

NYEIS Quick Reference Guide

User Role Account Creation Process for Rendering Providers who are also Service Coordinators

A user account can be created for a Rendering Provider who provides EI services (such as Physical Therapy services) and also provides Service Coordination. The individual's NYEIS user account can be set-up such that the user can; be assigned as the rendering provider to provide general services associated with their Qualified Profession / License, and view/access all of their assigned children and also be assigned as a child's Service Coordinator.

- In order for an individual to be assignable as a service coordinator for any agency they work for, they must be assigned a **User Role of PROV ServiceCoordinator**, have a **User Type of Service Coordinator**, and have **the Provider Name field associated with their name**.
- The individual must have the associated License and Professional Discipline/Qualified Personnel information recorded on their provider home page.
- The individual must also be registered on the Provider Employees/Contractors page of each agency that the individual will provide Service Coordination and/or render services for.

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

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

Municipal Steps for creating a Provider User Account for a Rendering Provider that delivers EI services (such as Physical Therapy services) and who also provides Service Coordination.

1. Display **User Home** page.
2. Confirm that the individual is a registered provider by clicking the **Service Provider** link in the Search cluster of the User Home page.
3. Confirm that the individual currently does not have a User Account by performing a **User Search**.

User Search

Search Criteria

User Name:

First Name: Last Name:

User Role: Municipality:

Display Deleted Users: Provider Name:

Search Results

Action	Name	Position	User Role	Municipality	Provider	Status
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- If the individual does not have a User Account, click **Create User** link from **My Shortcuts** section of the **User Home** page. **Create User** page displays.

Create User

Details

Title: First Name:

Middle Name: Last Name:

Location: Sensitivity:

Municipality: Geographic Area:


Provider Name: User Type:

Languages

- English
- Cambodian
- Vietnamese
- Japanese
- Russian
- Navajo
- Apache
- Other
- German
- Irish


Contact

Business Phone:

- Use the **Tab** key to navigate from field-to-field to enter information in the **Details** section. Follow the guidelines below for the specified field.
 - First Name** – use individual’s full first name.
 - Last Name** – use individual’s full last name.
 - Location** - click **Search**  icon and select ‘The State’. This is the default option.
 - Municipality** – select the ‘Statewide’ option.
 - User Type** - select the ‘**Service Coordinator**’ option.
 - Provider Name** - search and select the **individual’s name**.

The following table summarizes the data that should be entered

User Being Added	User Type	Municipality	Provider Name	User Role
Service Coordinator / Rendering Provider	Service Coordinator	Statewide	Select the individuals name	PROV_ Service Coordinator

- **Languages** – select one or more languages. To select multiple languages, press the Ctrl (Control) key and select each language.
 - **Contact** – at a minimum, record the individual’s Business Phone Number.
 - **User Name** – record the individual’s Health Commerce System (HCS) user name. **The spelling and character case must match exactly.** For example, ‘HCS222’, ‘hcs222’, and ‘Hcs222’ are each interpreted differently by the system. If the NYEIS User Name does not match exactly the HCS username, the individual will be prevented from logging in to NYEIS.
 - **Role Name** – select the **PROV_Service Coordinator** role by clicking the **Search**  icon. The User Roles pop-up page displays.
 - **Password and Confirm Password** – the Password and Confirm Password fields are required to complete the User Account creation process. However the user is not required to enter a password when logging into NYEIS. **Do not record the individual’s HCS password!** Use the default word ‘password’ in each field.
6. Click **Save** button. The User Account is created. **User Home** page displays. To cancel operation and return to previous page, click **Cancel** button on **Create User** page.

Agency Provider Steps needed in order for the municipality to create a Provider User Account for a Rendering Provider that delivers EI services (such as Physical Therapy services) and who also provides Service Coordination.

The agency provider must add the service coordinator/rendering provider to their agency employee/contractor list. The individual must also be registered on the Provider Employees/Contractors page of each agency that the individual will provide Service Coordination and/or render services for.

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. The municipality must be contacted in order to have a NYEIS user account created for the individual.

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

2. **Employees/Contractors** from the Navigation Bar. **Employees / Contractors** page displays for the current Provider.

Employee/Contractor List: Toonces Academy - 1280

Action	Name	Profession/OP	Personnel Type	Service Coordinator	State ID	NPI	From Date	To Date
View Edit	Amy Dennin	Physician Other Than Pediatrician	Contractor	No	4867	222222222	6/20/2011	
View Edit	Carol Fritz	Occupational Therapist	Employee	Yes		32514	8/1/2011	
View Edit	Carter, Melanie	Vision Certified Low Vision Specialist (ACVREP)	Employee	No		454563	1/20/2011	
View Edit	Cransberry, Angela	Teacher of Students with Disabilities (Birth - Grade 2)	Employee	No			8/8/2011	
View Edit	Dandy, Jim	Teacher of Special Education	Employee	No			4/1/2011	3/31/2014
View Edit	Deborah Yom	Occupational Therapist	Employee	No	2560	8765	1/3/2011	12/31/2012
View Edit	Dogwood, Tina	Licensed Practical Nurse	Employee	No		89798789	6/10/2011	

3. Click **New** button. **Add Employee/Contractor** page displays.

Add Employee/Contractor Toonces Academy

Use this page to search for and add an existing individual as an employee or contractor. If the search returns no results, use the Create Employee button to create and add an employee record or contact SDOH Provider Approval Unit for information about adding a contractor.

Details

*Employee/Contractor Name:

 *From Date:

*Personnel Type:
 To Date:

Locations


Toonces Center for Development

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 (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. A second record will cause the provider to not be assignable on Service Authorizations or prevent them from receiving tasks associated with the services provided to children.

Click

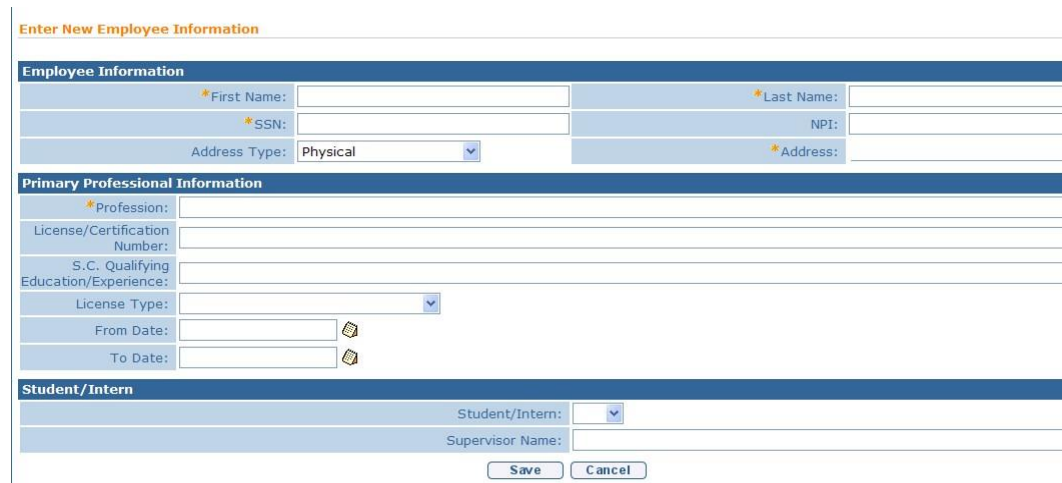
5. Click **Search**  icon to find and select an employee to add. **Search for Employee/Contractor** pop-up page displays. Enter search criteria in the **Search Criteria** cluster. Click **Search** button.



Search Criteria			
Employee/Contractor Name:	<input type="text" value="jefferson"/>	State ID:	<input type="text"/>
NPI:	<input type="text" value="98987"/>		
Profession/QP:	<input type="text"/>		
<input type="button" value="Search"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/>			
Search Results (Number of Items: 2)			
Action	Employee/Contractor Name	NPI	State ID
View Select	Jefferson, Sarah	98987	
View Select	Elijah Jefferson		

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 one or more search criteria you entered. The example above used last name and NPI number for search criteria

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.



Employee Information	
*First Name:	<input type="text"/>
*Last Name:	<input type="text"/>
*SSN:	<input type="text"/>
NPI:	<input type="text"/>
Address Type:	<input type="text" value="Physical"/>
*Address:	<input type="text"/>
Primary Professional Information	
*Profession:	<input type="text"/>
License/Certification Number:	<input type="text"/>
S.C. Qualifying Education/Experience:	<input type="text"/>
License Type:	<input type="text"/>
From Date:	<input type="text"/>
To Date:	<input type="text"/>
Student/Intern	
Student/Intern:	<input type="text"/>
Supervisor Name:	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

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)** is required. The **License/Certification Number** fields may or may not be required; it depends upon the **Profession** that is selected in the **Primary Professional Information** cluster.

Select the **Service Coordination** option in the **Profession** drop-down and record the provider's QP License/Certification number

- 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.

New Employee Information Summary ?

Employee Information	
First Name:	Melanie
SSN:	583885867
Last Name:	Carter
NPI:	454563
Address Type:	Physical
Address:	1288 Karner Blvd Albany (Albany) New York 10001

Primary Professional Information	
Profession:	Vision - Certified Low Vision Specialist (ACVREP)
License/Certification Number:	54645736546
S.C. Qualifying Education/Experience:	

Student/Intern	
Student/Intern:	
Supervisor Name:	

Languages		
Action	Language	Other Language
<input type="button" value="Create"/>		

Licenses					
<input type="button" value="Create"/>					
Action	License Number	License Name	License Type	From Date	To Date

- 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.

The individual is now listed on the employee/contractor page for the agency. The user will be listed on the employee/contractor page twice. The user will be listed as qualified personnel and as a service coordinator for the agency. This will allow the user to be selected as a rendering provider on a service authorization and on a service coordination service authorization. The provider submits a request to the municipality to add a NYEIS user with the user type of Service Coordinator.

Important Information:

When the service coordinator/rendering provider clicks the "My Provider Homepage link", the individual providers homepage displays, not the home page of any agency that s/he is employed or contracted by.

Clicking on the "My Cases" link displays all children that the individual has been assigned as Service Coordinator. It does not display children that have been assigned to render a service (such as Physical Therapy) for. In order to access the records of children assigned to render a service for, the individual performs a child search and can search by the child's name, or use the wildcard character (%) to list all children that the provider is the rendering provider for.