NYEIS Provider User Account Creation

Three scenarios regarding Provider User Account creation are presented in this appendix to educate User Account Administrators about the required fields in the User Account record and how the data entered in the fields enables or restricts the user from accessing case data and work queue tasks.

Scenario 1: Provider Service Coordinator is also a Rendering Provider. Scenario begins on page 1.

Scenario 2: Agency Evaluator is also a Rendering Provider. Scenario begins on page 7.

Scenario 3: Independent Provider is also a rendering provider for an Agency. Scenario begins on page 14.

Scenario 1
User account is created for a Provider Service Coordinator who also provides general services (such as Physical Therapy related services). The goal is to set up the individual’s NYEIS user account so she can 1) be assigned as a child’s Service Coordinator, 2) be assigned to general services associated with her Qualified Profession / License, and 3) view/access all of her assigned children (as Service Coordinator and rendering provider).

- The individual’s user account is created. Notice the user role is PROV_ServiceCoordinator and the Provider Name is the individual’s name agency and not an agency name. In order for an individual to be assignable as a service coordinator for any agency they work for, they must be assigned a User Role of PROV_ServiceCoordinator, have a User Type of Service Coordinator, and have the Provider Name field associated with their name.

- Refer to Unit 10 Municipal Administration, User Accounts for instructions and guidelines regarding user account creation.
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- If the individual (Sally Toonces) will also render services (such as Physical Therapy), they must have the associated License and Professional Discipline/Qualified Personnel information recorded on their provider home page.

![Provider Licenses & Certifications: Sally Toonces - 5120](image)

![Professional Discipline/Qualified Personnel: Sally Toonces - 5120](image)

- The individual must also be registered on the Provider Employees/Contractors page of each agency that the individual will provide Service Coordination and/or render services for. Refer to Unit 9 Provider Management for information about adding a provider to the agency’s Provider Employees/Contractor List.

- Notice also that Sally is an active employee because there isn’t a date recorded in the “To Date” field. If a date is recorded, and the date is in the past, it essentially tells the system that the employee is not actively employed by the agency and thus should not be selectable for any services when the Agency is selected for a Service Authorization.

![Employee/Contractor List: Toonces Academy - 1280](image)

- After all of these conditions are met, the individual will be assignable on any Service Coordination Service Authorization when the agency that the individual is employed/contracted by is selected as the Provider of Record for the SA.
b) assignable on any services Service Authorization when the agency that the individual is employed/contracted by is selected as the Provider of Record for the SA.

- I log into NYEIS as Sally Toonces. Notice her User Homepage displays her user role (Provider Service Coordinator Management).
- Also notice her home page links. If Sally had a different user role, such as PROV_RenderProvStaff, there would be fewer links providing less access to NYEIS features.
• Sally clicks the My Provider Homepage link and sees that it is her provider home page, and not the home page of any agency that she is employed / contracted by. If, in her NYEIS user account, I had selected an agency name in the “Provider Name” field, the My Provider Homepage would be the agency’s home page, and not hers.

• Clicking on the My Cases link displays all children that Sally has been assigned as Service Coordinator for. Note: It does not display children that Sally has been assigned to render a service (such as Physical Therapy) on.

• In order to access the records of children that she has been assigned to render a service for, Sally performs a child search. She can search by name, or use the wildcard character (%) to list all children.
• Note that neither the PROV_ServiceCoordinator user role nor the PROV_RenderProvStaff user role is subscribed to Work Queues.

• If the individual’s NYEIS user account is not set up correctly, they will not be assignable as a Service Coordinator.
• Notice the Sally’s NYEIS user account below is set up with a user role of PROV_RenderProvStaff (instead of PROV_ServiceCoordinator) and User Type of Provider (instead of Service Coordinator).
• Notice that Sally’s name does not appear in the list of selectable Service Coordinators when her user account is set up this way.
Scenario 2
User account is created for a Provider agency employee who conducts Evaluations but also provides general services (such as Nutrition related services). The goal is to set up the Agency employee’s NYEIS user account so she can 1) access the Evaluations tasks, 2) be assigned to general services, and 3) view/access all of their assigned children.

- The Agency employee’s user account is created. Notice the user role is PROV_Eval and the Provider Name is the agency (Growing Up Healthy) and not the individual rendering provider’s name.

- You can see on the Agency’s Employee / Contractor page that the rendering provider’s name appears. This indicates that the employee has a QP (and associated license).
- Notice the State ID column. If Shirley was an SDOH approved Independent provider, a number would be displayed in that column field in her record. In this case it is blank meaning that Shirley is not SDOH approved.
- Notice also that Shirley is an active employee because there isn’t a date recorded in the “To Date” field. If a date is recorded, and the date is in the past, it essentially tells the system that the employee is not actively employed by the agency and thus should not be selectable for any services when the Agency is selected for a Service Authorization.
• You can see on the employee individual home page (I clicked the “View” link next to her name in the list above) that her QP is Physician other Than Physician. She will be selectable for any service that her QP is qualified to provide.

• Notice that the Current Approval Status field space is blank. This is also an indicator that Shirley is not a SDOH approved Independent provider. If she was, the field would display a status such as ‘Approved’.

• I log into NYEIS as Shirley Conroy. Notice her User Homepage displays her user role (Provider Evaluation Management). Also notice her home page links are limited, like most Provider user roles.

• If Shirley was assigned a higher-level user role, such as PROV_All there would be more links providing greater access to NYEIS features.
Shirley clicks the My Provider Homepage link and see that it is her employer’s (i.e., Growing Up Healthy) agency home page, and not Shirley Conroy’s home page. If, in her NYEIS User Account, I had selected her name in the “Provider Name” field, the My Provider Homepage would be Shirley’s home page, and not her employer’s.

Shirley clicks the Inbox link and then Work Queues link. These work queue’s pertain to the agency. How do I know? Notice the number 11008 that is included in the work queue name. This identifies the provider reference number that the work queue is associated with. 11008 is the reference number for Growing Up Healthy. How can I confirm that? Go back to the My Provider Homepage and look at the number and look at the number next to the agency name at the top of the page.

Shirley clicks the 11008_Evaluations work queue “View” link. See a task in there for a MDE. If Shirley is the evaluator who will manage the MDE task (i.e., she is responsible for the data entry), she could reserve the task. Or she can leave it in the work queue and return to it at a later time. Most importantly, her user role of Prov_Eval and her association in her user account with the Agency (rather than herself) gives her access to the Agency’s Evaluations work queue, and the associated tasks that are allocated to that work queue.
• Next, we’ll confirm that Shirley can be selected as a rendering on a SA. I log in as a MUNI EIOD and create a Service Authorization for Nutrition-Basic for one of my cases. I work through the SA creation wizard …

• … and eventually select the Provider Agency. I search for and select Growing Up Healthy. I want to assign Shirley Conroy as the rendering, but at this point I can only select the Agency.
• I complete the Service Authorization by clicking Create Service Authorization button.

• I can then assign the rendering provider (Shirley Conroy) if I want using the Change/Assign Rendering Provider button on the SA Homepage.

• Note that I could also not assign the rendering, and leave it to the Agency when they accept the SA.
Notice that the names of all QP’s at the agency qualified to provide the service are listed when I click the button. I select Shirley as the rendering.

I now log into NYEIS as Shirley Conroy. I click the My Cases link. Notice no cases are listed. That’s because I am not the Case Supervisor (that’s the EIOD) or the Case Owner (that’s the Service Coordinator). My Cases limits the display of cases to EIODs and Service Coordinators. Shirley conducts Evaluations so her My Cases page will be blank.

Instead, I select the Search link to see all the children I am assigned to. I use the wildcard character (%) in the Last Name field. The results return only children who I am assigned to on an IFSP SA (these would be Kimberly Bonner and Tabitha Clancy). Tabitha is the child who we created the SA for in the steps above.

Shirley would be unsuccessful if she tried to search for any children assigned to the agency for an Evaluation. The only method for viewing children and cases assigned to any agency for an Evaluation is through the agency’s Evaluation work queue.
Notice that when an employee of the same Agency who has a NYEIS user role of PROV_All conducts a Search using the wild card character in Last Name field that they will see all of the children who have been assigned to the agency for Service Coordination and services such as Physical Therapy. This illustrates how some roles have greater access to child records, and some less. PROV_All has the most access, PROV_Eval a bit less, and PROV_RenderProvStaff the least access. This is intentional.
Scenario 3
User account is created for an Independent Contractor who is contracted with the Municipality to provide general services, and also contracts with a Provider Agency to provide similar services.

- Ava Dennin is an approved Independent Contractor. Her reference number is 11520.

- She currently has a contract with Albany county to provider EI general services

- Ava also has a contract with another approved Agency, Growing Up Healthy. (Note that the screen shot below is the Employee/Contractor page for Growing Up Healthy).
Ava’s NYEIS user account was set up associating herself in the “Provider Name” field, and a user role of PROV_All. By setting up her account this way she will be subscribed Ava Dennin’s work queues rather than Growing Up Healthy’s work queues. Ava will receive Service Authorization tasks when Ava Dennin is selected as the Provider of Record in the SA.

If she was associated with Growing Up Healthy in the Provider Name field she would be subscribed to Growing Up Healthy’s work queues. More importantly, if Ava Dennin is subsequently selected as the Provider of Record on an SA, the associated task will not be allocated to her work queues and she would not have the opportunity to Accept / Reject, or submit a claim for it later on.

Ava logs into NYEIS. Her home page indicates her user role is PROV_All (see “Provider Program Management” at top of page).

Her Home page links include fiscal (Invoicing) access. She will use those for all SA’s that she is assigned as Provider of Record.
• Ava clicks the My Provider Homepage link and confirms that it’s her home page.
• Notice that her Provider Reference number (11520) is listed at the top, next to her name.

![Provider Home: Ava Donnin - 11520](image)

• Ava clicks Inbox and then Work Queues. She is subscribed to the 4 standard Provider work queues.
• Notice the number before the work queue name … 11520. That corresponds to her Provider Reference #.

<table>
<thead>
<tr>
<th>My Work Queues: Ava Donnin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
</tr>
<tr>
<td>View</td>
</tr>
<tr>
<td>View</td>
</tr>
<tr>
<td>View</td>
</tr>
<tr>
<td>View</td>
</tr>
</tbody>
</table>

• Now Ava is going to be assigned to a SA. Logged in as an EIOD, I add a Service Authorization to an IFSP. EIOD navigates through the SA wizard …
Appendix M

• ... and selects Ava Dennin as the Provider of Record. EIOD completes the SA Wizard and approves it. The system creates the SA Accept / Reject task and allocates it to the Provider of Record’s Service Authorizations work queue.

• Log into NYEIS as Ava. She navigates to her Service Authorization work queue and manages the SA Accept / Reject task that was created above.
• Ava clicks the Search link and uses wild card search in Last Name field. She sees the child that was assigned her in the SA created above.


• Later on, after providing the service, Ava creates a claim to get paid using the Create Invoice link on her Homepage. She enters the SA # and sees her child. She proceeds to complete the claim.

• Now we’re going to create a SA and assign the agency (Growing Up Healthy) that Ava is contracted. The EIOD adds the Service Authorization using the wizard as before.
Instead of selecting Ava Dennin as the Provider of Record, EIOD selects Growing Up Healthy as the Provider of Record.

After creating the SA, the EIOD has the option of selecting the Rendering Provider by clicking the Change/Assign Rendering Provider button on the SA Home page.
All QP’s employed/contracted by Growing Up Healthy that are qualified to provide the service are displayed. EIOD selects Ava, and approves the SA. The system creates the SA Accept / Reject task and allocates it to the Provider of Record’s Service Authorizations work queue. In this scenario that would be Growing Up Healthy.

Log into NYEIS as Ava Dennin, and navigate to her Service Authorizations work queue. Notice the just created SA Accept / Reject task is not listed. That’s because she is not the Provider of Record.
• Still logged in as Ava. Clicks the Search link and uses wild card search in Last Name field. She sees all children that she has been assigned to, including the child assigned in the SA created above.

• This demonstrates some of the system security. She can search and see children she is assigned, regardless if she is the Provider of Record or the Rendering Provider. However, she will only receive tasks associated with cases that she is the Provider of Record for.

• Now logged into NYEIS as an employee of Growing Up Healthy with a PROV_All role. Navigate to the Growing Up Healthy Service Authorization work queue, and see the SA Accept / Reject task for the SA created above.

• Still logged in as the PROV_All user. Clicks the Search link and uses wild card search in Last Name field. Sees all children that the Agency has been assigned to, including the child assigned in the SA created above.

• Contrast that with Ava’s search results. She didn’t see all of Growing Up Healthy’s children, just the children she was assigned to.
## Child Search

### Search Criteria

<table>
<thead>
<tr>
<th>Reference Number</th>
<th>Last Name</th>
<th>First Name</th>
<th>Address Line 1</th>
<th>City</th>
<th>Date of Birth</th>
<th>Municipality</th>
</tr>
</thead>
<tbody>
<tr>
<td>500087</td>
<td>Marty</td>
<td>Brown</td>
<td>45 Tomson Ave</td>
<td>Albany</td>
<td>12/31/2008</td>
<td>Albany</td>
</tr>
<tr>
<td>500086</td>
<td>Kimberly</td>
<td>Bonner</td>
<td>3884 Third Ave</td>
<td>Albany</td>
<td>12/25/2010</td>
<td>Albany</td>
</tr>
<tr>
<td>500107</td>
<td>Tabitha</td>
<td>Chancy</td>
<td>450 Gorge Lane</td>
<td>Albany</td>
<td>3/1/2011</td>
<td>Albany</td>
</tr>
<tr>
<td>500087</td>
<td>Ian</td>
<td>Morse</td>
<td>99 Henry Street</td>
<td>Albany</td>
<td>1/5/2009</td>
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</tr>
<tr>
<td>500014</td>
<td>John</td>
<td>King</td>
<td>123 Main Street</td>
<td>Albany</td>
<td>6/30/2009</td>
<td>Albany</td>
</tr>
</tbody>
</table>
Logged in as Ava. Notice what happens when she attempts to create a claim for the child that she is the Rendering Provider for. When she searches for the SA to complete the process, she cannot find it. That’s because she is not the Provider of Record; Growing Up Healthy is.

Logged into NYEIS as an employee of Growing Up Healthy with a PROV_All role. Create an invoice. Notice that I am successful in my search on the SA number; that’s because my Agency is the Provider of Record.