Unit 9: Provider Management

Version 4.6
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### Document Revision History

<table>
<thead>
<tr>
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<th>Release</th>
<th>Description</th>
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<tbody>
<tr>
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<td>4.6</td>
<td>• Added Important note relating to HCS User Account Mgmt. under ‘Non Active Employees’</td>
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<td>• No Changes</td>
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<td></td>
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<td>• Updated Provider Flag section to indicate no longer used</td>
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<td>• Updated Provider Restriction section to indicate no longer used</td>
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<td>• Added new Agreements topic</td>
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<td></td>
<td>• Updated Provider Status Subtopic to detail new ‘Pending Agreement’ status</td>
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<td>1.5</td>
<td>• Added Response File topic</td>
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<td></td>
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<td>• Updated Languages topic</td>
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<td>• Updated Licenses topic</td>
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<tr>
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<td>1.4</td>
<td>• Updated Employees/Contractors topic. Added Pending Employee List, Service Coordinator Caseloads and Non-Active Employees page information.</td>
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<tr>
<td>3/31/2011</td>
<td>1.3</td>
<td>• Updated Create an Employee subtopic with information concerning where Qualified Profession (QP), License, SSN and NPI data recorded during the create process is stored.</td>
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<td>• Updated Locations subtopic with a definition of “Location”.</td>
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<td>• Added Edit Location Service Availability subtopic to Locations section.</td>
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<td>• Updated the Products topic.</td>
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<tr>
<td>1/31/2011</td>
<td>1.2</td>
<td>• Edited Employees/Contractors section with information about adding employees and creating employees.</td>
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<td>• Added Disposition History section.</td>
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<tr>
<td>11/22/2010</td>
<td>1.1</td>
<td>• My Provider Homepage section – Added new Provider Home page screen shot without FEIN/SSN field displayed. FEIN/SSN is no</td>
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<tr>
<td>Date</td>
<td>Version</td>
<td>Notes</td>
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<tr>
<td>10/1/2010</td>
<td>1.0</td>
<td>• October 2010 NYEIS launch.</td>
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<td>• My Provider Homepage section – Added reference to printing Provider Profile report.</td>
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<td></td>
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<td>• Creating MS Word Communications section – added Internet Explorer browser settings.</td>
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<td></td>
<td></td>
<td>• Contacts section – updated description.</td>
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<td></td>
<td></td>
<td>• Models section – updated description.</td>
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<tr>
<td></td>
<td></td>
<td>• Provider SCR Number section – Deleted references to Adding, Editing and Deleting SCR data. Provider has view only rights.</td>
</tr>
</tbody>
</table>
# Table of Contents

Unit 9: Provider Management ................................................................. 1  
Provider Home Page .............................................................................. 9  
  Provider Home Page Navigation Bar .................................................... 9  
  Whose Provider Homepage Can I Access? .......................................... 10  
  My Provider Homepage ...................................................................... 12  
Addresses ................................................................................................. 14  
Agreements ............................................................................................... 15  
Alternative IDs ......................................................................................... 15  
Bank Accounts .......................................................................................... 16  
Catchment Areas ....................................................................................... 19  
Communications ....................................................................................... 19  
  Viewing Communications .................................................................... 26  
  Editing Communications .................................................................... 27  
  Deleting Communications .................................................................. 29  
Communication Exceptions ...................................................................... 30  
  Adding a New Communication Exception .......................................... 30  
  Viewing a Communication Exception ................................................ 31  
  Editing a Communication Exception ................................................... 32  
  Deleting a Communication Exception ................................................ 32  
Contacts ..................................................................................................... 33  
Continuing Education .............................................................................. 33  
Contracts .................................................................................................. 34  
Disposition History .................................................................................. 35  
Email Addresses ....................................................................................... 35  
Employees / Contractors ........................................................................ 37  
  Employee / Contractor List .............................................................. 37  
    Add an Employee or Contractor ..................................................... 39  
    Create an Employee ....................................................................... 42  
  Pending Employee List ...................................................................... 49  
  Service Coordinator Caseloads ............................................................ 49  
  Student Intern ..................................................................................... 51  
Employee ID ............................................................................................. 56  
Non-Active Employees ............................................................................ 57  
Employers .................................................................................................. 59  
Financials ................................................................................................... 59  
Flags .......................................................................................................... 60  
Languages .................................................................................................. 60  
Licenses ...................................................................................................... 62  
Locations ................................................................................................... 64  
  View Locations .................................................................................. 64  
  Edit Location Service Availability ...................................................... 65  
Models ....................................................................................................... 66  
Monitoring ................................................................................................. 67  
Notes .......................................................................................................... 67
Provider Management

Unit Overview

This Unit covers review of the functions in NYEIS available to Providers to view and edit Provider data. Some of the functions on the Provider Homepage and related functional areas can only be accessed by SDOH Provider Approval Unit users. Other functional areas can be viewed but not edited. Adding or editing information in these areas requires the Provider to notify the SDOH Provider Approval Unit.
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PROVIDER HOME PAGE

Provider Home Page Navigation Bar

- Home
- Addresses
- Agreements
- Alternative IDs
- Bank Accounts
- Catchment Areas
- Communications
- Communication Exceptions
- Contacts
- Continuing Education
- Contracts
- Disposition History
- Email Addresses
- Employees/Contractors
- Employers
- Financials
- Flags
- Languages
- Licenses
- Locations
- Models
- Monitoring
- Notes
- Phone Numbers
- Products
- Professional Discipline/Qualified Personnel
- Provider Completed Evaluations
- Provider Configuration
- Provider SCR Number
- Referrals
- Response Files
- Restrictions
- Roles
- Service Authorization Download
- Special Population Served
- Surveys
- Tasks
- Web Addresses
Whose Provider Homepage Can I Access?

Understand these conditions regarding Provider Homepage access:

- The only method for a provider user to access a provider homepage is by clicking the ‘My Provider Homepage’ link located on your User Home page.

- The ‘Provider’ whose Home page you will see / have access to depends entirely on how your NYEIS User Account is set up. There is a field in the NYEIS user account called ‘Provider Name’. You will have access to the Homepage of the provider you are associated with in your User Account.

Important Information

Some NYEIS provider user roles (like PROV_ServiceCoordinator and PROV_RenderProvStaff) require the User Account provider name association to be with the individual rather than an agency. All other provider user roles require the user account provider association with an agency.
• For example, Prov_ServiceCoordinator Sally Toonces’ User Account Provider association is with provider ‘Sally Toonces’. Therefore she will see / have access to provider Sally Toonces home page when clicking the My Provider Homepage link on her User Homepage.

• Another example, this time for a PROV_All user role. Henry Hines’ User Account is associated with provider ‘Toonces Academy’. Therefore he will see / have access to provider Toonces Academy’s home page when clicking the My Provider Homepage link on his User Homepage.
My Provider Homepage

This section informs a Provider how to access their Homepage. The ability to change information is restricted by role. Some of the functions on the Provider Homepage and related functional areas can only be accessed by select municipal or SDOH Provider Approval Unit users. Other functional areas can be viewed but not edited. Adding or editing information in these areas requires the Provider to notify the municipality or the SDOH Bureau of Early Intervention Provider Approval Unit.
1. Display User Home Page. Click the My Provider Homepage link under the My Shortcuts column.

2. Provider Homepage displays.

3. The Current Approval Status field indicates that the provider is approved or not approved to provide services. The Current Status Date field indicates the effective date of the provider’s current approval status. The history of status changes can be viewed by clicking the Disposition History link in the Navigation menu.

Approval statuses include:
- Approved – provider is authorized to provide services as of the Current Status Date. Or reflects the date the agency transitioned from a Pending Agreement to an Agreement.
- Disapproved – provider is no longer approved to provide services as of the Current Status Date.
- Disqualified - provider is no longer approved to provide services as of the Current Status Date.
• Pending Agreement – provider’s agreement status is awaiting submission and approval from the Provider Approval Unit (PAU)
• Withdrawn - provider will discontinue providing services as of the Current Status Date.

4. The **State ID** field displays the provider’s New York State Provider Approval number. This is the primary NYEIS reference number assigned to an approved provider agency or individual.

**Notes:**

• Information on Provider Homepage is view only. This information can be edited only through the Application Amendment process.
• The provider’s Current Approval Status is managed solely by the Bureau of Early Intervention Provider Approval Unit. All questions related to the provider’s status must be made by contacting the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016.

**ADDRESSES**

Address refers to the Provider’s administrative or billing postal address. It does not refer to a “site” where services are delivered to children, although a Provider may locate their administrative offices at the same address as where they deliver services to children. See **Locations** section for information about Locations where services are delivered to children.

**Important Information**
Addresses information is View only. Changes to this information must be made by contacting the SDOH Bureau of Early

1. Display Provider Home Page. See **My Provider Homepage** section for information.

2. Click **Addresses** from the Navigation Bar. **Addresses** page displays.
3. View Address

Click View link under Action column from Addresses page. View Address page displays the sections Details and Comments. Click Close button after viewing the Address page. Addresses page displays.

Notes:

- Recent items on the Navigation Bar displays recently visited items.

AGREEMENTS

All Providers must have an Agreement in place with New York State in order to be assigned or bill for services through NYEIS. There are 2 types of agreements, Basic and Appendix:

Basic – The Basic agreement allows a provider to contract with an agency who has an Appendix agreement.

Appendix – The Appendix Agreement allows a service authorization to be assigned directly to a provider. This provider is then responsible to process claims with insurance companies and Medicaid. Providers granted an Appendix Agreement will also have a Basic Agreement.

Important Note:
If a Provider does not yet have a Basic Agreement in place, the Provider’s Approval Status will reflect Pending Agreement. See My Provider Homepage section of this chapter for more information on approval statuses.

Information in this section is View Only. Questions / Changes to Agreements must be made by contacting the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016.

ALTERNATIVE IDs

Providers may have multiple ‘reference’ numbers, such as National Provider ID (NPI), NYS Provider ID, FEIN/SSN (Federal Employer Identification Number/Social Security Number). These numbers are recorded in the Provider’s Alternative IDs page. This NYEIS feature allows for the capture of alternate means of identification for a provider.
The **Primary** Alternative ID equals: 1) an approved agency’s NYS Provider ID (State ID), 2) an approved Individual’s NYS Provider ID (State ID), or 3) an Employee ID or Reference Number. An Employee ID or Reference Number is created for any individual who is was not initially an approved Individual provider and who is added as an agency employee. An individual who is not an approved Individual provider and who is an employee has only one Employee ID or Reference Number, regardless of how many agencies they are employed by.

<table>
<thead>
<tr>
<th>Important Information</th>
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<tbody>
<tr>
<td>Alternate ID information is View only. (With the exception of National Provider ID (NPI) can be added to a record by an agency who employs or contracts the provider. Changes to this information must be made by contacting the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016.</td>
</tr>
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</table>

1. Display **Provider Home** page. See **My Provider Homepage** section for information.

2. Click **Alternative IDs** from the Navigation Bar. **Alternative IDs** page displays for current Provider.

<table>
<thead>
<tr>
<th>Alternative IDs: Midway Social Services - 29999999</th>
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<tbody>
<tr>
<td><strong>Action</strong></td>
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<tr>
<td>View</td>
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</tbody>
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3. View Alternative ID

   Click **View** link under Action column from **Alternative IDs** page. View **Alternative ID** page displays the sections **Details** and **Comments**. Click **Close** button after viewing the Alternative ID page. **Alternative IDs** page displays.

**Notes:**

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

<table>
<thead>
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<th>Exception</th>
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<td>Not available to all Provider User roles.</td>
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**BANK ACCOUNTS**
Users with Financial access rights will be able to work with Bank Accounts. This feature allows bank information to be stored and used to perform Electronic Funds Transfers.

**Important Information**
Although NYEIS is not involved in the direct payment process through Electronic Funds Transfer (EFT) some municipal financial functions, such as reconciling provider payments, may require the addition of bank information by the provider if the provider is paid by EFT outside of NYEIS. A provider may need to work with their municipality to ensure that a specific Bank Branch Name has been added into NYEIS for the provider to. See Unit 10: Municipal Administration, Banking for further information.

1. Display **Provider Home** page. See My Provider Homepage section for information.

2. Click **Bank Accounts** from the Navigation Bar. **Bank Accounts** page displays for the current Provider.

3. Perform one of the following functions:

   **Adding a New Bank Account**

   a. Click **New** button. **Create Bank Account** page displays the sections Details and Comments. **Fields requiring data entry are marked with an asterisk. A field can also be required based on logic that will not have an asterisk.**

   ![Create Bank Account](image)

   b. From the Details section, fill in information for **Account Name**, **Account Number**, **From**, **Primary**, **Account Type**, **Bank Branch Name**, **To** and **Joint Account**. If Primary checkbox is selected, the
newly added Bank Account is considered the Primary Account, and all other Bank Accounts are considered secondary.

To select a Bank Branch Name, click Search icon. Bank Branch Search page displays. Type information. Click the Search button. Records matching display in the Search Results section. To search again, click Reset button. Click Select link under Action column for desired Bank branch. Create Bank Account page displays.

### Important Information
If a Bank Branch Name is not found, the Branch will need to be added by a User with Administrative rights to NYEIS. See Unit 10: Municipal Administration, Banking for further information.

c. Click Save button to save current Bank Account. Bank Accounts page displays.

Or

Click Save & New button to continue adding Bank Accounts.

### Viewing a Bank Account

a. Click View link under Action column from Bank Accounts page. View Bank Account page displays the sections Details and Comments. The following buttons are available:

- **Edit** - See Editing a Bank Account section.
- **Close** - returns to Bank Accounts page.

### Editing a Bank Account

a. Click Edit link under Action column from Bank Accounts page. Modify Bank Account page displays the sections Details and Comments. Apply changes.

b. Click Save button. Bank Accounts page displays.

### Notes:

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

- **Cancel** button stops current operation and returns to previous page.
- **Recent items** on the Navigation Bar displays recently visited items.

## CATCHMENT AREAS

As of April 1, 2013 Providers enter into agreements with New York State to deliver services, replacing the use of contracts with individual municipalities.

**Catchment Areas** detail the individual counties in which the provider is available to deliver services and their effective dates. Keep in mind all providers are approved to deliver service statewide. Catchment Areas signify where the provider is available to provide services.

### Important Note:
Catchment Area information displayed on this page is View only. Changes to this information must be made by contacting the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016.

## COMMUNICATIONS

Communications are records of various Communications between Case Participants that are recorded in NYEIS. Communications may be paper, telephone or Microsoft Word Templates. Note that the Microsoft Word template feature is restricted for use to the PROV_ServiceCoordinator user role and Municipal staff such as EIOD and Service Coordinator.

Communications are not meant to be recorded session notes for Providers or Service Coordinators. The Communication feature is a way for NYEIS Users to document and enhance the exchange of information. For example, a Service Coordinator (Municipal or provider) can use the Communication feature to contact the Evaluator to obtain scheduled evaluation dates.
Important Information

Sensitive Information/Information Extraneous to Early Intervention

It is important to remember that NYEIS information is subject to all Early Intervention Program (EIP) confidentiality requirements. Users must recognize that there may be sensitive or extraneous information communicated or in documents in children’s early intervention records that does not directly relate to the EIP. Early Intervention Officials and Early Intervention Providers are responsible for being aware of and adhering to other EIP confidentiality requirements that may apply to and restrict the information that should be included in children’s early intervention records.

When disclosing or re-disclosing any information, including Communication information in NYEIS, the Early Intervention Official or Early Intervention Provider must review the information and determine whether disclosure is necessary for the provision of early intervention services to the Child and/or family by the receiving party. For example, a physician’s report or social services report may not be necessary or appropriate to share with other early intervention Providers, and in these circumstances, would not be appropriate to record as Communication in NYEIS.

1. Display Provider Home Page. See My Provider Homepage section for information.

2. Click Communications from the Navigation Bar. Communications page displays for the current Provider.

3. Perform one of the following functions:

   Record Communication

   Records any type of Communication (e.g., phone call, letter received).

   a. Click Record Communication button. Record Communication page displays.
b. Define correspondent by selecting one of the following items:

- If correspondent is registered in the system but has not yet had any interaction with NYEIS that has listed them as a participant (e.g., Referral Source), click Participant drop down. This drop down allows a User to search for a type of participant in NYEIS and remains on Child selection unless changed by the User.

There are three Participant Types the user can select:
- **Child** – children that the Provider is delivering services to.
- **Health Care Provider** – Providers registered in NYEIS.
- **Vendor** – SDOH approved Vendors registered in NYEIS.

Select Participant Type. Click Search icon. Search page displays. Type known information in Search Criteria. Click Search button. Search Results display. Click Select link under Action column to select correspondent. Record Communication page displays with correspondent name. Click Clear icon to clear selected name.

- If correspondent is not registered in the System, type Correspondent Name. Correspondent is automatically registered as a person in the System. Correspondent is only associated with Case. Correspondent does not display in a search. After a communication is created for a new participant, the participant is available in Case Participant drop down.

c. Click Next button. Next Record Communication page displays.

d. Type appropriate information in Communication Details section using Tab key to navigate from field-to-field. Be sure to select accurately from Communication Type drop down.

**Important Information**
Pro-Forma Type is not a required field but may be used by the User to track and identify a type of form used.
e. Enter appropriate information in Communication Text section. Be sure to type Subject.

f. Enter appropriate information in Correspondent Details section. If Address is not in the System, No Address Available will be printed. An Address is not required.

g. Continue entering information in the following sections: Protected Information Related Request Details, Protected Information Disclosure Details, Disclosure Purpose (multiple selections can be made), Other Required or Permitted Disclosure Purpose (multiple selections can be made), Associated Files and Comments.

The sections are related to the documentation of communications regarding protected Health Information under the Health Information Portability and Accountability Act (HIPAA) and/or confidentiality restrictions under the Family Educational Rights and Privacy Act (FERPA). If these fields are completed, a Protected Health Information Authorization must be captured in NYEIS. See Unit 4: Case Management, Protected Health Information Authorizations for additional information.

Protected Information Related Request Details section – Select the type of request from the drop down.

Protected Information Disclosure Details section – complete check boxes as appropriate and select Disclosure Type from the drop down (enter additional disclosure details as appropriate).

Information may involve the Child's HIV status, family abuse situations, Court orders, subpoenas and other Protected Health Information. See Unit 4: Case Management, Protected Health Information Restrictions and Protected Health Information Authorizations for additional information.

h. Click Save button. The status of the communication logged is automatically updated depending on the type of communication. Incoming logged communications show a Status of Received, outgoing logged communication show a Status of Sent. Errors or additional information required will display at the top of the page if Communication is not completed. Apply changes. You must save again. Communications page displays with Communication item added to list.
Create MS Word Communication

NYEIS has templates that can be used to create letters and notices related to a Provider. Contains saved Communications (e.g. letters) that NYEIS has provided.

a. Click Create MS Word button. Create MS Word Communication page displays.

b. Define correspondent by selecting one of the following items from:

- If correspondent is registered in the system but has not yet had any interaction with NYEIS that has listed them as a participant (e.g., Referral Source), click Participant drop down. This drop down allows a User to search for a type of participant in NYEIS and remains on Child selection unless changed by the User. Select Participant Type.

There are three Participant Types the user can select:
- Child – children that the Provider is delivering services to.
- Health Care Provider – Providers registered in NYEIS.
- Vendor – SDOH approved Vendors registered in NYEIS.

- Click Search icon. Search page displays. Type known information in Search Criteria. Click Search button. Search Results display. Click Select link under Action column to select correspondent. Record Communication page displays with correspondent name. Click Clear icon to clear selected name.
- If correspondent is not registered in the System, type Correspondent Name. Correspondent is automatically registered as a participant associated with the case. Correspondent does not display in a search. After a communication is created for a new participant, the participant is available in Case Participant drop down.

c. Click Next button. The Create MS Word Communications page displays.
d. Enter appropriate information in the following sections: 
   **Correspondent Details** (Click Search icon to locate valid address if correspondent is already registered in the System), **Protected Information Related Request Details**, **Protected Information Disclosure Details**, and **Other Required or Permitted Disclosure Purpose** (multiple selections can be made) and **Associated Files**.

The sections are related to the documentation of communications regarding protected Health Information under the Health Information Portability and Accountability Act (HIPAA) and/or confidentiality restrictions under the Family Educational Rights and Privacy Act (FERPA). If these fields are completed, a Protected Health Information Authorization must be captured in NYEIS. See Unit 4: Case Management, Protected Health Information Authorizations for additional information.

**Protected Information Related Request Details** section – Select the type of request from the drop down.

**Protected Information Disclosure Details** section – complete check boxes as appropriate and select **Disclosure Type** from the drop down (enter additional disclosure details as appropriate).

This information may involve the Child's HIV status, family abuse situations, Court orders, subpoenas and other Protected Health Information. See Unit 4: Case Management, Protected Health Information Restrictions and Protected Health Information Authorizations for additional information.
e. Click **Search** icon in **Template Name** field under **Template** section. **Provider MS Word Templates** page displays.

f. Click **Select** link under **Action** column for desired template. Template displays in the **Template Name** field.

g. Click **Save** button. *Errors or additional information required will display at the top of the page if Communication is not completed. You must Save again.* Selected template displays.

h. Apply changes.

i. **Close** file. **Exit** Application. Click **Yes** button to save changes. Changes are saved in the NYEIS database. **Communications** page displays.

j. The **Status** of the Communication logged is automatically set to **Draft** by the system. To update the Status to **Sent**, click **View** in the **Action** column next to the correspondence. Click the **[Mark as Sent]** link next to the **Communications Status** field in the **Communications Details** cluster. **Confirmation** page displays with the message *Are you sure you want to mark this communication as sent?* Click **Yes** button. **Communication Status** displays as **Sent**.

---

**Important Information**

Always save changed templates that contain Child information into the NYEIS database and not to a local drive. NYEIS is a secure location and database maintains the confidentiality of the Child data.

NYEIS templates can be edited by the Municipality and downloaded to the network or Personal Computer without Child-specific information. Then, data can be entered.

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**Notes:**

- To sort the data displayed on pages, click the underlined column heading. Click once to view the data in ascending order and click again to view the data in descending order.
- When a template displays, some fields will automatically populate (e.g., Address, Phone Number) and can be adjusted.
- **Cancel** button stops current operation and returns to previous page.
- **Recent items** on the Navigation Bar displays recently visited items.
• Users must have Microsoft Word 2003 or newer in order for the template function to work properly. User’s should contact their IT support staff to ensure that the following Internet Explorer browser settings are configured:
  • Popup blocker in the Internet Explorer browser on the user machine should be disabled.
  • Add the Cúram server host name including protocol (https://commerce.health.state.ny.us) to the list of trusted sites in the Internet Explorer.
  • The following ActiveX scripting options for the "Trusted sites" security zone must be set as follows:
    • ActiveX controls and plugins/Automatic prompting for ActiveX controls: Enable
    • ActiveX controls and plugins/Download signed ActiveX controls: Enable
    • ActiveX controls and plugins/Run ActiveX controls and plugins: Enable
    • ActiveX controls and plugins/Binary and script behaviors: Enable
    • ActiveX controls and plugins/Allow previously unused ActiveX controls to run without prompt: Enable
    • ActiveX controls and plugins/Script ActiveX controls marked as safe for scripting: Enable

**Viewing Communications**

The information below outlines the general steps for viewing any type of Communication (Recorded/MS Word). The title of the page reflects the type of Communication being viewed.

1. Display Provider Home Page. See My Provider Homepage section for information.

2. Click Communications from the Navigation Bar. Communications page displays.

3. Click View link under Action column for Communication to display. View Communication page displays.
4. Review information.

If the communication is MS Word communication, the Communication Status displays as Draft unless the User indicates it has been sent using the Mark as Sent feature. [When viewing an MS Word Communication, Communication Status displays as Draft. Click [Mark as Sent] link from Communication Status field. Confirmation page displays with the message Are you sure you want to mark this communication as sent? Click Yes button. Communication Status displays as Sent.]

5. Click Close button. Communications page displays.

**Editing Communications**

The information below outlines the general steps for editing any type of Communication (recording/MS Word). The title of the page reflects the type of Communication being edited.

1. Display Provider Home Page. See My Provider Homepage section for information.
2. Click **Communications** from the Navigation Bar. **Communications** page displays.

3. Click **Edit** link under **Action** column for Communication to display. **Modify Communication** page displays.

4. Apply necessary changes.

5. Click **Save** button. Changes are saved. **Communications** page displays.

**Notes:**

- To stop operation and not save changes, click **Cancel** button from the **Modify Communication** page.

- To update Communications, click **View** link under **Action** column. Click **Edit** button.

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

The information below outlines the general steps for deleting any type of Communication.

A Communication cannot be deleted. However, Microsoft Word communications can be “Deleted” when the Communication Status is “Draft”; it cannot be deleted when the Communication Status id “Sent”. Deleting a Microsoft Word communication causes the Status to be changed from “Draft” to “Cancelled”.

1. Display **Provider Home** page. See **My Provider Homepage** section for information.

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

3. Click **View** link under **Action** column for Communication to delete. **View Communication** page displays.

4. Click **Delete** button. **Delete Communication** page displays the message *Are you sure you want to delete this communication?*
5. Click Yes button. View Communication page displays. Notice the Status field displays Canceled.

6. Click Close button. Communications page displays with Canceled in the Status column.

COMMUNICATION EXCEPTIONS

Communication Exceptions are used to note when a particular form of communication cannot be used, e.g. phone for a deaf parent.

Important Information
Information in this link is View-only for some Provider user roles.

Adding a New Communication Exception

1. Display Provider Home page. See My Provider Homepage section for information.

2. Click Communications Exceptions from the Navigation Bar. Communications Exceptions page displays for the current Provider.

3. Click New button. Create Communication Exception page displays the sections Details and Comments.
Fill in information for **Method**, **From** and **Reason**. **Fields requiring data entry** are marked with an asterisk. A field can also be required based on logic that will not have an asterisk.

b. **Type Comments (Optional).**

c. Click **Save** button to save current Exception. **Communication Exceptions** page displays.

Or

Click **Save & New** button to continue adding Exceptions.

**Viewing a Communication Exception**

1. Display **Provider Home** page. See **My Provider Homepage** section for information.

2. Click **Communications Exceptions** from the Navigation Bar. **Communication Exceptions** page displays for the current Provider.

3. Click **View** link under **Action** column from **Communication Exceptions** page. **View Communication Exception** page displays the sections **Details** and **Comments**. The following buttons are available:

   - **Edit** - See **Editing a Communication Exception** section.
   - **Delete** - removes the **Communication Exception**. **Are you sure you want to delete this communication exception?** message displays. Select **Yes** button. **Communication Exceptions** page displays with **Status** as **Canceled**.
   - **Close** - returns to **Communication Exceptions** page.
# Editing a Communication Exception

1. Display **Provider Home** page. [See My Provider Homepage section for information.](#)

2. Click **Communications Exceptions** from the Navigation Bar. **Communication Exceptions** page displays for the current Provider.

<table>
<thead>
<tr>
<th>Communication Exceptions: Midway Social Services - 222331234</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
</tr>
</tbody>
</table>

3. Click **Edit** link under **Action** column from **Communication Exceptions** page. **Modify Communication Exception** page displays the sections **Details** and **Comments**. Apply changes. Click **Save** button. **Communications Exceptions** page displays.

# Deleting a Communication Exception

1. Display **Provider Home** page. [See My Provider Homepage section for information.](#)

2. Click **Communications Exceptions** from the Navigation Bar. **Communication Exceptions** page displays for the current Provider.

<table>
<thead>
<tr>
<th>Communication Exceptions: Midway Social Services - 222331234</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
</tr>
</tbody>
</table>

3. Click **Edit** link under **Action** column from **Communication Exceptions** page. **Modify Communication Exception** page displays the sections **Details** and **Comments**. Click **Delete** button. The confirmation *Are you sure you want to delete this communication exception?* displays. Click **Yes** button. **Communications Exceptions** page displays and the Communication Exception record displays the Status of **Canceled**.

### Notes:

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

- **Cancel** button stops current operation and returns to previous page.

- **Recent items** on the Navigation Bar displays recently visited items.
CONTACTS

The contacts section of My Provider Home Page lists key administrative personnel for the organization, their title and effective dates for the position:

<table>
<thead>
<tr>
<th>Action</th>
<th>Name</th>
<th>Type</th>
<th>From</th>
<th>To</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Nicolette Grifer</td>
<td>Director</td>
<td>1/1/2012</td>
<td>4/30/2012</td>
<td>Active</td>
</tr>
<tr>
<td>View</td>
<td>Bob Clark Anderson</td>
<td>Secretary</td>
<td>2/14/2012</td>
<td></td>
<td>Active</td>
</tr>
<tr>
<td>View</td>
<td>Thomas Smith</td>
<td>Director</td>
<td>5/1/2012</td>
<td></td>
<td>Active</td>
</tr>
</tbody>
</table>

Important Note:

Information on this page is View only, and view rights are restricted to those users associated with the Agency with the “Provider All” (Prov_All) role.

Changes to Contact information must be made by contacting the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016.

CONTINUING EDUCATION

Important Information

- Information in this link is View-only for some Provider user roles.
- An agency User such as PROV_All can edit the agency’s Continuing education list following the steps below. An agency User cannot edit an employee’s or contracted Continuing Education list however, when entering Continuing Education information for the agency, the employee/contractor that participated in the training can be entered in the Instructor/Trainee field.
- Changes to an employee’s Continuing Education information from their individual provider homepage must be made by a municipality or by contacting the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016.

1. Display Provider Home page. See My Provider Homepage section for information.

2. Click Continuing Education from the Navigation Bar. Continuing Education page displays for the current Provider.
3. Perform one of the following functions:

**Adding Continuing Education**

a. Click **Create** button. **Enter Continuing Education / In-Service Details** page displays.

b. Fill in information as necessary. *Fields requiring data entry are marked with an asterisk. A field can also be required based on logic that will not have an asterisk* Date fields must be formatted as **mm/dd/yyyy** format.

b. Click **Save** button. **Continuing Education** page displays.

**Editing a Continuing Education**

a. Click **Edit** link under **Action** column from **Continuing Education** page. **Enter Continuing Education / In-Service Details** page displays.

b. Make necessary changes. *Date fields must be formatted as **mm/dd/yyyy** format.*

c. Click **Save** button. **Continuing Education** page displays.

**Deleting Continuing Education**

a. Click **Delete** link under **Action** column from **Continuing Education** page. **Remove Continuing Education Info** page displays with message *Are you sure you want to remove this Personnel Continuing Education Info?* Click **Yes** button. **Continuing Education** page displays. Selected Continuing Education details are removed.

**CONTRACTS**

**Important Note:**
As of April 1, 2013 **Contracts** are no longer used to identify a relationship between a Providing Agency and a Municipality. Instead, Providers enter into **Agreements** with New York State to deliver services in **Catchment Areas**. See **Agreements** and **See Catchment Areas** subtopics of this chapter for more information.

A Provider’s prior Contract information is maintained under the **Contracts** section of **My Provider Home Page**.

### DISPOSITION HISTORY

Disposition History displays the Agency or Individual Provider’s approval history. Providers who are employees and not previously approved by the SDOH Bureau of early Intervention Provider Approval Unit do not have a Disposition and thus no history. Provider Disposition is determined by the State Department of Health, Bureau of Early Intervention Provider Approval Unit.

1. Display **Provider Home** page. See **My Provider Homepage** section for information.

2. Click **Disposition History** from the Navigation Bar. **Provider Disposition** page displays for the current Provider.

### EMAIL ADDRESSES

Email Addresses are gathered for approved agencies and individual providers

**Important Information**

- Information in this link is View-only for some Provider user roles.
- An agency User such as PROV_All can edit the agency’s Email Addresses following the steps below. However, an agency User cannot edit an employee’s or contracted Provider’s Email Addresses. Changes to an employee’s Email Addresses must be made by a municipality or by contacting the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016.

1. Display **Provider Home** page. See My Provider Homepage section for information.
2. Click **Email Addresses** from the Navigation Bar. **Email Addresses** page displays for the current Provider.

   ![](Image)

3. Perform one of the following functions:

   **Adding a New Email Address**
   
   a. Click **New** button. **Create Email Address** page displays the sections **Details** and **Comments**.
   
   b. Fill in information. **Address**, **From** and **Type** are *required* fields.
   
   c. Designate a **Primary** email address by clicking the **Primary** checkbox.
   
   d. Type **Comments** *(Optional)*.
   
   e. Click **Save** button. **Email Addresses** page displays.

   Or

   Click **Save & New** button to continue adding Email Addresses.

   **Viewing an Email Address**
   
   a. Click **View** link under **Action** column from **Email Addresses** page. **View Email Address** page displays the sections **Details** and **Comments**. The following buttons are available:

   - **Edit** - See Editing an Email Address section.
   - **Delete** - removes the Email Address. *Are you sure you want to delete this email address?* message displays. Select **Yes** button. Email Addresses page displays with Status as Canceled.
   - **Close** - returns to Email Addresses page.

   **Editing an Email Address**
   
   a. Click **Edit** link under **Action** column from **Email Addresses** page. **Modify Email Address** page displays the sections **Details** and **Comments**. Make necessary changes. Click **Save** button. Email Addresses page displays.
Deleting an Email Address

a. Click View link under Action column from Email Address page. Click Delete button. Delete Email Address page displays with message Are you sure you want to delete this email address? Click Yes button. Email Addresses page displays with Status set to Canceled.

Notes:

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

• Cancel button stops current operation and returns to previous page.

• Recent items on the Navigation Bar displays recently visited items.

EMPLOYEES / CONTRACTORS

*Only applicable to agency providers.

The Employees / Contractors page allows an Agency to manage the providers who are employed or contracted by the Agency. It enables the agency to:

• Add and End-Date providers who are Employees or Contractors.
• View pending employees.
• View agency Service Coordinators and the cases they have been assigned (only cases that the agency is listed as the Provider of Record).
• View and work Student Intern records.
• Add a NPI for each active rendering employee.
• View a history of former provider employees and contractors.

See Licenses section for information about viewing and editing employee license information.

Employee / Contractor List

The Employees/Contractor List page displays the providers (Qualified Personnel and Service Coordinators) currently employed or contracted by the agency. This is not a list of all agency employees because it does not display non-rendering staff such as administrative, fiscal, or data entry personnel.
The page displays information about each provider associated with the agency such as **Personnel Type** (Employee or Contractor), **State ID** if a DOH-approved Provider, **NPI**, employment / contracted start date (“Employment From Date”). A provider is considered not active with the agency if they have an ‘Employment To Date’ prior to today’s date recorded in the To Date field. Records of providers whose ‘To Date’ is prior to today’s date are listed on the **Non-Active Employee/Contractors List** page, and can be accessed by clicking the **Non-Active Employees** button.

**Important Information**

It is important for the agency to keep the list of providers on this page current, as NYEIS refers to this record when displaying the names of agency providers that can be selected as a Rendering Provider during the creation of a Service Authorization.

1. Display **Provider Home** page. See My Provider Homepage section for information.

2. Click **Employees/Contractors** from the Navigation Bar. **Employee/Contractor** page displays.

3. Perform one of the following functions:
**Viewing Employee or Contractor Data**

The ability to view provider data is based on having the access rights. Employing Agency may only view their providers.

a. Click **View** link under **Action** column from **Employee/Contractor List** page. **Product Provider Employee Home** page displays. Review information. Click **Close** button. **Employee/Contractor List** page displays.

**Editing Employee or Contractor Details**

A provider’s start date ("**From Date**"), end date ("**To Date**"), and type (**Employee, Contractor**) can be edited.

a. Click **Edit** link under **Action** column from **Employee/Contractor List** page. **Modify Employee/Contractor** page displays the sections **Details** and **Add Student/Internship**. Make necessary changes.

b. Click **Save** button. **Employee/Contractor List** page displays.

**End-Dating an Employee or Contractor**

A future date can be added in the **To Date** field to record the date that a provider will no longer be employed / contracted by the agency. The record will automatically be moved to the **Non-Active Employee/Contractors List** page by the system on that date.

a. Click **Edit** link under **Action** column from **Employee/Contractor List** page. **Modify Employee/Contractor** page displays the section **Details**. To specify the end of the employee affiliation with the Provider, type a date in the Employment **To Date** field. Click **Save** button. **Employee/Contractor List** page displays.

**Add an Employee or Contractor**

1. Display **Provider Home** page. See **My Provider Homepage** section for information.

2. Click **Employees/Contractors** from the Navigation Bar. **Employee / Contractor** page displays for the current Provider.
3. Click Add button. Add Employee/Contractor page displays.

4. Note the instructions. The first step in adding a provider to the agency is to search the NYEIS database for the person. If found, the agency simply selects the person and adds the provider’s record if she/he is already registered in NYEIS. If the provider does not exist in NYEIS (i.e., they are not found after searching) the agency creates an employee record.

Important Information
Conducting a thorough provider search is very important. If a record already exists for a provider and you fail to find it, you will accidentally create a second record. (Duplicate records will cause claims to be rejected.) See Unit 1: Getting Started, Searching section for useful tips when searching for a provider in the database.

Please contact the NYEIS Help Desk if you would like assistance searching for a provider record.
5. Click **Search** icon to find and select a provider to add. **Search for Employee/Contractor** pop-up page displays. Enter search criteria in the **Search Criteria** cluster. Click **Search** button.

![Search for Employee/Contractor](image)

Search results display in the **Search Results** cluster. The search will return all persons who 1) are registered in NYEIS as employees or approved provider, and 2) whose record matches the search criteria you entered. The example above used last name and NPI number for search criteria.

**Important Information**
Carefully complete searches using all known information about the person (name, NPI, State ID). Recommend using the person’s last name (if a two-part last name search by one part), **rather than first and last name**, in the **Employee/Contractor Name** search field. See Unit 1: Getting Started, **Searching** section for useful tips when searching for a provider in the database.

Select the **View** link in the **Action** column next to the person’s name to view information about the person. The **Product Provider Employee Home** pop-up page displays. Close the pop-up window after viewing.

**Important Information**
The system only allows a limited view of the person’s record, enough to allow verification of the correct person.

Contact the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016 if multiple search results are displayed and it appears that the information in NYEIS is incorrect. For example, you search for a person based on their NPI and the search results displays a person different than expected or multiple persons have the same NPI.

If you verify the listed provider is the correct person to add as an employee or contractor, click the **Select** link in the Action column. **Create Employee** page displays with **Employee Name** populated with the provider’s name.
Record the **Employment From Date** and **Personnel Type** information. *Fields requiring data entry are marked with an asterisk. Date fields must be formatted as mm/dd/yyyy format.*

**Important Information**

Only providers (i.e., have a State ID) with a Current Approval Status of ‘Approved’ can be added with a **Personnel Type** of **Contractor**.

Click **Save** button to save the record. **Employee / Contractor List** page displays with the name of the newly added provider listed.

OR

Click **Save & New** button to save the record and continue adding additional providers.

**Create an Employee**

An Agency should use the Create Employee function **only after** it has determined through a search of the NYEIS database that the provider’s record does not already exist.

**Important Information**

- The Create an Employee feature can only be used to create and add a **Personnel Type** of Employee. It cannot be used to create and add a Contractor. Contact the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016 if you want to add a provider as a Contractor but cannot find their record when searching the NYEIS database.
• The Create an Employee feature does not create a NYEIS user account for the individual. Contact the Municipality you primarily provide services for in order to have a NYEIS user account created for the individual if she/he will need access to NYEIS.

1. Display Provider Home page. See My Provider Homepage section for information.

2. Click Employees/Contractors from the Navigation Bar. Employee / Contractor page displays for the current Provider.

\[ \text{Employee/Contractor List: Saratoga Health Solutions - 1029} \]

<table>
<thead>
<tr>
<th>Action</th>
<th>Name</th>
<th>Profession/OP</th>
<th>Personnel Type</th>
<th>Service Coordinator</th>
<th>Service Coordinator ID</th>
<th>State</th>
<th>Date</th>
<th>NPI</th>
<th>Employment From Date</th>
<th>Employment To Date</th>
<th>Student/Intern</th>
</tr>
</thead>
<tbody>
<tr>
<td>View/Ed</td>
<td>vakars, laurel</td>
<td>Teacher of Students with Disabilities (Birth - Grade 2)</td>
<td>Employee</td>
<td>No</td>
<td>1234567893</td>
<td></td>
<td>11/13/2012</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View/Ed</td>
<td>miller, eva jack</td>
<td>Physical Therapist</td>
<td>Employee</td>
<td>No</td>
<td>21761</td>
<td></td>
<td>7/27/2012</td>
<td>65109000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View/Ed</td>
<td>miller, eva zach</td>
<td>Licensed Master Social Worker</td>
<td>Employee</td>
<td>No</td>
<td>5465465856</td>
<td></td>
<td>9/12/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View/Ed</td>
<td>jones, paul</td>
<td>Speech Language Pathologist</td>
<td>Employee</td>
<td>No</td>
<td>1237659044</td>
<td></td>
<td>4/5/2013</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View/Ed</td>
<td>ivy, sacy</td>
<td>Speech Language Pathologist</td>
<td>Employee</td>
<td>No</td>
<td>1354365746</td>
<td></td>
<td>10/22/2013</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View/Ed</td>
<td>cook, david</td>
<td>Speech Language Pathologist</td>
<td>Employee</td>
<td>No</td>
<td>1236578460</td>
<td></td>
<td>9/12/2011</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View/Ed</td>
<td>whigham, christen</td>
<td>Registered Nurse</td>
<td>Contractor</td>
<td>No</td>
<td>1539</td>
<td></td>
<td>1/1/2012</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. Click Add button. Add Employee/Contractor page displays.
4. Note the instructions. **The first step is to search the NYEIS database to determine if the provider employed or contracted by the agency is already registered in NYEIS.** If the provider is currently registered, the agency simply adds the provider's record to their Employee / Contractor List page. If the provider does not exist in NYEIS (i.e., they are not found after searching) the agency clicks the **Create Employee** button to create an employee record and register the person in the NYEIS database.

**Important Information**

Conducting a thorough provider search is very important. If a record already exists for a provider and you fail to find it, you will accidentally create a second record. (Duplicate records will cause claims to be rejected.) See **Unit 1: Getting Started, Searching** section for useful tips when searching for a provider in the database.

Please contact the **NYEIS Help Desk** if you would like assistance searching for a provider record.

5. Click **Search** icon to find and select an employee to add. **Search for Employee/Contractor** pop-up page displays. Enter search criteria in the **Search Criteria** cluster. Click **Search** button.
Search results display in the Search Results cluster. The search will return all providers who 1) are registered in NYEIS, and 2) whose record matches the criteria you entered.

Click the Cancel button if the search does not produce results that match the provider you want to add as an employee. The Add Employee / Contractor page displays. Click the Create Employee button. Enter New Employee Information page displays.

6. Three clusters comprise the page: Employee Information, Primary Professional Information, and Student/Intern. Fields requiring data entry are marked with an asterisk. Date fields must be formatted as mm/dd/yyyy format.

The NPI (National Provider Identification) and License/Certification Number fields are required.
If Service Coordination option is selected in the Profession drop-down, the user must 1) record the provider’s QP License/Certification number, or 2) select an option in the S.C. Qualifying Education / Experience field drop-down.

Service Coordinators MUST ALSO BE registered with a NYEIS User Account in order to be found in the search results when a Service Coordinator Service Authorization is being created. See Unit 10: Municipal Administration for special instructions when creating a NYEIS User Account for a Service Coordinator.

If adding Student/Intern:
- Set the Student/Intern flag to ‘Yes’
- Record the internship period in the Internship ‘From’ and ‘To’ Dates
- Search for the Supervisor’s name
- Record the ‘From’ and ‘To’ Dates that correspond to the chosen supervisors for the supervisory period

Important Notes:
- NPI is required at the time the intern record is being created. A License number is not required at the time of record creation.
- The Internship ‘From’ and ‘To’ dates must match or exist within the supervisors ‘From’ and ‘To’ dates.
- When billing, claims are submitted using the intern’s NPI.
- The supervisor’s profession must match the profession of the Intern record being created.
- An intern can only be employed by one agency and supervised by one staff at a time.
- Supervisors must be employees of the agency.

Important Information
The system compares the Primary Profession selected for the employee with the Agency’s SDOH-approved Professional Discipline/Qualified Personnel. The system will return an error message if the person’s
Professional Discipline/Qualified Personnel is not approved for the agency by SDOH Bureau of Early Intervention Provider Approval Unit.

7. Click the **Save** button to save the record. The **New Employee Information Summary** page displays. Click the **Create** button below the **Languages** cluster to add a language to the person’s record. Multiple languages can be added. Click the **Create** button below the **Licenses** cluster to add additional Profession and License information to the person’s record.

8. If the provider’s record is complete, click the **Register New Employee** button. The **Register Employee** page displays with the question *Are you sure you want to register this employee?* Click **Yes** to complete the registration, or **No**. If **No** is selected the record will be saved to the **Pending Employee List** page. See **Pending Employee List** topic.

9. If a provider’s record contains a future Employment From Date the provider will be found on the agency’s Non-Active Employees list until that date.

**Important Information**
The system compares the Primary Profession selected for the employee with the Agency’s SDOH-approved Professional Discipline/Qualified Personnel. The system will return an error message if the person’s Professional Discipline/Qualified Personnel is not SDOH-approved for the agency. Contact the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016 for information about approved Professions.

OR
If you do not want to register the person as an employee at this time, but want to save the data you have entered, click the **Cancel** button on the **New Employee Information Summary** page. The **Employee / Contractor List** page displays.

The saved record can be found by clicking the **Pending Employee List** button. The **New Employee List** page displays.

The page lists all personnel records that have been data entered but not yet registered. Click the **View** link in the **Action** column to view the record, edit any data, and/or register the person’s record. Click the **Delete** link on the **Action** column to delete the record.

**Notes:**

- Employee Qualified Profession (QP) and License information recorded on the **New Employee Information** page is viewable on the employee’s Provider Home page. See **Professional Discipline/Qualified Personnel** or **Licenses** subtopics for information about updating this information.
- Employee SSN (last 4 digits) and NPI recorded on the New Employee Information page are viewable on the employees Provider Home page, Alternate ID’s record.
- To sort the data displayed on pages, click the underlined column heading. Click once to view the data in ascending order and click again to view the data in descending order.
- **Cancel** button stops current operation and returns to previous page.
- **Recent items** on the Navigation Bar displays recently visited items.
Pending Employee List

The **Pending Employees List** page displays the records of providers who the agency is in the process of registering as an employee of the agency but who have not been fully registered during the ‘Create Employee’ process.

1. Display **Provider Home** page. See **My Provider Homepage** section for information.

2. Click **Employees/Contractors** from the Navigation Bar. **Employees / Contractors** page displays.

<table>
<thead>
<tr>
<th>Action</th>
<th>Name</th>
<th>Profession/CP</th>
<th>Personnel Type</th>
<th>Service Coordinator</th>
<th>State ID</th>
<th>NPI</th>
<th>Employment From Date</th>
<th>Employment To Date</th>
<th>Student/Intern</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Vickers, laurel</td>
<td>Teacher of Students with Disabilities</td>
<td>Employee</td>
<td>No</td>
<td>134567890</td>
<td>11/13/2012</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View</td>
<td>Miller, Eva</td>
<td>Physical Therapist</td>
<td>Employee</td>
<td>No</td>
<td>21761</td>
<td>65100000</td>
<td>7/27/2012</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View</td>
<td>Kelly, Zachary</td>
<td>Licensed Master Social Worker</td>
<td>Employee</td>
<td>No</td>
<td>546546585</td>
<td>9/12/2011</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View</td>
<td>Jones, paul</td>
<td></td>
<td>Employee</td>
<td>No</td>
<td>123705944</td>
<td>4/5/2013</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View</td>
<td>Ivy, scay</td>
<td>Speech Language Pathologist</td>
<td>Employee</td>
<td>No</td>
<td>135436746</td>
<td>10/22/2013</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View</td>
<td>Cook, david</td>
<td>Speech Language Pathologist</td>
<td>Employee</td>
<td>No</td>
<td>1236587460</td>
<td>9/12/2011</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View</td>
<td>Whigham, Christian</td>
<td>Registered Nurse</td>
<td>Contractor</td>
<td>No</td>
<td>1539</td>
<td>1/1/2012</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. Click **Pending Employee List** button. **New Employee List** page displays.

4. Click Delete to remove a provider from the **Pending Employee List**.

5. Click the **View** link in the **Action** column next to the provider’s name to view the data recorded thus far. The **New Employee Information Summary** page displays. Click the **Edit** button to change some of the data in the record. Click the **Register New Employee** button to add the provider as an employee of the agency.

6. Click the Cancel button on the New Employee List page return to the **Employee/Contractor List** page.

Service Coordinator Caseloads
The **Service Coordinator List** page displays the providers currently employed or contracted by the agency as a Service Coordinator, and their current caseload counts.

The page displays information about each provider Service Coordinator associated with the agency such as **Personnel Type** (Employee or Contractor), **State ID** if a DOH-approved individual, **NPI**, employment / contracted start date ("From Date") and end date ("To Date").

It also displays the Service Coordinator’s total **SC Caseload** count. The count includes cases that the Service Coordinator manages for your agency and all other agencies that he or she may be employed or contracted by.

1. Display **Provider Home** page. See **My Provider Homepage** section for information.

2. Click **Employees/Contractors** from the Navigation Bar. **Employee / Contractor** page displays.

3. Click **Service Coordinator Caseloads** button. **Service Coordinator List** page displays.

4. Click **Close** button to return to the **Employees/Contractors List** page.
Student Intern

The Student Intern page list displays a list of all current and prior interns, and their internship periods. From this list, Providers can view and manage details relating to the internship’s active periods, their supervisor’s history and their current supervisor’s active period:

Click the View link corresponding to the intern you wish to view/modify. Click View again. View Student Internship Page displays:

View Student Internship  Joseph, Anna - 000

Internship Details

Provider Name: Joseph, Anna
Internship From Date: 1/16/2013
Employment From Date: 1/16/2013
Student/Intern: No
User: Fred Smith

Profession: Speech Language Pathologist
Internship To Date: 1/14/2014
Employment To Date: 3/3/2014
Date Changed: 2/12/2014 10:17

Internship Supervisors

Actions | Supervisor Name | Supervisor From Date | Supervisor To Date | Date Changed | User
--- | --- | --- | --- | --- | ---
View/Edit | Smith, Fred | 1/16/2013 | 1/14/2014 | 2/12/2014 10:16 | Smith, Fred

Internship History

<table>
<thead>
<tr>
<th>Internship From Date</th>
<th>Internship To Date</th>
<th>Student/Intern</th>
<th>Date Changed</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/16/2013</td>
<td>1/14/2014</td>
<td>No</td>
<td>2/12/2014 10:17</td>
<td>Smith, Fred</td>
</tr>
<tr>
<td>1/16/2013</td>
<td>1/14/2014</td>
<td>Yes</td>
<td>2/13/2013 00:00</td>
<td>Smith, Fred</td>
</tr>
</tbody>
</table>

Click Edit button to modify the Student/Intern Yes/No flag or to modify Internship From/To dates. Modify Student Internship page displays:
When finished, click **Save** to save changes, or **Cancel** to abort any changes. **View Student Internship** Page displays:

Click **View** Button corresponding to existing supervisor in Internship Supervisors cluster to see details on Supervisor assignment. **Supervisor Details** page displays:
Click **Edit** button to modify Supervisor From/To Dates. Be sure to use **mm/dd/yyyy** format. When finished, click **Save** or **Cancel**. **View Student Internship** page displays:

![View Student Internship](image)

Click **Add** button above Internship Supervisors cluster to add a new internship supervisor. **Add Supervisor** page displays:

![Add Supervisor](image)
Existing Supervisor and active supervisory period will be listed in Internship Supervisors cluster. Click the **Search** icon to the right of Supervisor Name in the New Supervisor Details cluster to search for and select the new supervisor. Pop-up **List Agency Provider Employees** page displays:

Use the TAB key to navigate from field to field. Enter search criteria and click **Search**. Matching results populate Search Results. From the Search Results cluster, click **Select** Link corresponding to desired supervisor. Add Supervisor Page displays with selected Supervisor populating Supervisor Name field of New Supervisor Details cluster:
Record New Supervisors ‘From’ and ‘To’ Dates. Click **Save** when finished, or **cancel** to cancel the operation and return to the previous page. **View student Internship** page displays, with the newly recorded Supervisor and their effective dates of their supervisory relationship recorded in the Internship Supervisors cluster:

**Important Notes:**
Supervisors must be of type ‘Employee’. Contracted Providers cannot be assigned as supervisors to interns.

Active Supervisory periods cannot overlap. End-date the existing supervisory period before adding in the new supervisor and their active period.

Inset information on how to end an Internship.

**Employee ID**

The Employee ID list page displays social security number and NPI information recorded for each active employee and contractor. In order to safeguard sensitive Social Security Number data, the system limits the display to the last four digits of the number.

A provider should regularly review the Employee Identification List page to ensure that the correct Social Security Number and NPI are recorded for each active employee. If the employee’s NPI is incorrectly recorded, the Employee Identification List page Edit feature can be used to correct the number. If the Social Security Number suspected of being incorrect, the provider must contact the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016.

1. Display Provider Home page. See My Provider Homepage section for information.

2. Click Employees/Contractors from the Navigation Bar. Employee / Contractor List page displays.

3. Click the Employees ID button. The Employee Identification List page displays.
4. Review the Social Security Number or NPI recorded for each employee and verify their accuracy.

5. To edit an NPI, click the Edit link in the Action column next to the employee’s name. The Modify Employee NPI page displays.

6. Edit the current number as needed, and click the Save button. The Employee Identification List page displays with the data change.

---

**Non-Active Employees**

The Non-Active Employee/Contractor page displays the providers (Qualified Personnel and Service Coordinators) formerly employed or contracted (or with future employment/contracted dates) by the agency. **It is not a list of all former agency employees because it does not display non-rendering staff such as administrative, fiscal, or data entry personnel.**

The page displays information about each provider associated with the agency such as Personnel Type (Employee or Contractor), State ID (if a DOH-approved provider), NPI, employment / contracted start date (“From Date”) and end date (“To Date”).

A provider is considered not active with the agency if they have a ‘To Date’ prior to today’s date recorded in the To Date field. In addition, they are considered not active if the From Date is a future date.

Records of providers whose ‘To Date’ is after to today’s date are listed on the Employee/Contractors List page.

1. Display Provider Home page. See My Provider Homepage section for information.
2. Click **Employees/Contractors** from the Navigation Bar. **Employee / Contractor** page displays.

3. Click **Non-Active Employees** button. **Non-Active Employee/Contractor List** page displays.

4. Click **Close** button to return to the **Employees/Contractors List** page.

---

**Important Note:**

If you need to move a therapist or service coordinator from the non-active Employee/Contractor list to the current list of Employees/Contractors, you accomplish this via **Add** button on the **Employee/Contractor list** Page. **See Add an Employee or Contractor** subtopic for more information.

---

**Important Information to Providing Agencies regarding HCS User Account Management:**

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

  - When a user who is employed by only one agency leaves the agency, the HCS Director or Coordinator from the agency should contact the CAMU Help Desk at 1-866-529-1890 so that the HCS login can be terminated.
If this employee ever returns to work for an agency in the future, they will likely receive a new HCS user ID. In this specific circumstance, the employee should contact the NYEIS Help Desk to have their previous NYEIS user ID updated to match the latest HCD user ID.

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

## Employers

The **Work History** page displays all agencies that the Provider (Agency or Individual) is currently or has been employed / contracted by.

1. Display **Provider Home** page.

2. Click **Employers** from the Navigation Bar. **Work History** page displays with a list of Agencies/Employers for the current Provider.

### Notes:

- To sort the data displayed on pages, click the underlined column heading. Click once to view the data in ascending order and click again to view the data in descending order.
- **Cancel** button stops current operation and returns to previous page.
- **Recent items** on the Navigation Bar displays recently visited items.

## Financials

Financials displays a list with details of payments issued to the Provider. It also enables the Provider the capability to view and drill down to the specific details of the payments such as the service authorization and claim that the payment resulted from.
1. Display Provider Home page. See My Provider Homepage section for information.

2. Click Financials from the Navigation Bar. Provider Financials page displays.

3. Click View link under Action column for payment to display. Payment Instrument Details page displays.

4. Review information.

See Unit 8: Provider - Invoicing for further information.

FLAGS

Provider Flags are not in use at this time.

LANGUAGES

A Language should only be added when the Rendering Provider is fluent in the language and available to deliver bilingual or monolingual services to a family and/or Child whose dominant language is other than English. A language other than English added to an Agency’s Language page indicates that an employee or contractor working for the agency speaks the language. A language added to a provider’s Languages page indicates the provider speaks the language.

The agency’s language list will be automatically updated when a provider employee or approved individual provider engaged as a contractor is added to the Agency Employee / Contractors page and speaks a language other than English. If the provider’s language is already listed in the agency’s languages list, the system does nothing. If it is a new language, the system adds the language to the agency’s list. Likewise, when a provider employee or approved individual provider engaged as a contractor who has a language other than English is end-dated, the system determines if the language should be removed from the agency’s languages list.

If the approved agency or individual provider is approved for either the Core Evaluation model (approved agencies only) or Supplemental Evaluations Only model and their Language page indicates a language other than English is spoken, their Products list will be updated to include the associated Bi-Lingual Add On products. These products are required for the Agency or Individual provider to submit a claim for a Bi-Lingual Supplemental Evaluation claim. The system automatically adds the Bi-Lingual Add On product if a new language other than English is added and the agency / individual provider is approved for either the Core Evaluation model or Supplemental Evaluations Only model.
Important Information

- Information in this link is View-only for some Provider user roles.
- An agency User with a role such as PROV_All can edit the agency’s Language list following the steps below. However, an agency User cannot edit an employee’s or individual approved provider’s (i.e., contracted) Language list. Changes to an employee’s Language information must be made by contacting the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016.

1. Display **Provider Home** page. See My Provider Homepage section for information.

2. Click **Languages** from the Navigation Bar. **Provider Languages** page displays for the selected Provider.

<table>
<thead>
<tr>
<th>Action</th>
<th>Language</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td>German</td>
</tr>
<tr>
<td>Delete</td>
<td>English</td>
</tr>
<tr>
<td>Delete</td>
<td>French</td>
</tr>
</tbody>
</table>

3. Perform one of the following functions:

   **Adding a Language**
   
   a. Click New button. **Add Provider Language** page displays. Select **Language** drop down. Select Language.
   
   b. Click Save button. **Provider Languages** page displays with a list of Languages.

   **Important Information**
   If the provider is approved for either the Core Evaluation or Supplemental Evaluations Only models, adding the new Language will automatically cause the addition of the Bi-Lingual Add On in Products.

   **Deleting a Language**
   
   a. Click **Delete** link under **Action** column from **Provider Languages** page. **Delete Language** page displays with message *Are you sure that you want*
to delete the selected language? Click Yes button. Provider Languages page displays. Selected Language is removed.

Important Information
If the provider is approved for the Bi-Lingual Add On Product(s) and deleting the language eliminates all languages other than English from the provider’s Languages page, the deletion will automatically cause the Bi-Lingual Add On Product(s) to be end dated.

Notes:

- To add a Language, you must add one at a time from the Add Provider Language page.
- To sort the data displayed on pages, click the underlined column heading. Click once to view the data in ascending order and click again to view the data in descending order.
- Cancel button stops current operation and returns to previous page.
  Recent items on the Navigation Bar displays recently visited items.

LICENSES

Licenses, certifications and registrations relate to the employees of a provider agency (employees and subcontractors), and to individual approved providers. A provider agency does not have a license.

Licenses & Certifications terminology used throughout this section also refers to Registrations.

Important Information
- An agency does not have a License. Users are prevented from entering License information on the agency’s Provider License page.
- Employee License information must be updated by SDOH Bureau of Early Intervention Provider Approval Unit (PAU). Contact PAU at (518) 473-7016.
- Individual approved Providers can edit their License information using the steps described below as long as their User Account is associated with themselves as a Provider and not an Agency. To check this information, click the My Provider Homepage link on the User Homepage and review the Name field in the Details section. If it displays the Individual provider’s name, and the Individual Provider is assigned the role of Provider All (Prov_All), the provider can edit their License information.
1. Display Provider Home page. See My Provider Homepage section for information.

2. Click Licenses from the Navigation Bar. Provider Licenses & Certifications page displays for the current Provider.

```
Table:
<table>
<thead>
<tr>
<th>Action</th>
<th>License Number</th>
<th>License Name</th>
<th>License Type</th>
<th>From Date</th>
<th>To Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>435367</td>
<td>Physical Therapist</td>
<td>Professional License</td>
<td>9/30/2005</td>
<td>9/30/2015</td>
</tr>
</tbody>
</table>
```

3. Perform one of the following functions:

**Adding a Provider License & Certification**

a. Click New button. Create Provider License page displays.

b. Fill in information as necessary. Fields requiring data entry are marked with an asterisk. A field can also be required based on logic that will not have an asterisk. Date fields must be formatted as mm/dd/yyyy format.

c. Click Save button to save current License/Certification. Provider Licenses & Certifications page displays.

**Important Information**

All Professional Disciplines/Qualified Personnel as well as Service Coordinators require a National Provider Identification (NPI). Contact SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016 if an error message is encountered when adding a License indicating that the Provider does not currently have an NPI recorded in the system.

**End-Dating a Provider License or Certification**

a. Click Edit link under Action column from Provider Licenses & Certifications page. Modify Provider License page displays. Record the To Date to specify the end of the License or Certification term. Click Save to specify the end of the License or Certification term. Provider Licenses & Certifications page displays.

**Notes:**
• Licenses and Certifications cannot be deleted. Use the To Date field to specify when the License or Certifications expires. A history is retained so that all new information for a renewal does not have to be recreated.
• To sort the data displayed on pages, click the underlined column heading. Click once to view the data in ascending order and click again to view the data in descending order.
• Cancel button stops current operation and returns to previous page.
• Recent items on the Navigation Bar displays recently visited items.

LOCATIONS

Location refers solely to a site where services are delivered to children. It does not refer to an administrative or billing address, although a Provider may locate their administrative offices at the same address as where they deliver services to children. See Addresses section for information about editing administrative address information.

Locations must first be approved by SDOH Bureau of Early Intervention Provider Approval Unit.

Important Information
Locations information is View only. Changes to this information, including adding a new location, must be made by contacting the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016.

View Locations

1. Display Provider Home page. See My Provider Homepage section for information.

2. Click Locations from the Navigation Bar. Provider Locations page displays for the current Provider.

<table>
<thead>
<tr>
<th>Provider Locations: Toonces Academy - 1280</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>View</td>
</tr>
<tr>
<td>View</td>
</tr>
</tbody>
</table>
3. View Provider Locations

Click **View** link under **Action** column from **Provider Location** page. **View Location** page displays.

**Notes:**

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

- **Cancel** button stops current operation and returns to previous page.

- **Recent items** on the Navigation Bar displays recently visited items.

**Edit Location Service Availability**

A Provider can change the status of a service that is offered at a site from “Available” to “Not Available”. The change can be for a temporary period of time, or permanent. When the service status is marked as not available at a site, the location will not display in the Provider search results during the create Service Authorization process. See *Unit 6 - IFSP’s and SA’s, Adding Service Authorizations to Individualized Family Service Plans* for more information.

1. Display **Provider Home** page. See *My Provider Homepage* section for information.

2. Click **Locations** from the Navigation Bar. **Provider Locations** page displays for the current Provider.

3. Click View in the Action column next to the Location record to be changed. **View Location** page displays.
Unit 9: Provider Management

4. View the services listed in the Services Covered cluster. Notice the column labeled Availability. Click View link in the Action column next to the service whose availability is to be changed. View Service Type/Method at Location page displays.

5. Click the Change Availability button. Change Provider Location Availability page displays.

6. Click the Availability field drop down box and select “No” to change the service availability to not available. Click Save button. View Service Type/Method at Location page displays with the service availability set as “No”.

7. Click Close button to return to View Location page. Click Close button to Provider Locations page.

MODELS
The Provider Models page displays the models that the Agency is currently approved for by SDOH Provider Approval Unit.

The Model, combined with the approved Professional Discipline/Qualified Personnel, determines the services (i.e., Products) that the Agency / Individual is approved to provide.

**Important Information**
Model information is View only. Changes to this information must be made by contacting the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016.

1. Display **Provider Home** page. See **My Provider Homepage** section for information.

2. Click **Models** from the Navigation Bar. **Provider Models** page displays for the current Provider.

**Note:**
- Deleting the Model will potentially end-date associated services (i.e., Products). The exception occurs when there is another active Model that is associated with the service.

**MONITORING**

Monitoring is only accessible only by SDOH Bureau of Early Intervention user roles. It allows for the tracking of provider monitoring and Corrective Action Plans (CAPs).

**NOTES**

__Exception__

Not available to all Provider User roles.
1. Display Provider Home page. See My Provider Homepage section for information.

2. Click Notes from the Navigation Bar. Notes page displays for the current Provider.

3. Click View link under Action column from Notes page. View Note page displays. Review note information.

   The following buttons are available:
   - Edit – not active.
   - Delete – not active
   - Close - returns to Notes page.

Notes:

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

- Cancel button stops current operation and returns to previous page.

- Recent items on the Navigation Bar displays recently visited items.

**PHONE NUMBERS**

**Important Information**
- Information in this link is View-only for some Provider user roles.
- An agency User with a role such as PROV_All can edit the agency’s Phone Numbers list following the steps below. However, an agency User cannot edit an employee’s or contracted Provider’s Phone Numbers. Changes to an employee’s Phone Numbers information must be made by a municipality or by contacting the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016.
1. Display Provider Home Page. See My Provider Homepage section for information.

2. Click Phone Numbers from the Navigation Bar. Phone Numbers page displays for the current Provider.

```
<table>
<thead>
<tr>
<th>Action</th>
<th>Rotary Type</th>
<th>Area Code</th>
<th>Phone Number</th>
<th>Extension</th>
<th>From</th>
<th>To</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Yes</td>
<td>Main</td>
<td>333</td>
<td>3477478</td>
<td>1/1/2001</td>
<td></td>
<td>Active</td>
</tr>
</tbody>
</table>
```

3. Perform one of the following functions:

**Adding a Phone Number**

a. Click New button. Create Phone Number page displays the sections Details and Comments.

b. Fill in information. Type, From and Phone are required fields.

```
Important Information
There are three boxes associated with the Phone field.

Phone: __________  __________  __________

1st Box: Country Code (not required)
2nd Box: Area Code
3rd Box: Number
```

c. Type Comment (Optional).

d. Click Save button to save Phone Number. Phone Numbers page displays.

Or

Click Save & New button to continue adding Phone Numbers.

**Viewing Phone Number**

a. Click View link under Action column from Phone Numbers page. View Phone Number page displays the sections Details and Comments. The following buttons are available:

- **Edit** - See Editing a Phone Number section.
• **Delete** - removes the **Phone Number**. *Are you sure you want to delete this phone number?* message displays. Select **Yes** button. **Phone Numbers** page displays with **Status** as **Canceled**.

• **Close** - returns to **Phone Numbers** page.

**Editing a Phone Number**

a. Click **Edit** link under **Action** column from **Phone Numbers** page. **Modify Phone Number** page displays the sections **Details** and **Comments**. Make necessary changes. Click **Save** button. **Phone Numbers** page displays.

**Deleting a Phone Number**

a. Click **View** link under **Action** column from **Phone Numbers** page. **View Phone Number** page displays. Click **Delete** button. **Delete Phone Number** page displays with message *Are you sure you want to delete this phone number?* Click **Yes** button. **Phone Numbers** page displays with **Status** set to **Canceled**.

**Notes:**

- To delete a Phone Number, first specify a new Phone Number.
- To sort the data displayed on pages, click the underlined column heading. Click once to view the data in ascending order and click again to view the data in descending order.
- **Cancel** button stops current operation and returns to previous page.
- **Recent items** on the Navigation Bar displays recently visited items.
- **One phone number must be designated Primary. This can be done by checking the Primary designation box.**

**PRODUCTS**

The Products page lists the services that the Provider has been approved for by the SDOH Provider Approval Unit. The list of services is dependent upon the Models and the Qualified Personnel / Professional Discipline’s that the Provider is approved for. See **Models and Qualified Personnel / Professional Discipline** for more information.

**Important Information**

Product information is View only. Changes to this information must be made by contacting the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016.
1. Display Provider Home Page. See My Provider Homepage section for information.

2. Click Products from the Navigation Bar. Products page displays for the current Provider.

### Products: Toddler Core Today - 278

<table>
<thead>
<tr>
<th>Action</th>
<th>Name</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>Non-physician Supplemental Eval - OT</td>
<td>10/14/2009</td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td>OT - Basic</td>
<td>10/14/2009</td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td>OT - Extended</td>
<td>10/14/2009</td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td>OT - Facility</td>
<td>10/14/2009</td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td>Service Coordination</td>
<td>10/14/2009</td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td>PT - Basic</td>
<td>10/14/2009</td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td>PT - Extended</td>
<td>10/14/2009</td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td>PT - Facility</td>
<td>10/14/2009</td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td>Non-physician Supplemental Eval - PT</td>
<td>10/14/2009</td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td>Vision - Basic</td>
<td>10/14/2009</td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**

- The **Edit** link in the Action column has no function. Products are automatically created by the system based upon the approved Model(s) and Professional Discipline(s)/Qualified Personnel.
- The Product Start Date is recorded as the date that the associated Model and/or Professional Discipline/Qualified Personnel is approved by SDOH Bureau of Early Intervention Provider Approval Unit.
- The Product End Date is recorded as the date that the associated Model is deleted and/or Professional Discipline/Qualified Personnel is end-dated by SDOH Bureau of Early Intervention Provider Approval Unit.
- See Languages for more information about Bi-Lingual Add On products.

### Professional Discipline/Qualified Personnel

The Professional Discipline/Qualified Personnel page displays the Professional Discipline(s)/Qualified Personnel that a Provider Agency or Individual provider is currently approved for.

The Professional Discipline/Qualified Personnel, combined with the approved Model(s), determines the services (i.e., Products) that the Agency / Individual is approved to provide.

**Important Information**

Professional Discipline/Qualified Personnel information is View only. Changes to this information must be made by contacting the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016.
1. Display Provider Home page. See My Provider Homepage section for information.

2. Click Professional Discipline/Qualified Personnel from the Navigation Bar. Professional Discipline/Qualified Personnel page displays for the current Provider.

Note:
- The Professional Discipline/Qualified Personnel End Date for an individual provider (only) is initially set to the date that the associated License / Certification expires. In most cases the To Date field is blank.
- End dating the Agency Qualified Personnel/Professional Discipline will potentially end-date associated services (i.e., Products). The exception occurs when there is another active Qualified Personnel/Professional Discipline that can also provide the service.
- To sort the data displayed on pages, click the underlined column heading. Click once to view the data in ascending order and click again to view the data in descending order.
- Cancel button stops current operation and returns to previous page.
- Recent items on the Navigation Bar displays recently visited items.

**PROVIDER COMPLETED EVALUATIONS**

Displays the Evaluations that the Provider has performed, including Core Evaluations, associated Screenings, Family Assessments, Supplemental Evaluations and External Evaluations.

**Important Information**
Some agency employee’s will access their personal Provider Homepage rather than the Agency’s Homepage when clicking the My Provider Homepage link because of the way their NYEIS user account is set up. These users will not see the Agency’s Completed Evaluations.

1. Display Provider Home page. See My Provider Homepage section for information.
2. Click **Provider Completed Evaluations** from the Navigation Bar. **View Accepted Evaluations** page displays for the current Provider.

![View Accepted Evaluations: Midway Social Services - 222331234](image)

<table>
<thead>
<tr>
<th>Action</th>
<th>Child's Name</th>
<th>Date Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Frita Romshak</td>
<td>4/14/2009</td>
</tr>
</tbody>
</table>

3. Click **View** link under Action column. **View Completed MDE** page displays. Select **Close** button.

Or

Select **Print MDE** button.

**Notes:**

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

- **Cancel** button stops current operation and returns to previous page.

- **Recent items** on the Navigation Bar displays recently visited items.

**PROVIDER CONFIGURATION**

The Service Provider Configuration Settings page displays information about a Provider’s current method (i.e., Manual, Electronic) for Claims and Payments processing. Configuration Settings are managed by the SDOH. Contact SDOH at (518) 473-7016 to change this information.

1. Display **Provider Home** page. See **My Provider Homepage** section for information.

2. Click **Provider Configuration** from the Navigation Bar. **Service Provider System Configuration Settings** page displays for the current Provider.
3. View information.

4. Click Close button. **Provider Home** page displays.

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**PROVIDER SCR NUMBER**

A record of the Agency’s State Central Register (SCR) Resource ID and Agency Code.

**Important Information**

- Information in this link is View-only for Providers.
- Individual providers do not have a SCR ID.
- **Registry Code** is the Agency Code.

1. Display **Provider Home** page. See **My Provider Homepage** section for information.

2. Click **Provider SCR Number** from the Navigation Bar. **Provider SCR** page displays for the current Provider.
REFERRALS

This section displays a list of Child Referrals saved or submitted by a Provider. It also allows the Provider to view the status of referrals made as submitted (not yet accepted by the municipality) accepted (accepted by the municipality) and saved (able to edit/delete or submit or to the municipality). Providers may also initiate a Referral from this page.

Important Information

Some agency employee’s access their personal Provider Homepage rather than the Agency’s Homepage when clicking the My Provider Homepage link. It depends on if their NYEIS User Account is set up to associate the Provider with themselves or an agency. Users whose User Account is associated with themselves will not see the agency’s Referrals. However they will see Referrals they were recorded as the Referral Source on.

1. Display Provider Home page. See My Provider Homepage section for information.

2. Click Referrals from the Navigation Bar. Provider Referrals page displays for the current Provider.

3. Perform one of the following functions:

Creating a New Referral

a. Click New button. Create Referral page displays. See Unit 2: Referral & Intake for further information on creating a Referral.

Viewing a Referral
a. Click View link under Action column from Provider Referrals page. See Unit 2: Referral & Intake for further information on viewing a Referral.

Editing a Referral

a. Click View link under Action column from Provider Referrals page. See Unit 2: Referral & Intake for further information on editing a Referral.

Deleting a Referral

a. Click Delete link under Action column from Provider Referrals page. See Unit 2: Referral & Intake for further information on deleting a Referral.

Submitting a Saved Referral

a. Click View link under Action column from Provider Referrals page. See Unit 2: Referral & Intake for further information on submitting a saved Referral.

Notes:
- A Provider can only Delete a Referral with a status of Saved.
- A Provider cannot Edit a Referral with a Status of Submitted.

RESPONSE FILE

This feature enables the provider and State DOH staff to view the status of electronically submitted claims. The response file, known as HIPAA 997, provides information about electronic claims that were accepted or rejected based on the HIPAA standards.

See Unit 8: Provider Invoicing, Download Response Files for further information and instructions.

RESTRICTIONS

Provider Restrictions are a function of NYEIS Administration staff.

ROLES
A case participant plays a role on a case. For example, when an Integrated Case is created, the EIO\D is added to the case's list of roles. When a Provider is registered in NYEIS, their role is created automatically based on their interaction with the Child. For example, a provider may be a Provider, a Vendor, or a Referral Source. Providers can have multiple roles.

1. Display Provider Home Page. See My Provider Homepage section for information.

2. Click Roles from the Navigation Bar. Roles page displays for the current Provider.

| Roles: Toddler Care Today - 278 |
|-------------------------|----------------|--------------|-----------|
| Name                    | Type            | Registered   | Status    |
| Toddler Care Today      | Provider        | 10/14/2009   | Active    |
| Toddler Care Transportation Today | Vendor       | 5/19/2010    | Active    |
| Toddler Care Today      | Referral Source | 3/20/2010    | Active    |

**SPECIAL POPULATION SERVED**

Special Population Served relates to individual and Agency Providers. Special Population Served should only be added when the Provider has expertise and experience in delivering services to children and their families with specific developmental concerns or diagnosed conditions.

**Important Information**

- Information in this link is View-only for some Provider user roles.
- A User such as PROV_All can edit the Special Population Served list following the steps below. However, an agency User cannot edit an employee’s or contracted Provider’s Special Population Served list. Changes to an employee’s Special Population Served information must be made by a municipality or by contacting the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016.

2. Display Provider Home page. See My Provider Homepage section for information.

4. Perform one of the following functions:

**Adding Special Population Served Data**

a. Click **New** button. **Add Special Population Served** page displays.

b. Fill in information as necessary. *Fields requiring data entry are marked with an asterisk. A field can also be required based on logic that will not have an asterisk.*

c. Click **Save** button. **Special Population Served** page displays.

**Deleting Special Population Served Data**

a. Click **Delete** link under **Action** column from the **Special Population Served** page. **Delete Special Population Served** page displays with message *Are you sure that you want to delete selected special population served from the list?* Click **Yes** button. **Special Population Served** page displays with **Status** set to **Canceled**.

**Notes:**

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

- **Cancel** button stops current operation and returns to previous page.

- **Recent items** on the Navigation Bar displays recently visited items.

**SURVEYS**

This feature is currently not be used but may be used in the future to complete certain State Surveys in NYEIS. When the feature is being used to conduct a survey or collect needed data, a link from the Providers Home Page will take the User to a page with the survey or list of surveys. If the feature is not in use, no surveys will be posted on the page.

**TASKS**

[*] See **Unit 1 – Getting Started**, **Working with Tasks** for information about creating, viewing, editing, deleting and administering Tasks.
WEB ADDRESSES

Important Information
• Information in this link is View-only for some Provider user roles.
• A User such as PROV_All can edit the Web Addresses list by following the steps below. However, an agency User cannot edit an employee’s or contracted Provider’s Web Addresses Served list. Changes to an employee’s Web Addresses information must be made by a municipality or by contacting the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016.

1. Display Provider Home page. See My Provider Homepage section for information.

2. Click Web Addresses from the Navigation Bar. Web Addresses page displays for the current Provider.

<table>
<thead>
<tr>
<th>Web Addresses: Midway Social Services - 22231234</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
</tr>
<tr>
<td>View</td>
</tr>
</tbody>
</table>

3. Perform one of the following functions:

Adding a Web Address

a. Click New button. Create Web Address page displays the sections Details and Comments.

b. Fill in information. Web Address, From and Type are required fields.

c. Type Comments (Optional).

d. Click Save button to save current Web Address. Web Addresses page displays.

Or

Click Save & New button to continue adding Web Addresses.

Viewing a Web Address
a. Click **View** link under **Action** column from **Web Addresses** page. **View Web Address** page displays the sections **Details** and **Comments**. The following buttons are available:

- **Edit** - See **Editing a Web Address** section.
- **Delete** - removes the **Web Address**. **Are you sure you want to delete this Web Address?** message displays. Select **Yes** button. **Web Addresses** page displays with **Status** as **Canceled**.
- **Close** - returns to **Web Addresses** page.

**Editing a Web Address**

a. Click **Edit** link under **Action** column from **Web Addresses** page. **Modify Web Address** page displays the sections **Details** and **Comments**. Make necessary changes. Click **Save** button. **Web Addresses** page displays.

**Deleting a Web Address**

a. Click **View** link under **Action** column from **Web Addresses** page. Click **Delete** button. **Delete Web Address** page displays with message **Are you sure you want to delete this web address?** Click **Yes** button. **Web Addresses** page displays with **Status** set to **Canceled**.

**Notes:**

- To delete a Primary Web Address, first specify a new Web Address.
- To sort the data displayed on pages, click the underlined column heading. Click once to view the data in ascending order and click again to view the data in descending order.
- **Cancel** button stops current operation and returns to previous page.
- **Recent items** on the Navigation Bar displays recently visited items.