EI-Hub "Backward S" Training

Early Intervention & Children and Youth with Special Health Care Needs Summit:
2023 New York Statewide Meeting – May 3, 2023

Preparing for In-Person Training

Public Consulting Group (PCG) is hosting an in-person training on the EI-Hub during the Early Intervention & Children and Youth with Special Health Care Needs Summit: 2023 New York Statewide Meeting. The training exercise will allow participants to follow along as PCG demonstrates how to move a child through the Early Intervention Program (Backward 'S') stages using the EI-Hub Case Management component. The training will begin with creating a new child record and conclude with entering an evaluation. Time will also be allotted for a question and answer (Q&A) session.

To actively participate in the training, meeting participants must ensure they have met all the requirements listed under *Prerequisites*. The prerequisites outline the technical system requirements and the appropriate EI-Hub Sandbox user role setup needed to take part in the training. PCG has proactively set up accounts for registered in-person training participants. If you're attending the meeting in-person and find that your account does not have the necessary user roles, please contact the PCG Help Desk for assistance.

A virtual option will be available for those who cannot attend in-person. Virtual participants can watch and follow along with those in the room. While PCG won't be providing direct support to virtual attendees, the chat feature will be enabled.

If you have additional questions, please contact the PCG Help Desk.

Tel#: (866) 315-3747

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Prerequisites

- ☐ **IMPORTANT!** All in-person participants will need laptop access to participate in the training.

- ☐ Confirm you have one of the below-approved web browsers:

    - ☐ Google Chrome 🔴 *(recommended browser for the EI-Hub)*

    - ☐ Microsoft Edge 🔵

    - ☐ Apple Safari 🧭

    - ✓ Training Resource: [System Requirements](#)

- ☐ Confirm you have an active Health Commerce System (HCS) account.

    - ☐ Bring (or) memorize your username and password

    - ✓ Training Resource: [HCS Instructions](#), [Resource for Licensed Professionals](#), [Resources for Non-licensed Professionals](#)

- ☐ Confirm you can access the EI-Hub Sandbox environment.

    - ✓ Website: https://hub.uat.nyeihub.com/

- ☐ Confirm you have **all of the required user roles** listed below:
  *NOTE: To ensure that all registered in-person participants can fully participate in the training, PCG has configured their accounts with the necessary user role settings. If you plan to attend in-person and do not see the below user roles listed on your account, please contact the PCG Help Desk for assistance. This information can be found under '**My Profile**' in the '**Roles and Components**' section. PCG will not be configuring accounts for virtual participants.*

    - ☐ MuniProgAllNY

    - ☐ UniversalProvNY

    - ☐ EIO/D NY

    - ☐ ISC/OSC NY

    - ☐ ProvDataEntryNY

    - ☐ MuniDataEntryNY

NOTE: The 'Entity name' field will vary based on your county of employment.

Creating a New Child Record

NOTE: Creating new child records is limited to the below user roles:

- o *MuniProgAllNY*
- o *MuniDataEntryNY*

1. Navigate to the **Child menu and** select the +**Add** option.

    Note: To avoid creating duplicate records, users should search for the child's name in the system prior to creating a new record.

2. Navigate to the **Child Info tab** and complete the required fields under the **Basic Demographic Info panel**. After all required fields below are completed, select the **Submit** button to save.

    ☐ Child's First Name

    ☐ Child's Last Name

    ☐ Birth Date

    ☐ Ethnicity

    ☐ Race

    ☐ Sex

    ☐ Primary Language

    ☐ County of Residence *(will default based on user role access)*

Referral

NOTE: Entering referrals is limited to the below user roles:

- o *MuniProgAllNY*
- o *MuniDataEntryNY*
- o *EIO/D NY*

1. Navigate to the **Child Info tab** and select the **Referral panel**.

2. Select the **Add Referral** option to create a new child referral.

3. Complete the required fields under the **Referral EIP panel**. After all required fields are completed, select the **Submit** button to save.

    ☐ Referral Status (*will default to Open*)

    ☐ Referral Type

☐ Referral Date (*will default to today's date*)

☐ Referral Method

☐ Referral Reason

☐ Referral Source Type

☐ Referral Source First Name

☐ Referral Source Last Name

☐ Checkbox for - By checking this box, the Municipality indicates they have received confirmation from the referral source that the parent/legal guardian was consulted, and they did not object to the referral
Note: If the referral is made by someone other than the parent or guardian, you can enter the parent's/guardian's contact information in the ***Referral Source Comments*** field. Obtaining the child's address from the referral source is also highly recommended. The child's address is required to create the Service Authorization for initial service coordination.
Note: Although not mandatory, users have the option to upload a document(s) as part of the referral process. The upload option appears after the referral has been submitted.

4. Navigate to the **Child Info tab** and select the **Referral panel**.

5. Select the **Add Child Address** option to enter the child's address.

6. Complete the required fields under the **Child Address panel**. After all required fields are completed, select the **Submit** button to save.

   Note: The **Child Address panel** will appear as a pop-up.

   ☐ County of Residence (*will default to the county entered during the referral process*)

   ☐ Address Type

   ☐ Address Status

   ☐ Start Date

   ☐ Address Priority

   ☐ Address Line 1

   ☐ Zip Code

   ☐ City/Town

   ☐ Address State

☐ Select the **Address Validate** option. Select the Change option if there is a USPS suggested address.

7.
To start the EIO/D assignment process, EIO [MuniProgAllNY] will:

☐ Navigate to their **Children Assigned to Your Caseload dashboard** under the **Home menu**

☐ Locate the child on their dashboard and select the **Edit option** under the **Action column**

☐ Navigate to the **Team tab** and select the **Add EIO/D or Service Coordinator** option.

☐ Complete the required fields under the **EIO/D or Coordinator Entry panel**. After all required fields are completed, select the **Submit** button to save
  ☐ EIO/D or Coordinator Type
  ☐ Agency Lookup
  ☐ Start Date

8. To accept the agency assignment, the County/Agency Administrator [UniverisalProvAllNY] will:

☐ Navigate to their **Children Assigned to Your Caseload dashboard** under the **menu**

☐ Locate the child on their dashboard and select the **Agency Assigment** option under the **Action column**

☐ A pop-up will appear with an option to accept/reject the assignment. Select accept **Accepted** from the **Agency Accept/Reject Assignment** drop-down menu and select **Submit**. The Agency Assignment option will update to an **Edit** option after the assignment has been accepted.

☐ Select the **Edit** option. Selecting the Edit option will open the **Teams** tab.

☐ Select the **Edit option** under the **Action column**.

☐ Enter the EIO/D assignment in the **EIO/D or Service Coordinator Lookup** field

☐ Select the **Submit** button to save

9. To accept the new assignment, EIO/D will:

☐ Navigate to their **Children Assigned to your Caseload dashboard** under the **Home menu**

☐ Locate the child on their dashboard and select the **Accept/Reject option** under the **Action column**

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☐ A pop-up should appear with an option to accept/reject the assignment. Select accept from the EIO/D or Service Coordinator Accept/Reject drop-down menu.

☐ Select the **Submit** button to save

10. To start the ISC assignment process, EIO/D will:

☐ Navigate to their **Children Assigned to Your Caseload dashboard** under the **Home menu**

☐ Locate the child on their dashboard and select the **Edit option** under the **Action column**

☐ Navigate to the **Team tab** and select the **Add EIO/D or Service Coordinator** option.

☐ Complete the required fields under the **EIO/D or Coordinator Entry panel**. After all required fields are completed, select the **Submit** button to save

    ☐ EIO/D or Coordinator Type

    ☐ Agency Lookup

    ☐ Start Date

11. To accept the agency assignment, the County/Agency Administrator [UniverisalProvAllNY] will:

☐ Navigate to their **Children Assigned to Your Caseload dashboard** under the **menu**

☐ Locate the child on their dashboard and select the **Agency Assigment** option under the **Action column**

☐ A pop-up will appear with an option to accept/reject the assignment. Select accept **Accepted** from the **Agency Accept/Reject Assignment** drop-down menu and select **Submit**. The Agency Assignment option will update to an **Edit** option after the assignment has been accepted.

☐ Select the **Edit** option. Selecting the Edit option will open the **Teams** tab.

☐ Select the **Edit option** under the **Action column**.

☐ Enter the ISC assignment in the **EIO/D or Service Coordinator Lookup** field.

☐ Select the **Submit** button to save

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12. To accept the new assignment, ISC will:

☐ Navigate to their **Children Assigned to your Caseload dashboard** under the **Home menu**

☐ Locate the child on their dashboard and select the **Accept/Reject option** under the **Action column**

☐ A pop-up should appear with an option to accept/reject the assignment. Select **Accepted** from the EIO/D or Service Coordinator Accept/Reject drop-down menu. *NOTE*: If the pop-up does not appear, navigate to the **Teams Tab** and select **Accept** under the **EIO/D or Service Coordinator Accept/Reject field.**

☐ Select the **Submit** button to save

Initial Service Coordination / Intake

NOTE: Most panels completed during the intake process are limited to the below user roles:

- ○ *ISC/OSC NY*
- ○ *MuniProgAllNY*
- ○ *MuniDataEntryNY*
- ○ *EIO/D NY*
- ○ *ProvDataEntryNY*

1. Navigate to the **Services tab** and select the **Add Service Information** option to create a service authorization (SA) for initial service coordination.

2. Complete the required fields under the **Service Information panel**. After all required fields are completed, select the **Submit** button to save.

☐ Pay Source *(will default to the appropriate county)*

☐ Program:

☐ Service Type *(will default based on information in the Program field)*

☐ Enrollment Status *(will default to inactive)*

3. Complete the required fields under the **Service Delivery panel**. After all required fields are completed, select the **Submit** button to save.

☐ Service Type *(will auto-populate based on information entered on the previous panel)*

☐ Start Date

☐ End Date

☐ Frequency

☐ Frequency Unit

☐ Length

☐ Session Duration Minutes *(will auto-populate based on the above inputs)*

☐ Sessions Authorized *(will auto-populate based on the above inputs)*

4. Complete the required fields under the **Company Assignment panel**. After all required fields are completed, select the **Submit** button to save.

☐ Company Name

Note: The ISC (therapist) can be entered at this point – see step #8 (or) after the agency/county accepts the assignment.

5. Complete the required fields under the **Service Location panel**. After all required fields are completed, select the **Submit** button to save.

☐ Location Type

☐ Address 1

☐ City

☐ State

☐ Zip

☐ Is the child being serviced in a Natural Environment?

6. To approve the SA for initial service coordination, EIO/D will:

☐ Navigate to their **Evaluations dashboard** under the **Home menu**.

☐ Choose the **Non-IFSP Enrollment Review Needed** dashboard alert filter option and select **Search**.

☐ Locate the child on their dashboard and select the **Edit Child option** under the **Action column**.

☐ Locate the request for initial service coordination from the **Service Information grid** and select the **Edit option** under the **Action column**.

☐ Select **Approve** under the **EIO/D Approval field**.

☐ Select the **Submit** button to save.

7. To accept the assignment, Agency/County will:

☐ Navigate to their **Children Assigned to Caseload dashboard** under the **Home menu**.

☐ Locate the child on their dashboard and select the **Accept Assignment option** under the **Action column**.

☐ A pop-up should appear with an option to accept/reject the assignment. Select accepted from the **Accept Assignment** drop-down menu.

NOTE: If the pop-up does not appear, navigate to the **Services Tab** and locate the request for initial service coordination from the **Service Information grid**. Select the **Edit option** under the **Action column**. Next, navigate to the **Company Assignment panel** and select **Accept** under the **Accept Assignment field**.

☐ Select the **Submit** button to save.

8. To add the ISC (Therapist) to the SA for initial service coordination, the Data Entry staff [ProvDataEntryNY] (or) Agency Administrator [UniversalProvNY] will:

☐ Navigate to the **Services Tab** and locate the request for initial service coordination from the **Service Information grid**. Select the **Edit option** under the **Action column**.

☐ Navigate to the **Therapist Assignment panel**.

☐ Select the **Add Therapist Assignment** option.

☐ Complete the required fields under the **Therapist Assignment panel**.

  ☐ Therapist

☐ After all required fields are completed, select the **Submit** button to save.

9. Navigate to the **Child Info tab** and complete additional panels as part of the intake process. This training will cover the following panels:

☐ **Basic Demographic panel** *(All required fields were completed when the child record was created)*

☐ **Child Secondary Languages panel**

  ☐ Select the **Add** option

  ☐ Secondary Language (drop-down menu)

☐ **Child Address panel** *(All required fields were completed during the referral process)*

10. Navigate to the **Family tab** and select the **Edit** option from the **Family grid**.

11. Select the **Add Family Member** option to add individuals with a relationship to the child.

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12. Complete the required fields under the **Family Member Information panel**. After all required fields are completed, select the **Submit** button to save.

    ☐   Family Member Type

    ☐   Family Status

    ☐   First Name

    ☐   Last Name

    ☐   Contact Type *(for purposes of this training, select Primary Contact)*

    ☐   Dominant Language

   Note: When adding the individual who will be the policy holder for a child's insurance, select/tick the 'Insures Child' checkbox and enter their date of birth in the corresponding field. Date of birth is only required for the policy holder.

13. Navigate to the **Ins Info tab** and select the **Add** option *[right side of screen]* to enter their child's insurance information.

14. Complete the required fields under the **Insurance policy panel**. After all required fields are completed, select the **Submit** button to save.

    ☐   Date Entered *(will default to today's date)*

    ☐   Insurance Type

    ☐   Insurance Carrier

    ☐   Policy Status

    ☐   Coverage Start Date

    ☐   Insurance Policy Priority

   Note: Insurance address information will prepopulate with the **Insurance Carrier** selection. Also, the policyholder must be entered as a child's 'family member' on the **Family Info tab,** and the box for 'Insures Child' must also be checked for their name to be listed in the dropdown.

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Evaluation / Eligibility

NOTE: Most panels completed during the evaluation and eligibility process are limited to the below user roles:

- o *ISC/OSC NY*
- o *MuniProgAllNY*
- o *MuniDataEntryNY*
- o *EIO/D NY*
- o *UniversalProvAllNY*
- o *InProviderNY*
- o *RenderProvNY*
- o *JrRenderProvNY*
- o *ProvDataEntryNY*

1. Navigate to the **Eval Info tab** and select the **Add Evaluation information** option to create an evaluation request.

2. Complete the required fields under the **Evaluation Information panel**. After all required fields are completed, select the **Submit** button to save.

   ☐ Pay Source *(will default to the appropriate county)*

   ☐ Program *(select the binocular icon 👀 to show available choices)* and select **Save**

   ☐ Service Type *(will pre-populate after the Program field is completed)*

   ☐ Dates of Evaluation From

   ☐ Dates of Evaluation To

   ☐ Agency

   ☐ Location Type

   Note: If the evaluation will be conducted at a **Location Type** of 'Agency Provider Site', the **Agency Provider Sites** field needs to be completed.

3. To approve the SA for the evaluation, EIO/D will:

   ☐ Navigate to their **Evaluations dashboard** under the **Home menu.**

   ☐ Choose the **Non-IFSP Enrollment Review Needed** report filter option and select **Search**.

   ☐ Locate the child on their dashboard and select the **Edit Child** option under the **Action column**.

   ☐ Navigate to the **Eval Info** tab

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☐ Locate the request for evaluation from the **Evaluation Information grid** and select the **Edit option** under the **Action column**.

☐ Select **Approve** under the **EIO/D Approval field** from the **Evaluation Information panel**

☐ Select the **Submit** button to save.

Participant Feedback

PCG/BEI will reserve time at the end of the training to elicit feedback from participants