# Unit 11: System Administration

Version 4.6



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Date	Release	Description
6/14/2016	4.6	Added new section for managing Announcements
10/15/2014	4.01	Added Edit Reason mgmt. section
5/13/2014	4.01	Added new steps for managing via Property Administration:
		Municipal claim denial reasons
		• The user roles authorized to Modify an 'Approved' MDE (Unsubmit MDE)
		• The earliest allowed 'Effective Start Date' for Case Reactivation
		• The User Roles that can reactivate a closed IFSP or SA
		<ul> <li>The User Roles that can perform edits on a reactivated IFSP or SA</li> </ul>
		<ul> <li>The User Roles that have 'EIO/D' Privileges</li> </ul>
6/4/2012	1.6	No changes
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6/28/2011	1.4	• Moved User Account Administration topic to Unit 10 – Municipal
		Administration.
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## **Document Revision History**

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## **System Administration**

#### **Unit Overview**

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

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

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

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

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#### SECURITY

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

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

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

#### **Creating Security Identifiers**

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

#### **Important Information**

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

- 1. Display Administration Home page.
- 2. Click <u>Code Tables</u> link from My Shortcuts section. Code Tables page displays.
- 3. Click Security from the Navigation Bar. Security Roles page displays.

Security Roles			
New P	New Publish		
Action	Role Name		
View	ADMINROLE		
View	CASEWORKERROLE		
View	DOH_AuditUnit		
View	DOH_BEI_All		
View	DOH_DataAnalysis		
View	DOH_FiscalMgr		
View	DOH_FiscalUnitStaff		
View	DOH_Mgmt		
<u>View</u>	DOH_OITPM		
<u>View</u>	DOH_ProgramMgr		
<u>View</u>	DOH_ProviderApproval		

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

Security Identifiers			
New SID New Function SID Publish			
Action	Name	Туре	
View   Edit	Activity.acceptInvitation	Function	
View   Edit	Activity.cancelInvitation	Function	
View   Edit	Activity.cancelRecurringOrganizationActivity	Function	
View   Edit	Activity.cancelRecurringUserActivity	Function	
View   Edit	Activity.cancelStandardOrganizationActivity	Function	
View   Edit	Activity.cancelStandardUserActivity	Function	
View   Edit	Activity.createRecurringOrganizationActivity	Function	
View   Edit	Activity.createRecurringUserActivity	Function	
View   Edit	Activity.createStandardOrganizationActivity	Function	
View   Edit	Activity.createStandardUserActivity	Function	
View   Edit	Activity.createUserActivityWithDefaults	Function	
View   Edit	Activity.inviteAttendeeToRecurringActivity	Function	

5. Click one of the following:

New SID button. Create Security ID page displays.

Create Security ID			
Details			
Name:			
Description:			
Туре:	Field •		
		Save Save & New Cancel	

#### Or

New Function SID button. Create Function ID page displays.

Create Function ID	2
Details	
Name:	
Description:	
Function:	<u>୍</u> କୁ କ
	Save Save & New Cancel

- 6. Enter information in the **Details** section by pressing the **Tab** key to move from field-to-field.
- 7. Click Save button. Security Identifiers page displays.

Or

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

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

#### Notes:

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

#### **Creating Security Groups**

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

- 1. Display Administration Home page.
- 2. Click <u>Code Tables</u> link from My Shortcuts section. Code Tables page displays.
- 3. Click Security from the Navigation Bar. Security Roles page displays.

Security Roles	Security Roles ?		
New P	New Publish		
Action	Role Name		
<u>View</u>	ADMINROLE		
View	CASEWORKERROLE		
View	DOH_AuditUnit		
<u>View</u>	DOH_BEI_All		
View	DOH_DataAnalysis		
View	DOH_FiscalMgr		
View	DOH_FiscalUnitStaff		
View	DOH_Mgmt		
View	DOH_OITPM		
View	DOH_ProgramMgr		
View	DOH_ProviderApproval		
View	DOH_ProviderMonitoring		

Exception Currently not available to Muni User roles. 4. Click **Security Groups** from the Navigation Bar. **Security Groups** page displays.

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

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

Create Security Group			
Details			
Name:			
Description			
	Save Save & New Cancel		

- 6. Enter information in the **Details** and **Description** sections.
- 7. Click **Save** button. **Security Groups** page displays. *Click Save & New button to save current group and create a new group.*

Security Groups 2			
New Publish	)		
Action	Name	Description	
View   Edit	ADMINGROUP		
<u>View</u>   <u>Edit</u>	BASESECURITYGROUP	A group that is assigned the minimum set of security identifiers required to operate the Curam application.	
View   Edit	CASE_AppealAll	CRUD Access to Appeals (Mediations/Impartial Hearings)	
View   Edit	CASE_AppealView	View Only Access to Appeals (Impartial Hearings/Mediations)	
View   Edit	CASE_CFR_All	CRUD Access to County of Fiscal Responsibility	
View   Edit	CASE_CFR_View	View Only Access to County of Fiscal Responsibility	
View   Edit	CASE_CaseOnlyAll	CRUD Access to Case Only	
View   Edit	CASE_CaseOnlyView	View Only Access to Case	
View   Edit	CASE_CommunicationAll	CRUD Access to Communications (Both case/participant)	
View   Edit	CASE_CommunicationView	View Only Access to Communications	
View   Edit	CASE_EligibilityAll	CRUD Access to EI Eligibility Decision	
View   Edit	CASE_EligibilityView	View Only Access to EI Eligibility Decision	
View   Edit	CASE_ImpartialHearingView	View ONly Access to Impartial Hearings. Note:CASE_Appeals has both Impartial Hearings and Mediations	

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

View Secur	ity Group: Test for Training	?	
		Add Identifier Delete Close	
Details			
	Name: Test for Training	Description: MK testing Admin section	
Security Identifiers in the group			
Action	Security Identifiers	Туре	
		Add Identifier Delete Close	

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

Add Security Identifier To: Test for Training

Security Group Identifiers	
Activity.acceptInvitation	
Activity.cancelInvitation	(=)
Activity.cancelRecurringOrganizationActivity	
Activity.cancelRecurringUserActivity	
Activity.cancelStandardOrganizationActivity	
Activity.cancelStandardUserActivity	
Activity.createRecurringOrganizationActivity	
Activity.createRecurringUserActivity	
Activity.createStandardOrganizationActivity	
Activity.createStandardUserActivity	-

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

new securi	ty Group: Test for Training	
	(Add Identifier) Dele	te Close
)etails		
	Name: Test for Training	Description: MK testing Admin section
ecurity Id	entifiers in the group	
ction	Security Identifiers	Туре
<u>lemove</u>	Activity.acceptInvitation	Function
temove	Activity.cancelRecurringOrganizationActivity	Function
temove	Activity.cancelStandardUserActivity	Function
lemove	Activity.createStandardOrganizationActivity	Function
lemove	Activity.inviteAttendeeToRecurringActivity	Function
lemove	Activity.modifyRecurringUserActivity	Function
emove	Activity.modifyStandardUserActivity	Function

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

Remove Security Identifier From: Test for Training	
Are you sure you want to remove this security identifier?	
	Yes No
Are you sure you want to remove this security identifier.	Yes No

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

View Securi	ty Group: Test for Training		
		Add Identifier         Delete         Close	
Details			
	Name: Test for Training	Description: MK testing Admin section	n
Security Id	entifiers in the group		
Action	Security Identifiers	Туре	
Remove	Activity.modifyRecurringUserActivity	Functio	n
Remove	Activity.modifyStandardUserActivity	Functio	n
		Add Identifier Delete Close	

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

View Securit	y Group: Test for Training	?
		Add Identifier Delete Close
Details		
	Name: Test for Training	Description: MK testing Admin section
Security Ide	ntifiers in the group	
Action	Security Identifiers	Туре
		Add Identifier Delete Close

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

#### Notes:

- To display Group detail, click <u>View</u> link under Action column from the Security Groups page. Apply necessary changes.
- To edit the name or description of the Security Group, click <u>Edit</u> link under Action column from the Security Groups page.
- In order for the Security Group to become active in the System, the User *must* click the **Publish** button as defined in the steps above.

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

#### **Creating Security Roles**

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

- 1. Display Administration Home page.
- 2. Click <u>Code Tables</u> link from My Shortcuts section. Code Tables page displays.
- 3. Click Security from the Navigation Bar. Security Roles page displays.

Security Roles	;
New	Publish
Action	Role Name
View	ADMINROLE
<u>View</u>	CASEWORKERROLE
<u>View</u>	DOH_AuditUnit
View	DOH_BEI_All
View	DOH_DataAnalysis
View	DOH_FiscalMgr
View	DOH_FiscalUnitStaff
View	DOH_Mgmt
View	DOH_OITPM
View	DOH_ProgramMgr
View	DOH_ProviderApproval
<u>View</u>	DOH_ProviderMonitoring

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

Create Security Role	
Details	
Role Name:	
	Save Save & New Cancel

- 5. Type information in Role Name in Details sections.
- 6. Click **Save** button. **Security Roles** page displays. *Click Save & New button to save current role and create another new role.*

Security R	toles	2
New	Publish	
Action	Role Name	
View	ADMINROLE	
View	CASEWORKERROLE	
View	DOH_AuditUnit	
View	DOH_BEI_All	
View	DOH_DataAnalysis	
View	DOH_FiscalMgr	
<u>View</u>	DOH_FiscalUnitStaff	
View	DOH_Mgmt	
View	DOH_OITPM	
View	DOH_ProgramMgr	
View	DOH_ProviderApproval	
View	DOH_ProviderMonitoring	
<u>View</u>	DOH_SystemComplaint	
<u>View</u>	DOH_TA	
<u>View</u>	FISCALROLE	
<u>View</u>	MK Test	

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

View Secur	ity Role		
		Add Group Delete Close	
Details			
Role Nar	me: MK Test [Change]		
Groups In	Role		
Action	Role Name	Description	
		Add Group Delete Close	

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

Add Security Group to: MK Test				
Security Role Groups				
ADMINGROUP BASESECURITYGROUP CASE_AppealAll CASE_AppealView CASE_CFR_All	(E)			
	Save Close			

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

View Securi	ty Role	
		Add Group Delete Close
Details		
Role Nam	e: MK Test [Change]	
Groups In F	tole	
Action	Role Name	Description
Remove	BASESECURITYGROUP	A group that is assigned the minimum set of security identifiers required to operate the Curam application.
Remove	CASE_AppealView	View Only Access to Appeals (Impartial Hearings/Mediations)
Remove	CASE_CaseOnlyAll	CRUD Access to Case Only
Remove	CASE_CaseOnlyView	View Only Access to Case
		Add Group Delete Close

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

Remove	Group From S	ecurity Role	CASE_Case	OnlyAll		
Are you	sure you want	to remove thi	s group from th	ne security role	?	
				(	Yes	No

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

View Secur	ity Role	
		Add Group Delete Close
Details		
Role Nan	ne: MK Test [Change]	
Groups In I	Role	
Action	Role Name	Description
Remove	CASE_CaseOnlyView	View Only Access to Case
		Add Group Delete Close

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

Security Role	ioles	2
New	Publish	
Action	Role Name	
View	ADMINROLE	
View	CASEWORKERROLE	
<u>View</u>	DOH_AuditUnit	
<u>View</u>	DOH_BEI_All	
<u>View</u>	DOH_DataAnalysis	
View	DOH_FiscalMgr	
View	DOH_FiscalUnitStaff	

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

#### Notes:

- To display Role detail, click <u>View</u> link under Action column from the Security Roles page. Apply necessary changes.
- In order for the Security Role to become active in the System, the User *must* click the **Publish** button as defined in the steps above.

### **USER ACCOUNT ADMINISTRATION**

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

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

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

## **CODE TABLES**

My Tasks

Subject

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

**Important Information** 

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

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

<b>Exception</b>	Viewing/Editing Code Table Items					
Currently not						
available to all NYEIS User	1 1. Display Administration Home page.					
roles.	DOH Admin		2			
	Welcome to the New York Early Intervention System					
	My Shortcuts	Search				
	Registration	User				
	Create User	List ICD9				
	Templates	Search Durable Medical Equipment				
	Rate Tables					
	Code Tables					
	Surveys					
	Banks					
	Work Queues					

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

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

#### 3. Click <u>View</u> link under Action column. View Code Table page displays.

View Code	iew Code Table: APPLICATION_CODE						
New Item Delete Close							
Details							
		Name: APPLICATION_CODE [Change]		Default Code: De	faultApp [Change]		
Code Table Items							
Action	<u>Code</u>	Description	Annotation	<u>Selectable</u>	Language	Sort Order	
View   Edit	ADMINAPP	Application_administrationHome		Yes	English	0	
View   Edit	ATRISK	EIS_Application_atRiskHome		Yes	English	0	
View   Edit	DOHADMIN	EIS_Application_dohAdminHome		Yes	English	0	
View   Edit	DOHAUDIT	EIS_Application_dohAuditHome		Yes	English	0	
View   Edit	DOHBEI	EIS_Application_dohBEIHome		Yes	English	0	
View   Edit	DOHDATA	EIS_Application_dohDataAnalysisHome		Yes	English	0	

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

Modify Code Table Item: APPLICATION_CODE						
Details						
Code:	ADMINAPP	Selectable:				
Description:	Application_administrationHome	Language:	English -			
Annotation:		Sort Order:	0			
	Save	Cancel				

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

#### **Important Information**

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

- Code field is the name of Code Table Item that is stored in the System database when that Code Table Item is selected in a drop down field.
- **Description** field is the actual text that will display in the drop down for the Code Table Item.

- Annotation field is free text space for adding notes on a Code Table Item.
- Selectable field identifies if a Code Table Item is displayed in the drop down list on User pages. Items that are set to No are not displayed in drop down values. This allows Code Table Items to be deactivated but still maintain their history in the System.
- **Changuage** field defines User's language.
- Sort Order field allows a User to set a number to the order of the displayed item in the drop down.
- 6. Click **Save** button. *Click Cancel button to cancel operation and return to previous page*. **View Code Table** page displays with saved changes.
- 7. Click Close button. Code Tables page displays.

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

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

Exception Currently not available to all NYEIS User roles.

#### Adding Code Table Items

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

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

#### 3. Click <u>View</u> link under Action column. View Code Table page displays.

View Code 1	iew Code Table: APPLICATION_CODE					a		
	New Item Delete Close							
Details								
		Name: APPLICATION_CODE [Change]		Default Code: De	efaultApp [Change]			
Code Table	Items							
Action	<u>Code</u>	Description	Annotation	<u>Selectable</u>	Language	Sort Order		
View   Edit	ADMINAPP	Application_administrationHome		Yes	English	0		
View   Edit	ATRISK	EIS_Application_atRiskHome		Yes	English	0		
View   Edit	DOHADMIN	EIS_Application_dohAdminHome		Yes	English	0		
View   Edit	DOHAUDIT	EIS_Application_dohAuditHome		Yes	English	0		
View   Edit	DOHBEI	EIS_Application_dohBEIHome		Yes	English	0		
<u>View</u>   <u>Edit</u>	DOHDATA	EIS_Application_dohDataAnalysisHome		Yes	English	0		

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

Create Code Table	e Item: APPLICATI	ON_CODE					9
Code Table Item	Details						
	*Code:						
	*Description:						
	Annotation:						
	Selectable:						
	Language:	English -					
	Sort Order:	0					
			Save Save	& New Cancel			
Code Table Items							
<u>Code</u>	Description			Annotation	Selectable	<u>Language</u>	Sort Order
ADMINAPP	Application_ac	IministrationHome			Yes	English	0
ATRISK	EIS_Applicatio	n_atRiskHome			Yes	English	0
DOHADMIN	EIS_Applicatio	n_dohAdminHome			Yes	English	0
DOHAUDIT	EIS_Applicatio	n_dohAuditHome			Yes	English	0
DOHBEI	EIS_Applicatio	n_dohBEIHome			Yes	English	0
DOHDATA EIS_Application_dohDataAnalysisHome			Yes	English	0		
DOHDUEPROC				Yes	English	0	
DOHFISCAL EIS Application dohFiscalHome			Yes	English	0		
DOHMGMT	EIS_Applicatio	n_dohManagement	tHome		Yes	English	0
DOHOITPM	EIS_Applicatio	n_dohOITPMHome			Yes	English	0

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

#### **Important Information**

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

- Code field is the name of Code Table Item that is stored in the System database when that Code Table Item is selected in a drop down field.
- **Description** field is the actual text that will display in the drop down for the Code Table Item.
- Annotation field is free text space for adding notes on a Code Table Item.
- Selectable field identifies if a Code Table Item is displayed in the drop down list on User pages. Items that are set to No are not displayed in drop down values. This allows Code Table Items to be deactivated but still maintain their history in the System.
- **Changuage** field defines User's language.
- Sort Order field allows a User to set a number to the order of the displayed item to in the drop down.
- Click Save button to save new Code Table Item. Click Cancel button to cancel operation and return to previous page. View Code Table page displays. Or

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

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

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

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

## **RATE TABLES**

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

Exception Currently not available to all NYEIS User roles. Viewing Rate Tables

- 1. Display Administration Home page.
- 2. Click **<u>Rate Tables</u>** link from **My Shortcuts**. **Rate Tables** page displays.

Rate Tables		?
New		
Action	Name	
View	CPT Rate Table	
<u>View</u> <u>View</u> <u>View</u>	Voucher Rate Table	
View	Products Rate Table	

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

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

4. Click <u>View</u> link under Action column to view table. View Rate Table page displays.

View Rate Table: CPT Rate Table	7
	Edit Delete Close
Details	
Effective Date: 1/1/2007	Rate Table Type: CPT Rate Table
Rate Table	
	Statewide
90804 - Ind	iv psychotherapy, office/outpt, 20-30 min 100.0
90805 - Indiv psy	chotherapy, office/outpt, 20-30 min w med eval 200.0
90806 - Ind	iv psychotherapy, office/outpt, 45-50 min 150.0
90807 - Indiv psy	chotherapy, office/outpt, 45-50 min w med eval 150.0
90808 - Ind	iv psychotherapy, office/outpt, 75-80 min 200.0
90809 - Indiv psy	chotherapy, office/outpt, 75-80 min w med eval 100.0
90810 - Indiv psy	chotherapy, non-verbal, office/outpt, 20-30 min 100.0
90811 - Indiv psychothe	rapy, non-verbal, office/outpt, 20-30 min w med eval 100.0
90813 - Indiv psychothe	erapy, non-verbal, office/outpt,45-50 min w med eval 100.0
	chotherapy, non-verbal, office/outpt, 75-80 min 100.0
	rapy, non-verbal, office/outpt, 75-80 min w med eval 100.0

5. Review details of Rate Table.

- 6. Click **Close** button. **Rate Table** page displays. Click **Close** button. **Rate Tables** page displays.
- 7. Click Home from the Menu Bar. Administration Home page displays.

<b>Exception</b>	Editing Rate Tables
Currently not	
available to all NYEIS User	Only the State can edit a Rate Table.
roles.	
	1. Display Administration Home page.

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

Rate Tables		?
New		
Action	Name	
<u>View</u>	CPT Rate Table	
View	Voucher Rate Table	
View	Products Rate Table	

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

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

4. Click <u>Edit</u> link under Action column to view table. Modify Rate Table page displays.

Modify Rate Table: CP1	Rate Table			
Edit Header Close				
Details				
Effective (	Date: 12/10/2008	Rate	Table Type: CPT Rate Table	
Comments				
Rate Table				
			<u>Statewide</u>	
	_ 🗈 🗈		•	
		. 🛨 🗗	•	

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

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

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

Modify Cell Data	
Details	
Min:	
Max:	
Value:	90.0
	Save Cancel

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

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

Modify Rate Table Header: C	PT Rate Table				2
Details					ſ
Effective Date:	1/1/2007	<b>Ø</b>	Rate Table Type:	CPT Rate Table	
Status:	Active				
Comments					1
CPT Rate Table for Claiming to	Commercial Insurance				*
					-
		Save	Cancel		

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

#### **Important Information**

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

- 8. Click **Save** button. *Click Cancel button to cancel operation and return to previous page*. **Modify Rate Table** page displays.
- 9. Click Close button. Rate Table page displays. Click Close button. Rate Tables page displays.
- 10. Click **Home** from the Menu Bar. **Administration Home** page displays.

Exception Currently not available to all NYEIS User roles.

#### Cloning Rate Tables

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

changing. Cloning Rate Tables is used when a retroactive rate adjustment is required.

- 1. Display Administration Home page.
- 2. Click <u>Rate Tables</u> link from My Shortcuts. Rate Tables page displays.
- 3. Click <u>View</u> link under Action column. Rate Table page displays.

Rate Tables		?
New		
Action	Name	
View	CPT Rate Table	
<u>View</u> <u>View</u>	Voucher Rate Table	
View	Products Rate Table	

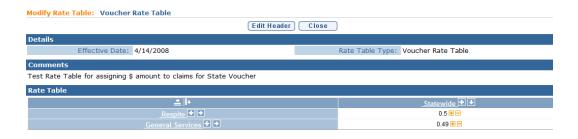
4. Click <u>Clone</u> link under Action column. Clone Rate Table page displays.

Clone Rate	Table							
Details								
	Effective Date:	4/1/2008	Ø			Rate Table Type:	Voucher Rate Table	
Comments								
Rate Table	for assigning \$ amo	ount to claims for	State Voucher					
				Save	Cancel			

- 5. Change **Effective Date** field in the **Details** section with the date the new Rate goes into effect. Edit **Comments**.
- 6. Click **Save** button. *Click Cancel button to cancel operation and return to previous page*. **Rate Table** page displays with cloned table listed.

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

- 7. Review Effective Date and Status column for cloned version.
- 8. Click the <u>Edit</u> link for the Cloned table. Modify Rate Table page displays.



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

Moully Cell Data	
Details	
Min:	
Max:	
Value:	0.5
	Save Cancel

- 10. Type revised amount in the Value field. Click Save button. Modify Rate Table page displays. Continue making any additional changes.
- 11. Click **Close** button. **Rate Table** page displays with a list of Rate Tables that are effective dated for the current Rate Table Cloned.

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

12. Click Close button. Rate Tables page displays.

Madific Call Data

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

#### **DURABLE MEDICAL EQUIPMENT TABLE**

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

#### **Searching Durable Medical Equipment**

- 1. Display Administration Home page.
- 2. Click <u>Search Durable Medical Equipment</u> link from Search section. Search Durable Medical Equipment page displays.

Search Du	rable Medical Equipm	ient			?
New	)				
Search Cr	iteria				í l
		DME Code:			
		DME Description:			
		DME Category:			•
		DME Subcategory:			•
		DME Status:			•
			Search Reset		
Search Re	sults				
Action	DME Code	DME Desc	ription	DME Status	

- 3. Type known Durable Medical Equipment data in Search Criteria section.
- 4. Click **Search** button. Records matching entered data display in **Search Results** section. Examine displayed records to determine if a matching DME record is listed. *To search again, click Reset button.*

	Search Reset					
Search Resu	ults (Numb	er of Items: 156)				
Action	<u>DME</u> <u>Code</u>	DME_Description	<u>DME</u> Status			
View Edit	E0944	Pelvic belt/harness/boot (limited to wheelchair 4-point padded belt)	Active			
View Edit	E0951	Heel loop/holder, any type, with or without ankle strap, each	Active			
View Edit	E0952	Toe loop/holder, any type, each	Active			
View Edit	E0955	Wheelchair accessory, headrest, cushioned, any type, including fixed mounting hardware, each	Active			
View   Edit	E0956	Wheelchair accessory, lateral trunk or hip support, any type, including fixed mounting hardware, each (up to 4 supports/prompts)	Active			
View Edit	E0957	Wheelchair accessory, medial thigh support, any type, including fixed mounting hardware, each	Active			
View Edit	E0958	Manual wheelchair accessory, one-arm drive attachment, each	Active			
View Edit	E0960	Wheelchair accessory, shoulder harness/straps or chest strap, including any type mounting hardware (includes padding)	Active			
View Edit	E0961	Manual wheelchair accessory, wheel lock brake extension (handle), each	Active			
View Edit	E0966	Manual wheelchair accessory, headrest extension, each	Active			
View Edit	E0967	Manual wheelchair accessory, hand rim with projections, any type, each	Active			
View Edit	E0971	Manual wheelchair accessory, anti-tipping device, each	Active			
View Edit	E0973	Wheelchair accessory, adjustable height, detachable armrest, complete assembly, each	Active			

- 5. To view or edit a DME Code from the Search Results list:
  - a. View Select the <u>View</u> link under the Action column for the DME Code to view. View DME page displays. Click Close button when finished viewing. Search Durable Medical Equipment page displays.
  - b. Edit Click <u>Edit</u> link. Modify DME page displays. Apply necessary changes. Click Save button. Search Durable Medical Equipment page displays.
- 6. Click **Home** from the Menu Bar. **Administration Home** page displays.

#### **Important Information**

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

#### **ICD CODES**

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

#### **Searching ICD Codes**

- 1. Display Administration Home page.
- 2. Click List ICD9 link from Search section. List ICD search page displays.

List ICD				
New				
Select an ICD	Category			
		Category: CENTRAL NERVOUS S	YSTEM (CNS) ABNORMALITIES	
		Category Ch	Reset	
Search Result	s			
Action	ICD Code	ICD Description	Start Date	Primary ICD?

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

List ICD				۵
New				
Select an ICD C	ategory			
		Category: Digestive System Diseases 🗸 🗸		
		Search Reset		
Search Results	(Number of Items:	656)		
Action	ICD Code	ICD Description	Start Date	EI Eligible ICD?
View Edit	792.10	792.10 - Abn find-stool contents	1/1/2000	No
View Edit	792.40	792.40 - Abn findings-saliva	1/1/2000	No
View Edit	793.30	793.30 - Nonsp abn fd-bilry tract	1/1/2000	No
View Edit	793.40	793.40 - Nonsp abn find-gi tract	1/1/2000	No
View Edit	793.60	793.60 - Nonsp abn fnd-abdom area	1/1/2000	No
View Edit	794.80	794.80 - Abn liver function study	1/1/2000	No
<u>View</u> Edit	551.30	551.30 - Diaphragm hernia w gangr	1/1/2000	No
<u>View</u> Edit	552.00	552.00 - Unil femoral hern w obst	1/1/2000	No
<u>View</u> Edit	552.01	552.01 - Rec unil fem hern w obst	1/1/2000	No
<u>View</u> Edit	552.02	552.02 - Bil femoral hern w obstr	1/1/2000	No
<u>View</u> Edit	552.03	552.03 - Rec bil fem hern w obstr	1/1/2000	No
<u>View</u> Edit	552.10	552.10 - Umbilical hernia w obstr	1/1/2000	No
<u>View</u> Edit	552.20	552.20 - Obstr ventral hernia NOS	1/1/2000	No
<u>View</u> Edit	552.21	552.21 - Obstr incisional hernia	1/1/2000	No
<u>View</u> Edit	552.29	552.29 - Obstr ventral hernia NEC	1/1/2000	No
<u>View</u> Edit	552.30	552.30 - Diaphragm hernia w obstr	1/1/2000	No

- 5. To view or edit an ICD Code from Search Results:
  - a. View Select the <u>View</u> link under the Action column for the ICD Code to view. View ICD page displays. Click Close button when finished viewing. List ICD page displays.

List ICD					2
New					
Select an ICD	Category				
	Category:	Blood Diseases	-		
		Search Reset			
Search Result	ts			- 10 M	
Action	ICD Code ICD D	escription	Start Date	EI Eligible ICD?	

- b. Edit Click Edit link. Modify ICD page displays. Apply necessary changes. Click Save button. List ICD page displays.
- 6. Click Home from the Menu Bar. Administration Home page displays.

#### **Important Information**

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

## SURVEYS

#### **Important Note:**

This functionality is not currently active

## TEMPLATES

Exception Currently not available to Muni User roles.

#### Adding a Template to the System

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

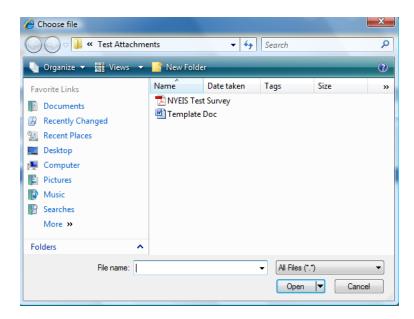
- 1. Display Administration Home page.
- 2. Click <u>Templates</u> link from My Shortcuts section. MS Word Templates page displays.

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

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

			Save Save & New	Cancel		
e Details						
*Template Document ID:					*Name:	
Category:	Case	•				
*File:			Browse			
mments						

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



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

Create MS Word Template			?
	Save Save 8	& New Cancel	
File Details			
*Template Document ID:	MK Test	*Name:	MK Test Template
Category:	Case 🔻		
*File:	Test Attachments\Templat Browse		
Comments			
			*
			+
	Save Save 8	& New Cancel	

- 6. Type information in the **Comments** section.
- 7. Click **Save** button. Template is saved. **MS Word Templates** page displays with new template.

#### Notes:

- Be sure to select **Category** (**Participant** or **Case**) from **File Details** section. If **Participant** is selected, the template is available as a Communication for a Provider or Child. If **Case** is selected, the template is available as a Communication for an Integrated Case, IFSP or SA.
- To cancel operation and not save changes, click **Cancel** button from the **Create MS Word Template** page.
- To view Template information, click <u>View</u> link under Action column from the MS Word Template page. MS Word Template page displays. Click Delete button to remove template and set Status to Canceled.
- To edit template information, click <u>Edit</u> link under Action column from the **MS Word Template** page.

#### BANKS

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

#### **Important Information**

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

1. Display Administration Home page.

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

Banks		
New		
Action	Name	Status
View   Edit	Citizens Bank	Active
View   Edit	Downtown Bank	Canceled
View   Edit	Evergreen Bank	Canceled
View   Edit	First Mortgage	Canceled
View   Edit	First National Bank	Active
View   Edit	Midway Savings Bank	Active
<u>View</u>   <u>Edit</u>	Midway Trustee Bank	Active

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

Create Bank						
		Save	Save	& New Cancel		
Bank Details						
*Name:			]	Website:		
*Start Date:	4/14/2009	٥		End Date:	<b>(</b> )	
		Save	Save	& New Cancel		

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

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

Or

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

#### Notes:

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

#### **Creating a Bank Branch**

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

#### **Important Information**

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

- 1. Display Administration Home page.
- 2. Click **<u>Banks</u>** link from **My Shortcuts** section. **Banks** page displays.

Banks		
New		
Action	Name	<u>Status</u>
View   Edit	Citizens Bank	Active
View   Edit	Downtown Bank	Canceled
View   Edit	Evergreen Bank	Canceled
View   Edit	First Mortgage	Canceled
View   Edit	First National Bank	Active
View   Edit	Midway Savings Bank	Active
View   Edit	Midway Trustee Bank	Active

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

navigation 💽	Bank Home: MK Bank of Albany					
• Home • Bank Branches	<b>E dit Delete</b>					
	Bank Details					
	Name:	MK Bank of Albany	Website:			
	Start Date:	10/19/2009	End Date:			
	Bank Status:	Open	Status:	Active		
recent items		Edit	Delete			
• Albany First Bank						

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

Bank Branches: MK E	Bank of USA			
New				
Action	Name	Sort Code	Status	

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

		Save Save 8	k New Cancel	
tails				
Bank Name:	MK Bank of USA		*Branch Name:	
*Start Date:	4/14/2009	<i>(</i> )	End Date:	<i>(</i> )
*Sort Code:				
dress				
Apt/Suite:			Address Line 2:	
Address Line 3:			City:	
State:		•	County:	
Zip:			Census Tract:	
one Number				
Country Code:			Area Code:	
Number:		]	Ext:	
x Number				
Country Code:			Area Code:	
Number:				
omments		- -		
minents				

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



Address for the Bank Branch *must* be entered.

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

Or

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

#### Notes:

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

#### **PROPERTY ADMINISTRATION - CUSTOM PARAMETERS**

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

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

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

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

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

1. Display DOH\_OITPM Home Page

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

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

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

navigation	Properties					
Security	Options					
Templates Batch	Add Property		Publish Changes	Reset D	efaults	
Batch Rate Tables	Filter Criteria					
Rules Editor Property Administration		Locale: English	*	Category:	Application - Custom application parame	eters
			Search Reset			
Gathering Durable Medical	Properties (Number	of Items: 6)		12		
	Action	Category	Display Name	Value		Locale
Surveys ICD	ViewlEdit	Application - Custom application parameters	curam.custom.nyeis.listDenialReasonsForMuniReject	IDR23, IDR24, IDR25, II	DR26,IDR27,IDR28	Englis
	View / Edit	Application - Custom application parameters	curam.custom.nyeis.listRolesCanModeifyApprovedMDE	MUNI_ProgramUserAc	dmin,MUNI_ProgramDataEntry,SUPERROLE	Englis
	View   Edit	Application - Custom application parameters	curam.custom.nyeis.preventReActivationDate	20100101		Englis
ant items	View IEsht	Application - Custom application parameters	curam.custom.nyeis.hasReActivationPrivileges	MUNI_ProgramUserAd	dmin,SUPERROLE,DOH_OITPM	Englis
	View l Edit	Application - Custom application parameters	curam.custom.nyeis.hasEditAfterReActivationPrivileges	MUNI_ProgramUserAd	dmin	Englis
	ViewlEdit	Application - Custom application parameters	curam.custom.nyeis.hasEIODPrivileges	MUNI ProgramUserAd	dmin, SUPERROLE	Englis

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

State DOHU	A∵ se only – no real (we data)		🕑 Home 🕑 Inbox 🔍 My Calendar	🕐 My Cales: 🔍 Search 🔍 About 🔍 Log
avigation	Edit Property			
	Details			-
	Property Name:	curam.custom.nyeis.listDenialReasonsForMuniReje	Type:	String Type •
cent items	Value:	IDR23, IDR24, IDR25, IDR26, IDR27, IDR28	Dynamic :	8
	Category:	Application - Custom application parameters *	Default Value:	IDR23, IDR24, IDR25, IDR26, IDR27, IDR28
		Save	ncel	

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

NYEIS QA	i only – no real ive data)			🔍 Home 🔍 Inbex 🔍 My Calendar	O My Cases O Search O	Absue 🔮 Log O
navigation	Properties					
	Options					
	Add Description					
	Details					
recent items		Property Name:	curam.custom.nyeis.listDenialReasonsForMuniReject	Type:	String Type	
	and the second se	Value:	IDR23, IDR24, IDR25, IDR26, IDR27, IDR28	Dynamic:	No	
		Category:	Application - Custom application parameters	Default Value:	IDR23,IDR24,IDR25,IDR26,ID	R27, IDR28
	Property Descript	tion				
	Action	Display Name		Description		Locale
	EditIDelete	curam.custom.r	nyeis.listDenialReasonsForMuniReject	Comma-delimited list of Denial Reasons for t	he Muni to select	English
			Edit Delete	Close		

religation (1)	Properties				
	Options		10.0		
Templates Batch	Add Property		Publish Changes	Reset Defaults	
Rate Tables	Filter Criteria		and the second		
Rules Editor Property Administration		Locale:	•	Category:	
Intelligent Evidence	1		Search Rese		
Gathering Durable Medical	Properties	90			310
Equipment	Action	Category	Display Name	Value	Locale



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

				Properties
	Reset Defaults	Publish Changes		Add Property
				Filter Criteria
	Category:	•	Locale:	estration
		Search Reset		ence
22		and the second	9	Properties
Locale	Value	Display Name	Category	Action
Locale	 Value		Category	ence Properties

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

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

#### 1. Display DOH\_OITPM Home Page

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

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

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

navigation     Code Tables	Properties					9
Security	Options					
) Templates ) Batch	Add Property		Publish Changes	Reset D	efaults	
	Filter Criteria					
Rules Editor		Locale: English	•	Category:	Application - Custom application parame	eters •
Property Administration Intelligent Evidence			Search Reset			
Gathering Durable Medical	Properties (Number	of Items: 6)		-		
	Action	Category	Display Name	Value	3	Locale
Surveys ICD	View IEdit	Application - Custom application parameters	curam.custom.nyeis.listDenialReasonsForMuniReject	IDR23, IDR24, IDR25, I	DR26,IDR27,IDR28	Englis
	View / Edit	Application - Custom application parameters	curam.custom.nyeis.listRolesCanModeifyApprovedMDE	MUNI_ProgramUserA	dmin,MUNI_ProgramDataEntry,SUPERROLE	English
	View   Edit	Application - Custom application parameters	curam.custom.nyeis.preventReActivationDate	20100101		English
icent items	View I Edit	Application - Custom application parameters	curam.custom.nyeis.hasReActivationPrivileges	MUNI_ProgramUserAd	dmin,SUPERROLE,DOH_OITPM	English
	MewlEdit	Application - Custom application parameters	curam.custom.nyeis.hasEditAfterReActivationPrivilege	s MUNI_ProgramUserAd	dmin	Englist
	ViewTEdit	Application - Custom application parameters	curam.custom.nyeis.hasEIODPrivileges	MUNI_ProgramUserA	dmin,SUPERROLE	Englist

 Click <u>Edit</u> link corresponding to the parameter with Display Name: curam.custom.nyeis.listRolesCanModeifyApprovedMDE [sic]. Edit Property page displays.

NYEIS O	vA: see onty−no real ive data)		🔍 Hame 🔍 Johan 🔍 My Calendar	🔍 My Casaes 🔍 Search 🔍 Absae 🔍 Lag Cur
navigation	Edit Property			1
	Details			
	Property Name:	curam.custom.nyeis.listRolesCanModeifyApproved	Type:	String Type
recent Items	Value:	MUNI_ProgramUserAdmin,MUNI_ProgramDataEntr	Dynamic:	
	Category:	Application - Custom application parameters •	Default Value:	MUNI_ProgramUserAdmin,MUNI_ProgramDataE
		Save Ca	ncel	

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

NYEIS OF	∿ s only – no real live data)			O Home O Inbex	O My Calendar O My Cases O Search O	About 🕑 Log Out
navigation	Properties					
	Options					
	Add Description	ii.				
	Details					
recent items	Pro	perty Name:	curam.custom.nyeis.listRolesCanModeifyApprovedMDE	Type:	String Type	
		Value:	MUNI_ProgramUserAdmin,MUNI_ProgramDataEntry,SUPERROLE	Dynamic:	No	
		Category:	Application - Custom application parameters	Default Value:	MUNI_ProgramUserAdmin,MUNI_ProgramDa	taEntry, SUPERROL
	Property Descript	tion				
	Action	Disp	lay Name	Description		Locale
	EditIDelete	cur	am.custom.nyeis.listRolesCanModeifyApprovedMDE	Comma-delimited list of roles	who can modify the approved MDE.	English
	NAME TACKNESS	Cu	Edit Dek		me cerimenty are approved neet	

Code Tables	Properties				
Security	Options				
Templates Batch	Add Property		Publish Changes	Reset Defaults	
Rate Tables	Filter Criteria		and the second		
Rules Editor Property Administration		Locale:	•	Category:	
Intelligent Evidence			Search Reset		
	Properties	96	and the second	45	S.R. 1
Equipment	Action	Category	Display Name	Value	Locale
Surveys					



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

nigation 💽	Properties				
	Options		10.0		
remplates Batch	Add Property		Publish Changes	Reset Defaults	
	Filter Criteria				
tules Editor Property Administration		Locale:	•	Category:	
Intelligent Evidence	1.		Search Reset		
Gathering Durable Medical	Properties		and the second		SAC 1991
	Action	Category	Display Name	Value	Locale

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

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

1. Display DOH\_OITPM Home Page

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

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

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

navigation	Properties					
Security	Options					
Templates Batch	Add Property		Publish Changes	Reset D	efaults	
Batch Rate Tables	Filter Criteria					
Rules Editor Property Administration		Locale: English	*	Category:	Application - Custom application parame	eters
			Search Reset			
Gathering Durable Medical	Properties (Number	of Items: 6)		12		
	Action	Category	Display Name	Value		Locale
Surveys ICD	ViewlEdit	Application - Custom application parameters	curam.custom.nyeis.listDenialReasonsForMuniReject	IDR23, IDR24, IDR25, II	DR26,IDR27,IDR28	Englis
	View / Edit	Application - Custom application parameters	curam.custom.nyeis.listRolesCanModeifyApprovedMDE	MUNI_ProgramUserAc	dmin,MUNI_ProgramDataEntry,SUPERROLE	Englis
	View   Edit	Application - Custom application parameters	curam.custom.nyeis.preventReActivationDate	20100101		Englis
ant items	View IEsht	Application - Custom application parameters	curam.custom.nyeis.hasReActivationPrivileges	MUNI_ProgramUserAd	dmin,SUPERROLE,DOH_OITPM	Englis
	View l Edit	Application - Custom application parameters	curam.custom.nyeis.hasEditAfterReActivationPrivileges	MUNI_ProgramUserAd	dmin	Englis
	ViewlEdit	Application - Custom application parameters	curam.custom.nyeis.hasEIODPrivileges	MUNI ProgramUserAd	dmin, SUPERROLE	Englis

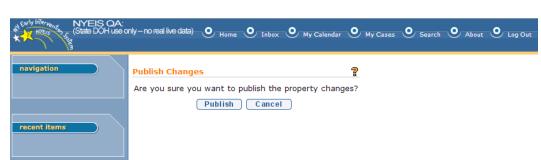
5. Click <u>Edit</u> link corresponding to the parameter with Display Name: curam.custom.nyeis.preventReActivationDate. Edit Property page displays.

State DOH use o	nty – no real live data)		💽 Home 🕑 Inbox 🔍 My Calendar 🤤	My Casees 🥥 Search 🔍 About 🔍 Log Out
avigation	Edit Property			1
	Details			
	Property Name:	curam.custom.nyeiis.preventReActivationDate	Type:	String Type
cent items	Value:	20100101	Dynamic:	8
	Category:	Application - Custom application parameters •	Default Value:	20100101

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

NVEIS OA	only – no real ive data)		🕐 Home 🕐 Inbox 🕐 My Calendar	🕑 му Санат 🥥	Search 🕐 About 🕐 Log Out
navigation	Properties				7
	Options				
12 12	Add Description				
Francisco State	Details				
recent items		Property Name: curam.custom.nyeis.preventReActivationDate	Type:	String Type	
		Value: 20100101	Dynamic:	No	
		Category: Application - Custom application parameters	Default Value:	20100101	
	Property Descript	ion			
	Action	Display Name		Description	Locale
	EditIDelete	curam.custom.nyeis.preventReActivationDate			English
		Edit Delete	Close		

ala)		🔍 Hame 🔍 Islan 🔍 My Calendar 🔍 My Ca	ses 🔮 Search 🔮 About 🔮 Lay G
erty	Publish Changes	Reset Defaults	
ria -			
Locale:	•	Category:	
CONTRACTOR OF	Search Reset		
	and the second	21N	All Control of Control
Category	Display Name	Value	Locale
-	rty in Locales	rty Publish Changes In Locales . Search Reset	rty Publish Changes Pesst Perfaults



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

navigation  Properties O Code Tables						
Batch	ublish Changes	set Defaults				
Rate Tables Filter Criteria Rates Editor Locale:	• Category:					
Intelligent Evidence Gathering	Search Reset					
Durable Hedical Properties Learneint Action Category Serverys	Display.Name	Value Locale				
109						

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

- 1. Display **DOH\_OITPM Home** Page
- 2. Click <u>Code Tables</u> link from My Shortcuts section. Code Tables page displays.
- 3. Click <u>Property Administration</u> from Left-Hand Navigation section. Properties Page displays
- From Locale drop-down, select English. From <u>Category</u> drop-down, select Application Custom application parameters. Click <u>Search</u>. Results populate page:

navigation	Properties					1			
Security	Options								
1 Templates	Add Property		Publish Changes	Reset D	efaults				
Batch     Rate Tables	Filter Criteria								
		Locale: English	<b>T</b>	Category:	Application - Custom application parame	aters .			
Property Administration     Intelligent Evidence		Search Reset							
Gathering Durable Medical	Properties (Number	of Items: 6)		73					
	Action	Category	Display Name	Value	3	Locale			
Surveys ICD	View  Edit	Application - Custom application parameters	curam.custom.nyeis.listDenialReasonsForMuniReject	IDR23, IDR24, IDR25, I	DR26,IDR27,IDR28	Englis			
	View / Edit	Application - Custom application parameters	curam.custom.nyeis.listRolesCanModeifyApprovedMDE	MUNI_ProgramUserA	dmin,MUNI_ProgramDataEntry,SUPERROLE	Englis			
	View   Edit	Application - Custom application parameters	curam.custom.nyeis.preventReActivationDate	20100101		Englist			
icent items	View IEsht	Application - Custom application parameters	curam.custom.nyeis.hasReActivationPrivileges	MUNI_ProgramUserAd	dmin,SUPERROLE,DOH_OITPM	Englist			
	View lEdit	Application - Custom application parameters	curam.custom.nyeis.hasEditAfterReActivationPrivilege	MUNI_ProgramUserA	dmin	Englist			
	ViewlEdit	Application - Custom application parameters	curam.custom.nyeis.hasEIODPrivileges	MUNI ProgramUserA	dmin, SUPERROLE	Englis			

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

NYEIS OA: NYEIS OA: (State DOH use of State State S	nly – no real live data)	O Home O Inbox O M	Ny Calendar 🔮 My Cases 🔮	Search O About O Log Out
navigation	Edit Property			?
	Details			
	Property Name:	curam.custom.nyeis.hasEditAfterReActivationPriv	Type:	String Type 🔹
recent items	Value:	MUNI_ProgramUserAdmin	Dynamic:	
	Category:	Application - Custom application parameters 🔻	Default Value:	MUNI_ProgramUserAdmin
		Save Cancel		

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

NYEIS OA: (State DOH use o	nly – no real live data)	O Home	O Inbox O My Calence	iar O My Cases O	Search O About	t 🕑 Log Out
navigation	Properties					2
	Options					
	Add Description					
	Details					
recent items	Property Na	e: curam.custom.nyeis.hasEditAfterReAc	tivationPrivileges	Type:	String Type	
	Val	e: MUNI_ProgramUserAdmin		Dynamic:	No	
	Catego	y: Application - Custom application para	meters	Default Value:	MUNI_ProgramU	serAdmin
	Property Descripti	n				
	Action	isplay Name			Description	Locale
	Edit   Delete	curam.custom.nyeis.hasEditAfterReActiva	ationPrivileges			English
		<b>E dit</b>	Delete Close			





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

O Code Tables O Security Options O Encuders 2 Add Property 2 Publish Changes 2 Reset 1 O Batch O Batch Tables Filter Criteria	
Batch	
	Defaults
D Rules Editor Category: Category:	
Dintelligent Evidence Search Reset	
Gathering Durable Medical Properties	
Equipment Action Category Display Name Value	Locale
Surveys	
O TED	

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

1. Display DOH\_OITPM Home Page

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

3. Click <u>Property Administration</u> from Left-Hand Navigation section. Properties Page displays 4. From <u>Locale</u> drop-down, select **English.** From <u>Category</u> drop-down, select **Application** - **Custom application parameters.** Click <u>Search.</u> Results populate page:

navigation	Properties				
Code Tables	Options				
	Add Property		Publish Changes	Reset Defaults	_
Batch     Rate Tables	Filter Criteria				
		Locale: English	•	Category: Application - Custom application param	eters
Property Administration Intelligent Evidence			Search Reset		
Gathering Ourable Hedical Equipment	Properties (Number	of Items: 6)		7	_
	Action	Category	Display Name	Value	Local
) Surveys ) ICD	View IEdit	Application - Custom application parameters	curam.custom.nyeis.listDenialReasonsForMuniReject	IDR23,IDR24,IDR25,IDR26,IDR27,IDR28	Engli
	View I Edit	Application - Custom application parameters	curam.custom.nyeis.listRolesCanModeifyApprovedMDE	MUNI_ProgramUserAdmin,MUNI_ProgramDataEntry,SUPERROLE	Engli
	View   Edit	Application - Custom application parameters	curam.custom.nyeis.preventReActivationDate	20100101	Engli
recent items	View  Edit	Application - Custom application parameters	curam.custom.nyeis.hasReActivationPrivileges	MUNI_ProgramUserAdmin,SUPERROLE,DOH_OITPM	Engle
	MewlEdit	Application - Custom application parameters	curam.custom.nyeis.hasEditAfterReActivationPrivileges	MUNI_ProgramUserAdmin	Engli
	View IEdit	Application - Custom application parameters	curam.custom.nyeis.hasEIODPrivileges	MUNI_ProgramUserAdmin, SUPERROLE	Engl

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

NYEIS OA: With With State DOH use o	nly – no real live data)	O Home O Inbox O My Calendar O M	Ay Cases 🧿 Sear	ch 🧿 About 🧕 Log Out
navigation	Edit Property Details			?
		curam.custom.nyeis.hasReActivationPrivileges	Type:	String Type 🔻
recent items	Value:	MUNI_ProgramUserAdmin,SUPERROLE,DOH_OITPN	Dynamic:	
	Category:	Application - Custom application parameters 🔻	Default Value:	MUNI_ProgramUserAdmin
		Save Cancel		

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

NYEIS OA: (State DOH use o	only – no real live data)	O Home O Inb	ox 🕚 My Calenda	r O My Cases	• Search •	About O Log Out
navigation	Properties					?
	Options	Options				
	Add Description	1				
	Details					
recent items	Property Name:	curam.custom.nyeis.hasReActivationPrivileges	Type:	String Type		
	Value:	MUNI_ProgramUserAdmin,SUPERROLE,DOH_OITPM	Dynamic:	No		
	Category:	Application - Custom application parameters	Default Value:	MUNI_Program	UserAdmin,SUPE	RROLE, DOH_OITPM
	Property Descrip	tion				
	Action	Display Name			Description	Locale
	Edit Delete	curam.custom.nyeis.hasReActivationPrivileges				English
		E dit D ele	te Close	)		





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

State DOH use of	niy – no real ive data)		O 14	me 🔍 Inhex 🔍 My Calendar 🔍 My Cases 🔾	🕑 Smarch 🔍 About 🔍 Logi
avigation (3)	Properties				
Security	Options				
	Add Property		Publish Changes	Reset Defaults	
latch late Tables	Filter Criteria				
		Locale:	•	Category:	
roperty Administration				100 CONTRACTOR 100	
telligent Evidence			Search Res	et	
urable Medical guipment	Properties			in Maller	
inveys	Action	Category	Display Name	Value	Locale
int items					

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

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

- 1. Display DOH\_OITPM Home Page
- 2. Click <u>Code Tables</u> link from My Shortcuts section. Code Tables page displays.

- 3. Click <u>Property Administration</u> from Left-Hand Navigation section. Properties Page displays
- From Locale drop-down, select English. From <u>Category</u> drop-down, select Application Custom application parameters. Click <u>Search.</u> Results populate page:

State DOHuse	onty – no real live data)		O Hine	🗴 Inhox 🔍 My Calendar 🔍 My Cases 🔍 Search 🔍 About 🝳	/ Log Out
navigation	Properties				1
Security	Options				
Templates     A Batch	Add Property		Publish Changes	Reset Defaults	
Rate Tables	Filter Criteria				
Rules Editor     Property Administration		Locale: English	<b>T</b>	Category: Application - Custom application parame	eters 🔻
Intelligent Evidence			[Search ] Reset		
Gathering	Properties (Number	of Items: 6)		9 — · · · · · · · · · · · · · · · · · ·	
Equipment	Action	Category	Display Name	Value	Locale
Surveys     ICD	<u>View lEdit</u>	Application - Custom application parameters	curam.custom.nyeis.listDenialReasonsForMuniReject	IDR23, IDR24, IDR25, IDR26, IDR27, IDR28	English
	View / Edit	Application - Custom application parameters	curam.custom.nyeis.listRolesCanModeifyApprovedMDE	MUNI_ProgramUserAdmin,MUNI_ProgramDataEntry,SUPERROLE	English
	View IEdit	Application - Custom application parameters	curam.custom.nyeis.preventReActivationDate	20100101	English
recent items	View   Edit	Application - Custom application parameters	curam.custom.nyeis.hasReActivationPrivileges	MUNI_ProgramUserAdmin,SUPERROLE,DOH_OITPM	English
	View / Edit	Application - Custom application parameters	curam.custom.nyeis.hasEditAfterReActivationPrivileges	MUNI_ProgramUserAdmin	English
	View IEdit	Application - Custom application parameters	curam.custom.nyeis.hasEIODPrivileges	MUNI_ProgramUserAdmin, SUPERROLE	English

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

NYEIS OA	only – no real live data)		🕑 Home 🔮 Inbox 🔮 My Colendar 🛛	O My Cases O Search O About O Logo
navigation	Edit Property			
	Details			
	Property Name:	curam.custom.nyeis.hasEt00Privileges	Туре:	String Type
ecent items	Value:	MUNI_ProgramUserAdmin,SUPERROLE	Dynamic:	0
and the second	Category	Application - Custom application parameters	Default Value:	MUNI_ProgramUserAdmin,SUPERROLE

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

2.1	vA: se only – no real live data)				🔍 Hama 🔍 Inbox 🔍 My	Calendar 🕑 My Casea	C Learch C About C
gation	Properties						7
	Options						
	Add Description						
	Details						
nt items		Property Name:	curam.custom.nyeis.hasEIOD	Privileges	Type:	String Type	
		Value:	MUNI_ProgramUserAdmin,SUP	ERROLE	Dynamic:	No	
		Category:	Application - Custom applicat	ion parameters	Default Value:	MUNI_ProgramUserAd	min, SUPERROLE
	Property Description	1					
	Action	Display Name		Description			Locale
	EditIDelete	curam.custom.m	yeis.hasEIODPrivileges	Comma-delimited lis	t of roles who have EIOD like p	rivileges.	English





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

code Tables	Properties				
	Options				
Templates Batch	Add Property		Publish Changes	Reset Defaults	
Rate Tables	Filter Criteria				
		Locale:	•	Category:	
Property Administration Intelligent Evidence			Search Rese	1	
Gathering Durable Medical	Properties		Sec. 24013		
	Action	Category	Display Name	Value	Locale
Surveys co					

#### 'Reason for Edit' Codes and their associated descriptions:

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

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

The Edit reason codes have to be unique

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

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

The Edit reason codes can be logically deleted (set to inactive so the

user will no longer be able to select a "logically deleted" reason)

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

Current list of Selectable Edit Reasons, an	nd their associated codes:
---	----------------------------

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

# To Access the 'Reason for Edit' code table:

1 – From DOH\_OITPM 'Home' page, select 'Code Tables:

WEIS DA	welopment	0	My Calendar O My Cases O Search O About O Lag Out
en ) /	New Task   New Activity		
navigation	DOH OITPM Welcome to the New York Early Intervention System		7
Hy Cases	My Shortcuts	Search	
Hy Calendar     Search	Registration	User	95
Registration	Reporta	Child	
Sector Sector Sector	Claim Funding	Service Authorizations	
	Rate Tables	Service Providers	
8	Code Tables	Invoices	
Contraction of the second	Templates	Payments Received	
recent items	Unsolicited Adjustments	Payments Issued	
	Greate User Surveys	Vouchers Third Party Insurance	
L	Banks	Liability Claims	
	Work Oueues	Vendors	
	Reports	Third Party Insurance Batch	
	Provider Application	Referral Sources	
	Print Provider Profiles	Provider Claims	
	Print, Vendor, Profiles	Einancial Paymenta	
	Generate Mailing Labels	Provider Application	
	Supervisor Metrics	Suspended Accounts	
	Manage Terms And Conditions	At Risk Surveillance	
	Company and the second second second second	List ICD9	
		Search Durable Medical Equipment	
	My Tasks	My Calendar	
	Task Subject	Deadine Start Date Subject	

#### 2- Page: 'Code Tables' displays:

WEIS Dev	elopment					O Huma O labor O My Calandar O My Casas O Saarch O Abact O Log Cal
navigation •	Code Tal	bles			7	
Code Tables     Security	New	Publish				
Templates	Action	Table Name	Default Value	Last Modified		
fiatch	Minter	APPLICATION_CODE [Change]	DefaultApp	8/17/2009 10:33		
Rate Tables	View	AcceptanceStatus [Change]		8/17/2009 10:33		
Rules Editor	Man	ActionPageNameCode [Change]	APN1	8/17/2009 10:33		
Property     Administration	YERK	ActivityAttendeeType [Change]	RL9	8/17/2009 10:33		
Intelligent Evidence	Minw	ActivityCategory [Change]		8/17/2009 10:33		
	Mistor	ActivityClientType [Change]	RL1	8/17/2009 10:33		
Durable Hedical     Equipment	Merec	ActivityLevel (Change)		8/17/2009 10:33		
e surveys	Minor	ActivityPriority [Change]	AP2	8/17/2009 10:33		
• IED	View	ActivityStatus [Change]		8/17/2009 10:33		
	MHON	ActivityTimeStatus [Change]	ATS2	8/17/2009 10:33		
	Mitter	ActivityType [Change]	AT100	8/17/2009 10:33		
	View	AddressCountry [Change]	US	8/17/2009 10:33		

3- Click 'View' link corresponding to Table name 'EIS\_ReasonForEditing':

View	EIS_ProviderType [Change]		8/17/2009 10:33	
View	EIS_ReActivationReason [Change]		1/1/2014 00:00	
Minow	EIS_ReasonForEditing [Change]		1/1/2014 00:00	
Minim	EIS_RebillStatus [Change]		8/17/2009 10:33	
View	EIS_ReferralReason [Change]		8/17/2009 10:33	
View	EIS_ReferralSource [Change]		8/17/2009 10:33	
Minor	EIS_ReferralStatusCode [Change]		8/17/2009 10:33	
View	EIS_ReferralSubmitStatus [Change]	0	8/17/2009 10:33	
View	EIS_ReferralType [Change]		8/17/2009 10:33	
Minux	EIS_ReportConfiguration [Change]	RC01	8/17/2009 10:33	
Minor	EIS_ReportProtocol [Change]		8/17/2009 10:33	
Mienv	EIS_RereferralStatus [Change]		6/27/2011 17:36	
View	EIS_RespiteReason [Change]		12/17/2012 13:54	
a diama	Etc. BassitsCandearWise [Channel]		8/17/2000 10:22	

				te Close			
D	etails			· · · · · · · · · · · · · · · · · · ·	- <sup>0.40</sup>		
			Name: EIS_ReasonForEditing [Cha	ingel		Default Code: [Change]	
and the second se	ode Table Iten						
A	ction	Code	Description	Annotation	Selectable	Language	Sort Ord
X	ien: I Edit	CRRE01	Adding Service Authorization Previously Not Recorded to reflect services actually delivered		Yes	English	1
¥	iew I Edit	CRRE02	SA Service Type incorrect, add SA to reflect correct service type for services actually agreed to, authorized and delivered		Yes	English	2
x	iew 1 Edit	CRRE03	Correction to service dates to reflect actual dates of service delivery agreed to, authorized and delivered		Yes	English	з
¥	iew I Edit	CRRE04	Correction to service frequency to reflect actual frequency of services agreed to, authorized and delivered		Yes	English	4
У	iew I Edit	CRRE05	Addition of co-visits to reflect co-visits that were agreed to, authorized and delivered		Yes	English	5
¥	iew   Edit	CRRE06	Addition of make-up visits to reflect make-up visits that were agreed to authorized and delivered		Yes	English	6
У	iew I Edit	CRRE07	Correction of Qualified Personnel agreed to, and authorized to deliver services		Ves	English	8
×	iew I Edit	CRRE08	Correction of Qualified Personnel agreed to and authorized to participate in co- visits		Yes	English	9
x	iew I Edit	CRRE09	Amendment to Child's Level of Functioning		Yes	English	10
м	isze i Edit	CRRE10	Amendment to Child's Outcomes		Yes	English	11
У	iaw I Edit	CRRE11	Amendment to Child's Natural Environment		Yes	English	12
ж	iew I Edit	CRRE12	Other IFSP demographic correction/addition/change (must provide detailed information in comments)		Yes	English	13
ж	iew I Edit	CRRE13	Other SA correction/change (must provide detailed information in comments)		Yes	English	14
x	Sew   Edit	CRRE14	Adding or Changing Provider of Record		Yes	English	7

#### 4 – Page: 'View Code Table: EIS\_ReasonForEditing' displays:

# Adding new Edit reasons for selection in 'Reason for Editing'

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

1 – Click 'New Item' Button located at the top of 'EIS\_ReasonForEditing':

rigation	View Code Table	View Code Yable: EIS_ReasonForEditing  New Item  Delate  Close								
	Details				- Tata - C					
			Name: EIS_ReasonForEditing [Cha	ogel		Default Code: [Change]				
ent items	Code Table Iter	ns								
	Action	Code	Description	Annetation	Selectable	Language	Sort Order			
	View I Edit	CRRE01	Adding Service Authorization Previously Not Recorded to reflect services actually delivered		Yes	English	1			
	View I Edit	CRRE02	SA Service Type incorrect, add SA to reflect correct service type for services actually agreed to, authorized and delivered		Yes	English	2			
	View 1 Edit	CRREDO	Correction to service dates to reflect actual dates of service delivery agreed to, authorized and delivered		Yes	English	3			
	View I Edit	CRRE04	Correction to service frequency to reflect actual frequency of services agreed to, authorized and delivered		Yes	English	4			
	View   Edit	CRRE05	Addition of co-visits to reflect co-visits that were agreed to, authorized and delivered		Yes	English	5			
	View I Edit	CRRE06	Addition of make-up visits to reflect make-up visits that were agreed to authorized and delivered		Yes	English	6			
	View 1 Edit	CRRE07	Correction of Qualified Personnel agreed to, and authorized to deliver services		Yes	English	8			
	View I Edit	CRRE08	Correction of Qualified Personnel agreed to and authorized to participate in co- visits		Yes	English	9			
	View I Edit	CRRE09	Amendment to Child's Level of Functioning		Yes	English	10			
	View I Edit	CRRE10	Amendment to Child's Outcomes		Yes	English	11			
	View I Edit	CRRE11	Amendment to Child's Natural Environment		Yes	English	12			
	View I Edit	CRRE12	Other IFSP demographic correction/addition/change (must provide detailed information in comments)		Yes	English	13			
	View I Edit	CRRE13	Other SA correction/change (must provide detailed information in comments)		Yes	English	14			
	Miese I Edit	CRRE14	Adding or Changing Provider of Record		Yes	English	7			

2 – Page: 'Create Code Table Item' displays:

NYESD	welopment			🔍 Home 🔍 Inher 🔍 My Caland	г 🔍 Му Санаа 🔍 (	Search 🔍 Abeat 🔮
ation	Create Code Table I	Item: EIS_ReasonForEditi	ng			
	Code Table Item De	etails				
	-	Codec	CREE15			
	S					
titems		Description:	4.01 Test adding a new Edit Reason			
		Annotation:				
		Selectable:	8			
		Language:	English •			
		Sort Order:	14			
			Save Save & Nev	w Cancel		
	Code Table Items		Save Save Save 6 New			
	Code Table Items	Description	Annotation	Selectable	Language	Sort Order
	a series and a series of the s		Authorization Previously Not Recorded		C/18085071	
	CRRE01	to reflect service	ces actually delivered	Yes	English	1
	CRRE02		e incorrect, add SA to reflect correct r services actually agreed to,	Ves	English	2
	CROEDZ	authorized and		Tes	English	2
	CRREDO		ervice dates to reflect actual dates of	Yes	English	3
			agreed to, authorized and delivered arvice frequency to reflect actual			
	CRRE04		rvices agreed to, authorized and	Yes	English	4
		delivered	and the second			
	CRRE05		visits to reflect co-visits that were orized and delivered	Yes	English	5
			e-up visits to reflect make-up visits	Yes		12
	CRRE06	that were agree	ed to authorized and delivered	Yes	English	6
	CRRE07	Correction of Q authorized to d	ualified Personnel agreed to, and	Yes	English	8
			ualified Personnel agreed to and		-	
	CRRE08	authorized to p	articipate in co-visits	Yes	English	9
	CRRE09		Child's Level of Functioning	Yes	English	10
	CRRE10		Child's Outcomes	Yes	English	11
	CRRE11		Child's Natural Environment	Yes	English	12
	CRRE12		ographic correction/addition/change letailed information in comments)	Yes	English	13
	CRRE13	Other SA correction in c	tion/change (must provide detailed omments)	Yes	English	14
	CRRE14		aing Provider of Record	Yes	English	7

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

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

b) '**Description**' is required. Text entered in here is what will display in the list of edit reasons from which a user can select.

c) 'Annotation' – Leave blank

d) 'Selectable' – Place a check mark in the check box if the code is to be immediately available for selection. (Uncheck this for existing edit reasons to remove the Edit reason from selection list without actually deleting the code/description)

e) Langauge – Leave at default: 'English'

f) **Sort order** – The system will list the edit reasons displayed according to the sort order specified in this field.

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

4 – Page: 'View Code Table: EIS\_ReasonForEditing' displays. The list will contain the new reason:

N.						box 😃 My Calandar 🔮 My Cases	
	View Code Table	e: EIS_ReasonFort	Editing	New Item Delete	Close		
	Details				ciose		
			Name: EIS_ReasonForEditing [Cha	nge]		Default Code: [Change]	
•	Code Table Iter			an arrest and	100000000		
	Action	Code	4.01 Test adding a new Edit	Annotation	Selectable	Language	Sort Ords
	view 1 Edit	CREE15	Reason		Yes	English	15
	View I Edit	CRRE01	Adding Service Authorization Previously Not Recorded to reflect services actually delivered		Yes	English	1
	View 1 Edit	CRRE02	SA Service Type incorrect, add SA to reflect correct service type for services actually agreed to, authorized and delivered		Yes	English	2
	view 1 Edit	CRREOJ	Correction to service dates to reflect actual dates of service delivery agreed to, authorized and delivered		Yes	English	а
	Visor I Edit	CRRE04	Correction to service frequency to reflect actual frequency of services agreed to, authorized and delivered		Yes	English	4
	Visor I Edit	CRREOS	Addition of co-visits to reflect co-visits that were agreed to, authorized and delivered		Yes	English	5
	View 1 Edit	CRRE06	Addition of make-up visits to reflect make-up visits that were agreed to authorized and delivered		Yes	English	6
	View 1 Edit	CRRE07	Correction of Qualified Personnel agreed to, and authorized to deliver services		Yes	English	8
	View 1 Edit	CRREOB	Correction of Qualified Personnel agreed to and authorized to participate in co- visits		Yes	English	9
	View 1 Edit	CRRE09	Amendment to Child's Level of Functioning		Yes	English	10

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

			0			1 2
WEIS Dow	elopment					O Home O Tokoc O My Calendar O My Cases O Search O About O Lag Out
navigation (1) © Code Tables	Code Tal	Publish			7	
Security     Templates	Action	Table Name	Default Value	Last Modified		
O Balch	View	APPLICATION_CODE [Change]	DefaultApp	8/17/2009 10:33	10	
Rate Tables	View	AcceptanceStatus [Change]		8/17/2009 10:33		
• Roles Editor	View	ActionPageNameCode [Change]	APN1	8/17/2009 10:33		
Property     Administration	Mittax	ActivityAttendeeType [Change]	RL9	8/17/2009 10:33		
Intelligent Evidence	View	ActivityCategory [Change]		8/17/2009 10:33		
Gathering  Dorable Heilical	Vitor	ActivityClientType [Change]	FL.1	8/17/2009 10:33		
Durable Helical     Equipment	Mittin	ActivityLevel [Change]		8/17/2009 10:33		
Surveys	View	ActivityPriority [Change]	AP2	8/17/2009 10:33		
0 100	View.	ActivityStatus [Change]		8/17/2009 10:33		
	Men	ActivityTimeStatus [Change]	ATS2	8/17/2009 10:33		
	View	ActivityType [Change]	AT100	8/17/2009 10:33		
	View	AddressCountry [Change]	US	8/17/2009 10:33		
	View	AddressElementType [Change]		8/17/2009 10:33		
recent items	Menn	AddressLayoutType [Change]	US	8/17/2009 10:33		
	Mittax	AddressState [Change]		3/24/2011 08:43		
	View	AddressType [Change]	AT1	8/17/2009 10:33		

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



7- Click the 'Yes' button to publish changes.

# **ANNOUNCEMENT ADMINISTRATION**

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

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

New Task   New Activity           Index           OH JITPM           Welcome to the New York Early Intervention System           Announcements           O Hy Caeses           6 /3/2016: This is a 3rd Sample announcement to display. A maximum of 5 announcements can be seen at any Announcement #3.           6 /3/2016: This is yet another sample announcement. Announcement #2!           6 /3/2016: This is sample announcement number 1. Important information will be displayed here.           8 /3/2016: This is sample announcement number 1. Important information will be displayed here.           6 /3/2016: This is a sample announcement number 1. Important information will be displayed here.           6 /3/2016: This is a sample announcement number 1. Important information will be displayed here.           7 /3/2016: This is a sample announcement number 1. Important information will be displayed here.           6 /3/2016: This is a sample announcement number 1. Important information will be displayed here.           7 /3 /2016: This is a sample announcement number 1. Important information will be displayed here.           7 /3 /2016: This is a sample announcement number 1. Important information will be displayed here.           7 /3 /2016: This is a sample announcement number 1. Important information will be displayed here.           7 /3 /2016: This is a sample announcement number 1. Important information will be displayed here.           7 /3 /2016: This is a sample announcement number 1. Important information will be displayed here. </th <th>NYEIS OA</th> <th>only – no real live data) Welcome, Chris O'Connor. Server # 7.</th> <th>O Home O Inbox O My Calendar O My Cases O Search O About O Log O</th>	NYEIS OA	only – no real live data) Welcome, Chris O'Connor. Server # 7.	O Home O Inbox O My Calendar O My Cases O Search O About O Log O				
0       Home 0       Infox         0       Hy Cases 0       Hy Cases 0       Hy Cases 0       Hy Calendar 0       Search         0       Registration       6/3/2016: This is a 3rd Sample announcement to display. A maximum of 5 announcements can be seen at any Announcement #3.         0       Registration         0       Registration         0       Registration         recent items       Search         Registration       User Calendar         0       Registration         0       Registration         0       Registration         Code Tables       Invoices         Templates       Payments Received         Unsolicited Adjustments       Vectores         Surveys       Third Party Insurance         Banks       Liability Claims         Work Ouceues       Vectores         Reports       Provider Application         Print Provider Profiles       Provider Claims         Print Provider Profiles       Provider Claims <th></th> <th>New Task   New Activity</th> <th></th>		New Task   New Activity					
Registration     User       Reports     Child       Claim Funding     Service Authorizations       Rate Tables     Envice Providers       Code Tables     Invoices       Templates     Payments Received       Unsolicited Adjustments     Payments Issued       Create User     Vouchers       Surveys     Third Party Insurance       Banks     Liability, Claims       Work Queues     Vendors       Reports     Provider Application       Provider Application     Referral Sources       Print Vendor Profiles     Provider Claims       Print Vendor Profiles     Provider Application       Manage Terms And Conditions     Suspended Accounts       Manage Announcements     At Risk Surveillance       List ICD     Search Durable Medical Equipment	O Home O Inbox O My Cases O My Calendar O Search	Welcome to the New York Early Intervention System         Announcements         6/3/2016: This is a 3rd Sample announcement to display. A maximum of 5 announcements can be seen at any time. Announcement #3.         6/3/2016: This is yet another sample announcement. Announcement #2!					
Registration     User       Reports     Child       Claim Funding     Service Authorizations       Rate Tables     Service Providers       Code Tables     Invoices       Templates     Payments Received       Unsolicited Adjustments     Payments Issued       Create User     Vouchers       Surveys     Third Party Insurance       Banks     Liability, Claims       Work Queues     Vendors       Reports     Provider Application       Provider Application     Referral Sources       Print Vendor Profiles     Provider Claims       Print Vendor Profiles     Provider Claims       Print Vendor Profiles     Provider Application       Manage Terms And Conditions     Suspended Accounts       Manage Announcements     At Risk Surveillance       List ICD     Search Durable Medical Equipment		· · · · · · · · · · · · · · · · · · ·					
Reports       Child         Claim Funding       Service Authorizations         Rate Tables       Service Providers         Code Tables       Invoices         Templates       Payments Received         Unsolicited Adjustments       Payments Issued         Create User       Vouchers         Surveys       Third Party Insurance         Banks       Liability Claims         Work Queues       Vendors         Reports       Third Party Insurance Batch         Provider Application       Referral Sources         Print Provider Profiles       Financial Payments         Print Vendor Profiles       Financial Payments         Manage Terms And Conditions       Suspended Accounts         Manage Announcements       List ICD         Search Durable Medical Equipment       Search Durable Medical Equipment			Search				
Reports       Child         Claim Funding       Service Authorizations         Rate Tables       Service Providers         Code Tables       Invoices         Templates       Payments Received         Unsolicited Adjustments       Payments Issued         Create User       Youchers         Surveys       Third Party Insurance         Banks       Liability Claims         Work Queues       Yendors         Reports       Provider Application         Provider Application       Referral Sources         Print Provider Profiles       Provider Claims         Print Vendor Profiles       Provider Application         Manage Terms And Conditions       Suspended Accounts         Manage Announcements       At Risk Surveillance         List ICO       Search Durable Medical Equipment	recent items	Registration					
Rate Tables       Service Providers         Code Tables       Invoices         Templates       Payments Received         Unsolicited Adjustments       Payments Issued         Create User       Vouchers         Surveys       Third Party Insurance         Banks       Liability: Claims         Work Queues       Vendors         Reports       Third Party Insurance Batch         Provider Application       Referral Sources         Print Provider Profiles       Fload Payments         Generate Mailing Labels       Provider Application         Manage Terms And Conditions       Suspended Accounts         Manage Announcements       At Risk Surveillance         List ICO       Search Durable Medical Equipment	recent items		Child				
Code TablesInvoicesTemplatesPayments ReceivedUnsolicited AdjustmentsPayments IssuedUnsolicited AdjustmentsVouchersSurveysThird Party InsuranceBanksLiability ClaimsWork OueuesVendorsReportsThird Party Insurance BatchProvider ApplicationReferral SourcesPrint Provider ProfilesProvider ClaimsPrint Vendor ProfilesProvider ApplicationBanga E Terms And ConditionsSuspended AccountsManage AnnouncementsAt Risk SurveillanceList ICDSearch Durable Medical Equipment		Claim Funding	Service Authorizations				
Templates       Payments Received         Unsolicited Adjustments       Payments Issued         Create User       Vouchers         Surveys       Third Party Insurance         Banks       Liability Claims         Work Oueues       Vendors         Reports       Third Party Insurance Batch         Provider Application       Referral Sources         Print Provider Profiles       Financial Payments         Generate Mailing Labels       Provider Application         Manage Terms And Conditions       Suspended Accounts         Manage Announcements       At Risk Surveillance         List ICD       Search Durable Medical Equipment		Rate Tables	Service Providers				
Unsolicited Adjustments     Payments Issued       Create User     Vouchers       Surveys     Third Party Insurance       Banks     Liability, Claims       Work Queues     Yendors       Reports     Third Party Insurance Batch       Provider Application     Referral Sources       Print Provider Profiles     Provider Claims       Print Vendor Profiles     Frovider Application       Manage Terms And Conditions     Suspended Accounts       Manage Announcements     At Risk Surveillance       List ICD     Search Durable Medical Equipment		Code Tables	Invoices				
Create User       Vouchers         Surveys       Third Party Insurance         Banks       Liability Claims         Work Queues       Vendors         Reports       Third Party Insurance Batch         Provider Application       Referral Sources         Print Provider Profiles       Provider Claims         Print Vendor Profiles       Financial Payments         Generate Mailing Labels       Provider Application         Manage Terms And Conditions       Suspended Accounts         Manage Announcements       List ICD         Search Durable Medical Equipment       Search Durable Medical Equipment		Templates	Payments Received				
Surveys       Third Party Insurance         Banks       Liability Claims         Work Queues       Vendors         Reports       Third Party Insurance Batch         Provider Application       Referral Sources         Print Provider Profiles       Provider Claims         Print Vendor Profiles       Financial Payments         Generate Mailing Labels       Provider Application         Manage Terms And Conditions       Suspended Accounts         Manage Announcements       List ICD         Search Durable Medical Equipment       Search Durable Medical Equipment		Unsolicited Adjustments	Payments Issued				
Banks     Liability Claims       Work Queues     Vendors       Reports     Third Party Insurance Batch       Provider Application     Referral Sources       Print Provider Profiles     Provider Claims       Print Vendor Profiles     Financial Payments       Generate Mailing Labels     Provider Application       Manage Terms And Conditions     Suspended Accounts       Manage Announcements     At Risk Surveillance       List ICD     Search Durable Medical Equipment		Create User	Vouchers				
Work Oueues     Vendors       Reports     Third Party Insurance Batch       Provider Application     Referral Sources       Print Provider Profiles     Provider Claims       Print Vendor Profiles     Financial Payments       Generate Mailing Labels     Provider Application       Manage Terms And Conditions     Suspended Accounts       Manage Announcements     At Risk Surveillance       List ICD     Search Durable Medical Equipment		Surveys	Third Party Insurance				
Reports       Third Party Insurance Batch         Provider Application       Referral Sources         Print Provider Profiles       Provider Claims         Print Vendor Profiles       Financial Payments         Generate Mailing Labels       Provider Application         Manage Terms And Conditions       Suspended Accounts         Manage Announcements       At Risk Surveillance         List ICD       Search Durable Medical Equipment		Banks	Liability Claims				
Provider Application     Referral Sources       Print Provider Profiles     Provider Claims       Print Vendor Profiles     Financial Payments       Generate Mailing Labels     Provider Application       Manage Terms And Conditions     Suspended Accounts       Manage Announcements     At Risk Surveillance       List ICD     Search Durable Medical Equipment		Work Queues	Vendors				
Print Provider Profiles     Provider Claims       Print Vendor Profiles     Financial Payments       Generate Mailing Labels     Provider Application       Manage Terms And Conditions     Suspended Accounts       Manage Announcements     At Risk Surveillance       List ICD     Search Durable Medical Equipment		Reports	Third Party Insurance Batch				
Print Vendor Profiles       Financial Payments         Generate Mailing Labels       Provider Application         Manage Terms And Conditions       Suspended Accounts         Manage Announcements       At Risk Surveillance         List ICO       Search Durable Medical Equipment		Provider Application	Referral Sources				
Generate Mailing Labels     Provider Application       Manage Terms And Conditions     Suspended Accounts       Manage Announcements     At Risk Surveillance       List ICD     Search Durable Medical Equipment		Print Provider Profiles	Provider Claims				
Manage Terms And Conditions     Suspended Accounts       Manage Announcements     At Risk Surveillance       List ICD     Search Durable Medical Equipment		Print Vendor Profiles	Financial Payments				
Manage Announcements       At Risk Surveillance         List ICD       Search Durable Medical Equipment		Generate Mailing Labels	Provider Application				
List ICD Search Durable Medical Equipment		Manage Terms And Conditions	Suspended Accounts				
Search Durable Medical Equipment		Manage Announcements	At Risk Surveillance				
			List ICD				
My Tasks My Calendar			Search Durable Medical Equipment				
		My Tasks	My Calendar				
Task Subject Deadline Start Date Subject							

# To Access the 'Manage Announcements' Page:

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

2. Manage Announcements Page displays:

igation	Manage Anr	ouncements:						
	New							
	Action	Title	Start Date	End Date	Created On	Created By	Updated On	Updated By
nt items	View   Edit	SampleAnnouncement#3	6/3/2016	6/30/2016	6/3/2016 12:11	Chris O'Connor	6/3/2016 15:49	Chris O'Conno
( items	View   Edit	SampleAnnouncement#2	6/3/2016	6/30/2016	6/3/2016 12:10	Chris O'Connor	6/3/2016 12:10	Chris O'Conno
	View   Edit	SampleAnnouncement#1	6/3/2016	6/30/2016	6/3/2016 12:08	Chris O'Connor	6/3/2016 12:08	Chris O'Conno
	Announcem	ents						

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

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

#### **Creating a new Announcement**

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

navigation	Create Announcement:			2
		Save Save &	New Cancel	
	Details			
	*Title:			
recent items	*Start Date:	6/3/2016 🖉	End Date:	0
	Text and Comments			
	*Text:			
				1

- 2. Use the **TAB** key to move from field to field to enter data:
  - a. **Title** (Required field) The Announcement title will only be seen from the **Manage Announcements** page, and accepts a maximum of 20 characters. You must record at least one (non-space) character in the Title field.
  - b. **Start Date** (Required field) Use this date field to set the effective start date for when the announcement should be displayed. You

can type the date in manually (mm/dd/yyyy) or use the calendar icon to select a date from the pop-up calendar

- c. End Date (Optional) Use this field to set the effective end date for the Announcement. Once an Announcement's end date has been reached, it will no longer be seen in the Annoucements section of all NYEIS Home pages.
- d. **Text** (Required) Enter the text you wish to be displayed in the Announcemnts section of the NYEIS Home pages for all users, up to a maximum of 400 characters.
- e. **Comments** (Optional) Record any comments that you wish in this field, up to 100 characters. Text recorded in this field is only seen within **Manage Announcements** and is not broadcasted to all users' Home Pages.
- 3. Click **Save** to save the record and return to the **Manage Announcements** Page, or click **Save & New** to save the record and remain on this page to record another announcement. Or, Click **Cancel** to abort the creation of the new Announement and return to the **Manage Announcements** Page.

#### **Important Notes:**

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

## **Viewing/Editing Existing Announcements**

tion	Manage Ani	nouncements:						
	New							
	Action	<u>Title</u>	Start Date	End Date	Created On	Created By	Updated On	Updated By
items	View   Edit	SampleAnnouncement#3	6/3/2016	6/30/2016	6/3/2016 12:11	Chris O'Connor	6/3/2016 15:49	Chris O'Conno
items	View   Edit	SampleAnnouncement#2	6/3/2016	6/30/2016	6/3/2016 12:10	Chris O'Connor	6/3/2016 12:10	Chris O'Conno
	View   Edit	SampleAnnouncement#1	6/3/2016	6/30/2016	6/3/2016 12:08	Chris O'Connor	6/3/2016 12:08	Chris O'Conno
	Announcements							
	6/3/2016: Announcen	This is a 3rd Sample an	nouncemen	t to display.	A maximum	of 5 announcem	ents can be s	een at any ti

For those users authorized to access the page:

- All current and prior Annoucement records maintained within the **Manage Announcements** page can be viewed to either delete the record in its entirety or obtain additional detail.
- All current and prior Annoucement records maintained within the **Manage Announcements** page can also be edited to manage the start/end dates, title, announcement, or comments.

#### Viewing Existing Announcements

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

View Announcement:			2
	Delete	Cancel	
Details			
	SampleAnnouncement#3		
Start Date:	6/3/2016	End Date:	6/30/2016
Text and Comments			
Text:	This is a 3rd Sample announcem any time. Announcement #3.	ent to display. A maximum of 5	announcements can be seen at
Comments:	4.6 UM Documentation		
Audit Details			
Created By:	Chris O'Connor	Updated By:	Chris O'Connor
Created On:	6/3/2016 12:11	Updated On:	6/3/2016 15:49
	Delete	Cancel	

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

#### **Deleting Existing Announcements**

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

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

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

Delete Announcement:	2
Are you sure you want to delete this announ	cement?
Yes No	

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

#### Editing Existing Announcements

avigation	Manage Ani	nouncements:						
	New							
	Action	Title	Start Date	End Date	Created On	Created By	Updated On	Updated By
cent items	View   Edit	SampleAnnouncement#3	6/3/2016	6/30/2016	6/3/2016 12:11	Chris O'Connor	6/3/2016 15:49	Chris O'Connor
	View   Edit	SampleAnnouncement#2	6/3/2016	6/30/2016	6/3/2016 12:10	Chris O'Connor	6/3/2016 12:10	Chris O'Connor
	View   Edit	SampleAnnouncement#1	6/3/2016	6/30/2016	6/3/2016 12:08	Chris O'Connor	6/3/2016 12:08	Chris O'Connor
	Announcem	ents						
	6/3/2016: Announcen	This is a 3rd Sample an 1ent #3.	nouncemen	t to display.	A maximum	of 5 announcem	ents can be s	seen at any tin
	6/3/2016	This is yet another sam	nle announ	ement Ann	ouncement a	#21		

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

Modify Announcement:			?			
	Save	Cancel				
Details						
*Title:	SampleAnnouncement#3					
Start Date:	6/3/2016	End Date:	6/30/2016			
Text and Comments						
*Text:	This is a 3rd Sample announcement to display. A maximum of 5 announcements can be see at any time. Announcement #3.					
Comments:	4.6 UM Documentation		1			
Audit Details						
Created By:	Chris O'Connor	Updated By:	Chris O'Connor			
Created On:	6/3/2016 12:11	Updated On:	6/3/2016 15:49			
	Save	Cancel				

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

- d. **Text** (Required) Change the text you wish to be displayed in the Announcemnts section of the NYEIS Home pages for all users, up to a maximum of 400 characters.
- e. **Comments** (Optional) Modify any comments that you wish in this field, up to 100 characters. Text recorded in this field is only seen within **Manage Announcements** and is not broadcasted to all users' Home Pages.
- 4. When finished with edits, click **Save**. **Manage Announcements** page displays. Alternatively, click **Cancel** to abort any in-progress edits and return to the **Manage Announcements** page.

# **Important Notes:**

- If the end date for an announcement has passed and you remove the end date or advance the end date into the future, the announcement will again be visible to all NYEIS users until its revised end date is reached.
- The current State Roles capable of **Creating and Editing** Annoucements are: **DOH\_OITPM** and **SUPERROLE** Users
- The current State Roles capable of Viewing Announcements are DOH\_AuditUnit, DOH\_Mgmt, DOH\_ProgramMgr, DOH\_FiscalMgr, DOH\_FiscalUnitStaff, DOH\_ProviderApproval
- You cannot edit the start date to being earlier than the current date of the edit being peformed
- You cannot edit the end date to being earlier than the start date