

# Home and Community Based Services (HCBS) Referral & Authorization Portal

## User Guide – Guide to Edits

**Summary:** The HCBS Referral & Authorization Portal will undergo updates over time and with it, the User Guide will be updated. This document will serve as a catalog of those User Guide updates for quick reference. Items added in the most recent iteration of this document are highlighted.

Date Added	Section & Update	Update Summary
August 20, 2024	Portal Access – Accessing the System  Page 4  <b>Removed</b> information and screenshots	Removed information pertaining to IRAMS Access and assigning gatekeepers. Information has been moved to the <a href="#">New York State Department of Health Incident Reporting and Management System Access Guide</a> .
August 20, 2024	Child Case Page  Page 7  <b>Updated</b> screenshot	Updated screenshot of Child Case Page to reflect ability to add associated care managers.
August 20, 2024	Child Case Page – Filters  Pages 7-9  <b>Addition</b> of language/screenshots	The Child Case Page can be filtered to allow users to view their caseloads according to different criteria. Users can filter by designated counties, service types, service status, and organizations. Users can also use the filters to narrow down their search by Managed Care Plans, CMA, Health Home, and HCBS Agency. Users can add multiple filters to refine their search to specific criteria.  To check the 'Service Status,' the toggle feature may be used to filter through referral eligible only, documents only, and recent HCBS activity only.
August 20, 2024	Child Case Page – Child/Youth Information  Page 10  <b>Addition</b> of language	Note: For languages, the dropdown list is only a suggested list for autocomplete and users can manually enter any necessary value.

Date Added	Section & Update	Update Summary
August 20, 2024	Child Case Page – Child/Youth Information  Page 11  <b>Addition</b> of language and screenshots	The HHCM/C-YES will need to ensure that the HCBS Designated County has been correctly recorded. If any of the following situations apply, the care manager must manually change the designated county of the participant within the system: <ol style="list-style-type: none"> <li>1. If the participant's Medicaid county of residence is in NYC</li> <li>2. If the participant's Medicaid county is listed as Special county in Medicaid (OMH)</li> <li>3. If there is a discrepancy in Medicaid residence county with the county of the residence zip code</li> </ol> Further instructions are provided on how to manually adjust the participant's Designated County to align with their county of residence.
August 20, 2024	Child Case Page – Care Team Member Information  Pages 11-14  <b>Addition</b> of language/screenshots	Care manager contact information is now available in the Care Team Member Information section of the Child Case page.  Instructions have been provided on how to add care managers into the system.
August 20, 2024	Child Case Page – Child/Youth's Family/Guardian Information  Page 17  <b>Addition</b> of language	Though there is a drop-down provided for the "Relationship" under the 'Edit Parent/Guardian' section, users may choose to type free text in the box if they feel their situation is not accurately captured by the drop-down options.
August 20, 2024	Referral Creation – Review and Submission  Page 22  <b>Addition</b> of language and a screenshot	Reminder that HHCM/C-YES should <b>not</b> send the referral to all designated providers and must only send the referral to HCBS providers that the family has consented to.
August 20, 2024	HCBS Provider Reviews & Responds to a Referral – Removal From the Agency Waitlist	Clarification that if an HCBS provider has waitlisted or declined a child/youth then another provider is selected to serve the child/youth, the child/youth will remain on the waitlisted agency's list for 15 days afterwards with "Not Selected" viewable.

Date Added	Section & Update	Update Summary
	Page 28  <b>Addition</b> of language and screenshots	
August 20, 2024	Discharge Process – Viewer & Discharge Permissions  Page 34  <b>Addition</b> of language	The HHCM/C-YES will be alerted via the Daily Digest if one of their children/youth was discharged from HCBS service(s) on the previous day.
August 20, 2024	System Notifications – Daily Digest Emails  Page 34  <b>Addition</b> of language and updated screenshot	Daily Digest emails will now include a segment if a child/youth was discharged from service or if any Connections that were confirmed on the previous day, in addition to the existing statuses.