

NYEIS Provider User Account Creation

Three scenarios regarding Provider User Account creation are presented in this appendix to educate User Account Administrators about the required fields in the User Account record and how the data entered in the fields enables or restricts the user from accessing case data and work queue tasks.

- Scenario 1: Provider Service Coordinator is also a Rendering Provider. Scenario begins on page 1.
- Scenario 2: Agency Evaluator is also a Rendering Provider. Scenario begins on page 7.
- Scenario 3: Independent Provider is also a rendering provider for an Agency. Scenario begins on page 14.

Scenario 1

User account is created for a Provider Service Coordinator who also provides general services (such as Physical Therapy related services). The goal is to set up the individual's NYEIS user account so she can 1) be assigned as a child's Service Coordinator, 2) be assigned to general services associated with her Qualified Profession / License, and 3) view/access all of her assigned children (as Service Coordinator and rendering provider).

- The individual's user account is created. Notice the user role is PROV_ServiceCoordinator and the Provider Name is the individual's name agency and not an agency name. 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.
- Refer to **Unit 10 Municipal Administration, User Accounts** for instructions and guidelines regarding user account creation.

Contact Details	
User Name:	saltoon
Location:	The State
Business Phone:	
Business Phone Extension:	
Business Fax:	
Business Mobile:	
Business Pager:	
Business Email:	
Personal Phone:	
Personal Email:	
Municipality:	Statewide
Geographic Area:	
User Type:	Service Coordinator
Provider Name:	Sally Toonces

Further Details	
Default Printer:	[Change]
Creation Date:	12/16/2010
Role:	PROV_ServiceCoordinator
Login Restrictions:	No
Sensitivity:	1
Status:	Active
Account Expiry Date:	
Redirect Tasks To:	
Login Failures:	0
Account Enabled:	Yes Enable Disable
Password Expires:	
Call Center User:	No
User Homepage:	EIS_Application_providerServiceCoordinatorHome

Languages Spoken

Appendix M

- If the individual (Sally Toonces) will also render services (such as Physical Therapy), they must be have the associated License and Professional Discipline/Qualified Personnel information recorded on their provider home page.

Provider Licenses & Certifications: Sally Toonces - 5120

Action	License Number	License Name	License Type	From Date	To Date
Edit	69594949	Physical Therapist	Professional License	3/16/2010	

Professional Discipline/Qualified Personnel: Sally Toonces - 5120

Action	Profession/OP	From Date	To Date
Edit	Physical Therapist	12/14/2010	
Edit	Service Coordinator	1/1/2010	

- The individual must also be registered on the Provider Employees/Contractors page of each agency that the individual will provider Service Coordination and/or render services for. Refer to **Unit 9 Provider Management** for information about adding a provider to the agency’s Provider Employees/Contractor List.
- Notice also that Sally is an active employee because there isn’t a date recorded in the “To Date” field. If a date is recorded, and the date is in the past, it essentially tells the system that the employee is not actively employed by the agency and thus should not be selectable for any services when the Agency is selected for a Service Authorization.

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	Arnie Poolmer	Licensed Master Social Worker	Contractor	Yes	24065	4546546	8/1/2011	
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	
View Edit	Elijah Jefferson	Teacher of Special Education	Employee	No			1/10/2011	
View Edit	Goldman, Sandy		Employee	No			1/29/2011	12/31/2012
View Edit	Harder, Jessica		Employee	Yes			7/21/2011	
View Edit	Henry Hines LLC	Teacher of Deaf and Hearing Impaired	Employee	No		1234621234	6/24/2010	
View Edit	Herb Bertoots	Pediatrician	Employee	No		1234621234	9/27/2010	
View Edit	John Smith	Service Coordinator	Contractor	Yes	11777	920034	4/19/2011	
View Edit	Knight, Shirley	Occupational Therapist	Employee	No		3243554	3/19/2011	
View Edit	Lovelace, Heather	Audiologist	Employee	No		583838	1/31/2011	
View Edit	Nightly, Liza	Speech Language Pathologist	Employee	No		1891167	1/1/2010	
View Edit	Sally Toonces	Service Coordinator	Employee	Yes		43838823-1	12/14/2010	
View Edit	Sally Toonces	Physical Therapist	Employee	Yes		43838823-1	12/14/2010	

- After all of these conditions are met, the individual will be
 - a) assignable 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.

Select Provider & Location Close

Search Criteria

Provider Name:	toonces	NPI:	
DBA Name:		State Provider ID:	
Special Population Served:		Municipality:	
Qualified Personnel Type:		City:	
Language:		Zip:	
Site:			

Search Reset

Search Results (Number of Items: 1)

Action	Provider Name	State Provider ID	Site	Address Line 1	City
Select	Toonces Academy	1280	Toonces Center for Development_Johnson St	12 Johnson St	Albany

Close

Assign Initial Service Coordinator Save Cancel

Initial Service Coordinator Name:

Service Coordination Details

Start Date: 11/5/2011 End Date: 12/20/2011

*Number of Units: 0

https://nyeis-qa.health.state.ny.us/pp_child.concernRoleID=20876645804518932488pp_agencyProvid - Win...

Comments

Service Coordinator Search Show Search Criteria Cancel

Search Results

Action	Name	Agency Name	Caseload
Select	Arnie Poolmer	Toonces Academy	0
Select	Cindy Smith	Toonces Academy	6
Select	Sally Toonces	Toonces Academy	6
Select	Carol Fritz	Toonces Academy	0
Select	John Smith	Toonces Academy	3
Select	Jessica Harder	Toonces Academy	4
Select	Carol Fitz	Toonces Academy	1

Show Search Criteria Cancel

b) assignable on any services Service Authorization when the agency that the individual is employed/contracted by is selected as the Provider of Record for the SA.

List Agency Provider Employees PT - Basic - 235020 Assign Provider as Rendering Provider Cancel

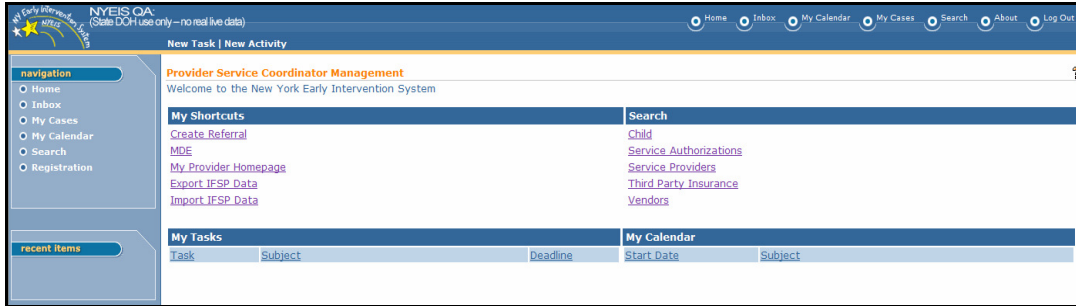
Rendering Provider Details

Rendering Provider Name:	Stanford, Betty	NPI:	65765876
State ID:		Address:	31 River rd Albany (Albany) New York 10001
Employer Name:	Toonces Academy	Employer NPI:	1239485799
Employer State ID:	1280	Employer Address:	1 Main Street Troy (Rensselaer) New York 10001

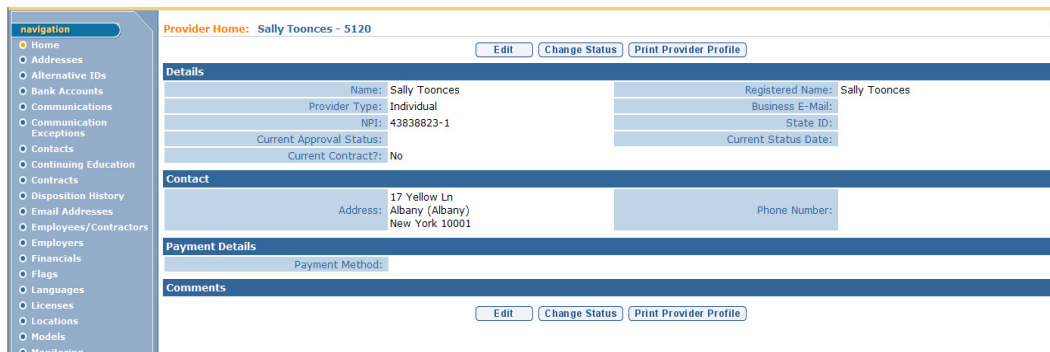
Agency Provider Employees

Action	Employer Name	Employee Name	NPI	State ID	Qualified Personnel
Select	Toonces Academy	Stanford, Betty	65765876		Physical Therapist
Select	Toonces Academy	Sally Toonces	43838823-1		Physical Therapist, Service Coordinator

- I log into NYEIS as Sally Toonces. Notice her User Homepage displays her user role (Provider Service Coordinator Management).
- Also notice her home page links. If Sally had a different user role, such as PROV_RenderProvStaff, there would be fewer links providing less access to NYEIS features.



- Sally clicks the My Provider Homepage link and sees that it is her provider home page, and not the home page of any agency that she is employed / contracted by. If, in her NYEIS user account, I had selected an agency name in the “Provider Name” field, the My Provider Homepage would be the agency’s home page, and not hers.



- Clicking on the My Cases link displays all children that Sally has been assigned as Service Coordinator for. Note: It does not display children that Sally has been assigned to render a service (such as Physical Therapy) on.

My Cases				
Case List				
Case Reference	Primary Client	Case Status	Case Status Date	Start Date
19728	Sheena Anderson	IFSP 12 Month Review Approved	8/9/2011	7/15/2010
91654	Sam Brown	Service Coordinator Assigned	7/22/2011	4/1/2011
46080	Kimberly Speed	Initial IFSP Submitted	10/12/2011	12/21/2010
61449	Kimberly Bonner	Service Coordinator Assigned	6/25/2011	3/29/2011

- In order to access the records of children that she has been assigned to render a service for, Sally performs a child search. She can search by name, or use the wildcard character (%) to list all children.

Appendix M

Child Search

Search Criteria

Reference Number:

Last Name: %

Date of Birth:

City:

SSN:

Mother's Last Name:

First Name:

Address Line 1:

Family Telephone Number:

Child Birth Last Name:

Father's Last Name:

Search Results (Number of Items: 4)

Reference Number	First Name	Last Name	Address Line 1	City	Date of Birth	Municipality
500037	Kim	Speed	81 Main Street	Albany	9/1/2009	Albany
500037	Kimberly	Speed	81 Main Street	Albany	9/1/2009	Albany
500396	Stan	Cooper	16 Woodbridge St	Albany	1/1/2011	Albany
500055	Tom	Tom	111 tom st	albany	1/1/2010	Albany

- Note that neither the PROV_ServiceCoordinator user role nor the PROV_RenderProvStaff user role is subscribed to Work Queues.

My Work Queues: Sally Toonces

Action	Name	Subscription Date	# of Tasks

- If the individual's NYEIS user account is not set up correctly, they will not be assignable as a Service Coordinator.
- Notice the Sally's NYEIS user account below is set up with a user role of PROV_RenderProvStaff (instead of PROV_ServiceCoordinator) and User Type of Provider (instead of Service Coordinator).

User Home: Sally Toonces

Contact Details

User Name: saltoon	Business Email:
Location: The State	Personal Phone:
Business Phone:	Personal Email:
Business Phone Extension: 1	Municipality: Statewide
Business Fax:	Geographic Area:
Business Mobile:	User Type: Provider
Business Pager:	Provider Name: Sally Toonces

Further Details

Default Printer: [Change]	Account Expiry Date:
Creation Date: 12/16/2010	Redirect Tasks To:
Role: PROV_RenderProvStaff	Login Failures: 0
Login Restrictions: No	Account Enabled: Yes Enable Disable
Sensitivity: 1	Password Expires:
Status: Active	Call Center User: No
User Homepage: EIS_Application_providerRenderingProviderHome	

Languages Spoken

Appendix M

- Notice that Sally's name does not appear in the list of selectable Service Coordinators when her user account is set up this way.

Assign Initial Service Coordinator

Save Cancel

Initial Service Coordinator

Name: _____

Service Coordination Details

Start Date: 6/13/2011 End Date: 7/28/2011

*Number of Units: 0

Comments

Service Coordinator Search

Show Search Criteria Cancel

Action	Name	Agency Name	Caseload
Select	Arnie Poolmer	Toonces Academy	0
Select	Cindy Smith	Toonces Academy	6
Select	Carol Fritz	Toonces Academy	0
Select	John Smith	Toonces Academy	3
Select	Jessica Harder	Toonces Academy	4
Select	Carol Fitz	Toonces Academy	1

Show Search Criteria Cancel

Scenario 2

User account is created for a Provider agency employee who conducts Evaluations but also provides general services (such as Nutrition related services). The goal is to set up the Agency employee’s NYEIS user account so she can 1) access the Evaluations tasks, 2) be assigned to general services, and 3) view/access all of their assigned children.

- The Agency employee’s user account is created. Notice the user role is PROV_Eval and the Provider Name is the agency (Growing Up Healthy) and not the individual rendering provider’s name.

User Home: Shirley Conroy

[Edit](#) [Delete](#) [Reactivate](#)

Contact Details	
User Name:	sconroy
Location:	The State
Business Phone:	
Business Phone Extension:	
Business Fax:	
Business Mobile:	
Business Pager:	
Business Email:	
Personal Phone:	
Personal Email:	
Municipality:	Statewide
Geographic Area:	
User Type:	Provider
Provider Name:	Growing Up Healthy

Further Details	
Default Printer:	[Change]
Creation Date:	4/7/2011
Role :	PROV_Eval
Login Restrictions:	No
Sensitivity:	1
Status:	Active
Account Expiry Date:	
Redirect Tasks To:	
Login Failures:	0
Account Enabled:	Yes Enable Disable
Password Expires:	
Call Center User:	No
User Homepage:	EIS_Application_providerEvaluationManagementHome

Languages Spoken

- You can see on the Agency’s Employee / Contractor page that the rendering provider’s name appears. This indicates that the employee has a QP (and associated license).
- Notice the State ID column. If Shirley was an SDOH approved Independent provider, a number would be displayed in that column field in her record. In this case it is blank meaning that Shirley is not SDOH approved.
- Notice also that Shirley is an active employee because there isn’t a date recorded in the “To Date” field. If a date is recorded, and the date is in the past, it essentially tells the system that the employee is not actively employed by the agency and thus should not be selectable for any services when the Agency is selected for a Service Authorization.

Employee/Contractor List: Growing Up Healthy - 11008

[Add](#) [Pending Employee List](#) [Service Coordinator Caseloads](#) [Non-Active Employees](#)

Action	Name	Profession/QP	Personnel Type	Service Coordinator	State ID	NPI	From Date	To Date
View Edit	Alexander, Jason		Employee	No		54657654	3/1/2011	
View Edit	Almeida, Tony	Physical Therapist	Employee	No		5645648458	6/17/2011	
View Edit	Ava Dennin	Registered Nurse	Contractor	No	11520	6547865657	4/8/2011	
View Edit	Ava Dennin	Occupational Therapist	Contractor	No	11520	6547865657	4/8/2011	
View Edit	Ava Dennin	Physical Therapist	Contractor	No	11520	6547865657	4/8/2011	
View Edit	Ava Dennin	Teacher of Students with Disabilities (Birth - Grade 2)	Contractor	No	11520	6547865657	4/8/2011	
View Edit	Conroy, Shirley	Physician Other Than Pediatrician	Employee	No		43875189	3/1/2011	

- You can see on the employee individual home page (I clicked the “View” link next to her name in the list above) that her QP is Physician other Than Physician. She will be selectable for any service that her QP is qualified to provide.
- Notice that the Current Approval Status field space is blank. This is also an indicator that Shirley is not a SDOH approved Independent provider. If she was, the field would display a status such as ‘Approved’.

Product Provider Employee Home: Conroy, Shirley - 11265 ?

Name	
Name:	Conroy, Shirley
Registered Name:	Conroy, Shirley
State ID:	

Status	
Current Approval Status:	
Current Status Date:	

E-mail Addresses					
Primary	Email Address	Type	From	To	Status

Locations			
Location Name	Start Date	End Date	Status
Conroy, Shirley Location	3/1/2011		Active

Professional Disciplines/Qualified Personnel		
Profession/QP	From Date	To Date
Physician Other Than Pediatrician	3/1/2011	

Special Populations		
Population Type	Intervention Strategy	Status

Restrictions				
Type	Municipality	From	To	Status

- I log into NYEIS as Shirley Conroy. Notice her User Homepage displays her user role (Provider Evaluation Management). Also notice her home page links are limited, like most Provider user roles.
- If Shirley was assigned a higher-level user role, such as PROV_All there would be more links providing greater access to NYEIS features.

Provider Evaluation Management ?

Welcome to the New York Early Intervention System

My Shortcuts		Search
Create Referral		Child
My Provider Homepage		

My Tasks		My Calendar	
Task	Subject	Deadline	Start Date

- Shirley clicks the My Provider Homepage link and see that it is her employer’s (i.e., Growing Up Healthy) agency home page, and not Shirley Conroy’s home page. If, in her NYEIS User Account, I had selected her name in the “Provider Name” field, the My Provider Homepage would be Shirley’s home page, and not her employer’s.

Provider Home: Growing Up Healthy - 11008 ?

[Edit](#) [Change Status](#) [Print Provider Profile](#)

Details			
Name:	Growing Up Healthy	Registered Name:	Growing Up Healthy
Provider Type:	Agency	Business E-Mail:	
NPI:	4354365	State ID:	11008
Current Approval Status:	Approved	Current Status Date:	3/1/2011
Current Contract?:	Yes		

Contact	
Address:	1800 Kindercare Lane Albany (Albany) New York 10001
Phone Number:	

Payment Details	
Payment Method:	Check

Comments	
Edit Change Status Print Provider Profile	

- Shirley clicks the Inbox link and then Work Queues link. These work queue’s pertain to the agency. How do I know? Notice the number 11008 that is included in the work queue name. This identifies the provider reference number that the work queue is associated with. 11008 is the reference number for Growing Up Healthy. How can I confirm that? Go back to the My Provider Homepage and look at the number and look at the number next to the agency name at the top of the page.

My Work Queues: Shirley Conroy ?

Action	Name	Subscription Date	# of Tasks
View Reserve Next Task	11008_Evaluations	4/7/2011 14:19	1

- Shirley clicks the 11008_Evaluations work queue “View” link. See a task in there for a MDE. If Shirley is the evaluator who will manage the MDE task (i.e., she is responsible for the data entry), she could reserve the task. Or she can leave it in the work queue and return to it at a later time. Most importantly, her user role of Prov_Eval and her association in her user account with the Agency (rather than herself) gives her access to the Agency’s Evaluations work queue, and the associated tasks that are allocated to that work queue.

Work Queue Tasks: 11008_Evaluations ?

Action	Task ID	Subject	Priority	Status	Deadline
Reserve	67081	A Multidisciplinary Evaluation has been assigned to Growing Up Healthy for Marty Brown		Open	

navigation

- Inbox
- Reserved Tasks
- Assigned Tasks
- Deferred Tasks
- Work Queues
- Notifications

- Next, we'll confirm that Shirley can be selected as a rendering on a SA. I log in as a MUNI EIOD and create a Service Authorization for Nutrition-Basic for one of my cases. I work through the SA creation wizard ...

Select Delivery Details ?

Nutrition - Basic

Delivery Details

Qualified Personnel: ^

- Audiologist
- Pediatrician
- Physician Other Than Pediatrician
- Physician Assistant
- Nurse Practitioner
- Registered Nurse
- Licensed Practical Nurse
- Certified Dietitian/Nutritionist (NYS or ADA)

*Location Type: v
Child's Home

Group Type: v

Service Intervention Methodology: v

If other than home or provider location please enter address

Address Line 1: Address Line 2:

Address Line 3: City:

State: v County: v

Zip: Census Tract:

- ... and eventually select the Provider Agency. I search for and select Growing Up Healthy. I want to assign Shirley Conroy as the rendering, but at this point I can only select the Agency.

Select Provider & Location ?

Nutrition - Basic

Search Criteria

Provider Name: NPI:

DBA Name: State Provider ID:

Special Population Served: v Municipality: v

Qualified Personnel Type: v City:

Language: v Zip:

Site:

Search Results (Number of Items: 1)

Action	Provider Name	State Provider ID	Site	Address Line 1	City
Select	Growing Up Healthy	11008	Growing Up Healthy Location	1800 Kindercare Lane	Albany

- I complete the Service Authorization by clicking Create Service Authorization button.

Create Service Authorization Prior Approval ?

Nutrition - Basic

Authorized Visits	
Child shall receive no more than X number of all types of service in one day: <input type="text" value="3"/>	Visits per day clinically appropriate for this SA must not exceed: <input type="text" value="1"/>

Make-Up Visits	
Make-Up Visits Allowed?: <input type="checkbox"/>	
Number of make-up visits: <input type="text"/>	
Per: <input type="text"/>	

Co-Visits	
Co-Visits Allowed?: <input type="checkbox"/>	
Number of co-visits: <input type="text"/>	
Per: <input type="text"/>	

Qualified Personnel for Co-Visits	
<ul style="list-style-type: none"> Audiologist Pediatrician Physician Other Than Pediatrician Physician Assistant Nurse Practitioner Registered Nurse Licensed Practical Nurse Certified Dietitian/Nutritionist (NYS or ADA) 	

- I can then assign the rendering provider (Shirley Conroy) if I want using the Change/Assign Rendering Provider button on the SA Homepage.
- Note that I could also not assign the rendering, and leave it to the Agency when they accept the SA.

NYEIS Integrated Case - 61697 Initial - 61700 Nutrition - Basic - 63750

Service Authorization Home: Nutrition - Basic - 63750 ?

Manage

Service Authorization Details

Service Authorization Reference:	63750	Service Type/Method:	Nutrition - Basic
Script Recommendation Provided By:	Physician	Script recommendation on file?:	Yes
Script Start Date:	3/15/2011	Script End Date:	
Service Coordinator:	Ken Ober	Date Authorization Issued:	4/7/2011
Status:	Approved	Accepted by Provider?:	No

Child Details

Child's Name:	Tabitha Clancy	Child's Reference Number:	500107
Legal Guardian(Female):	Molly Clancy	Legal Guardian(Male):	Jeffrey
Child's Address:	456 Gorge Lane Albany (Albany) New York 10001	Child's Phone:	518 344-9066

Provider & Location Details

Provider of Record:	Growing Up Healthy	NPI:	4354365
State ID:	11008	Provider Location:	Growing Up Healthy Location
Provider Location Address:	1800 Kindercare Lane Albany (Albany) New York 10001		

Rendering Provider Details

Rendering Provider Name:		NPI:	
State ID:		Employer NPI:	
Employer Name:		Employer Address:	

- Notice that the names of all QP's at the agency qualified to provide the service are listed when I click the button. I select Shirley as the rendering.

List Agency Provider Employees Nutrition - Basic - 63750

Assign Provider as Rendering Provider Cancel

Agency Provider Employees					
Action	Employer Name	Employee Name	NPI	State ID	License/Certification Number
Select	Growing Up Healthy	Conroy, Shirley	43875189		4356542
Select	Growing Up Healthy	Garden, Jennifer	43565735		43652

Assign Provider as Rendering Provider Cancel

- I now log into NYEIS as Shirley Conroy. I click the My Cases link. Notice no cases are listed. That's because I am not the Case Supervisor (that's the EIOD) or the Case Owner (that's the Service Coordinator). My Cases limits the display of cases to EIODs and Service Coordinators. Shirley conducts Evaluations so her My Cases page will be blank.

My Cases

Case Reference	Case Type	Primary Client	Start Date	Status

- Instead, I select the Search link to see all the children I am assigned to. I use the wildcard character (%) in the Last Name field. The results return only children who I am assigned to on an IFSP SA (these would be Kimberly Bonner and Tabitha Clancy). Tabitha is the child who we created the SA for in the steps above.
- Shirley would be unsuccessful if she tried to search for any children assigned to the agency for an Evaluation. The only method for viewing children and cases assigned to any agency for an Evaluation is through the agency's Evaluation work queue.



Child Search

Search Criteria						
Reference Number:	<input type="text"/>					
Last Name:	%	<input type="text"/>		First Name:	<input type="text"/>	
Date of Birth:	<input type="text"/>	<input type="text"/>		Address Line 1:	<input type="text"/>	
City:	<input type="text"/>			Family Telephone Number:	<input type="text"/>	
SSN:	<input type="text"/>			Child Birth Last Name:	<input type="text"/>	
Mother's Name:	<input type="text"/>					


Search Reset

Search Results (Number of Items: 3)						
Reference Number	First Name	Last Name	Address Line 1	City	Date of Birth	Municipality
500087	Marty	Brown	45 Tomson Ave	Albany	12/31/2008	Albany
500106	Kimberly	Bonner	3884 Third Ave	Albany	12/25/2010	Albany
500107	Tabitha	Clancy	456 Gorge Lane	Albany	3/1/2011	Albany

- Notice that when an employee of the same Agency who has a NYEIS user role of PROV_All conducts a Search using the wild card character in Last Name field that they will see all of the children who have been assigned to the agency for Service Coordination and services such as Physical Therapy. This illustrates how some roles have greater access to child records, and some less. PROV_All has the most access, PROV_Eval a bit less, and PROV_RenderProvStaff the least access. This is intentional.

 Child Search


Search Criteria

Reference Number:	<input type="text"/>		First Name:	<input type="text"/>
Last Name:	<input type="text" value="%"/>		Address Line 1:	<input type="text"/>
Date of Birth:	<input type="text"/> 		Family Telephone Number:	<input type="text"/>
City:	<input type="text"/>		Child Birth Last Name:	<input type="text"/>
SSN:	<input type="text"/>			
Mother's Name:	<input type="text"/>			

Search Results (Number of Items: 4)

Reference Number	First Name	Last Name	Address Line 1	City	Date of Birth	Municipality
500087	Marty	Brown	45 Tomson Ave	Albany	12/31/2008	Albany
500106	Kimberly	Bonner	3884 Third Ave	Albany	12/25/2010	Albany
500107	Tabitha	Clancy	456 Gorge Lane	Albany	3/1/2011	Albany
500007	Ian	Morse	99 Henry Street	Albany	1/5/2009	Albany

Scenario 3

User account is created for an Independent Contractor who is contracted with the Municipality to provide general services, and also contracts with a Provider Agency to provide similar services.

- Ava Dennin is an approved Independent Contractor. Her reference number is 11520.

Provider Home: Ava Dennin - 11520

[Edit](#) [Change Status](#) [Print Provider Profile](#)

Details

Name:	Ava Dennin	Registered Name:	Ava Dennin
Provider Type:	Individual	Business E-Mail:	adennin@email.com
NPI:		State ID:	11520
Current Approval Status:	Approved	Current Status Date:	4/7/2011
Current Contract?:	Yes		

Contact

Address:	54654 564654 (Albany) New York 44444	Phone Number:	
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Payment Details

Payment Method:	Check
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Comments

[Edit](#) [Change Status](#) [Print Provider Profile](#)

- She currently has a contract with Albany county to provider EI general services

Provider Service Contracts: Ava Dennin - 11520

[New](#)

Action	Type	From Date	To Date	Status	Contract Number	Municipality
View Edit	Standard	4/8/2011		Active	435654	Albany

- Ava also has a contract with another approved Agency, Growing Up Healthy. (Note that the screen shot below is the Employee/Contractor page for Growing Up Healthy).

Employee/Contractor List: Growing Up Healthy - 11008

[Add](#) [Pending Employee List](#)

Action	Name	Personnel Type	State ID	NPI	From Date	To Date
View Edit	Garden, Jennifer	Employee		435654	4/7/2011	
View Edit	Ava Dennin	Contractor	11520	6547865657	4/8/2011	
View Edit	Alexander, Jason	Employee		54654	3/1/2011	
View Edit	Conroy, Shirley	Employee		43875189	3/1/2011	
View Edit	Nellie Nash	Contractor	11264	8597557554	3/2/2011	
View Edit	Tess Schmidt	Contractor	7888	695949	3/15/2011	
View Edit	Johansen, Gwen	Employee			4/7/2011	

- Ava’s NYEIS user account was set up associating herself in the “Provider Name” field, and a user role of PROV_All. By setting up her account this way she will be subscribed Ava Dennin’s work queues rather than Growing Up Healthy’s work queues. Ava will receive Service Authorization tasks when Ava Dennin is selected as the Provider of Record in the SA.
- If she was associated with Growing Up Healthy in the Provider Name field she would be subscribed to Growing Up Healthy’s work queues. More importantly, if Ava Dennin is subsequently selected as the Provider of Record on an SA, the associated task will not be allocated to her work queues and she would not have the opportunity to Accept / Reject, or submit a claim for it later on.

User Home: [Ava Dennin](#) ?

Contact Details	
User Name:	adennin
Location:	The State
Business Phone:	
Business Phone Extension:	
Business Fax:	
Business Mobile:	
Business Pager:	
Business Email:	
Personal Phone:	
Personal Email:	
Municipality:	Statewide
Geographic Area:	
User Type:	Provider
Provider Name:	Ava Dennin

Further Details	
Default Printer:	[Change]
Creation Date:	4/8/2011
Role :	PROV_All
Login Restrictions:	No
Sensitivity:	1
Status:	Active
Account Expiry Date:	
Redirect Tasks To:	
Login Failures:	0
Account Enabled:	Yes Enable Disable
Password Expires:	
Call Center User:	No
User Homepage:	EIS_Application_providerUniversalHome

Languages Spoken	
<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Reactivate"/>	

- Ava logs into NYEIS. Her home page indicates her user role is PROV_All (see “Provider Program Management” at top of page).
- Her Home page links include fiscal (Invoicing) access. She will use those for all SA’s that she is assigned as Provider of Record.

Provider Program Management ?

Welcome to the New York Early Intervention System

My Shortcuts		Search	
Submit Referral		Child	
Create Invoice		Service Authorizations	
Submit Invoice		Invoices	
Upload 837 Invoice		Vendors	
Download Response Files		Provider Claims	
My Provider Homepage			

My Tasks			My Calendar	
Task	Subject	Deadline	Start Date	Subject

- Ava clicks the My Provider Homepage link and confirms that it's her home page.
- Notice that her Provider Reference number (11520) is listed at the top, next to her name.

Provider Home: Ava Dennin - 11520 ?

[Edit](#) [Change Status](#) [Print Provider Profile](#)

Details			
Name:	Ava Dennin	Registered Name:	Ava Dennin
Provider Type:	Individual	Business E-Mail:	adennin@email.com
NPI:	6547865657	State ID:	11520
Current Approval Status:	Approved	Current Status Date:	4/7/2011
Current Contract?:	No		

Contact	
Address:	54654 564654 (Albany) New York 44444
Phone Number:	

Payment Details	
Payment Method:	Check

Comments

[Edit](#) [Change Status](#) [Print Provider Profile](#)

- Ava clicks Inbox and then Work Queues. She is subscribed to the 4 standard Provider work queues.
- Notice the number before the work queue name ... 11520. That corresponds to her Provider Reference #.

My Work Queues: Ava Dennin ?

Action	Name	Subscription Date	# of Tasks
View Reserve Next Task	11520_Evaluations	4/8/2011 11:16	0
View Reserve Next Task	11520_Financials	4/8/2011 11:16	0
View Reserve Next Task	11520_General	4/8/2011 11:16	0
View Reserve Next Task	11520_ServiceAuthorizations	4/8/2011 11:16	0

- Now Ava is going to be assigned to a SA. Logged in as an EIOD, I add a Service Authorization to an IFSP. EIOD navigates through the SA wizard ...

Select Delivery Details ?

PT - Basic

Delivery Details	
Qualified Personnel:	<ul style="list-style-type: none"> Audiologist Pediatrician Physician Other Than Pediatrician Physician Assistant Nurse Practitioner Registered Nurse Licensed Practical Nurse Certified Dietitian/Nutritionist (NYS or ADA)
*Location Type:	Child's Home
Group Type:	
Service Intervention Methodology:	

If other than home or provider location please enter address

Address Line 1:		Address Line 2:	
Address Line 3:		City:	
State:		County:	
Zip:		Census Tract:	

- ... and selects Ava Dennin as the Provider of Record. EIOD completes the SA Wizard and approves it. The system creates the SA Accept / Reject task and allocates it to the Provider of Record's Service Authorizations work queue.

Select Provider & Location ?

PT - Basic

Search Criteria			
Provider Name:	dennin	NPI:	
DBA Name:		State Provider ID:	
Special Population Served:		Municipality:	
Qualified Personnel Type:		City:	
Language:		Zip:	
Site:			

Search Results (Number of Items: 1)					
Action	Provider Name	State Provider ID	Site	Address Line 1	City
Select	Ava Dennin	11520	Ava Dennin Location	54654	564654

- Log into NYEIS as Ava. She navigates to her Service Authorization work queue and manages the SA Accept / Reject task that was created above.

Work Queue Tasks: 11520_ServiceAuthorizations ?

Action	Task ID	Subject	Priority	Status	Deadline
Reserve	67336	Accept/Reject PT - Basic Service Authorization for Derek Stewart in Albany	Medium	Open	4/15/2011 11:23

- Ava clicks the Search link and uses wild card search in Last Name field. She sees the child that was assigned her in the SA created above.

Child Search ?

Search Criteria

Reference Number:	<input type="text"/>	First Name:	<input type="text"/>
Last Name: %	<input type="text"/>	Address Line 1:	<input type="text"/>
Date of Birth:	<input type="text"/>	Family Telephone Number:	<input type="text"/>
City:	<input type="text"/>	Child Birth Last Name:	<input type="text"/>
SSN:	<input type="text"/>		
Mother's Name:	<input type="text"/>		

Search Results (Number of Items: 1)

Reference Number	First Name	Last Name	Address Line 1	City	Date of Birth	Municipality
500109	Derek	Stewart	One State	Latham	1/1/2010	Albany

- Later on, after providing the service, Ava creates a claim to get paid using the Create Invoice link on her Homepage. She enters the SA # and sees her child. She proceeds to complete the claim.

Search Service Authorizations ?

Search Criteria

Child's Last Name:	<input type="text"/>	Child's First Name:	<input type="text"/>
Service Authorization Start Date:	<input type="text"/>	Service Authorization End Date:	<input type="text"/>
Service Authorization Number:	<input type="text" value="64003"/>		
Service Type:	<input type="text"/>		

Search Results (Number of Items: 1)

Action	Service Authorization Number	Child's Name	Service Type	Service Authorization Start Date	Service Authorization End Date	Status
View Select	64003	Derek Stewart	PT	3/31/2011	9/30/2011	Active

- Now we're going to create a SA and assign the agency (Growing Up Healthy) that Ava is contracted. The EIOD adds the Service Authorization using the wizard as before.

Select Delivery Details ?

PT - Extended

Delivery Details

Qualified Personnel:	Audiologist Pediatrician Physician Other Than Pediatrician Physician Assistant Nurse Practitioner Registered Nurse Licensed Practical Nurse Certified Dietitian/Nutritionist (NYS or ADA)
*Location Type:	Child's Home
Group Type:	
Service Intervention Methodology:	

If other than home or provider location please enter address

Address Line 1:		Address Line 2:	
Address Line 3:		City:	
State:		County:	
Zip:		Census Tract:	

- Instead of selecting Ava Dennin as the Provider of Record, EIOD selects Growing Up Healthy as the Provider of Record.

Select Provider & Location ?

PT - Extended

Search Criteria

Provider Name:	grow	NPI:	
DBA Name:		State Provider ID:	
Special Population Served:		Municipality:	
Qualified Personnel Type:		City:	
Language:		Zip:	
Site:			

Search Results (Number of Items: 1)

Action	Provider Name	State Provider ID	Site	Address Line 1	City
Select	Growing Up Healthy	11008	Growing Up Healthy Location	1800 Kindercare Lane	Albany

- After creating the SA, the EIOD has the option of selecting the Rendering Provider by clicking the Change/Assign Rendering Provider button on the SA Home page.

NYEIS Integrated Case - 40704 Initial - 54273 PT - Extended - 64004

Service Authorization Home: PT - Extended - 64004

Manage

[Edit](#) [Activate Online](#) [Close](#) [Suspend](#)
[Submit](#) [Delete](#) [Change Closure Details](#) [Unsuspend](#)
[Approve](#) [Extend](#)

Service Authorization Details

Service Authorization Reference:	64004	Service Type/Method:	PT - Extended
Script Recommendation Provided By:	Physician	Script recommendation on file?:	Yes
Script Start Date:	4/1/2011	Script End Date:	
Service Coordinator:	Ernie Kings	Date Authorization Issued:	
Status:	Submitted	Accepted by Provider?:	No

Child Details

Child's Name:	John King	Child's Reference Number:	500014999
Legal Guardian(Female):	Alice King	Legal Guardian(Male):	
Child's Address:	123 Main Street Albany (Albany) New York 12205	Child's Phone:	518 5551213

[Change/Assign Provider and Location](#)

Provider & Location Details

Provider of Record:	Growing Up Healthy	NPI:	4354365
State ID:	11008	Provider Location:	Growing Up Healthy Location
Provider Location Address:	1800 Kindercare Lane Albany (Albany) New York 10001		

[Change/Assign Rendering Provider](#)

Rendering Provider Details

Rendering Provider Name:		NPI:	
State ID:		Employer NPI:	

- All QP's employed/contracted by Growing Up Healthy that are qualified to provide the service are displayed. EIOD selects Ava, and approves the SA. The system creates the SA Accept / Reject task and allocates it to the Provider of Record's Service Authorizations work queue. In this scenario that would be Growing Up Healthy.

List Agency Provider Employees PT - Extended - 64004

[Assign Provider as Rendering Provider](#) [Cancel](#)

Agency Provider Employees

Action	Employer Name	Employee Name	NPI	State ID	License/Certification Number
Select	Growing Up Healthy	Ava Dennin	6547865657	11520	435367
Select	Growing Up Healthy	Nellie Nash	8597557554	11264	
Select	Growing Up Healthy	Tess Schmidt	695949	7888	

[Assign Provider as Rendering Provider](#) [Cancel](#)

- Log into NYEIS as Ava Dennin, and navigate to her Service Authorizations work queue. Notice the just created SA Accept / Reject task is not listed. That's because she is not the Provider of Record.

Work Queue Tasks: 11520_ServiceAuthorizations ?

Action	Task ID	Subject	Priority	Status	Deadline

- Still logged in as Ava. Clicks the Search link and uses wild card search in Last Name field. She sees all children that she has been assigned to, including the child assigned in the SA created above.
- This demonstrates some of the system security. She can search and see children she is assigned, regardless if she is the Provider of Record or the Rendering Provider. However, she will only receive tasks associated with cases that she is the Provider of Record for.

Child Search ?

Search Criteria

Reference Number:	<input type="text"/>	First Name:	<input type="text"/>
Last Name: %	<input type="text"/>	Address Line 1:	<input type="text"/>
Date of Birth:	<input type="text"/>	Family Telephone Number:	<input type="text"/>
City:	<input type="text"/>	Child Birth Last Name:	<input type="text"/>
SSN:	<input type="text"/>		
Mother's Name:	<input type="text"/>		

Search Results (Number of Items: 2)


Reference Number	First Name	Last Name	Address Line 1	City	Date of Birth	Municipality
500109	Derek	Stewart	One State	Latham	1/1/2010	Albany
500014	John	King	123 Main Street	Albany	6/30/2009	Albany

- Now logged into NYEIS as an employee of Growing Up Healthy with a PROV_All role. Navigate to the Growing Up Healthy Service Authorization work queue, and see the SA Accept / Reject task for the SA created above.

Work Queue Tasks: 11008_ServiceAuthorizations ?

Action	Task ID	Subject	Priority	Status	Deadline
Reserve	67337	Accept/Reject PT - Extended Service Authorization for John King in Albany	Medium	Open	4/15/2011 11:38
Reserve	67087	Accept/Reject Nutrition - Basic Service Authorization for Tabitha Clancy in Albany	Medium	Open	4/14/2011 17:13

- Still logged in as the PROV_All user. Clicks the Search link and uses wild card search in Last Name field. Sees all children that the Agency has been assigned to, including the child assigned in the SA created above.
- Contrast that with Ava's search results. She didn't see all of Growing Up Healthy's children, just the children she was assigned to.

Search Criteria	
Reference Number:	<input type="text"/>
Last Name:	% <input type="text"/>
Date of Birth:	<input type="text"/> 
City:	<input type="text"/>
SSN:	<input type="text"/>
Mother's Name:	<input type="text"/>
First Name:	<input type="text"/>
Address Line 1:	<input type="text"/>
Family Telephone Number:	<input type="text"/>
Child Birth Last Name:	<input type="text"/>

Search Results (Number of Items: 5)							
Reference Number	First Name	Last Name	Address Line 1	City	Date of Birth	Municipality	
500087	Marty	Brown	45 Tomson Ave	Albany	12/31/2008	Albany	
500106	Kimberly	Bonner	3884 Third Ave	Albany	12/25/2010	Albany	
500107	Tabitha	Clancy	456 Gorge Lane	Albany	3/1/2011	Albany	
500007	Ian	Morse	99 Henry Street	Albany	1/5/2009	Albany	
500014	John	King	123 Main Street	Albany	6/30/2009	Albany	

Appendix M

- Logged in as Ava. Notice what happens when she attempts to create a claim for the child that she is the Rendering Provider for. When she searches for the SA to complete the process, she cannot find it. That's because she is not the Provider of Record; Growing Up Healthy is.

Search Service Authorizations ?

Search Criteria

Child's Last Name:	<input type="text"/>	Child's First Name:	<input type="text"/>
Service Authorization Start Date:	<input type="text"/>	Service Authorization End Date:	<input type="text"/>
Service Authorization Number:	<input type="text" value="64004"/>		
Service Type: <input type="text"/>			

Search Results (Number of Items: 0)

Action	Service Authorization Number	Child's Name	Service Type	Service Authorization Start Date	Service Authorization End Date	Status
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- Logged into NYEIS as an employee of Growing Up Healthy with a PROV_All role. Create an invoice. Notice that I am successful in my search on the SA number; that's because my Agency is the Provider of Record.

Search Service Authorizations ?

Search Criteria

Child's Last Name:	<input type="text"/>	Child's First Name:	<input type="text"/>
Service Authorization Start Date:	<input type="text"/>	Service Authorization End Date:	<input type="text"/>
Service Authorization Number:	<input type="text" value="64004"/>		
Service Type: <input type="text"/>			

Search Results (Number of Items: 1)

Action	Service Authorization Number	Child's Name	Service Type	Service Authorization Start Date	Service Authorization End Date	Status
View Select	64004	John King	PT	2/9/2011	8/8/2011	Approved