Unit 9:
Provider Management

Version 4.6

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Document Revision History

Date	Release	Description
6/14/2016	4.6	• Added Important note relating to HCS User Account Mgmt. under 'Non Active Employees'
2/24/2016	4.5.1	• No Changes
12/15/2015	4.5	• No Changes
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4/1/2013	2.0	• Updated Contracts section to reflect new use of Provider Agreements • Updated Provider Flag section to indicate no longer used • Updated Provider Restriction section to indicate no longer used • Added new **Agreements** topic • Updated Provider Status Subtopic to detail new 'Pending Agreement' status • Added **Catchment Areas** topic
3/4/2013	1.6.2.1	• No Changes
2/14/2013	1.6.2	• Updated **Create Employee** and **Employees/Contractors** sections with **Student Intern** subtopic
7/19/2012	1.6.1	• No Changes
6/4/2012	1.6	• Updated the **Contracts** subtopic to add information regarding contract status when the provider approval status changes. • Added the **Employee ID** subtopic.
10/24/2011	1.5	• Added **Response File** topic • Updated **Languages** topic • Updated **Licenses** topic
6/24/2011	1.4	• Updated **Employees/Contractors** topic. Added **Pending Employee List, Service Coordinator Caseloads** and **Non-Active Employees** page information.
3/31/2011	1.3	• Updated **Create an Employee** subtopic with information concerning where Qualified Profession (QP), License, SSN and NPI data recorded during the create process is stored. • Updated **Locations** subtopic with a definition of "Location". • Added **Edit Location Service Availability** subtopic to **Locations** section. • Updated the **Products** topic.
1/31/2011	1.2	• **Edited** Employees/Contractors **section with information about adding employees and creating employees.** • **Added** Disposition History **section.**
11/22/2010	1.1	• **My Provider Homepag**e section – Added new Provider Home page screen shot without FEIN/SSN field displayed. FEIN/SSN is no

		longer displayed on Homepage. • **My Provider Homepag**e section – Added reference to printing Provider Profile report. • **Creating MS Word Communications** section – added Internet Explorer browser settings. • **Contacts** section – updated description. • **Models** section – updated description. • **Provider SCR Number** section **–** Deleted references to Adding, Editing and Deleting SCR data. Provider has view only rights.
10/1/2010	1.0	• October 2010 NYEIS launch.

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Provider Management

Unit Overview

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

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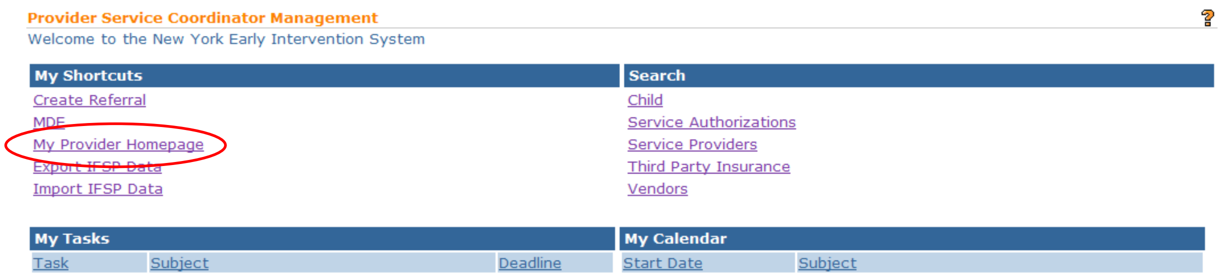
PROVIDER HOME PAGE

Provider Home Page Navigation Bar

Whose Provider Homepage Can I Access?

Understand these conditions regarding Provider Homepage access:

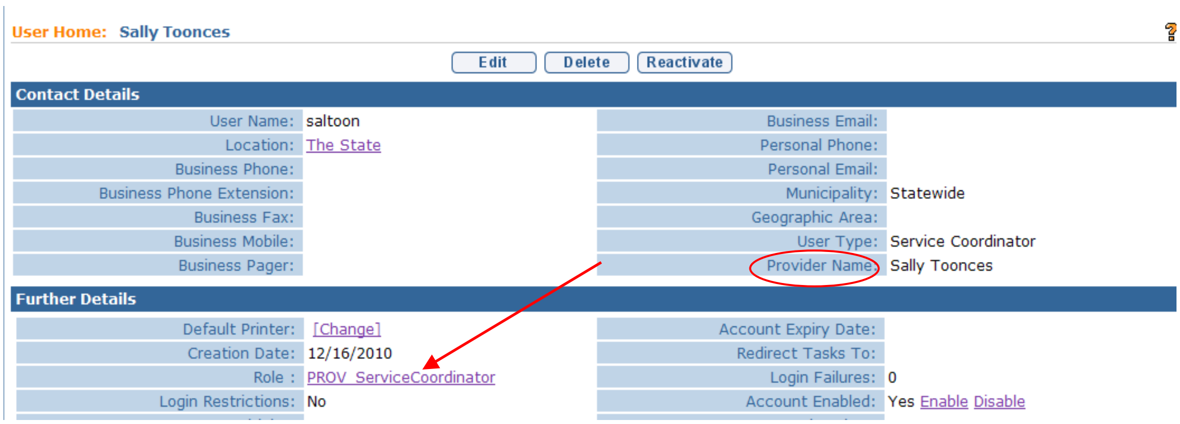
- The only method for a provider user to access a provider homepage is by clicking the ‘My Provider Homepage’ link located on your User Home page.

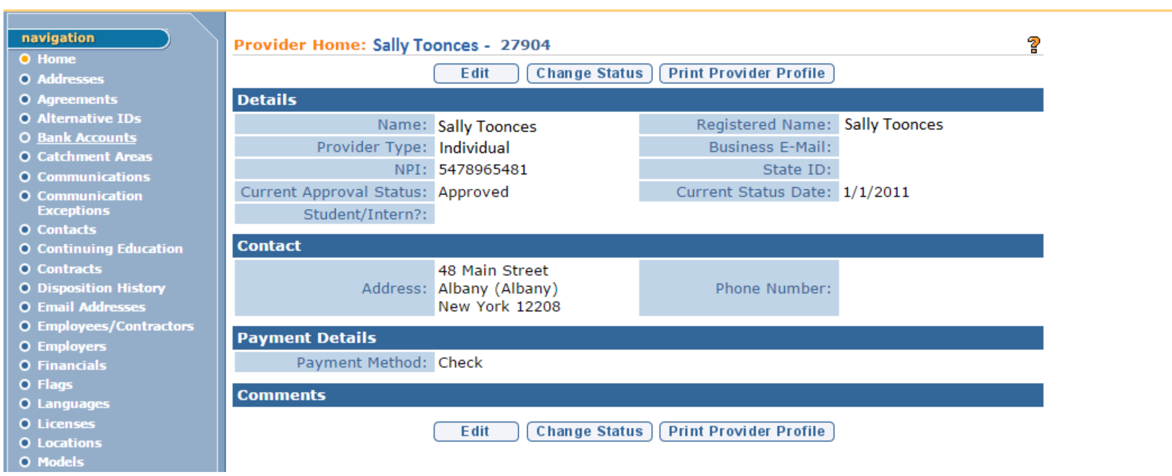


- The ‘Provider’ whose Home page you will see / have access to depends entirely on how your NYEIS User Account is set up. There is a field in the NYEIS user account called ‘Provider Name’. You will have access to the Homepage of the provider you are associated with in your User Account.

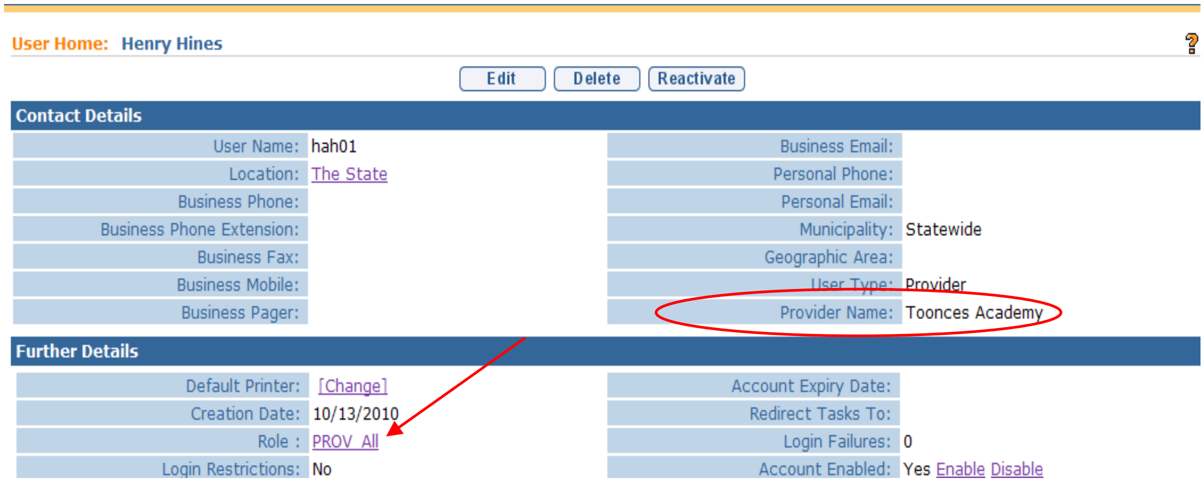
> **Important Information**
> Some NYEIS provider user roles (like PROV_ServiceCoordinator and PROV_RenderProvStaff) require the User Account provider name association to be with the individual rather than an agency. All other provider user roles require the user account provider association with an agency.

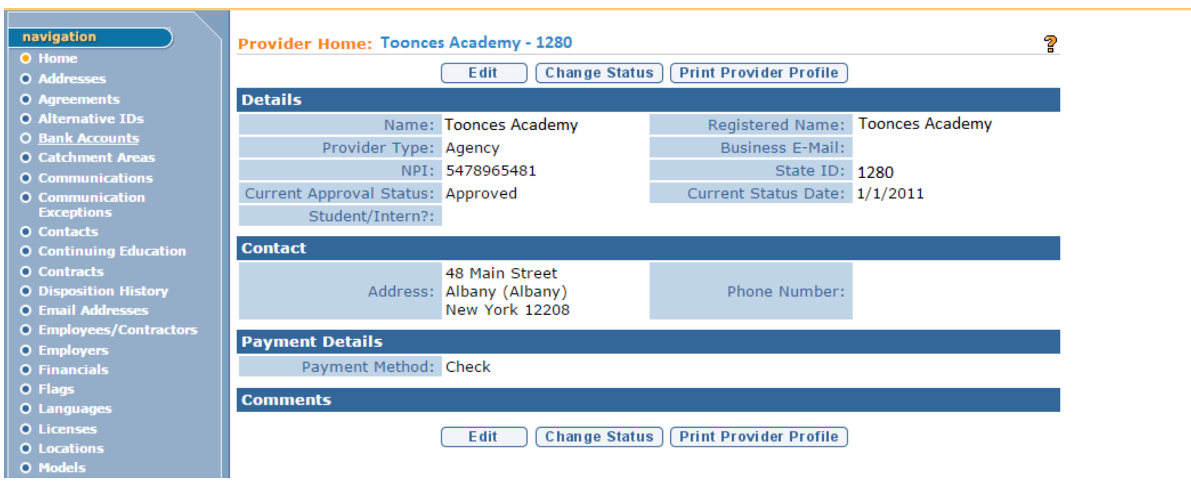
- For example, Prov_ServiceCoordinator Sally Tooncés' User Account Provider association is with provider 'Sally Tooncés'. Therefore she will see / have access to provider Sally Tooncés home page when clicking the My Provider Homepage link on her User Homepage.





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

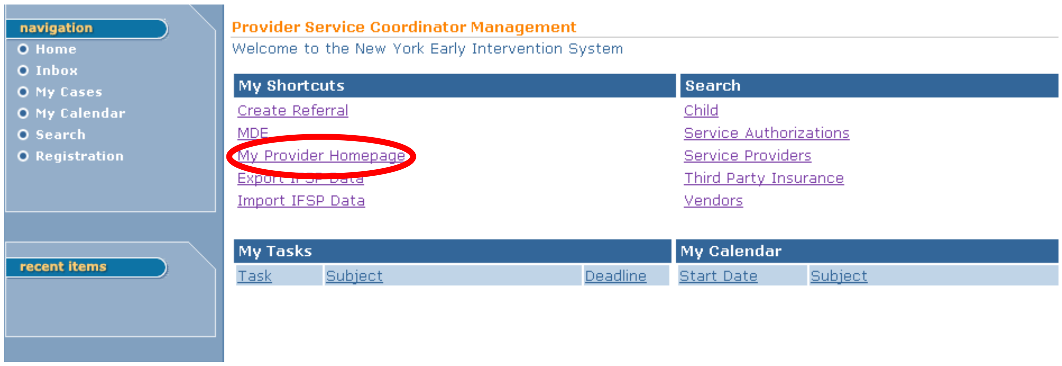




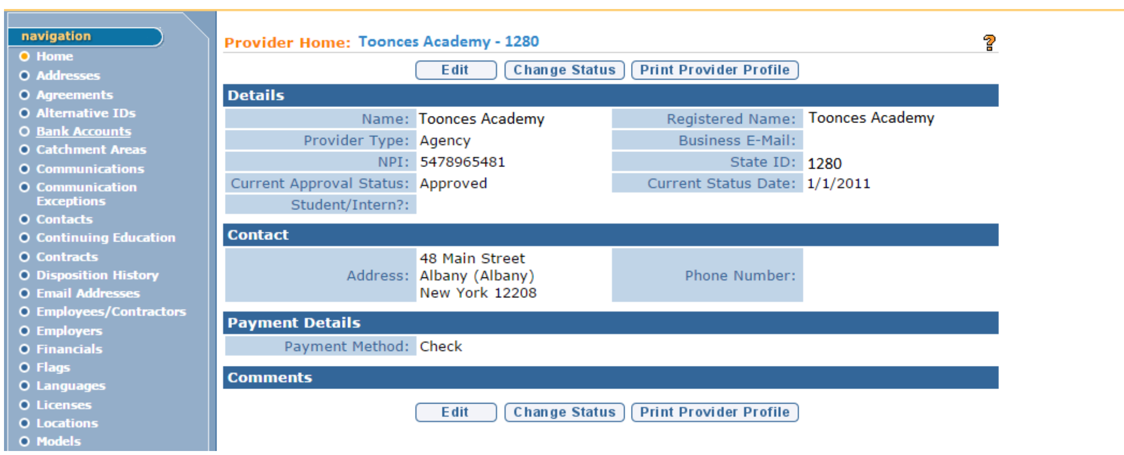
My Provider Homepage

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

1. Display User Home Page. Click the My Provider Homepage link under the My Shortcuts column.



2. **Provider Homepage** displays.



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

   Approval statuses include:
   - Approved – provider is authorized to provide services as of the Current Status Date. Or reflects the date the agency transitioned from a Pending Agreement to an Agreement.
   - Disapproved – provider is no longer approved to provide services as of the Current Status Date.
   - Disqualified - provider is no longer approved to provide services as of the Current Status Date.

- Pending Agreement – provider's agreement status is awaiting submission and approval from the Provider Approval Unit (PAU)
- Withdrawn - provider will discontinue providing services as of the Current Status Date.

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

Notes:

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

ADDRESSES

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

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

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

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

Addresses: All Families First - 28416

New

Action	Primary	Type	Address	City	From	To
View | Edit	Yes	Mailing	1234 Wolf Road	Colonie	4/17/2009	
View | Edit	No	Physical	10 Main St	Albany	10/20/2009	

3. View Address

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

Notes:

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

AGREEMENTS

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

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

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

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

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

Exception
Not available to all Provider User roles.

ALTERNATIVE IDS

Providers may have multiple 'reference' numbers, such as National Provider ID (NPI), NYS Provider ID, FEIN/SSN (Federal Employer Identification Number/Social Security Number). These numbers are recorded in the Provider's Alternative IDs page. This NYEIS feature allows for the capture of alternate means of identification for a provider.

The Primary Alternative ID equals: 1) an approved agency's NYS Provider ID (State ID), 2) an approved Individual's NYS Provider ID (State ID), or 3) an Employee ID or Reference Number. An Employee ID or Reference Number is created for any individual who is was not initially an approved Individual provider and who is added as an agency employee. An individual who is not an approved Individual provider and who is an employee has only one Employee ID or Reference Number, regardless of how many agencies they are employed by.

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

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

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

Alternative IDs: Midway Social Services - 899999999

New

Action	Primary	Alternative ID	Type	From	To	Status
View | Edit	No	1234567890	National Provider ID	10/1/2008		Active
View | Edit	No	899999999	NYS Provider ID	10/1/2008		Active

3. View Alternative ID

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

Notes:

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

Exception
Not available to all Provider User roles.

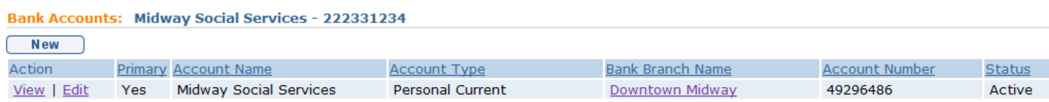
BANK ACCOUNTS

Users with Financial access rights will be able to work with Bank Accounts. This feature allows bank information to be stored and used to perform Electronic Funds Transfers.

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

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

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



Bank Accounts: Midway Social Services - 222331234

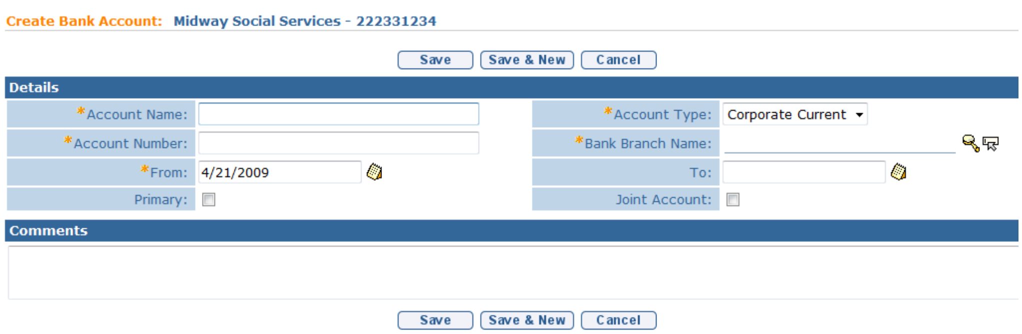
New

Action	Primary	Account Name	Account Type	Bank Branch Name	Account Number	Status
View | Edit	Yes	Midway Social Services	Personal Current	Downtown Midway	49296486	Active

3. Perform one of the following functions:

<u>Adding a New Bank Account</u>

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



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

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

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

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

Or

Click **Save & New** button to continue adding Bank Accounts.

Viewing a Bank Account

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

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

Editing a Bank Account

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

b. Click **Save** button. **Bank Accounts** page displays.

Notes:

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

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

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

CATCHMENT AREAS

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

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

Action	Municipality	Effective Start Date	Effective End Date
View | Edit | Delete	Westchester	4/1/2013	
View | Edit | Delete	Bronx	4/1/2013	
View | Edit | Delete	Queens	4/1/2013	
View | Edit | Delete	New York (Manhattan)	4/1/2013	
View | Edit | Delete	Nassau	4/1/2013	9/19/2014
View | Edit | Delete	Putnam	4/1/2013	9/19/2014
View | Edit | Delete	Richmond (Staten Island)	4/1/2013	
View | Edit | Delete	Kings (Brooklyn)	4/1/2013	
View | Edit | Delete	Putnam	12/4/2014	

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

COMMUNICATIONS

Exception
Not available to all Provider User roles.

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

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

Important Information

Sensitive Information/Information Extraneous to Early Intervention

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

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

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

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

Communications: All Families First - 28416

Record Communication | Create MS Word

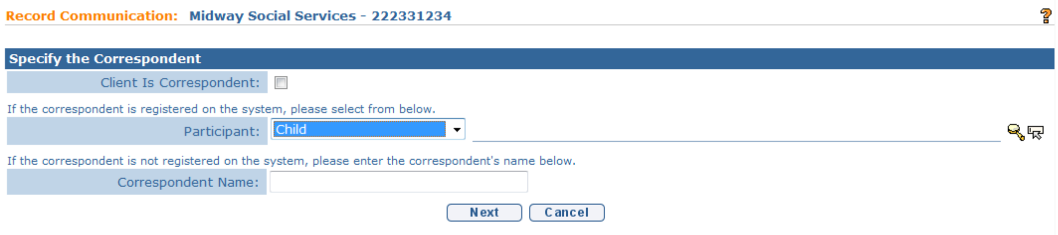
Action	Name	Communication Status	Subject	Date	Status
View | Edit	All Families First	Draft	Test		Active
View | Edit	cap letter test	Draft	cap letter test	8/19/2009	Active
View | Edit	another test	Draft	ttt	8/19/2009	Active
View | Edit	template test	Draft	template test	8/19/2009	Active
View | Edit	Red Riding Hood	Draft	Cap test letter	8/19/2009	Active
View | Edit	All Families First	Draft	test1	8/18/2009	Active
View | Edit	All Families First	Draft	Approval letter	8/18/2009	Active
View | Edit	Jim Smith	Draft	Test	8/18/2009	Active
View | Edit	All Families First	Draft	Test	8/18/2009	Active
View | Edit	All Families First	Draft	SOmething	8/6/2009	Active

3. Perform one of the following functions:

Record Communication

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

a. Click **Record Communication** button. **Record Communication** page displays.



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

Attention
Not all code table values are applicable (e.g., Health Care Provider = EI Provider, Organization Contact and Representative).

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

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

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

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

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

Important Information
Pro-Forma Type is not a *required* field but may be used by the User to track and identify a type of form used.

e. Enter appropriate information in **Communication Text** section. Be sure to type **Subject**.

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

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

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

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

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

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

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

Exception
Not available to all Provider User roles.

Create MS Word Communication

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

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

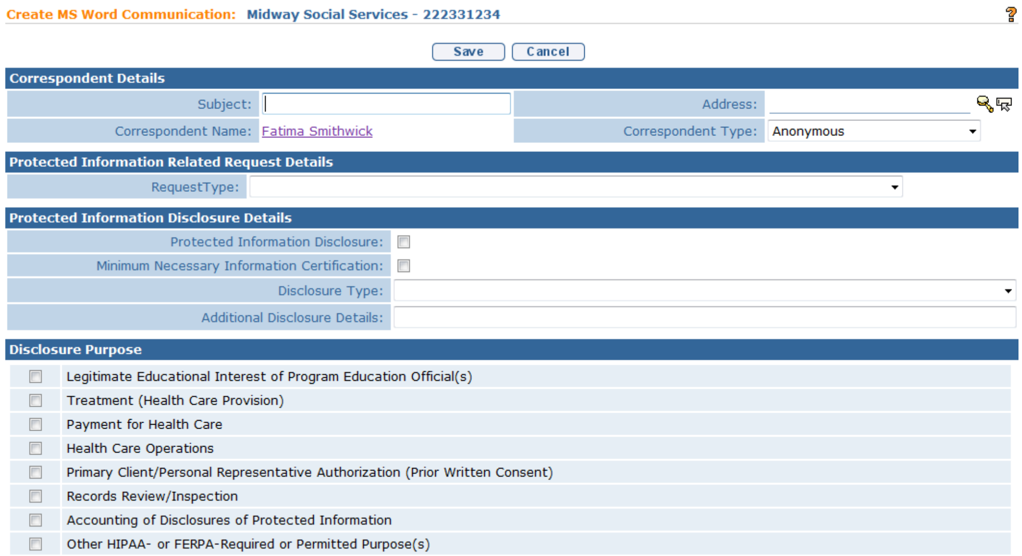
b. Define correspondent by selecting one of the following items from:

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

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

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

c. Click **Next** button. The **Create MS Word Communications** page displays.



Create MS Word Communication: Midway Social Services - 222331234

Save | Cancel

Correspondent Details

Subject:		Address:	
Correspondent Name:	Fatima Smithwick	Correspondent Type:	Anonymous

Protected Information Related Request Details

RequestType:

Protected Information Disclosure Details

Protected Information Disclosure:
Minimum Necessary Information Certification:
Disclosure Type:
Additional Disclosure Details:

Disclosure Purpose

- Legitimate Educational Interest of Program Education Official(s)
- Treatment (Health Care Provision)
- Payment for Health Care
- Health Care Operations
- Primary Client/Personal Representative Authorization (Prior Written Consent)
- Records Review/Inspection
- Accounting of Disclosures of Protected Information
- Other HIPAA- or FERPA-Required or Permitted Purpose(s)

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

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

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

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

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

e. Click **Search** icon in **Template Name** field under **Template** section. **Provider MS Word Templates** page displays.

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

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

h. Apply changes.

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

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

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

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

Notes:

- To sort the data displayed on pages, click the underlined column heading. Click once to view the data in ascending order and click again to view the data in descending order.
- When a template displays, some fields will automatically populate (e.g., Address, Phone Number) and can be adjusted.
- **Cancel** button stops current operation and returns to previous page.
- **Recent items** on the Navigation Bar displays recently visited items.

- Users must have Microsoft Word 2003 or newer in order for the template function to work properly. User's should contact their IT support staff to ensure that the following Internet Explorer browser settings are configured:
    - Popup blocker in the Internet Explorer browser on the user machine should be disabled.
    - Add the Cúram server host name including protocol (https://commerce.health.state.ny.us) to the list of trusted sites in the Internet Explorer.
    - The following ActiveX scripting options for the "Trusted sites" security zone must be set as follows:
    - ActiveX controls and plugins/Automatic prompting for ActiveX controls: **Enable**
    - ActiveX controls and plugins/Download signed ActiveX controls: **Enable**
    - ActiveX controls and plugins/Run ActiveX controls and plugins: **Enable**
    - ActiveX controls and plugins/Binary and script behaviors: **Enable**
    - ActiveX controls and plugins/Allow previously unused ActiveX controls to run without prompt: **Enable**
    - ActiveX controls and plugins/Script ActiveX controls marked as safe for scripting: **Enable**

Viewing Communications

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

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

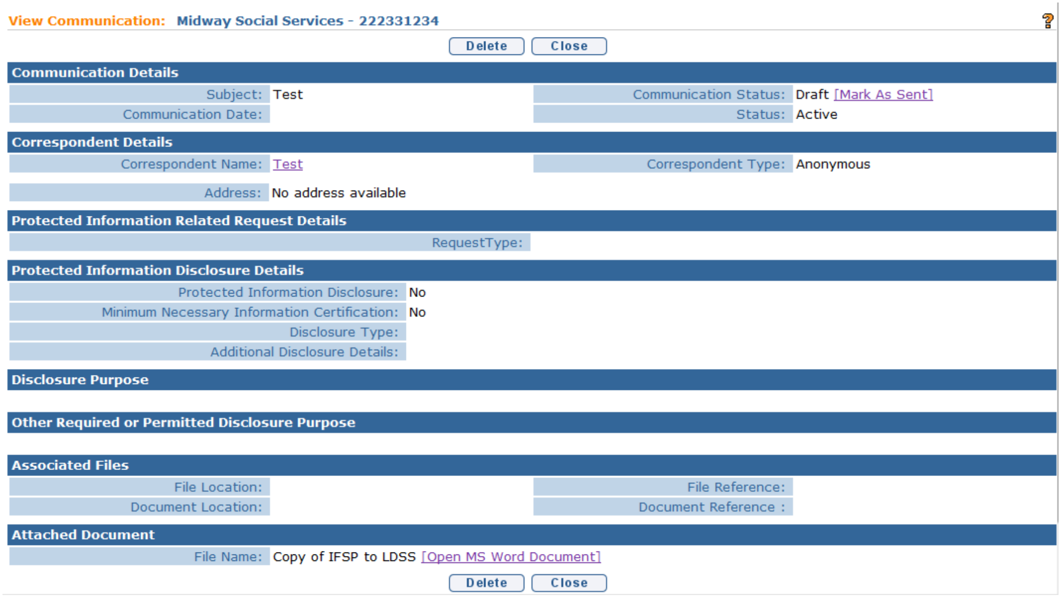
2. Click **Communications** from the Navigation Bar. **Communications** page displays.

Communications: **Midway Social Services - 222331234**

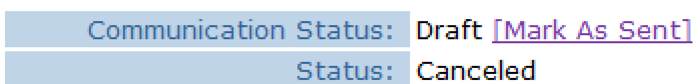
Record Communication | Create MS Word

Action	Name	Communication Status	Subject	Date	Status
View | Edit	Test	Draft	Test		Active
View | Edit	tes	Draft	test		Active
View | Edit	Fatima Smithwick	Draft	MS Word doc		Active
View | Edit	Fatima Smithwick	Draft	Test MS Word Template		Active
View | Edit	Test	Draft	Test		Active
View | Edit	tes	Draft	Test		Active
View | Edit	Fatima Smithwick	Sent	Test #4	4/21/2009	Active
View | Edit	Some Correspondent	Sent	Communication	1/8/2009	Active

3. Click **<u>View</u>** link under **Action** column for Communication to display. **View Communication** page displays.



4. Review information.



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

5. Click **Close** button. **Communications** page displays.

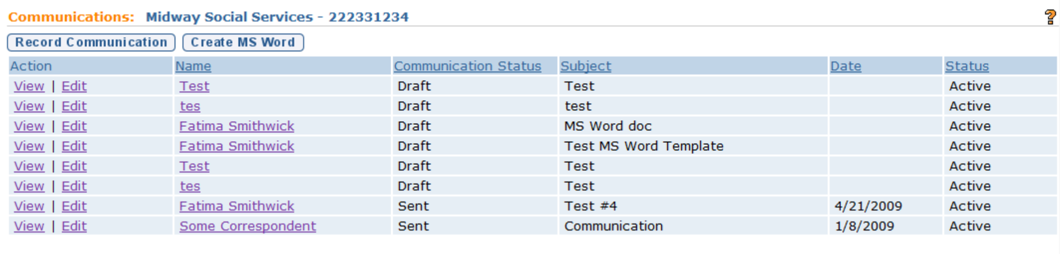
Editing Communications

Exception
Not available to all Provider User roles.

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

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

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



Communications: Midway Social Services - 222331234

Record Communication | Create MS Word

Action	Name	Communication Status	Subject	Date	Status
View | Edit	Test	Draft	Test		Active
View | Edit	tes	Draft	test		Active
View | Edit	Fatima Smithwick	Draft	MS Word doc		Active
View | Edit	Fatima Smithwick	Draft	Test MS Word Template		Active
View | Edit	Test	Draft	Test		Active
View | Edit	tes	Draft	Test		Active
View | Edit	Fatima Smithwick	Sent	Test #4	4/21/2009	Active
View | Edit	Some Correspondent	Sent	Communication	1/8/2009	Active

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

4. Apply necessary changes.

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

Notes:

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

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

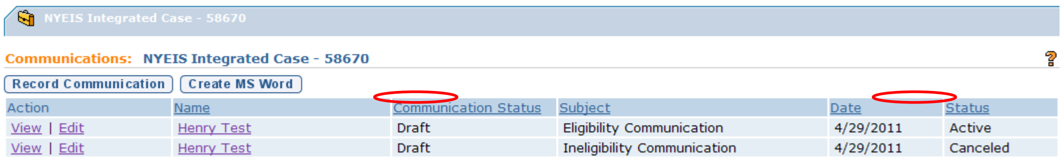
- To sort the data displayed on pages, click the underlined column heading. Click once to view the data in ascending order and click again to view the data in descending order.

Exception
Not available to all Provider User roles.

Deleting Communications

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

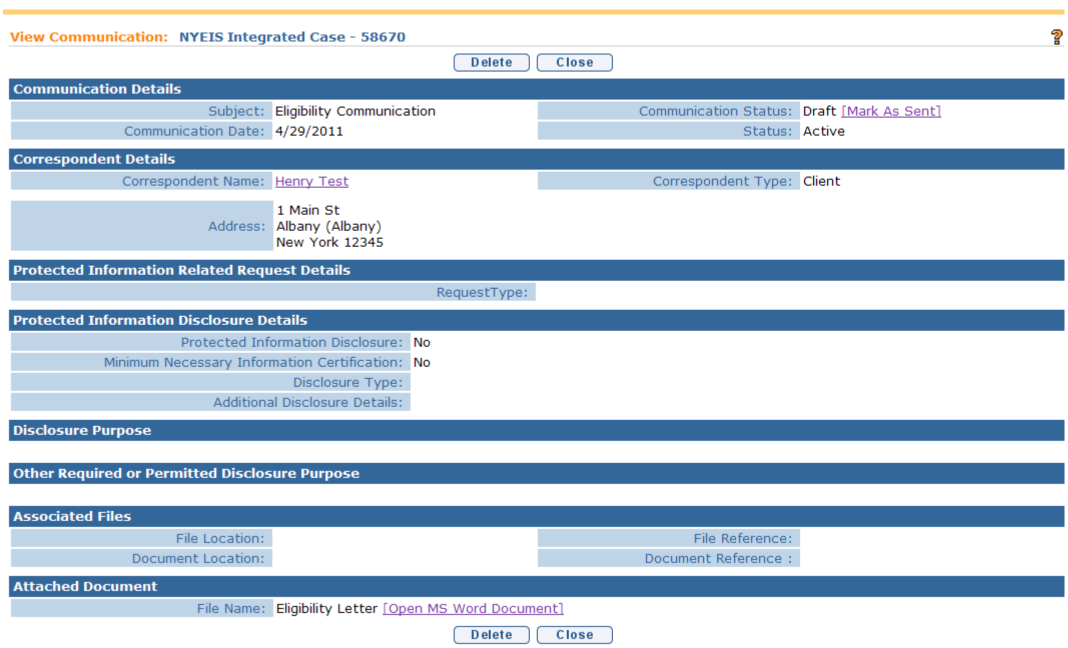
A Communication cannot be deleted. However, Microsoft Word communications can be "Deleted" when the Communication Status is "Draft"; it cannot be deleted when the Communication Status id "Sent". Deleting a Microsoft Word communication causes the Status to be changed from "Draft" to "Cancelled".



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

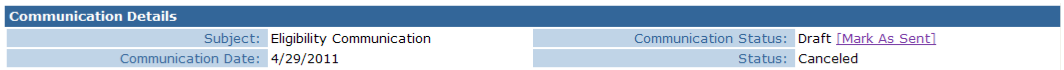
2. Click **Communications** from the Navigation Bar. **Communications** page displays.

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



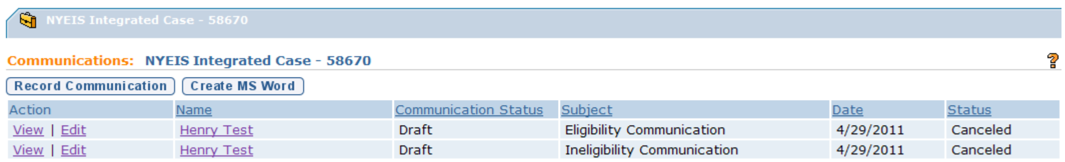
4. Click **Delete** button. **Delete Communication** page displays the message ***Are you sure you want to delete this communication?***

5. Click **Yes** button. **View Communication** page displays. Notice the **Status** field displays **Canceled**.



Communication Details			
Subject:	Eligibility Communication	Communication Status:	Draft [Mark As Sent]
Communication Date:	4/29/2011	Status:	Canceled

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



NYEIS Integrated Case - 58670

Communications: NYEIS Integrated Case - 58670

Record Communication | Create MS Word

Action	Name	Communication Status	Subject	Date	Status
View | Edit	Henry Test	Draft	Eligibility Communication	4/29/2011	Canceled
View | Edit	Henry Test	Draft	Ineligibility Communication	4/29/2011	Canceled

Communication Exceptions

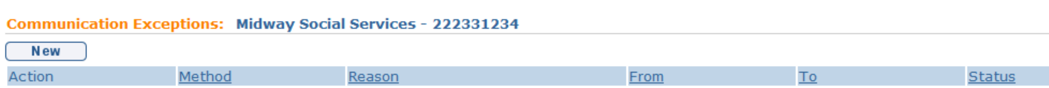
Communication Exceptions are used to note when a particular form of communication cannot be used, e.g. phone for a deaf parent.

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

Adding a New Communication Exception

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

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

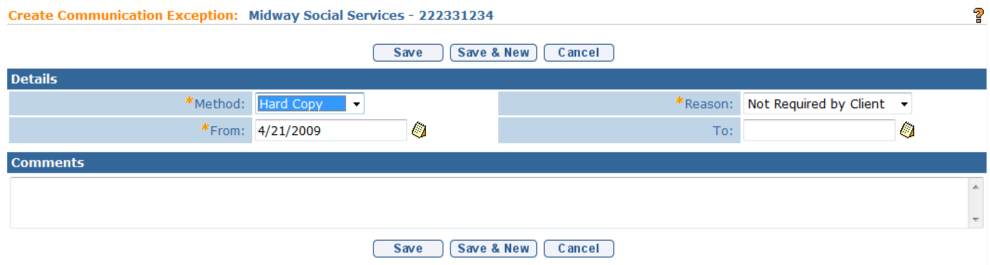


Communication Exceptions: Midway Social Services - 222331234

New

Action	Method	Reason	From	To	Status

3. Click **New** button. **Create Communication Exception** page displays the sections **Details** and **Comments**.



a. Fill in information for **Method**, **From** and **Reason**. *Fields requiring data entry are marked with an asterisk. A field can also be required based on logic that will not have an asterisk.*

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

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

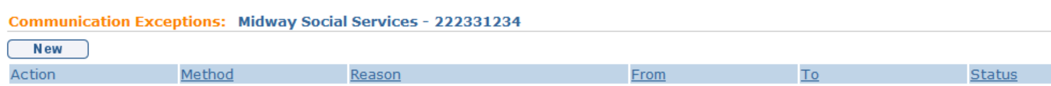
   Or

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

Viewing a Communication Exception

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

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



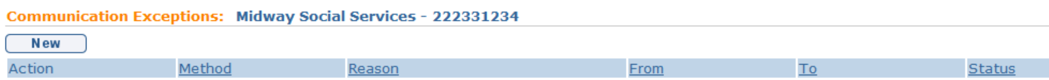
3. Click **<u>View</u>** link under **Action** column from **Communication Exceptions** page. **View Communication Exception** page displays the sections **Details** and **Comments**. The following buttons are available:

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

Editing a Communication Exception

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

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

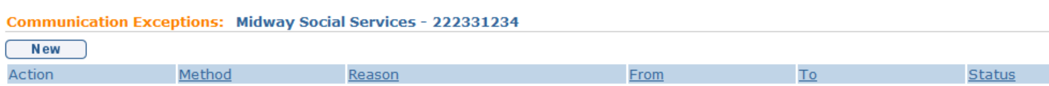


3. Click **Edit** link under **Action** column from **Communication Exceptions** page. **Modify Communication Exception** page displays the sections **Details** and **Comments**. Apply changes. Click **Save** button. **Communications Exceptions** page displays.

Deleting a Communication Exception

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

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



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

Notes:

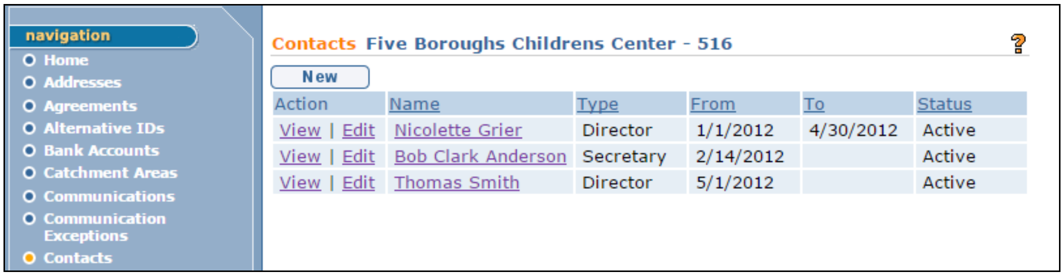
- To sort the data displayed on pages, click the underlined column heading. Click once to view the data in ascending order and click again to view the data in descending order.

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

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

CONTACTS

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



Action	Name	Type	From	To	Status
View | Edit	Nicolette Grier	Director	1/1/2012	4/30/2012	Active
View | Edit	Bob Clark Anderson	Secretary	2/14/2012		Active
View | Edit	Thomas Smith	Director	5/1/2012		Active

Important Note:

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

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

CONTINUING EDUCATION

Important Information

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

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

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

3. Perform one of the following functions:

<u>Adding Continuing Education</u>

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

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

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

<u>Editing a Continuing Education</u>

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

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

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

<u>Deleting Continuing Education</u>

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

CONTRACTS

Important Note:

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

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

DISPOSITION HISTORY

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

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

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

Provider Disposition

Disposition	Start Date	End Date	User
Approved	6/24/2010		lms23

EMAIL ADDRESSES

Email Addresses are gathered for approved agencies and individual providers

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

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

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

Email Addresses: Midway Social Services - 222331234

New

Action	Primary	Email Address	Type	From	To	Status
View | Edit	Yes	MidwaySocialServices@curamsoftware.com	Business	1/1/2001		Active

3. Perform one of the following functions:

<u>Adding a New Email Address</u>

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

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

c. Designate a **Primary** email address by clicking the **Primary** checkbox.

d. Type **Comments** *(Optional)*.

e. Click **Save** button. **Email Addresses** page displays.

Or

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

<u>Viewing an Email Address</u>

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

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

<u>Editing an Email Address</u>

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

Deleting an Email Address

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

Notes:

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

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

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

EMPLOYEES / CONTRACTORS

*Only applicable to agency providers.

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

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

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

Employee / Contractor List

The Employees/Contractor List page displays the providers (Qualified Personnel and Service Coordinators) currently employed or contracted by the agency. **This is not a list of all agency employees because it does not display non-rendering staff such as administrative, fiscal, or data entry personnel.**

Employee/Contractor List: Saratoga Health Solutions - 1029

Add | Pending Employee List | Service Coordinator Caseloads | Student Intern | Employees ID | Non-Active Employees

Action	Name	Profession/QP	Personnel Type	Service Coordinator	State ID	NPI	Employment From Date	Employment To Date	Student/Intern
View|Edit	vakers, laurel	Teacher of Students with Disabilities (Birth - Grade 2)	Employee	No		1234567893	11/13/2012		
View|Edit	miller, Eva	Physical Therapist	Employee	No	21761	65109900	7/27/2012		
View|Edit	kelly, zachary	Licensed Master Social Worker	Employee	No		5465465856	9/12/2011		
View|Edit	jones, paul		Employee	No		1237659044	4/5/2013		
View|Edit	ivy, sacay	Speech Language Pathologist	Employee	No		1354367546	10/22/2013		
View|Edit	cook, david	Speech Language Pathologist	Employee	No		1236587460	9/12/2011		
View|Edit	Wingham, Christian	Registered Nurse	Contractor	No	1539		1/1/2012		

The page displays information about each provider associated with the agency such as **Personnel Type** (Employee or Contractor), **State ID** if a DOH- approved Provider, **NPI**, employment / contracted start date ("Employment **From Date**"). A provider is considered not active *with the agency* if they have an 'Employment To Date' prior to today's date recorded in the **To Date** field. Records of providers whose 'To Date' is prior to today's date are listed on the **Non-Active Employee/Contractors List** page, and can be accessed by clicking the **Non-Active Employees** button.

Important Information

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

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

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

Employee/Contractor List: Saratoga Health Solutions - 1029

Add | Pending Employee List | Service Coordinator Caseloads | Student Intern | Employees ID | Non-Active Employees

Action	Name	Profession/QP	Personnel Type	Service Coordinator	State ID	NPI	Employment From Date	Employment To Date	Student/Intern
View|Edit	vakers, laurel	Teacher of Students with Disabilities (Birth - Grade 2)	Employee	No		1234567893	11/13/2012		
View|Edit	miller, Eva	Physical Therapist	Employee	No	21761	65109900	7/27/2012		
View|Edit	kelly, zachary	Licensed Master Social Worker	Employee	No		5465465856	9/12/2011		
View|Edit	jones, paul		Employee	No		1237659044	4/5/2013		
View|Edit	ivy, sacay	Speech Language Pathologist	Employee	No		1354367546	10/22/2013		
View|Edit	cook, david	Speech Language Pathologist	Employee	No		1236587460	9/12/2011		
View|Edit	Wingham, Christian	Registered Nurse	Contractor	No	1539		1/1/2012		

3. Perform one of the following functions:

Viewing Employee or Contractor Data

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

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

Editing Employee or Contractor Details

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

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

End-Dating an Employee or Contractor

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

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

Add an Employee or Contractor

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

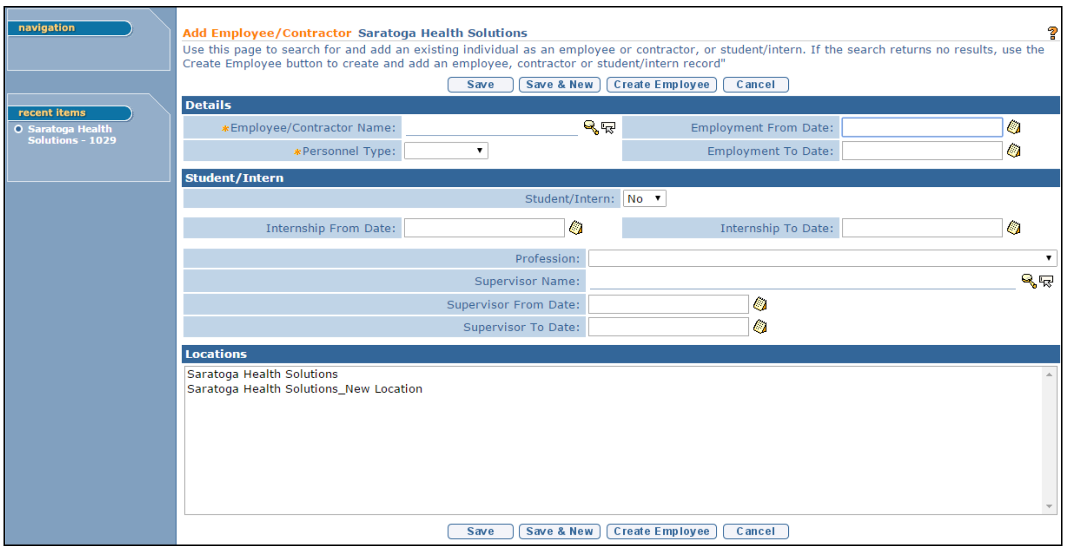
2. Click **Employees/Contractors** from the Navigation Bar. **Employee / Contractor** page displays for the current Provider.

Employee/Contractor List: Saratoga Health Solutions - 1029

Add | Pending Employee List | Service Coordinator Caseloads | Employees ID | Non-Active Employees

Action	Name	Profession/QP	Personnel Type	Service Coordinator	State ID	NPI	From Date	To Date
View|Edit	Bates, Norman	Licensed Psychologist	Employee	No		123098	8/23/2011	
View|Edit	Bear, Jennifer	Licensed Clinical Social Worker	Employee	No		57489	9/12/2011	
View|Edit	Bearing, Mary	Physical Therapist	Employee	No		758457348	9/16/2011	
View|Edit	Bee, Precious	Teacher of Special Education	Employee	No		55522555	8/23/2011	
View|Edit	Brower, Tina	Occupational Therapist	Employee	No		5645387955	4/7/2011	
View|Edit	Brown, Charlie	Speech Language Pathologist	Employee	No			9/12/2011	
View|Edit	Bulmer, Kate	Speech Language Pathologist	Employee	No			9/12/2011	
View|Edit	Cara Caruso		Employee	No		645578	11/22/2010	
View|Edit	Carmen Vigo	Pediatrician	Employee	No		946547	10/27/2010	
View|Edit	Dee, Dan	Teacher of Special Education	Employee	No			9/12/2011	
View|Edit	Doe, Jane	Speech Language Pathologist	Employee	No			9/12/2011	
View|Edit	Duck, Donald	Speech Language Pathologist	Employee	No		1471231541	9/12/2011	
View|Edit	Field, Sam	Licensed Psychologist	Employee	No			9/12/2011	
View|Edit	Fischer, Margie	Teacher of Special Education	Employee	No			9/12/2011	
View|Edit	Freebush, Mary Lu	Service Coordinator	Employee	Yes			8/30/2011	

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

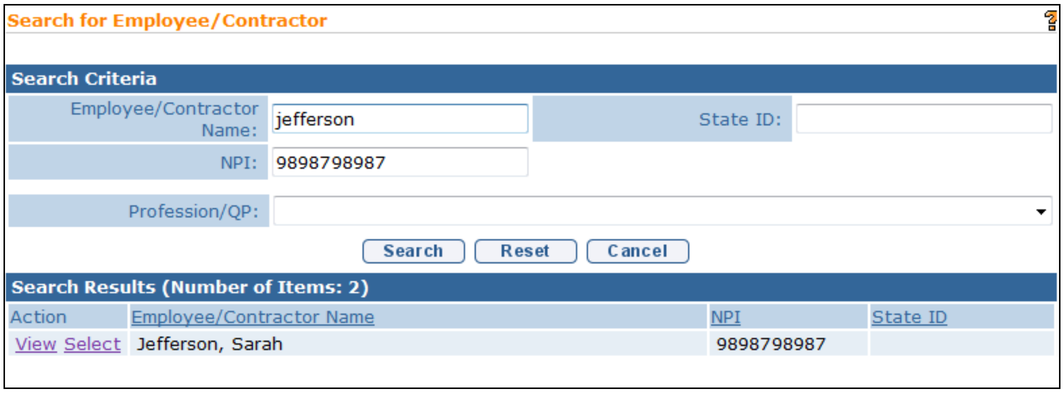


4. Note the instructions. **The first step in adding a provider to the agency is to search the NYEIS database for the person**. If found, the agency simply selects the person and adds the provider's record if she/he is already registered in NYEIS. If the provider does not exist in NYEIS (i.e., they are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

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

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

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



Search for Employee/Contractor

Search Criteria

Employee/Contractor Name: jefferson
State ID:
NPI: 9898798987
Profession/QP:

Search Reset Cancel

Search Results (Number of Items: 2)

Action	Employee/Contractor Name	NPI	State ID
View Select	Jefferson, Sarah	9898798987	

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

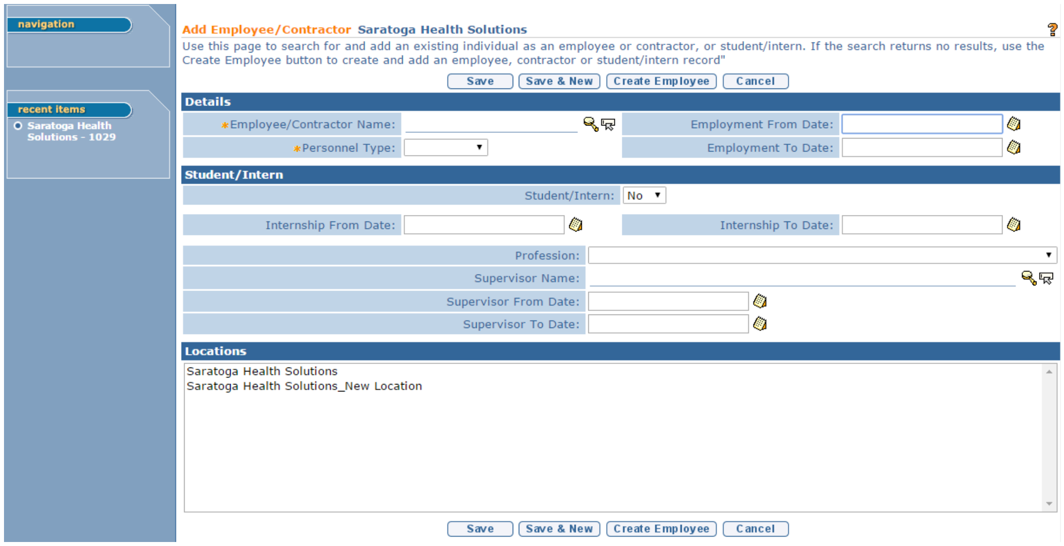
Important Information
Carefully complete searches using all known information about the person (name, NPI, State ID). Recommend using the person's last name (if a two-part last name search by one part), **rather than first and last name,** in the *Employee/Contractor Name* search field. *See* **Unit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

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

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

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

If you verify the listed provider is the correct person to add as an employee or contractor, click the **Select** link in the Action column. **Create Employee** page displays with **Employee Name** populated with the provider's name.



Record the **Employment From Date** and **Personnel Type** information. *Fields requiring data entry are marked with an asterisk. Date fields must be formatted as **mm/dd/yyyy** format.*

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

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

OR

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

Create an Employee

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

Important Information

- The Create an Employee feature can only be used to create and add a **Personnel Type** of Employee. It cannot be used to create and add a Contractor. Contact the SDOH Bureau of Early Intervention Provider Approval Unit at (518) 473-7016 if you want to add a provider as a Contractor but cannot find their record when searching the NYEIS database.

- The Create an Employee feature does not create a NYEIS user account for the individual. Contact the Municipality you primarily provide services for in order to have a NYEIS user account created for the individual if she/he will need access to NYEIS.

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

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

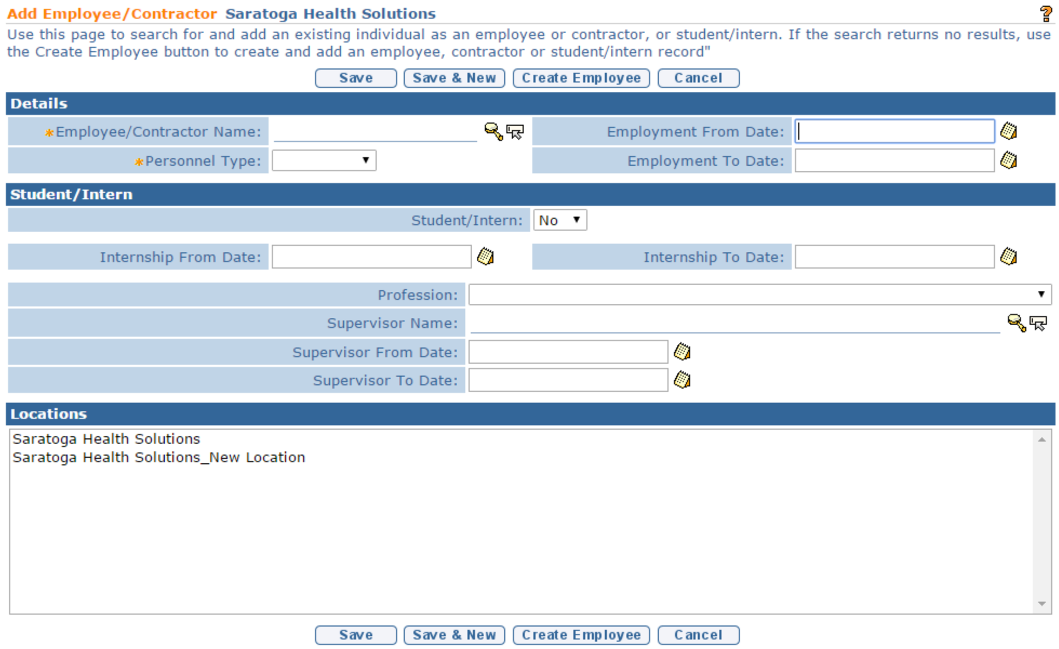
Important Information
Employees/Contractors with multiple licenses, more than one tax ID, or NPI will be displayed additional times in the Employees/Contractors list, corresponding to their professions.

Employee/Contractor List: Saratoga Health Solutions - 1029

Add | Pending Employee List | Service Coordinator Caseloads | Student Intern | Employees ID | Non-Active Employees

Action	Name	Profession/QP	Personnel Type	Service Coordinator	State ID	NPI	Employment From Date	Employment To Date	Student/Intern
View|Edit	vakers, laurel	Teacher of Students with Disabilities (Birth - Grade 2)	Employee	No		1234567893	11/13/2012		
View|Edit	miller, Eva	Physical Therapist	Employee	No	21761	65109900	7/27/2012		
View|Edit	kelly, zachary	Licensed Master Social Worker	Employee	No		5465465856	9/12/2011		
View|Edit	jones, paul		Employee	No		1237659044	4/5/2013		
View|Edit	ivy, sacay	Speech Language Pathologist	Employee	No		1354367546	10/22/2013		
View|Edit	cook, david	Speech Language Pathologist	Employee	No		1236587460	9/12/2011		
View|Edit	Wingham, Christian	Registered Nurse	Contractor	No	1539		1/1/2012		

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

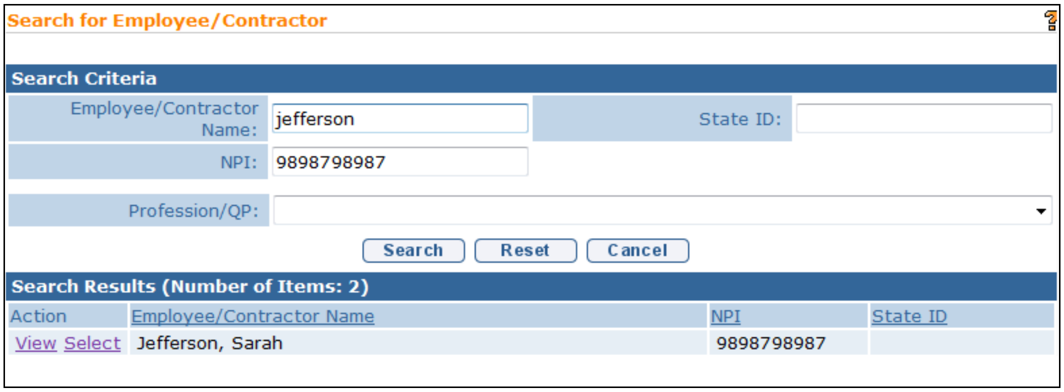


4. Note the instructions. **The first step is to search the NYEIS database to determine if the provider employed or contracted by the agency is already registered in NYEIS**. If the provider is currently registered, the agency simply adds the provider's record to their Employee / Contractor List page.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

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

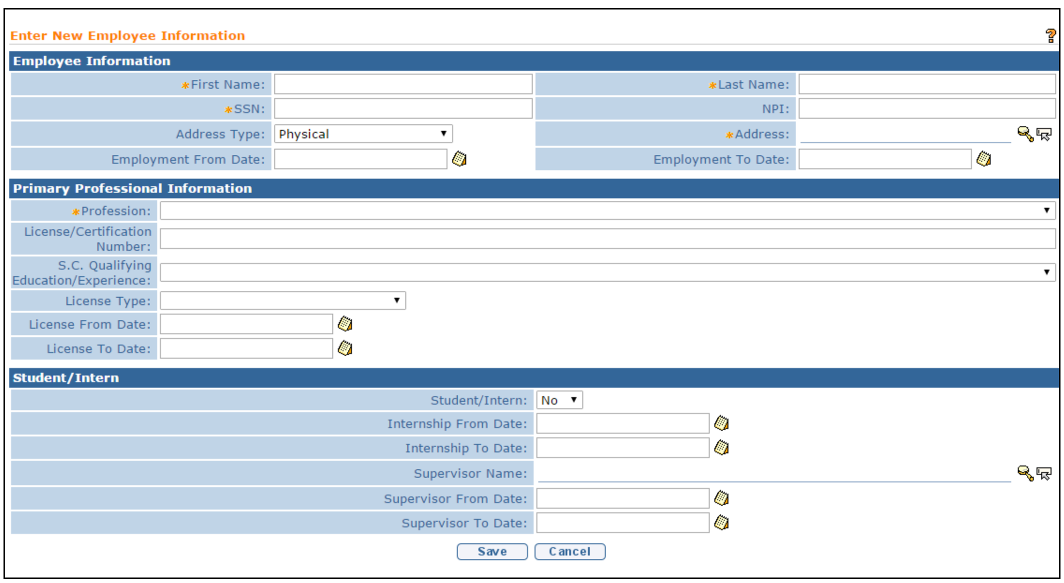
Please contact the **NYEIS Help Desk** if you would like assistance searching for a provider record.

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



Search results display in the **Search Results** cluster. The search will return all providers who 1) are registered in NYEIS, and 2) whose record matches the criteria you entered.

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



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

   The **NPI (National Provider Identification)** and **License/Certification Number** fields are required.

If **Service Coordination** option is selected in the **Profession** drop-down, the user must 1) record the provider's QP License/Certification number, or 2) select an option in the **S.C. Qualifying Education / Experience** field drop-down.

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

If adding Student/Intern:

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

Important Notes:

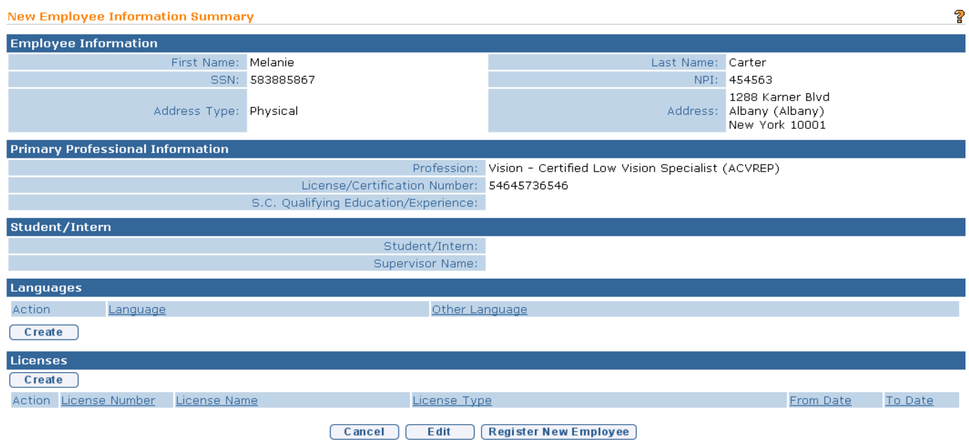
- NPI is required at the time the intern record is being created. A License number is not required at the time of record creation.
- The Internship 'From' and 'To' dates must match or exist within the supervisors 'From' and 'To' dates.
- When billing, claims are submitted using the intern's NPI.
- The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

Important Information

The system compares the Primary Profession selected for the employee with the Agency's SDOH-approved Professional Discipline/Qualified Personnel. The system will return an error message if the person's

Professional Discipline/Qualified Personnel is not approved for the agency by SDOH Bureau of Early Intervention Provider Approval Unit.

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



8. If the provider's record is complete, click the **Register New Employee** button. The **Register Employee** page displays with the question *Are you sure you want to register this employee?* Click **Yes** to complete the registration, or **No.** If **No** is selected the record will be saved to the **Pending Employee List** page. 🕮 *See* **Pending Employee List** topic.
9. If a provider's record contains a future Employment From Date the provider will be found on the agency's Non-Active Employees list until that date.

Important Information

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

OR

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

Employee/Contractor List: Toonces Academy - 1280

Add | Pending Employee List | Service Coordinator Caseloads | Non-Active Employees

Action	Name	Profession/QP	Personnel Type	Service Coordinator	State ID	NPI	From Date	To Date
View|Edit	Amy Dennin	Physician Other Than Pediatrician	Contractor	No	4867	2222222222	6/20/2011	
View|Edit	Carol Fritz	Occupational Therapist	Employee	Yes		32514	8/1/2011	
View|Edit	Carter, Melanie	Vision Certified Low Vision Specialist (ACVREP)	Employee	No		454563	1/20/2011	
View|Edit	Cransberry, Angela	Teacher of Students with Disabilities (Birth - Grade 2)	Employee	No			8/8/2011	
View|Edit	Dandy, Jim	Teacher of Special Education	Employee	No			4/1/2011	3/31/2014
View|Edit	Deborah Yom	Occupational Therapist	Employee	No	2560	8765	1/3/2011	12/31/2012
View|Edit	Dogwood, Tina	Licensed Practical Nurse	Employee	No		89798789	6/10/2011	

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

New Employee List

Pending Employees				
Action	First Name	Last Name	Profession	License/Certification Number
View Delete	Melanie	Carter	Vision - Certified Low Vision Specialist (ACVREP)	54645736546

Cancel

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

Notes:

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

Pending Employee List

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

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

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

Employee/Contractor List: Saratoga Health Solutions - 1029

Add | Pending Employee List | Service Coordinator Caseloads | Student Intern | Employees ID | Non-Active Employees

Action	Name	Profession/QP	Personnel Type	Service Coordinator	State ID	NPI	Employment From Date	Employment To Date	Student/Intern
View|Edit	vakers, laurel	Teacher of Students with Disabilities (Birth - Grade 2)	Employee	No		1234567893	11/13/2012		
View|Edit	miller, Eva	Physical Therapist	Employee	No	21761	65109900	7/27/2012		
View|Edit	kelly, zachary	Licensed Master Social Worker	Employee	No		5465465856	9/12/2011		
View|Edit	jones, paul		Employee	No		1237659044	4/5/2013		
View|Edit	ivy, sacay	Speech Language Pathologist	Employee	No		1354367546	10/22/2013		
View|Edit	cook, david	Speech Language Pathologist	Employee	No		1236587460	9/12/2011		
View|Edit	Wingham, Christian	Registered Nurse	Contractor	No	1539		1/1/2012		

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

New Employee List

Pending Employees

Action	First Name	Last Name	Profession	License/Certification Number
View Delete	Keith	Garggen	Physical Therapist	546565
View Delete	Chris	Smith	Licensed Practical Nurse	45357678976

Cancel

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

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

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

Service Coordinator Caseloads

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

Service Coordinator List: Toonces Academy - 1280

Close

Action	Name	Personnel Type	SC Caseload	State ID	NPI	From Date	To Date
View|Edit	Carol Fritz	Employee	1		32514	8/1/2011	
View|Edit	Harder, Jessica	Employee	5			7/21/2011	
View|Edit	John Smith	Contractor	1	11777	920034	4/19/2011	
View|Edit	Sally Toonces	Employee	14		43838823-1	12/14/2010	

Close

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

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

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

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

Employee/Contractor List: Saratoga Health Solutions - 1029

Add | Pending Employee List | Service Coordinator Caseloads | Student Intern | Employees ID | Non-Active Employees

Action	Name	Profession/QP	Personnel Type	Service Coordinator	State ID	NPI	Employment From Date	Employment To Date	Student/Intern
View|Edit	vakers, laurel	Teacher of Students with Disabilities (Birth - Grade 2)	Employee	No		1234567893	11/13/2012		
View|Edit	miller, Eva	Physical Therapist	Employee	No	21761	65109900	7/27/2012		
View|Edit	kelly, zachary	Licensed Master Social Worker	Employee	No		5465465856	9/12/2011		
View|Edit	jones, paul		Employee	No		1237659044	4/5/2013		
View|Edit	ivy, sacay	Speech Language Pathologist	Employee	No		1354367546	10/22/2013		
View|Edit	cook, david	Speech Language Pathologist	Employee	No		1236587460	9/12/2011		
View|Edit	Wingham, Christian	Registered Nurse	Contractor	No	1539		1/1/2012		

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

Service Coordinator List: Toonces Academy - 1280

Close

Action	Name	Personnel Type	SC Caseload	State ID	NPI	From Date	To Date
View|Edit	Carol Fritz	Employee	1		32514	8/1/2011	
View|Edit	Harder, Jessica	Employee	5			7/21/2011	
View|Edit	John Smith	Contractor	1	11777	920034	4/19/2011	
View|Edit	Sally Toonces	Employee	14		43838823-1	12/14/2010	

Close

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

Student Intern

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

Student/Intern List:

Close

Action	Name	Profession/QP	Internship From Date	Internship To Date
View	Joseph, Anna	Speech Language Pathologist	1/16/2013	1/14/2014
View	Glatterman, Denise	Speech Language Pathologist	5/15/2012	5/15/2013
View	Thomas, Anu Anna	Speech Language Pathologist	6/19/2012	12/14/2012
View	Girgis, Fred	Speech Language Pathologist	6/5/2012	3/22/2013
View	Perez Villar, Joseph	Speech Language Pathologist	5/21/2012	6/21/2013
View	Jones, Thomas	Speech Language Pathologist	6/17/2013	4/16/2014
View	Lewis, Beatriz	Speech Language Pathologist	9/11/2013	9/11/2014

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

View Student Internship Joseph, Anna - 600

Close Edit

Internship Details

Provider Name:	Joseph, Anna	Profession:	Speech Language Pathologist
Internship From Date:	1/16/2013	Internship To Date:	1/14/2014
Employment From Date:	1/16/2013	Employment To Date:	3/3/2014
Student/Intern:	No	Date Changed:	2/12/2014 10:17
User:	Fred Smith		

Add

Internship Supervisors

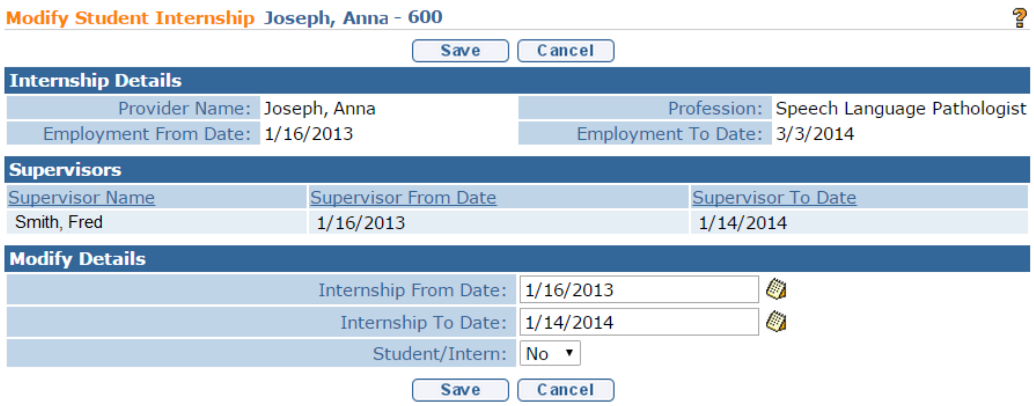
Actions	Supervisor Name	Supervisor From Date	Supervisor To Date	Date Changed	User
View|Edit	Smith, Fred	1/16/2013	1/14/2014	2/12/2014 10:16	Smith, Fred

Internship History

Internship From Date	Internship To Date	Student/Intern	Date Changed	User
1/16/2013	1/14/2014	No	2/12/2014 10:17	Smith, Fred
1/16/2013	1/16/2014	Yes	2/13/2013 00:00	Smith, Fred

Close Edit

Click **Edit** button to modify the Student/Intern Yes/No flag or to modify Internship From/To dates. Modify Student Internship page displays:



Modify Student Internship Joseph, Anna - 600

Save | Cancel

Internship Details

Provider Name:	Joseph, Anna	Profession:	Speech Language Pathologist
Employment From Date:	1/16/2013	Employment To Date:	3/3/2014

Supervisors

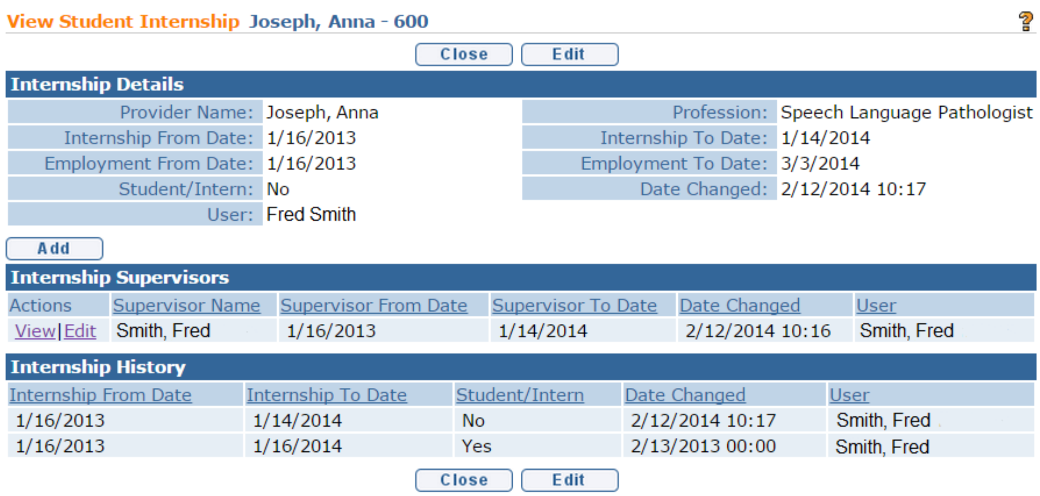
Supervisor Name	Supervisor From Date	Supervisor To Date
Smith, Fred	1/16/2013	1/14/2014

Modify Details

Internship From Date:	1/16/2013
Internship To Date:	1/14/2014
Student/Intern:	No

Save | Cancel

When finished, click **Save** to save changes, or **Cancel** to abort any changes. **View Student Internship** Page displays:



View Student Internship Joseph, Anna - 600

Close | Edit

Internship Details

Provider Name:	Joseph, Anna	Profession:	Speech Language Pathologist
Internship From Date:	1/16/2013	Internship To Date:	1/14/2014
Employment From Date:	1/16/2013	Employment To Date:	3/3/2014
Student/Intern:	No	Date Changed:	2/12/2014 10:17
User:	Fred Smith		

Add

Internship Supervisors

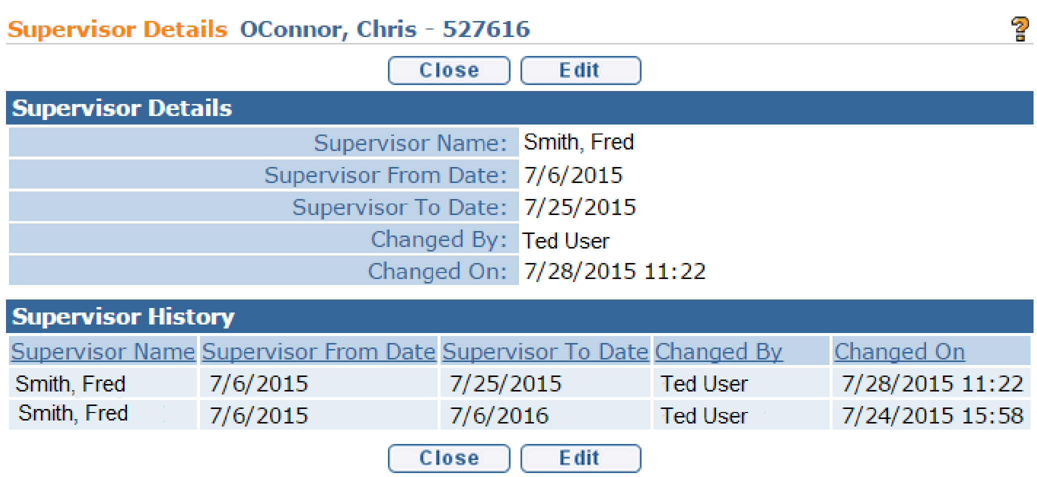
Actions	Supervisor Name	Supervisor From Date	Supervisor To Date	Date Changed	User
View | Edit	Smith, Fred	1/16/2013	1/14/2014	2/12/2014 10:16	Smith, Fred

Internship History

Internship From Date	Internship To Date	Student/Intern	Date Changed	User
1/16/2013	1/14/2014	No	2/12/2014 10:17	Smith, Fred
1/16/2013	1/16/2014	Yes	2/13/2013 00:00	Smith, Fred

Close | Edit

Click **View** Button corresponding to existing supervisor in Internship Supervisors cluster to see details on Supervisor assignment. **Supervisor Details** page displays:



Supervisor Details OConnor, Chris - 527616

Close | Edit

Supervisor Details

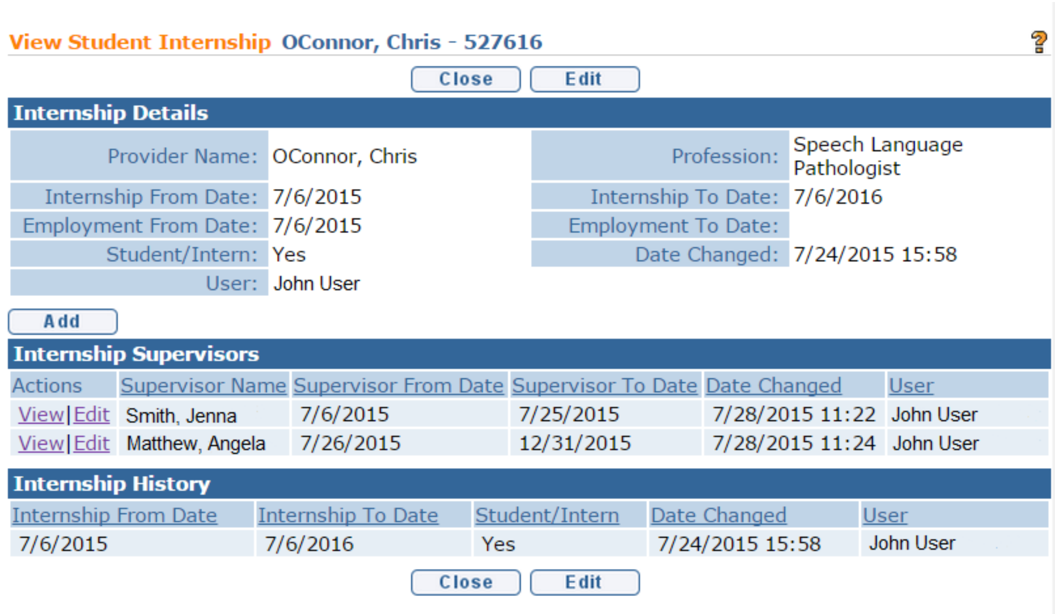
Supervisor Name:	Smith, Fred
Supervisor From Date:	7/6/2015
Supervisor To Date:	7/25/2015
Changed By:	Ted User
Changed On:	7/28/2015 11:22

Supervisor History

Supervisor Name	Supervisor From Date	Supervisor To Date	Changed By	Changed On
Smith, Fred	7/6/2015	7/25/2015	Ted User	7/28/2015 11:22
Smith, Fred	7/6/2015	7/6/2016	Ted User	7/24/2015 15:58

Close | Edit

Click **Edit** button to modify Supervisor From/To Dates. Be sure to use *mm/dd/yyyy* format. When finished, click **Save** or **Cancel. View Student Internship** page displays:


View Student Internship OConnor, Chris - 527616

Close Edit

Internship Details

Provider Name:	OConnor, Chris	Profession:	Speech Language Pathologist
Internship From Date:	7/6/2015	Internship To Date:	7/6/2016
Employment From Date:	7/6/2015	Employment To Date:	
Student/Intern:	Yes	Date Changed:	7/24/2015 15:58
User:	John User		

Add

Internship Supervisors

Actions	Supervisor Name	Supervisor From Date	Supervisor To Date	Date Changed	User
View|Edit	Smith, Jenna	7/6/2015	7/25/2015	7/28/2015 11:22	John User
View|Edit	Matthew, Angela	7/26/2015	12/31/2015	7/28/2015 11:24	John User

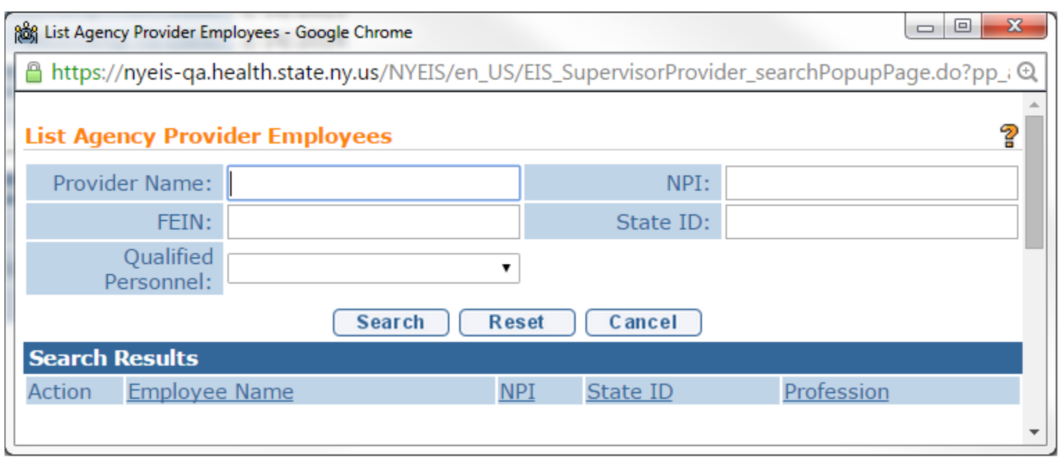
Internship History

Internship From Date	Internship To Date	Student/Intern	Date Changed	User
7/6/2015	7/6/2016	Yes	7/24/2015 15:58	John User

Close Edit

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

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



Use the TAB key to navigate from field to field. Enter search criteria and click **Search.** Matching results populate Search Results. From the Search Results cluster, click **Select** Link corresponding to desired supervisor. Add Supervisor Page displays with selected Supervisor populating Supervisor Name field of New Supervisor Details cluster:

Add Supervisor

Save | Cancel

Internship Details

Profession:	Speech Language Pathologist
Internship From Date:	7/6/2015
Internship To Date:	7/6/2016

Internship Supervisors

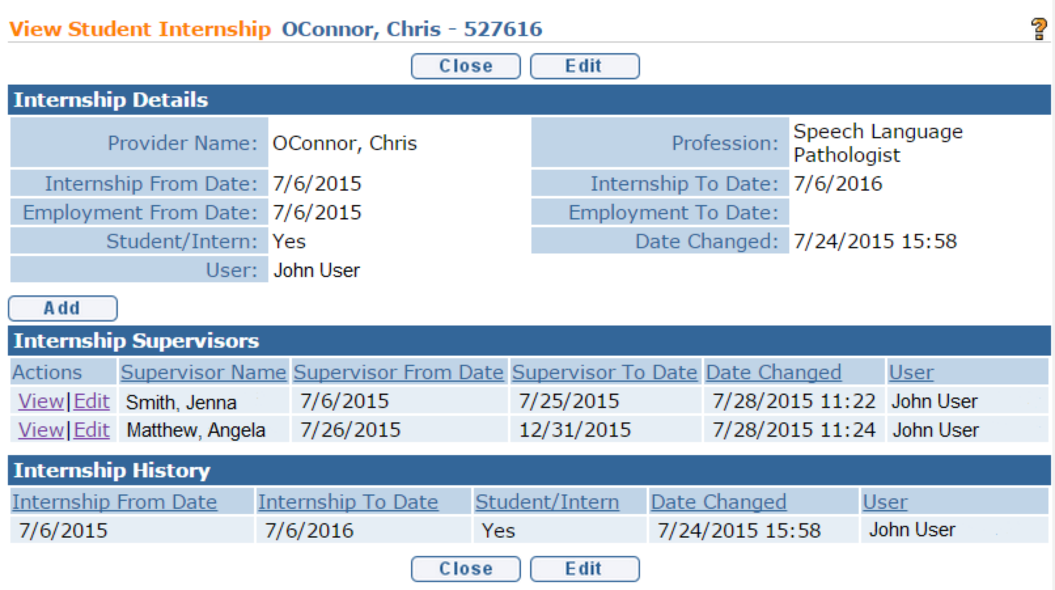
Supervisor Name	Supervisor From Date	Supervisor To Date
Smith, Jenna	7/6/2015	7/25/2015

New Supervisor Details

Supervisor Name:	Matthew, Angela
Supervisor From Date:	7/26/2015
Supervisor To Date:	12/31/2015

Save | Cancel

Record New Supervisors 'From' and 'To' Dates. Click **Save** when finished, or **cancel** to cancel the operation and return to the previous page**. View student Internship** page displays, with the newly recorded Supervisor and their effective dates of their supervisory relationship recorded in the Internship Supervisors cluster:



View Student Internship OConnor, Chris - 527616

Close | Edit

Internship Details

Provider Name:	OConnor, Chris	Profession:	Speech Language Pathologist
Internship From Date:	7/6/2015	Internship To Date:	7/6/2016
Employment From Date:	7/6/2015	Employment To Date:	
Student/Intern:	Yes	Date Changed:	7/24/2015 15:58
User:	John User		

Add

Internship Supervisors

Actions	Supervisor Name	Supervisor From Date	Supervisor To Date	Date Changed	User
View|Edit	Smith, Jenna	7/6/2015	7/25/2015	7/28/2015 11:22	John User
View|Edit	Matthew, Angela	7/26/2015	12/31/2015	7/28/2015 11:24	John User

Internship History

Internship From Date	Internship To Date	Student/Intern	Date Changed	User
7/6/2015	7/6/2016	Yes	7/24/2015 15:58	John User

Close | Edit

Important Notes:

Supervisors *must* be of type 'Employee'. Contracted Providers cannot be assigned as supervisors to interns.

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

Inset information on how to end an Internship.

Employee ID

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

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

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

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

Employee/Contractor List: Saratoga Health Solutions - 1029

Add | Pending Employee List | Service Coordinator Caseloads | Employees ID | Non-Active Employees

Action	Name	Profession/QP	Personnel Type	Service Coordinator	State ID	NPI	From Date	To Date
View | Edit	Bates, Norman	Licensed Psychologist	Employee	No		123098	8/23/2011	
View | Edit	Bear, Jennifer	Licensed Clinical Social Worker	Employee	No		57489	9/12/2011	
View | Edit	Bearing, Mary	Physical Therapist	Employee	No		758457348	9/16/2011	
View | Edit	Bee, Precious	Teacher of Special Education	Employee	No		55522555	8/23/2011	
View | Edit	Brower, Tina	Occupational Therapist	Employee	No		5645387955	4/7/2011	
View | Edit	Brown, Charlie	Speech Language Pathologist	Employee	No			9/12/2011	

3. Click the **Employees ID** button. The **Employee Identification List** page displays.

Employee Identification List: Saratoga Health Solutions - 1029

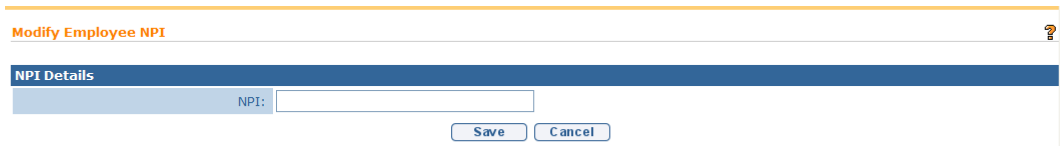
Close

Edits to the provider's Social Security Number can only be completed by Bureau of Early Intervention Provider Approval Unit. Please contact PAU for assistance.

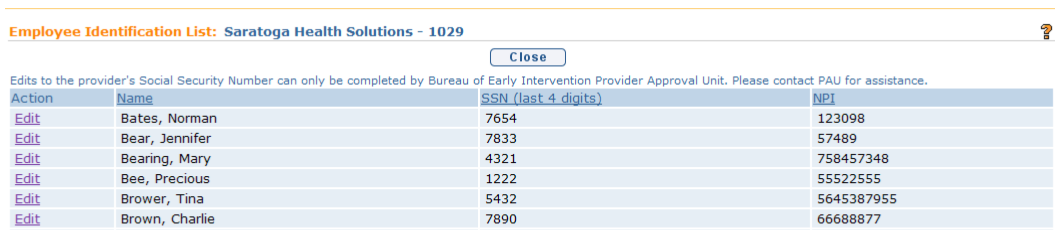
Action	Name	SSN (last 4 digits)	NPI
Edit	Bates, Norman	7654	123098
Edit	Bear, Jennifer	7833	57489
Edit	Bearing, Mary	4321	758457348
Edit	Bee, Precious	1222	55522555
Edit	Brower, Tina	5432	5645387955
Edit	Brown, Charlie	7890	

4. Review the Social Security Number or NPI recorded for each employee and verify their accuracy.

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



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


Employee Identification List: Saratoga Health Solutions - 1029

Close

Edits to the provider's Social Security Number can only be completed by Bureau of Early Intervention Provider Approval Unit. Please contact PAU for assistance.

Action	Name	SSN (last 4 digits)	NPI
Edit	Bates, Norman	7654	123098
Edit	Bear, Jennifer	7833	57489
Edit	Bearing, Mary	4321	758457348
Edit	Bee, Precious	1222	55522555
Edit	Brower, Tina	5432	5645387955
Edit	Brown, Charlie	7890	66688877

Non-Active Employees

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

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

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

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

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

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

Employee/Contractor List: Saratoga Health Solutions - 1029

Add | Pending Employee List | Service Coordinator Caseloads | Student Intern | Employees ID | Non-Active Employees

Action	Name	Profession/QP	Personnel Type	Service Coordinator	State ID	NPI	Employment From Date	Employment To Date	Student/Intern
View|Edit	vakers, laurel	Teacher of Students with Disabilities (Birth - Grade 2)	Employee	No		1234567893	11/13/2012		
View|Edit	miller, Eva	Physical Therapist	Employee	No	21761	65109900	7/27/2012		
View|Edit	kelly, zachary	Licensed Master Social Worker	Employee	No		5465465856	9/12/2011		
View|Edit	jones, paul		Employee	No		1237659044	4/5/2013		
View|Edit	ivy, sacay	Speech Language Pathologist	Employee	No		1354367546	10/22/2013		
View|Edit	cook, david	Speech Language Pathologist	Employee	No		1236587460	9/12/2011		
View|Edit	Wingham, Christian	Registered Nurse	Contractor	No	1539		1/1/2012		

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

Non-Active Employee/Contractor List: Toonces Academy - 1280

Close

Action	Name	Profession/QP	Personnel Type	Service Coordinator	State ID	NPI	From Date	To Date
View	Adirondack Good Guys, LLC		Contractor	No	2305999	0990122343	7/1/2011	7/20/2011
View	Backdate Test Agency 2		Contractor	No	3586	656525	1/1/2011	3/25/2011
View	TestRole, Security		Employee	No		5968509-68	2/2/2011	2/3/2011
View	smith, cindy	Teacher of Special Education	Employee	No			4/1/2011	7/21/2011

Close

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

Important Note:

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

Important Information to Providing Agencies regarding HCS User Account Management:

- Please note that each providing agency should have established an individual(s) within the organization to serve as a liaison between the agency and the HCS for matters relating to agency employee HCS account management. One individual must be designated an HCS Director and an additional one or two individuals may be designated HCS Coordinators.
    - When a user who is employed by only one agency leaves the agency, the HCS Director or Coordinator from the agency should contact the CAMU Help Desk at 1-866-529-1890 so that the HCS login can be terminated.

- If this employee ever returns to work for an agency in the future, they will likely receive a new HCS user ID. In this specific circumstance, the employee should contact the NYEIS Help Desk to have their previous NYEIS user ID updated to match the latest HCD user ID.

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

EMPLOYERS

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

1. Display **Provider Home** page.

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

Notes:

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

Exception
Not available to all Provider User roles.

FINANCIALS

Financials displays a list with details of payments issued to the Provider. It also enables the Provider the capability to view and drill down to the specific details of the payments such as the service authorization and claim that the payment resulted from.

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

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

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

4. Review information.

🕮 *See* **Unit 8: Provider - Invoicing** for further information.

FLAGS

Provider Flags are not in use at this time.

LANGUAGES

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

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

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

Important Information

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

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

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

Provider Languages: Midway Social Services - 222331234

New

Action	Language
Delete	German
Delete	English
Delete	French

3. Perform one of the following functions:

<u>Adding a Language</u>

a. Click **New** button. **Add Provider Language** page displays. Select **Language** drop down. Select Language.

b. Click **Save** button. **Provider Languages** page displays with a list of Languages.

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

<u>Deleting a Language</u>

a. Click **<u>Delete</u>** link under **Action** column from **Provider Languages** page. **Delete Language** page displays with message ***Are you sure that you want***

to delete the selected language? Click **Yes** button. **Provider Languages** page displays. Selected Language is removed.

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

Notes:

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

LICENSES

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

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

Important Information

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

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

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

Provider Licenses & Certifications: Ava Dennin - 11520

New

Action	License Number	License Name	License Type	From Date	To Date
Edit	435367	Physical Therapist	Professional License	9/30/2005	9/30/2015

3. Perform one of the following functions:

<u>Exception</u>
Feature only accessible by Individual Contractors.

<u>Adding a Provider License & Certification</u>

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

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

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

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

<u>Exception</u>
Feature only accessible by Individual Contractors.

<u>End-Dating a Provider License or Certification</u>

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

Notes:

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

LOCATIONS

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

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

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

View Locations

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

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

Provider Locations: Toonces Academy - 1280

New

Action	Location Name	Municipality	Start Date	End Date
View | Edit	Toonces Center for Development_Central Ave	Albany	1/17/2011	
View | Edit	Toonces Center for Development_Johnson St	Albany	6/24/2010	

3. View Provider Locations

   Click **<u>View</u>** link under **Action** column from **Provider Location** page. **View Location** page displays.

Notes:

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

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

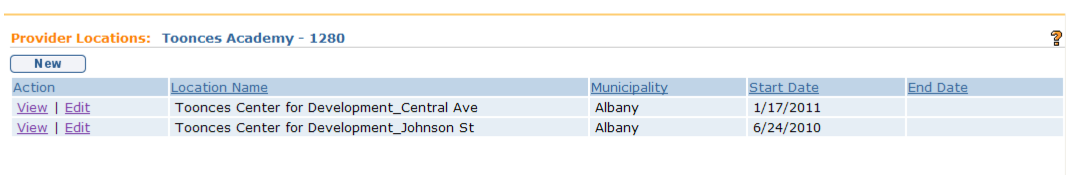
- **Recent items** on the Navigation Bar displays recently visited items.

Edit Location Service Availability

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

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

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

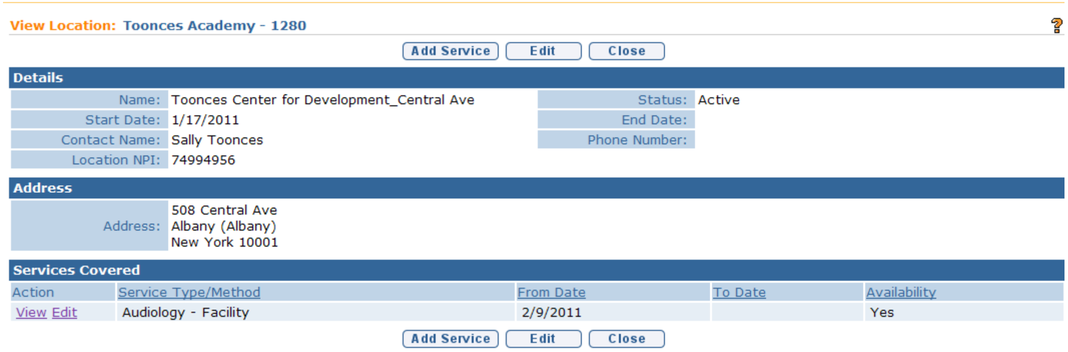


Provider Locations: Toonces Academy - 1280

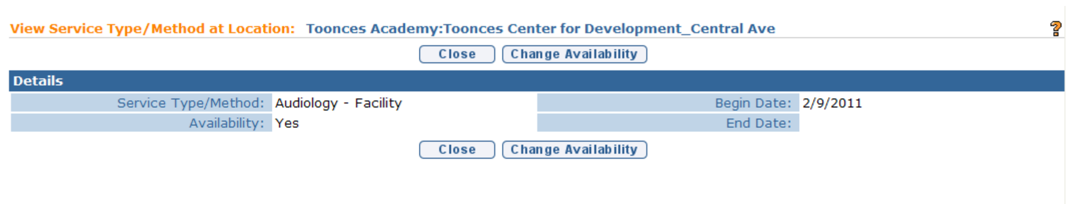
New

Action	Location Name	Municipality	Start Date	End Date
View | Edit	Toonces Center for Development_Central Ave	Albany	1/17/2011	
View | Edit	Toonces Center for Development_Johnson St	Albany	6/24/2010	

3. Click View in the Action column next to the Location record to be changed. **View Location** page displays.

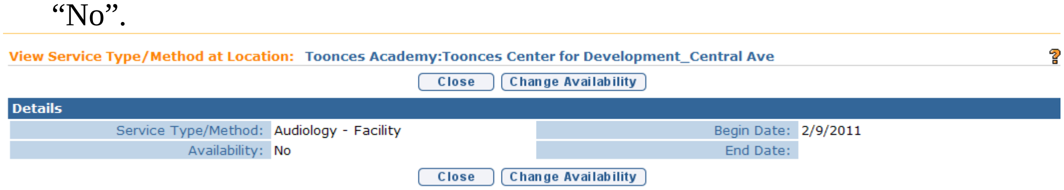


4. View the services listed in the **Services Covered** cluster. Notice the column labeled **Availability**. Click **View** link in the **Action** column next to the service whose availability is to be changed. **View Service Type/Method at Location** page displays.



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

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



7. Click **Close** button to return to **View Loca**tion page. Click **Close** button to **Provider Locations** page.

MODELS

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

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

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

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

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

Provider Models

Models

Action	Model
Delete	Evaluations (Includes Core, Screening, and Supplemental)
Delete	Supplemental Evaluations Only
Delete	Service Coordination
Delete	Home/community-based individual/collateral
Delete	Facility-Based Individual/collateral
Delete	Parent-Child Group
Delete	Group Developmental Intervention
Delete	Family Caregiver/Support Group

Create

Note:

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

MONITORING

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

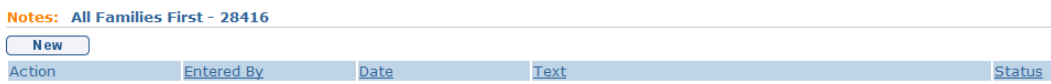
NOTES

Exception
Not available to all Provider User roles.

Important Information
Information in this link is View-only.

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

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



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

   The following buttons are available:

   - **Edit** – not active.
   - **Delete** – not active
   - **Close** - returns to **Notes** page.

Notes:

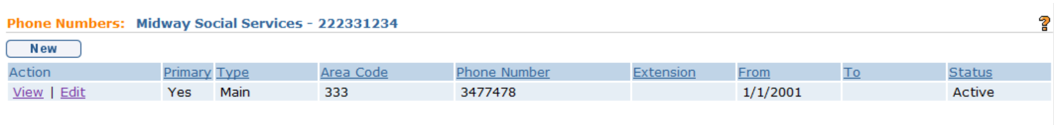
- To sort the data displayed on pages, click the underlined column heading. Click once to view the data in ascending order and click again to view the data in descending order.
- **Cancel** button stops current operation and returns to previous page.
- **Recent items** on the Navigation Bar displays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

Phone Numbers

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

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

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



Phone Numbers: Midway Social Services - 222331234

New

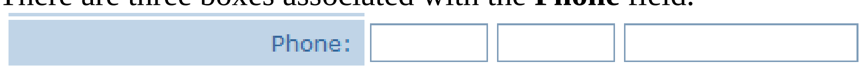
Action	Primary	Type	Area Code	Phone Number	Extension	From	To	Status
View | Edit	Yes	Main	333	3477478		1/1/2001		Active

3. Perform one of the following functions:

<u>Adding a Phone Number</u>

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

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

> **Important Information**
> There are three boxes associated with the **Phone** field.
>
> 
>
>
> 1st Box: Country Code (not required)
> 2nd Box: Area Code
> 3rd Box: Number

c. Type **Comment** *(Optional)*.

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

Or

Click **Save & New** button to continue adding Phone Numbers.

<u>Viewing Phone Number</u>

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

- **Edit -** *See* **Editing a Phone Number** section.

- **Delete** - removes the **Phone Number**. ***Are you sure you want to delete this phone number?*** message displays. Select **Yes** button. **Phone Numbers** page displays with **Status** as **Canceled**.
- **Close** - returns to **Phone Numbers** page.

Editing a Phone Number

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

Deleting a Phone Number

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

Notes:

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

PRODUCTS

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

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

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

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

Products: Toddler Care Today - 278

Action	Name	Start Date	End Date
Edit	Non-physician Supplemental Eval - OT	10/14/2009	
Edit	OT - Basic	10/14/2009	
Edit	OT - Extended	10/14/2009	
Edit	OT - Facility	10/14/2009	
Edit	Service Coordination	10/14/2009	
Edit	PT - Basic	10/14/2009	
Edit	PT - Extended	10/14/2009	
Edit	PT - Facility	10/14/2009	
Edit	Non-physician Supplemental Eval - PT	10/14/2009	
Edit	Vision - Basic	10/14/2009	

Notes:

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

PROFESSIONAL DISCIPLINE/QUALIFIED PERSONNEL

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

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

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

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

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

Professional Discipline/Qualified Personnel: Ava Dennin - 11520

New

Action	Profession/QP	From Date	To Date
Edit	Physical Therapist	9/30/2005	9/30/2015

Note:

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

Provider Completed Evaluations

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

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

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

2. Click **Provider Completed Evaluations** from the Navigation Bar. **View Accepted Evaluations** page displays for the current Provider.

View Accepted Evaluations: Midway Social Services - 222331234

Action	Child's Name	Date Completed
View	Frita Rorshak	4/14/2009

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

   Or

   Select **Print MDE** button.

Notes:

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

PROVIDER CONFIGURATION

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

1. Display **Provider Home** page. See **My Provider Homepage** section for information.
2. Click **Provider Configuration** from the Navigation Bar. **Service Provider System Configuration Settings** page displays for the current Provider.

Service Provider System Configuration Settings: All Families First - 28416

Edit | Close

Submission Details	
Preferred Submission Method:	Manual
Electronic Communication Details	
Do you support claim file HIPAA 837P?:	Yes
Do you support claim file HIPAA 837I?:	No
Do you support claim file HIPAA 835?:	No
Do you support claim inquiry files HIPAA 276?:	No
Do you support prior authorization requests, HIPAA 278?:	No
Do you support eligibility inquiry files, HIPAA 270?:	No
Service Provider	
User ID:	
Credential:	
Web Service URL:	
Service Provider Name:	
Service Provider ETIN:	AFFETIN

Edit | Close

3. View information.

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

Provider SCR Number

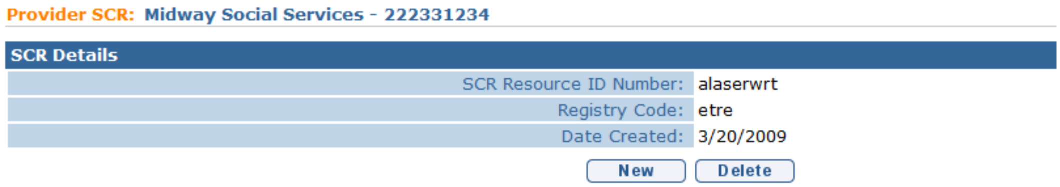
<u>Exception</u>
Not available to all Provider User roles.

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

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

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

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



REFERRALS

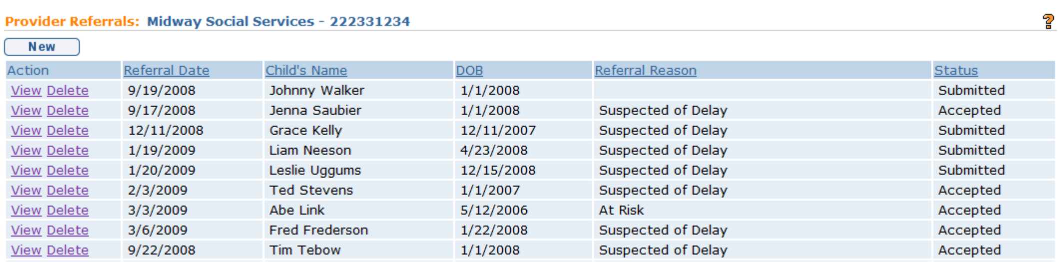
Exception
View only for some Provider User roles.

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

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

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

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


Provider Referrals: Midway Social Services - 222331234

New

Action	Referral Date	Child's Name	DOB	Referral Reason	Status
View Delete	9/19/2008	Johnny Walker	1/1/2008		Submitted
View Delete	9/17/2008	Jenna Saubier	1/1/2008	Suspected of Delay	Accepted
View Delete	12/11/2008	Grace Kelly	12/11/2007	Suspected of Delay	Submitted
View Delete	1/19/2009	Liam Neeson	4/23/2008	Suspected of Delay	Submitted
View Delete	1/20/2009	Leslie Uggums	12/15/2008	Suspected of Delay	Submitted
View Delete	2/3/2009	Ted Stevens	1/1/2007	Suspected of Delay	Accepted
View Delete	3/3/2009	Abe Link	5/12/2006	At Risk	Accepted
View Delete	3/6/2009	Fred Frederson	1/22/2008	Suspected of Delay	Accepted
View Delete	9/22/2008	Tim Tebow	1/1/2008	Suspected of Delay	Accepted

3. Perform one of the following functions:

Creating a New Referral

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

Viewing a Referral

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

Editing a Referral

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

Deleting a Referral

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

Submitting a Saved Referral

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

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

RESPONSE FILE

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

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

RESTRICTIONS

Provider Restrictions are a function of NYEIS Administration staff.

ROLES

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

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

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

Roles: Toddler Care Today - 278

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

Special Population Served

Exception
Not available to all Provider User roles.

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

Important Information

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

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

3. Click **Special Population Served** from the Navigation Bar. **Special Population Served** page displays for the current Provider.

Special Population Served: Midway Social Services - 222331234

New

Action	Population Type	Intervention Strategy	Status

4. Perform one of the following functions:

   <u>Adding Special Population Served Data</u>

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

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

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

   <u>Deleting Special Population Served Data</u>

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

Notes:

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

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

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

SURVEYS

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

TASKS

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

Exception
Not available to all Provider User roles.

WEB ADDRESSES

Important Information

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

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

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

Web Addresses: Midway Social Services - 222331234

New

Action	Primary	Web Address	Type	From	To	Status
View | Edit	Yes	http://www.midwaysocialservices.gov	General Services	1/1/2001		Active

3. Perform one of the following functions:

   Adding a Web Address

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

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

   c. Type **Comments** *(Optional)*.

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

      Or

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

   Viewing a Web Address

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

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

Editing a Web Address

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

Deleting a Web Address

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

Notes:

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