Canceled</td>
</tr>
<tr>
<td>View</td>
<td>First Mortgage</td>
<td>Canceled</td>
</tr>
<tr>
<td>View</td>
<td>First National Bank</td>
<td>Active</td>
</tr>
<tr>
<td>View</td>
<td>Midway Savings Bank</td>
<td>Active</td>
</tr>
<tr>
<td>View</td>
<td>Midway Trustee Bank</td>
<td>Active</td>
</tr>
</tbody>
</table>

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.

**Notes:**

- To view Bank information, click **View** 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 **Edit** 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 **Banks** link from **My Shortcuts** section. **Banks** page displays.

<table>
<thead>
<tr>
<th>Action</th>
<th>Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Citizens Bank</td>
<td>Active</td>
</tr>
<tr>
<td>View</td>
<td>Downtown Bank</td>
<td>Canceled</td>
</tr>
<tr>
<td>View</td>
<td>Evergreen Bank</td>
<td>Canceled</td>
</tr>
<tr>
<td>View</td>
<td>First Mortgage</td>
<td>Canceled</td>
</tr>
<tr>
<td>View</td>
<td>First National Bank</td>
<td>Active</td>
</tr>
<tr>
<td>View</td>
<td>Midway Savings Bank</td>
<td>Active</td>
</tr>
<tr>
<td>View</td>
<td>Midway Trustee Bank</td>
<td>Active</td>
</tr>
</tbody>
</table>

3. Click **View** 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.

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

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

![Publish Changes Confirmation](image)

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

![Properties Page](image)

### 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 **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.listRolesCanModifyApprovedMDE [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:

![Publish Changes](image)

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

![Properties](image)

### 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 **Edit** 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 **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:

![Publish Changes Confirmation Page](image1)

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

![Properties Page](image2)

**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:

![Edit Property page](image)

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:

![Properties page](image)

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 list of user roles that are eligible to reactivate a closed 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.nyis.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 **Publish Changes. Publish Changes** confirmation page displays:

![Publish Changes](image1)

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

![Properties](image2)

**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 **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.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 **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:

‘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:

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

1 – From DOH_OITPM ‘Home’ page, select ‘Code Tables:

![Image of Code Tables](image1.png)

2- Page: ‘Code Tables’ displays:

![Image of Code Tables](image2.png)

3- Click ‘View’ link corresponding to Table name ‘EIS_ReasonForEditing’:

![Image of Code Tables](image3.png)
4 – Page: ‘View Code Table: EIS_ReasonForEditing’ displays:

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’:
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) Language – 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:

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

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:

   ![Manage Announcements Page Image]

   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:

   ![Create Announcement Page Image]

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 **Announcements** section of all NYEIS Home pages.

d. **Text** (Required) – Enter the text you wish to be displayed in the Announcements 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 Announcement 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 Announcements 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 recording 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 specific 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

For those users authorized to access the page:

- All current and prior Announcement 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 Announcement 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:

   ![View Announcement](image)

   - **Details**
     - **Title:** SampleAnnouncement#3
     - **Start Date:** 6/3/2016
     - **End Date:** 6/30/2016
   
   - **Text and Comments**
     - **Text:** This is a 3rd Sample announcement to display. A maximum of 5 announcements can be seen at any time. Announcement #3.
     - **Comments:** 4.6 UH Documentation
   
   - **Audit Details**
     - **Created By:** Chris O'Connor
     - **Updated By:** Chris O'Connor
     - **Created On:** 6/3/2016 12:11
     - **Updated On:** 6/3/2016 15:49

3. Click the **Delete** button

4. **Delete Announcement** Page displays:

   ![Delete Announcement](image)

   - **Are you sure you want to delete this announcement?**
   
     - **Yes**
     - **No**

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:

   - **Title** (Required) – Will accept a minimum of 1 character and a max of 20 characters
   - **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
   - **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 **Announcements** section of all NYEIS Home pages.
d. **Text** (Required) – Change the text you wish to be displayed in the Announcements 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.

<table>
<thead>
<tr>
<th>Important Notes:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 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.</td>
</tr>
<tr>
<td>• The current State Roles capable of Creating and Editing Announcements are: DOH_OITPM and SUPERROLE Users</td>
</tr>
<tr>
<td>• The current State Roles capable of Viewing Announcements are DOH_AuditUnit, DOH_Mgmt, DOH_ProgramMgr, DOH_FiscalMgr, DOH_FiscalUnitStaff, DOH_ProviderApproval</td>
</tr>
<tr>
<td>• You cannot edit the start date to being earlier than the current date of the edit being performed</td>
</tr>
<tr>
<td>• You cannot edit the end date to being earlier than the start date</td>
</tr>
</tbody>
</table>