Unit 11: System Administration

Version 4.6



This page intentionally left blank.

| 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 |
| | | The User Roles that can perform edits on a reactivated IFSP or SA |
| | | The User Roles that have 'EIO/D' Privileges |
| 6/4/2012 | 1.6 | No changes |
| 10/24/2011 | 1.5 | No changes |
| 6/28/2011 | 1.4 | • Moved User Account Administration topic to Unit 10 – Municipal |
| | | Administration. |
| 3/28/2011 | 1.3 | No changes |
| 1/31/2011 | 1.2 | No changes |
| 11/22/2010 | 1.1 | No changes |
| 10/1/2010 | 1.0 | October 2010 NYEIS launch. |

Document Revision History

Table of Contents

| Unit 11: System Administration | 1 |
|---|------|
| Security | 9 |
| Creating Security Identifiers | 9 |
| Creating Security Groups | . 11 |
| Creating Security Roles | . 15 |
| User Account Administration | . 17 |
| Code Tables | . 18 |
| Viewing/Editing Code Table Items | 18 |
| Adding Code Table Items | 20 |
| Rate Tables | . 23 |
| Viewing Rate Tables | . 23 |
| Editing Rate Tables | . 24 |
| Cloning Rate Tables | . 25 |
| Durable Medical Equipment Table | . 27 |
| Searching Durable Medical Equipment | . 28 |
| ICD Codes | |
| Searching ICD Codes | . 29 |
| Surveys | . 30 |
| Templates | . 30 |
| Adding a Template to the System | . 30 |
| Banks | . 32 |
| Creating a Bank Branch | . 33 |
| Property Administration - Custom Parameters | . 35 |
| Managing Municipal Claim Denial Reasons that can be selected when mu | ni |
| denies an invoice or claim | . 36 |
| Managing the User Roles Authorized to modify an 'Approved' MDE | |
| (Unsubmit MDE). | . 38 |
| Managing the earliest allowed 'Effective Start Date' for Case Reactivation | 40 |
| Managing the list of User Roles that are allowed to Edit a "Reactivated" | |
| IFSP or SA | . 42 |
| Managing the list of user roles that are eligible to reactivate a closed IFSP | or |
| SA | . 44 |
| Modifying the list of User Roles that have 'EIO/D privileges' | . 46 |
| 'Reason for Edit' Codes and their associated descriptions: | . 48 |
| To Access the 'Reason for Edit' code table: | |
| Adding new Edit reasons for selection in 'Reason for Editing' | 51 |
| Announcement Administration | |
| To Access the 'Manage Announcements' Page: | 54 |
| Creating a new Announcement | 55 |
| Viewing/Editing Existing Announcements | 57 |

This page intentionally left blank.

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.

This page intentionally left blank.

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.

| Exception |
|------------------|
| 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).

| Exception | 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.

| Exception | 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 | Ø | 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 | |

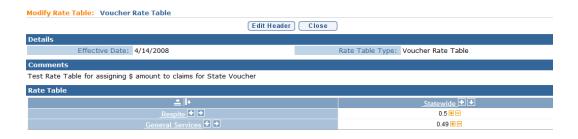
4. Click <u>Clone</u> link under Action column. Clone Rate Table page displays.

| 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.

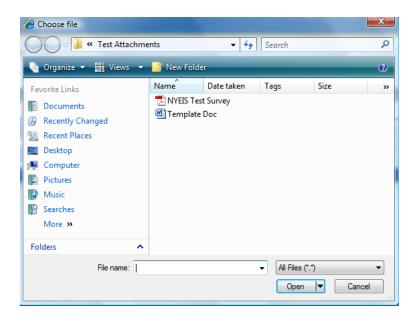
- 1. Display Administration Home page.
- 2. Click <u>Templates</u> link from My Shortcuts section. MS Word Templates page displays.

| 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: | () | |
| | | 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 | E dit Delete | | | | | |
| | 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 | T | 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 |
| | | E dit | 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 | T | 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 | | | · · · · · · · · · · · · · · · · · · · | - ^{0.40} | | |
| | | | 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