

# Unit 4: Case Management

Version 4.3

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### Document Revision History

<u>Date</u>	<u>Release</u>	<u>Description</u>
9/22/2015	4.3	<ul style="list-style-type: none"> <li>• No changes</li> </ul>
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1/8/2015	4.01	<ul style="list-style-type: none"> <li>• Updated financials to reflect 4/1/13 cutover to SFA</li> <li>• Removed mention of ‘Find Task’ feature for muni or provider users</li> <li>• Added content relating to demographic data change history</li> <li>• Added content from unit 10 dealing with managing Child’s Insurance as this is now also handled by child’s Service Coordinator</li> </ul>
6/4/2012	1.6	<ul style="list-style-type: none"> <li>• Updated <b>Unit Overview</b> topic to state that the MUNI_ProgramUserAdmin user role can conduct the same NYEIS Case Management actions as the child’s EIO/D.</li> </ul>
10/24/2011	1.5	<ul style="list-style-type: none"> <li>• Updated <b>Attachments</b> subtopic.</li> </ul>
6/27/2011	1.4	<ul style="list-style-type: none"> <li>• Added Tasks (<b>Open Task Summary</b>) subtopic to the Integrated Case topic.</li> <li>• Added <b>Case Lifecycle Status</b> subtopic</li> <li>• Added <b>Status History</b> subtopic</li> </ul>
3/31/2011	1.3	<ul style="list-style-type: none"> <li>• Updated Child Home page screen shots. Child Information cluster renamed “Child Name.”</li> <li>• Added Important Information to <b>Attachments</b> and <b>Record Communication</b> sections. Both features are currently disabled until an Anti-Virus scanning application is added to NYEIS.</li> <li>• Updated the <b>Alternate Names</b> section.</li> <li>• Added <b>Editing Child Homepage</b> section.</li> </ul>
1/31/2011	1.2	<ul style="list-style-type: none"> <li>• <b>Edited Address Validation screen shots and guidance to reflect new required search fields: City, State and Zip.</b></li> <li>• <b>Added Health Assessments section.</b></li> </ul>
11/22/2010	1.1	<ul style="list-style-type: none"> <li>• <b>Working with Integrated Case Homepage</b> section – Deleted reference to Suspend/Restart 45-Day Clock functionality. Added new Integrated Case screen shot.</li> </ul>
11/2/2010		<ul style="list-style-type: none"> <li>• <b>Creating MS Word Communications</b> section – added Internet Explorer browser settings.</li> <li>• Added <b>Child Home Page</b> section including screen shot of left navigation bar.</li> <li>• Added <b>Addresses</b> section.</li> <li>• Added <b>Cases</b> section.</li> <li>• Added <b>Financials</b> section.</li> <li>• Added <b>Notes from the Child Home Page</b> section.</li> <li>• Added <b>Phone Numbers</b> section.</li> <li>• <b>Tasks</b> section – updated explanation about user-created</li> </ul>

		tasks. <ul style="list-style-type: none"><li>• Added <b>At-Risk Follow Up</b> section</li><li>• Added <b>Audit Logs</b> section.</li><li>• Added <b>Referrals</b> section.</li></ul>
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## Table of Contents

Unit 4: Case Management.....	1
Integrated Case Home Page .....	10
Integrated Case Home Page Navigation Bar .....	10
Working with Integrated Case Home Page.....	11
Attachments .....	12
Case Participants .....	13
Viewing Case Participants .....	13
Editing Case Participants .....	14
Communications .....	15
Record Communication .....	16
Creating MS Word Communication .....	19
Viewing Communications .....	23
Editing Communications .....	24
Deleting Communications .....	25
Events.....	26
Calendar Views.....	26
Creating a New Activity .....	27
Inviting Attendees.....	29
Creating Recurring Meeting Activity .....	32
Responding to an Invite .....	36
Editing Activities .....	37
Deleting Activities .....	38
Notes .....	39
Creating Notes .....	40
Viewing Notes .....	41
Editing Notes .....	41
Deleting Notes .....	43
Tasks (Open Tasks Summary) .....	44
Viewing Open Tasks.....	44
Creating a Task .....	46
Assign Evaluator for MDE .....	47
Child’s Completed Evaluations .....	47
Eligibility .....	47
IFSPs .....	47
Transfers .....	47
Transitions.....	47
Mediations.....	47
Impartial Hearings .....	47
User Roles.....	48
Status History.....	48
Municipality of Fiscal Responsibility.....	49
Protected Health Information Restrictions.....	50
Recording a Protected Health Information Restriction.....	50
Viewing a Protected Health Information Restriction.....	51

Editing a Protected Health Information Restriction.....	52
Deleting a Protected Health Information Restriction.....	53
Protected Health Information Authorizations.....	54
Recording a Protected Health Information Authorization.....	54
Viewing a Protected Health Information Authorization.....	56
Editing a Protected Health Information Authorization.....	57
Revoking a Protected Health Information Authorization.....	58
Health Assessments.....	59
Creating Health Assessments.....	59
Viewing Health Assessments.....	61
Editing Health Assessments.....	62
Deleting Health Assessments.....	63
Case Lifecycle Status.....	64
Child Home Page.....	66
Child Home Page Navigation Bar.....	66
Child Home Page.....	67
Editing Child Homepage.....	67
Addresses.....	70
Creating Addresses.....	70
Viewing Addresses.....	73
Editing Addresses.....	74
Deleting Addresses.....	75
Alternative IDs.....	76
Alternative Names.....	76
Creating Alternative Names.....	77
Viewing Alternative Names.....	78
Editing Alternative Names.....	79
Deleting Alternative Names.....	80
Cases.....	82
Communication Exceptions from the Child Home Page.....	83
Creating Communication Exceptions.....	83
Viewing Communication Exceptions.....	84
Editing Communication Exceptions.....	85
Deleting Communication Exceptions.....	86
Financials.....	87
Adding and Modifying Financial information.....	88
Notes from the Child Home Page.....	88
Phone Numbers.....	89
Creating Phone Numbers.....	89
Viewing Phone Numbers.....	90
Editing Phone Numbers.....	91
Deleting Phone Numbers.....	92
Relationships.....	94
Creating Relationships.....	94
Viewing Relationships.....	95
Editing Relationships.....	96

Deleting Relationships .....	96
Tasks .....	97
Adding Tasks .....	98
Viewing Tasks .....	99
At-Risk Follow Up.....	100
Audit Log.....	100
Referrals.....	100
Demographic Data Change Request from the Child Home Page (Provider View).....	101
Creating a Data Change Request .....	101
Municipality Accepting Data Change Request.....	102
Insurance Coverage from the Child Home Page.....	104
Creating Child Commercial Insurance Coverage .....	104
Creating Child Medicaid Coverage .....	109
Checking Medicaid Eligibility – (Currently inactive) .....	110
Viewing/Selecting Medicaid Eligibility Request Results.....	112
Viewing Child Insurance Coverage .....	115
Editing Child Insurance Coverage .....	116
Deleting Child Insurance Coverage .....	117
Creating Services Not Covered.....	118
Commercial Insurance Coverage .....	118
Viewing Services Not Covered.....	120
Commercial Insurance Coverage .....	120
Editing Services Not Covered.....	121
Commercial Insurance Coverage .....	121
Creating Prior Authorization/Referrals.....	122
Commercial Insurance Coverage –Prior Authorizations/Referral Required .....	122
Commercial Insurance Coverage – Create Prior Authorization .....	124
Commercial Insurance Coverage – Create 278 Request.....	127
Commercial Insurance Coverage – New Primary Care Physician Referral .....	128
Viewing Prior Authorization / Referrals.....	130
Commercial Insurance Coverage – View Service Details .....	130
Commercial Insurance Coverage – View Prior Authorization .....	131
Editing Prior Authorization / Referrals.....	133
Commercial Insurance Coverage – Edit Service Details .....	133
Commercial Insurance Coverage – Edit Prior Authorization .....	134
Deleting Prior Authorization / Referrals.....	136
Commercial Insurance Coverage – Delete Service Details Required ....	136
Commercial Insurance Coverage – Delete Prior Authorization .....	137
Commercial Insurance Coverage – Delete Primary Care Physician Referral .....	139
Generating Subrogation Letters .....	141
Viewing and Printing Subrogation Letters .....	141
Surveys.....	141

Taking Surveys ..... 141

## Case Management

### Unit Overview

Cases are used to manage the delivery of services to a Child in NYEIS. Cases should be thought of as folders where information for a Child is stored. Examples of Cases/*Folders* are a child's IFSPs and Service Authorizations. This Unit focuses primarily on the case management functions associated with the child's homepage and integrated case homepage. Case management of other NYEIS "cases" (IFSPs, etc.) is covered in other User Manual Units (Unit 9: Provider Management, Unit 6: IFSP and Service Authorization, etc.).

An Integrated Case is a central location for the Child's Case to be managed. An Integrated Case is created for a Child when an EIO/D is assigned.

It will be helpful to remember that Case Management in NYEIS refers to managing the Cases/*Folders* as described above. It *does not* refer to the responsibilities of a Service Coordinator in the EIP. Although many of the Case Management functions will be available to Service Coordinators, many are available to other NYEIS Users with assigned access rights.

Case management functions performed in NYEIS are normally carried out by the child's assigned EIO/D or Service Coordinator. However, any municipal user assigned the MUNI\_ProgramUserAdmin user role has the ability to perform the same case management functions as the child's EIO/D.

## INTEGRATED CASE HOME PAGE

### Integrated Case Home Page Navigation Bar



- ❶ **Navigation** section – displays all the different areas that can be reviewed, added or updated for a Child’s Integrated Case.
- ❷ **Recent Items** section – displays the name of recently visited Children, Providers, Vendors, etc., as a link.

#### Important Information

The Navigation Bar is different depending on the page displayed and the User. Some links will not be available to all Users.

## Working with Integrated Case Home Page

**1** ← Case Tab Bar

**2** ← **Integrated Case Home:** NYEIS Integrated Case - 62464

**3** ← **Options**  
Close Case

**4** ← **Details**  
Case Reference: 62464  
Child's Name: [Derek Stewart](#)  
Status: Draft  
Child's Latest Referral Date: 3/31/2011  
Due Date of Initial IFSP: 5/15/2011

**5** ← **Service Coordination Service Authorizations**

Case Reference	Start Date	End Date	Status
<a href="#">76299</a>	3/31/2011	5/26/2011	Closed
<a href="#">62465</a>	3/31/2011	5/25/2011	Closed

**6** ← **Evaluation Service Authorizations**

Case Reference	Start Date	End Date	Status
<a href="#">62466</a>	3/29/2011	5/23/2011	Closed
<a href="#">62467</a>	3/29/2011	5/23/2011	Closed

**7** ← **IFSPs**

Case Reference	IFSP Type	Start Date	End Date	Status
<a href="#">62468</a>	Initial	3/31/2011	9/30/2011	Active

**8** ← **Comments**

- 1 Case Tab Bar** – displays multiple tabs when more than one Case is open. Tabs are always linked to a Child. Examples of tabs include Integrated Case, Individualized Family Service Plan (IFSP) and Service Authorizations (SA).

NYEIS Integrated Case - 14597 Initial - 17921 Vision - Basic - 44292

**Service Authorization Home:** Vision - Basic - 44292

- 2 Header Bar** – displays page name and Reference Number (unique identifier for the Case). The reference number always stays with the Case.
- 3 Options section** –

**Close Case** Select link to go to **Close Case** page. See **Unit 10: Municipal Administration, Closing a Case** for important additional information and process for closing a case.

④ **Details** section – displays details about the Case.

- **Child’s Name** – clicking the child’s name will navigate the User to the **Child Home page**.
- **Status** - is either Draft (i.e., Open) or Closed. The Integrated Case Status field displays the current status. Click the Status History link in the Navigation menu to view the Status History.
- **Child’s Latest Referral Date** – displays the child’s current **New Referral** date or **Re-Referral** date. Does not display **Additional Referral** dates.  
 **See Unit 2: Referral and Intake** for additional information regarding types of Referrals.

⑤ **Service Coordination Service Authorizations** section – displays the initial service coordination Service Authorization that can be viewed and changed by clicking **Case Reference** link.

⑥ **Evaluation Service Authorizations** section – displays a list of Evaluations and associated Service Authorizations that can be viewed by clicking **Case Reference** link.  **See Unit 5: Evaluation** for complete information.

⑦ **IFSPs** section – displays list of Individual Family Service Plans (IFSP) that can be viewed and changed by clicking **Case Reference** link. Service Authorizations for each IFSP are accessible from the **IFSP Service Authorizations List** section on the IFSP Home Page.  **See Unit 6: IFSP & Service Authorization** for complete information.

⑧ **Comments** section – displays comments about the Case.

## ATTACHMENTS

The attachment link is available from the Integrated Case Navigation Bar and is used to attach documents that provide additional information regarding the Child in NYEIS.

Any file type may be attached depending on the Users software installed on their Personal Computer. Sample file types are (but not limited to): Word, Excel, PDF and JPG.

 **See Unit 1: Getting Started, Attachments** for further information and instructions.

## CASE PARTICIPANTS

A Case Participant is any person who has interaction with the Child's Case through NYEIS. Case Participants do not have to be NYEIS Users. For example, a physician will be a Case Participant when a communication with them is documented in NYEIS and a Provider will be a Case Participant when a Service Authorization is issued to them through NYEIS. It is also important to note that some NYEIS Users that are Case Participants will not have access rights to perform all functions in NYEIS.

 See **Unit 10: Municipal Administration** for information on registering specific types of Case Participants.

### Viewing Case Participants

Users can View Case Participants associated with the Child's Case.

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Case Participants** from the Navigation Bar. **Case Participants** page displays.

NYEIS Integrated Case - 14597					
Case Participants: NYEIS Integrated Case - 14597					
Action	Name	Type	Start Date	End Date	Status
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Midway Bankers</a>	Correspondent	1/27/2009		Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Fatima Smithwick</a>	Correspondent	1/27/2009		Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Midway Medicines</a>	Correspondent	1/27/2009		Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Jim Tarey</a>	Correspondent	1/27/2009		Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Womens, Infants, and Children Program</a>	Correspondent	1/22/2009		Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Jim Tarey</a>	Primary Client	12/16/2008		Active

3. Click **View** link under **Action** column for Case Participant to display. **View Participant Role** page displays.

View Participant Role: NYEIS Integrated Case - 14597			
		<a href="#">Edit</a>	<a href="#">Close</a>
<b>Details</b>			
Name:	<a href="#">Womens, Infants, and Children Program</a>	Type:	Correspondent
Start Date:	1/22/2009	End Date:	
Status:	Active		
<b>Comments</b>			
		<a href="#">Edit</a>	<a href="#">Close</a>

4. Review information. Click **Close** button when finished. **Case Participants** page displays.

Exception  
Currently  
not  
available to  
all NYEIS  
User roles.

## Editing Case Participants

Case Participants are view only. Comments can only be added or changed when using the edit function. The edit function is used to add or change a comment that is specific to the Case Participant record for a specific Child.

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Case Participants** from the Navigation Bar. **Case Participants** page displays.

NYEIS Integrated Case - 14597

Case Participants: NYEIS Integrated Case - 14597

Action	Name	Type	Start Date	End Date	Status
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Midway Bankers</a>	Correspondent	1/27/2009		Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Fatima Smithwick</a>	Correspondent	1/27/2009		Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Midway Medicines</a>	Correspondent	1/27/2009		Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Jim Tarey</a>	Correspondent	1/27/2009		Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Womens, Infants, and Children Program</a>	Correspondent	1/22/2009		Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Jim Tarey</a>	Primary Client	12/16/2008		Active

3. Click **Edit** link under **Action** column for Case Participant to display. **Modify Participant Role** page displays.

Modify Participant Role: NYEIS Integrated Case - 14597

Details	
Name:	<a href="#">Womens, Infants, and Children Program</a>
Type:	Correspondent
Start Date:	1/22/2009
End Date:	
Status:	Active

Comments

4. Add or change **Comments**.
5. Click **Save** button. Participant comments are saved. **Case Participants** page displays.

### Note:

- Click **Edit** button from the **View Participant Role** as an alternative for editing Comments.

## COMMUNICATIONS

Communications is an area in NYEIS to record Communications between Case Participants. Communications may be paper, telephone or Word Templates (available only to Municipal Users).

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 can use the Communication feature to document communications with the Evaluator regarding scheduled evaluation dates. The EIO/D can work with the feature to document contacting the CPSE chairperson regarding the transition conference, or a fiscal User to document contacting third party insurance regarding covered EI services.

**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.

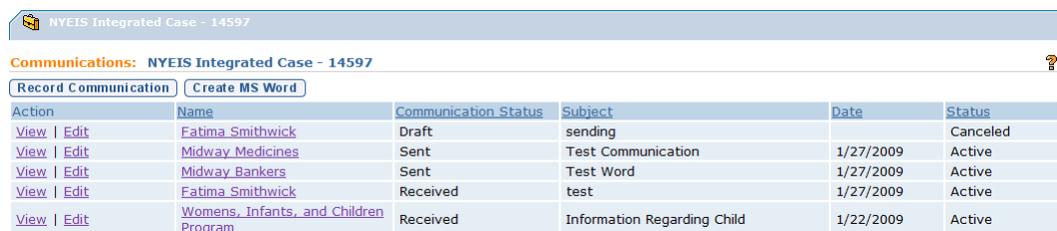
**Exception**

Currently not available to all NYEIS User roles.

## Record Communication

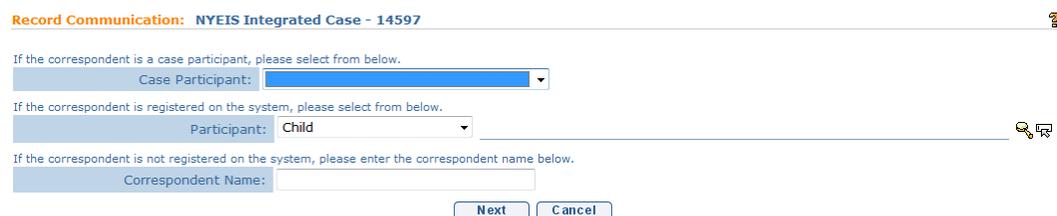
This feature is used to record any type of Communications related to a Child's Case (e.g., phone call, letter received).

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Communications** from the Navigation Bar. **Communications** page displays.



Action	Name	Communication Status	Subject	Date	Status
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Fatima Smithwick</a>	Draft	sending		Canceled
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Midway Medicines</a>	Sent	Test Communication	1/27/2009	Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Midway Bankers</a>	Sent	Test Word	1/27/2009	Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Fatima Smithwick</a>	Received	test	1/27/2009	Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Womens, Infants, and Children Program</a>	Received	Information Regarding Child	1/22/2009	Active

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



**Record Communication: NYEIS Integrated Case - 14597**

If the correspondent is a case participant, please select from below.

Case Participant:

If the correspondent is registered on the system, please select from below.

Participant:

If the correspondent is not registered on the system, please enter the correspondent name below.

Correspondent Name:

4. Define correspondent by selecting one of the following items from the **Record Communication** page:
  - If correspondent is already a Case Participant, click **Case Participant** drop down. Select Participant (e.g., if a communication has already been documented in NYEIS, some of these may be available to select: Physician, Committee on Preschool Special Education (CPSE) chairperson).
  - 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. 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.*

There are four **Participant Types** the Municipal user can select:

- Child – children that the Municipality is delivering services to.
- Health Care Provider – agencies and individual providers registered in NYEIS.
- Referral – registered referral sources.
- Vendor – SDOH approved Vendors registered in NYEIS.

➤ 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.

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

**Record Communication: NYEIS Integrated Case - 14597**

Save Cancel

Communication Details	
Direction: <b>Outgoing</b>	Communication Type: <b>Letter</b>
Method: <b>Hard Copy</b>	Pro-Forma Type: <b>0</b>
Communication Date: <b>4/9/2009</b>	
Frequency to Re-send:	

Communication Text	
Subject:	
Communication Text:	

Correspondent Details	
Correspondent Name: <b>Advanced Audiology Services</b>	Correspondent Type: <b>Anonymous</b>
Address:	Fax/Phone Number:
Email Address:	

**Protected Information Related Request Details**

6. Enter 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.

7. Enter appropriate information in **Communication Text** section. Be sure to type **Subject**.
8. Enter appropriate information in **Correspondent Details** section. *If address is not in the System, No Address Available must be selected.*
9. Continue to go through and enter appropriate 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 **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 **Protected Health Information Restrictions** and **Protected Health Information Authorizations** for additional information.

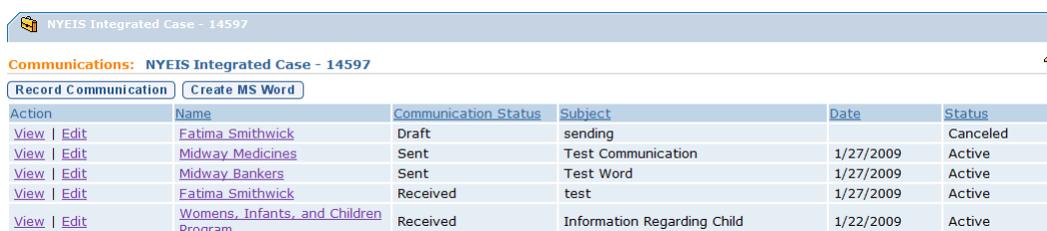
10. Click **Save** button. The status of the communication logged is automatically updated depending on the type of communication. Incoming logged communications show a **Status** of **Received**, outgoing logged communication show a **Status** of **Sent**. *Errors or additional information required 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  
Currently  
not  
available to  
all NYEIS  
User roles.

## Creating MS Word Communication

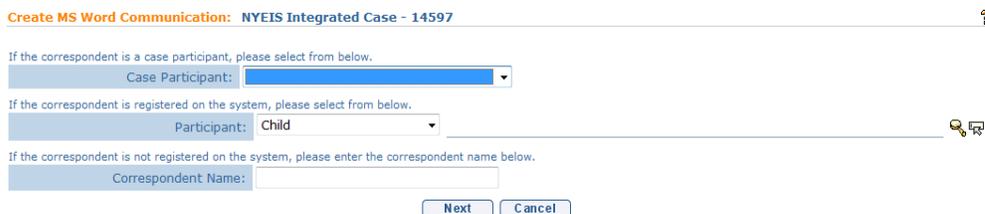
NYEIS has templates that can be used to create letters and notices related to a Child.

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Communications** from the Navigation Bar. **Communications** page displays.



Action	Name	Communication Status	Subject	Date	Status
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Fatima Smithwick</a>	Draft	sending		Canceled
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Midway Medicines</a>	Sent	Test Communication	1/27/2009	Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Midway Bankers</a>	Sent	Test Word	1/27/2009	Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Fatima Smithwick</a>	Received	test	1/27/2009	Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Womens, Infants, and Children Program</a>	Received	Information Regarding Child	1/22/2009	Active

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



**Create MS Word Communication: NYEIS Integrated Case - 14597**

If the correspondent is a case participant, please select from below.

Case Participant:

If the correspondent is registered on the system, please select from below.

Participant:

If the correspondent is not registered on the system, please enter the correspondent name below.

Correspondent Name:

4. Define correspondent by selecting one of the following items from the **Create MS Word Communication** page:
  - If correspondent is already a Case Participant, click **Case Participant** drop down. Select Participant (e.g., Child, Physician, and Committee on Preschool Special Education (CPSE) chairperson).
  - 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 four **Participant Types** the Municipal user can select:

- Child – children that the Municipality is delivering services to.

- Health Care Provider – agencies and individual providers registered in NYEIS.
- Referral – registered referral sources.
- 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 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.

5. Click **Next** button. The next **Create MS Word Communication** page displays.

Create MS Word Communication: NYEIS Integrated Case - 14597 

Correspondent Details	
Subject:	<input type="text"/>
Address:	<input type="text"/>  
Correspondent Name:	Jim Tarey
Correspondent Type:	Anonymous

Protected Information Related Request Details	
RequestType:	<input type="text"/>

Protected Information Disclosure Details	
Protected Information Disclosure:	<input type="checkbox"/>
Minimum Necessary Information Certification:	<input type="checkbox"/>
Disclosure Type:	<input type="text"/>
Additional Disclosure Details:	<input type="text"/>

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

6. Enter appropriate information in the following sections: **Correspondent Details** (Address is a *required* field. Click **Search**  icon to locate valid address if correspondent is already registered in the System. If search result displays **No Address Available**, it *must* be selected in order to log the Communication in NYEIS), **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 **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 **Protected Health Information Restrictions and Protected Health Information Authorizations** for additional information.

7. Click **Search**  icon in **Template Name** field under **Template** section. **MS Word Templates** page displays.
8. Click **Select** link under **Action** column for desired template. Template displays in the **Template Name** field. Many types of templates have been developed and are available for use in NYEIS. Examples include: assignment of initial service coordinator, eligibility/ineligibility notification to parents, scheduling of IFSP meetings and transition letters.
9. Click **Save** button. *Errors or additional information required will display at the top of the page if Communication is not completed. Apply changes. You must save again.* Selected template displays.
10. Apply changes.
11. **Close** file and **Exit** Application. Click **Yes** button to save changes. **Communications** page displays. 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. **Communication 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:**

- When a template displays, some fields will automatically populate (e.g., Name, Address, Phone Number).
- Selected fields can be edited when using templates.
- Users must have Microsoft Word 2003 or newer in order for the template function to work properly. Users should contact their local IT support staff to ensure that the following Internet Explorer browser settings are configured:
  - a. Popup blocker in the Internet Explorer browser on the user machine should be disabled.
  - b. Add the Cúram server host name including protocol (<https://commerce.health.state.ny.us>) to the list of trusted sites in the Internet Explorer.
  - c. 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 (recording/MS Word). The title of the page reflects the type of Communication being viewed.

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Communications** from the Navigation Bar. **Communications** page displays.

NYEIS Integrated Case - 14597					
Communications: NYEIS Integrated Case - 14597					
Record Communication		Create MS Word			
Action	Name	Communication Status	Subject	Date	Status
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Fatima Smithwick</a>	Draft	sending		Canceled
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Midway Medicines</a>	Sent	Test Communication	1/27/2009	Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Midway Bankers</a>	Sent	Test Word	1/27/2009	Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Fatima Smithwick</a>	Received	test	1/27/2009	Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Womens, Infants, and Children Program</a>	Received	Information Regarding Child	1/22/2009	Active

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

View Communication: NYEIS Integrated Case - 150100	
<a href="#">Delete</a>	<a href="#">Close</a>
Communication Details	
Subject: MK Test	Communication Status: Draft <a href="#">[Mark As Sent]</a>
Communication Date: 10/7/2009	Status: Active
Correspondent Details	
Correspondent Name: <a href="#">Test Test</a>	Correspondent Type: Client
Address: No address available	
Protected Information Related Request Details	
RequestType:	
Protected Information Disclosure Details	
Protected Information Disclosure: No	
Minimum Necessary Information Certification: No	
Disclosure Type:	
Additional Disclosure Details:	
Disclosure Purpose	

4. Review information.

Communication Status: Draft <a href="#">[Mark As Sent]</a>
Status: Canceled

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.

**Exception**  
Currently not available to all NYEIS User roles.

## Editing Communications

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 the Child's Integrated Case Home Page. See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Communications** from the Navigation Bar. **Communications** page displays.

NYEIS Integrated Case - 14597

Communications: NYEIS Integrated Case - 14597

Record Communication | Create MS Word

Action	Name	Communication Status	Subject	Date	Status
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Fatima Smithwick</a>	Draft	sending		Canceled
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Midway Medicines</a>	Sent	Test Communication	1/27/2009	Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Midway Bankers</a>	Sent	Test Word	1/27/2009	Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Fatima Smithwick</a>	Received	test	1/27/2009	Active
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Womens, Infants, and Children Program</a>	Received	Information Regarding Child	1/22/2009	Active

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

Modify Recorded Communication: NYEIS Integrated Case - 14597

**Communication Details**

Direction: **Outgoing** | Communication Type: **Notice**

Method: **Hard Copy** | Communication Date: **4/9/2009**

Pro-Forma Type: **0**

Frequency to Re-send:

**Communication Text**

Subject: **Notice**

Communication Text: **This is text text**

4. Apply necessary changes.
5. Click **Save** button. **Communications** page displays.

Exception  
Currently not available to all NYEIS User roles.

### Deleting Communications

The information below outlines the general steps for deleting an MS Word type of Communication. MS Word Communications can only be deleted when in *Draft* status. **A Non-MS Word Communication cannot be deleted.**

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Communications** from the Navigation Bar. **Communications** page displays.
3. Click **View** link under **Action** column for the Communication to delete. **View Communication** page displays.

**View Communication: NYEIS Integrated Case - 150100** ?

Communication Details	
Subject: MK Test	Communication Status: Draft <a href="#">[Mark As Sent]</a>
Communication Date: 10/7/2009	Status: Active
Correspondent Details	
Correspondent Name: <a href="#">Test Test</a>	Correspondent Type: Client
Address: No address available	
Protected Information Related Request Details	
RequestType:	
Protected Information Disclosure Details	
Protected Information Disclosure: No	
Minimum Necessary Information Certification: No	
Disclosure Type:	
Additional Disclosure Details:	
Disclosure Purpose	

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

**Delete Communication: Information Regarding Child**

---

Are you sure you want to delete this communication?

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

Communication Status: Draft [\[Mark As Sent\]](#)  
Status: Canceled

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

Communications: NYEIS Integrated Case - 14597 

Action	Name	Communication Status	Subject	Date	Status
<a href="#">View</a>   <a href="#">Edit</a>	Fatima Smithwick	Draft	sending		Canceled

### Important Information

Only an MS Word Communication with a status set to “Draft” can be deleted. If a MS Word Communication is marked as “Sent”, it cannot be deleted. Non-MS Word Communications can NEVER be deleted; they always have a Status of “Received” or “Sent” based on if the record of the communication was incoming or outgoing.

## EVENTS

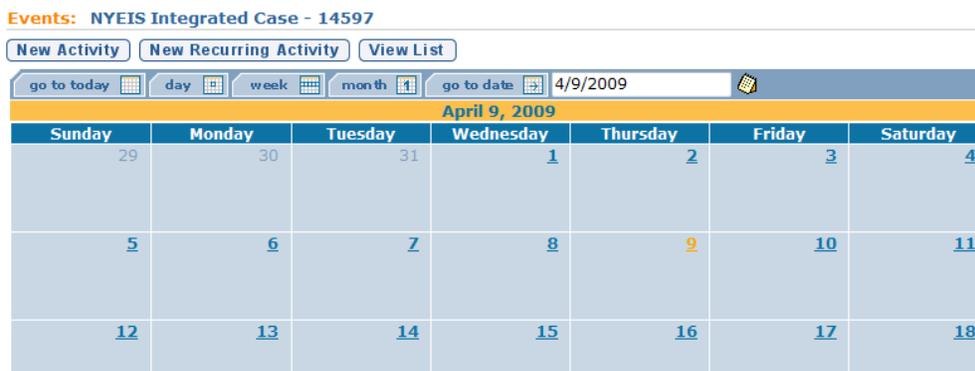
The Calendar Application is used when a User needs to record and share important Events or milestones for a *Child among many NYEIS Users*. Events can be placed on the Child’s Integrated Case and will display on the common Child calendar. The Calendar is accessible to Users with assigned access rights.

If a User needs to record their important events or milestones *to track and remember*, the My Calendar function from their personal Home Page is used. Events will be placed on the User’s personal calendar.

 See **Unit 1: Getting Started** for further detail on displaying the User calendar.

## Calendar Views

- Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
- Click **Events** from the Navigation Bar. **Events** page displays in a **Month** view with current day in a different color.



3. Use the Tabs above the Calendar to switch to one of the following views: **go to today**, **day**, **week**, **month** or **go to date**.



**Exception**  
Currently not available to all NYEIS User roles.

### Creating a New Activity

Activities can be created by a User to invite other Case Participants. For example, an EIO/D can schedule a conference call to discuss information about a Child’s services with an ongoing Service Coordinator and a Service Provider.

1. Display the Child's Integrated Case Home Page. See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Events** from the Navigation Bar. **Events** page displays in a **Month** view with the current day in a different color.

Events: NYEIS Integrated Case - 14597

New Activity   New Recurring Activity   View List						
go to today   day   week   month   go to date   4/9/2009						
April 9, 2009						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

3. Click **New Activity** button. **Create Activity** page displays.

Create Activity: NYEIS Integrated Case - 14597

Save | Save & New | Save & Invite | Cancel

Details	
*Subject:	Medium
Location:	Ignore all conflicts: <input type="checkbox"/>
Time	
*Start: 4/9/2009 00:00	*End: 4/9/2009 00:00
All Day: <input type="checkbox"/>	*Show As: Busy
Concerning	
Case Participant:	
Comments	

Save | Save & New | Save & Invite | Cancel

4. Enter appropriate information for the following sections using **Tab** key to navigate from field-to-field: **Details**, **Time**, **Concerning** (displays a selection of Case Participants) 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. Date fields must be formatted as **mm/dd/yyyy** format.*

- Click **Save** button to save Activity and return to **Events** page. Activity displays on specified date.

April 9, 2009						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	31	1	2	3	4
5	6	7	8	9	10 09:00 - Child Me	11

OR

Click **Save & New** button to save Activity and create an additional Activity.

OR

Click **Save & Invite** button to invite Attendees. See **Inviting Attendees** for further information.

**Exception**

Currently not available to all NYEIS User roles.

**Inviting Attendees**

Only registered users of NYEIS can be invited to an Activity/Event.

- Display the Child's Integrated Case Home Page. See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
- Click **Events** from the Navigation Bar. **Events** page displays in a **Month** view with the current day in a different color.

Events: NYEIS Integrated Case - 14597

New Activity   New Recurring Activity   View List

April 9, 2009						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18

- Click **New Activity** button. **Create Activity** page displays.

Create Activity: NYEIS Integrated Case - 14597 ?

Details	
*Subject:	<input type="text"/>
*Priority:	Medium <input type="button" value="v"/>
Location:	<input type="text"/> <input type="button" value="📍"/> <input type="button" value="🗨️"/>
Ignore all conflicts:	<input type="checkbox"/>

Time	
*Start:	4/9/2009 <input type="button" value="📅"/> 00 : 00 <input type="button" value="v"/>
*End:	4/9/2009 <input type="button" value="📅"/> 00 : 00 <input type="button" value="v"/>
All Day:	<input type="checkbox"/>
*Show As:	Busy <input type="button" value="v"/>

Concerning	
Case Participant:	<input type="text"/> <input type="button" value="v"/>

Comments	
<input type="text"/>	

- Enter appropriate information for the following sections using **Tab** key to navigate from field-to-field: **Details**, **Time**, **Concerning** (displays a selection of Case Participants) 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. Date fields must be formatted as **mm/dd/yyyy** format.*
- Click **Save & Invite** button. **Invite Attendee** page displays.

**Note:**

- Only registered users of NYEIS may be invited to an activity or event.

Invite Attendee: ?

Details	
Attendee:	User <input type="button" value="v"/> <input type="button" value="🗨️"/>

Attendees	
Attendee	Status
provider provider	Accepted

- Select **Attendee** type from drop down in **Details** section.

- Click **Search**  icon for **Attendee** field. **Search** page displays.



**User Search** ?

**Search Criteria**

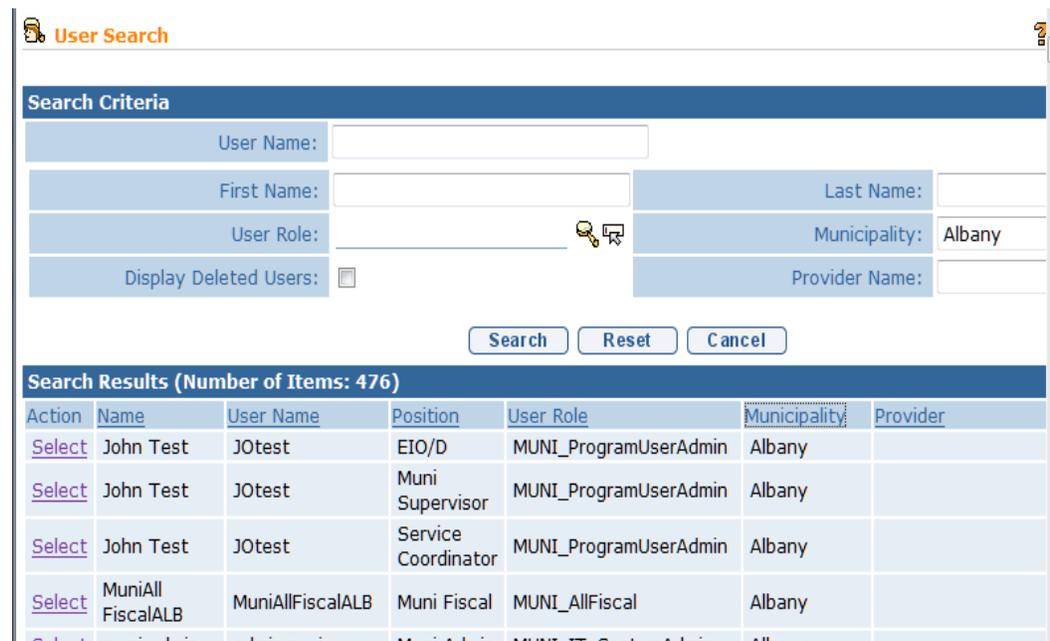
User Name:

First Name:  Last Name:

User Role:    Municipality:

Display Deleted Users:  Provider Name:

- Type all known information in **Search Criteria** section. *If searching for a Provider, be sure to enter as much detail as possible to narrow down search results. The search results are not limited to the Child's Case that is currently open.*
- Click **Search** button. Records matching display in **Search Results** section. *To search again, click **Reset** button.*



**User Search** ?

**Search Criteria**

User Name:

First Name:  Last Name:

User Role:    Municipality: Albany

Display Deleted Users:  Provider Name:

**Search Results (Number of Items: 476)**

Action	Name	User Name	Position	User Role	Municipality	Provider
<a href="#">Select</a>	John Test	J0test	EIO/D	MUNI_ProgramUserAdmin	Albany	
<a href="#">Select</a>	John Test	J0test	Muni Supervisor	MUNI_ProgramUserAdmin	Albany	
<a href="#">Select</a>	John Test	J0test	Service Coordinator	MUNI_ProgramUserAdmin	Albany	
<a href="#">Select</a>	MuniAll FiscalALB	MuniAllFiscalALB	Muni Fiscal	MUNI_AllFiscal	Albany	
<a href="#">Select</a>	muni_admin	adminmuni	Muni Admin	MUNI_IT_SystemAdmin	Albany	

- Click **Select** link under **Action** column to select individual. **Invite Attendee** page redisplay with **Attendee** populated. *Click **Clear**  icon to clear selected name.*

Invite Attendee: ?

Details	
Attendee:	Information Provider <span style="float: right;">Albany DDSO</span>
Attendees	
Attendee	Status
<a href="#">provider provider</a>	Accepted

11. Click **Save & New** button to save Attendee and search to invite another Attendee. Repeat **Steps 6** through **10**.

OR

Click **Save** button to save Activity and return to **Events** page. Activity displays on specified date. An invite has been sent to the User's Inbox to accept or reject.

### Notes:

- To remove an Attendee from list, click the Event from Calendar view. **View Activity Details** page displays. Click **Remove** link from **Attendees** section to remove individual. **Remove Attendee** page displays with the message *Are you sure you want to remove this attendee?* Click **Yes** button. If the Attendee has accepted the invitation, the individual is removed from Attendees section and Event is removed from their events list and calendar. Click **Close** button.
- If an attendee is removed from an invite the meeting is removed from their personal calendar but no notification is sent to inform them.

#### Exception

Currently not available to all NYEIS User roles.

### Creating Recurring Meeting Activity

The Recurring Events function in NYEIS is useful to record Events that occur on the same schedule for a period of time. A good example would be recording the schedule for multiple services a Child receives. If entered on the Child's calendar, other authorized Service Providers, the Service Coordinator and the EIO/D will be able to view the schedule of services (e.g., PT every Tuesday and Thursday from 10:00 A.M. - 10:30 A.M.).

- Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
- Click **Events** from the Navigation Bar. **Events** page displays in a **Month** view with the current day in a different color.

**Events: NYEIS Integrated Case - 14597**

New Activity   New Recurring Activity   View List

go to today   day   week   month   go to date   4/9/2009

April 9, 2009						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25

- Click **New Recurring Activity** button. **Create Recurring Activity** page displays.

**Create Recurring Activity: NYEIS Integrated Case - 14597** ?

Save   Save & New   Save & Invite   Cancel

**Details**

\*Subject:    \*Priority: Medium

Location:

**Time**

\*Start: 4/9/2009 00:00   \*End: 4/9/2009 00:00

\*Show As: Busy   Ignore Conflicts:

All Day:

**Concerning**

Case Participant: Jim Tarey

**Activity Recurrence**

\*Frequency:

**Recurrence Duration**

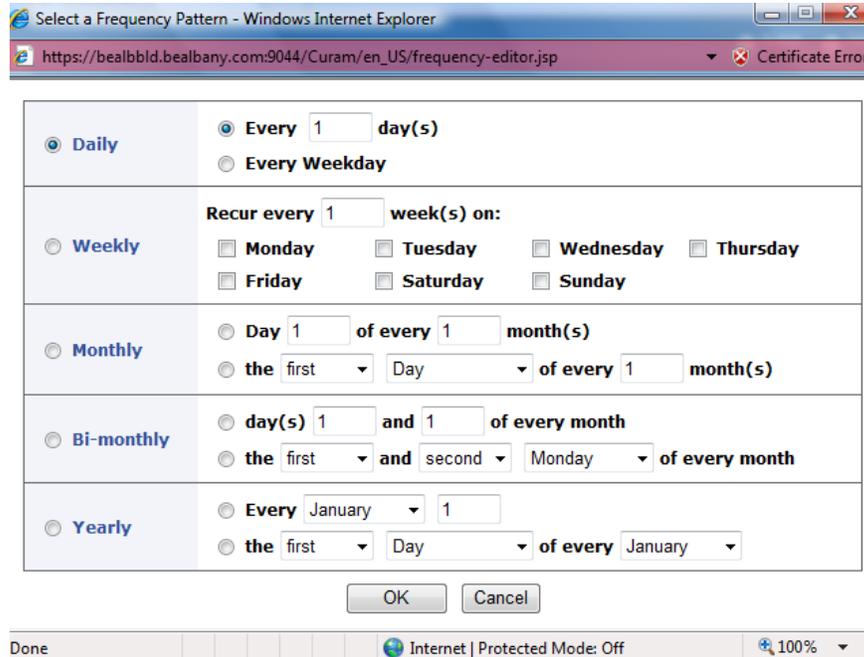
Number of Occurrences: 0   To Date:

**Comments**

Save   Save & New   Save & Invite   Cancel

- Enter appropriate information for the following sections using **Tab** key to navigate from field-to-field: **Details**, **Time** and **Concerning** (displays a selection of Case Participants). *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.*

- To select a frequency pattern, click **Frequency Pattern**  button from **Frequency** field. **Select a Frequency Pattern** window displays.



- Select details for the recurring Activity. Click **OK**. **Create Recurring Activity** page displays with **Frequency** field populated.



- Specify the **Number of Occurrences** for the Event or define a **To Date** in **Recurrence Duration** section.
- Type **Comments (Optional)**.

9. Click **Save** button to save Activity and return to **Events** page. Activity displays on specified date.

Sunday	Monday
29	30
<u>5</u>	<u>6</u>
<u>12</u>	<u>13</u> 00:00 - Weekly   10:00 - Test App
<u>19</u>	<u>20</u> 00:00 - Weekly
<u>26</u>	<u>27</u> 00:00 - Weekly

OR

Click **Save & New** button to save Activity and create an additional Activity.

OR

Click **Save & Invite** button to invite Attendees.  See **Inviting Attendees** for further information.

## Responding to an Invite

1. Display User Home Page. Click **Home** from Menu Bar. **My Calendar** section displays Invites.

My Calendar	
Start Date	Subject
4/7/2009 15:00	<a href="#">Follow-up Meeting</a>
4/9/2009 00:00	<a href="#">Weekly P/T</a>
4/9/2009 09:00	<a href="#">Vendor Meeting</a>
4/10/2009 09:00	<a href="#">Child Meeting</a>
4/10/2009 10:00	<a href="#">Status meeting</a>
4/13/2009 00:00	<a href="#">Weekly P/T</a>
4/13/2009 10:00	<a href="#">Test Appt</a>

2. Click **Subject** link for invite to display. **View Activities Detail** page displays.

View Activity Details: [Invite Test](#) ?

Details		
Subject:	Invite Test	
Location:		
Priority:	Medium	
Status:	Active	
Time		
Start:	4/9/2009 00:00	
End:	4/9/2009 00:00	
Show As:	Busy	
All Day:	No	
Concerning		
Client:		
Case Reference:		
Attendees		
Action	Attendee	Status
<a href="#">Remove</a>	<a href="#">provider provider</a>	Accepted
<a href="#">Remove</a>	<a href="#">John USER</a>	Provisional
Comments		

3. Click **Accept** button to accept meeting. **Accept Invitation** page displays with the message *Are you sure you want to accept this invitation?* Click **Yes** button. **View Activities Detail** page displays. **Status** under the **Attendees** section is changed to **Accepted**.

OR

Click **Reject** button to reject meeting. **Reject Invitation** page displays with the message *Are you sure you want to reject this invitation?* Click **Yes** button. **My Calendar** page displays with invite removed.

## Editing Activities

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, *Displaying Integrated Case Home Page*** for further information.
2. Click **Events** from the Navigation Bar. **Events** page displays in a **Month** view with the current day in a different color.
3. Locate Activity to edit. Click link. **View Activity Details** page displays.

View Activity Details: Test

Details		
Subject: Test	Priority: Medium	
Location:	Status: Active	
Time		
Start: 4/23/2009 01:00	End: 4/23/2009 02:00	
Show As: Busy	All Day: No	
Concerning		
Client:	Case Reference:	
Attendees		
Action	Attendee	Status
<a href="#">Remove</a>	provider provider	Accepted
Comments		

4. Click **Edit** button. **Modify Activity** page displays.

Modify Activity: Test

Details	
*Subject: Test	*Priority: Medium
Location:	Ignore all conflicts: <input type="checkbox"/>
Time	
*Start: 4/23/2009 01:00	*End: 4/23/2009 02:00
All Day: <input type="checkbox"/>	Show As: Busy
Concerning	
Client: Employer	Case Reference:
Comments	

5. Apply necessary changes.
6. Click **Save** button. Changes are saved. **Events** page displays.

OR

Click **Save & Invite** button to invite additional Attendees to Activity.

**Notes:**

- The user that creates an event on a child's calendar also has that event populated on their own personal calendar.
- Any change made to an Event is automatically updated by NYEIS and displayed on the Users calendar for an Activity that has been accepted. *Users will not be notified by NYEIS that a change has been made.*
- Any User that has access rights to a Child's Case may edit the Child's Calendar. A User may not edit a Calendar Event on another User's Calendar.

**Deleting Activities**

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Events** from the Navigation Bar. **Events** page displays in a **Month** view with the current day in a different color.
3. Locate Activity to delete. Click link. **View Activity Details** page displays.

View Activity Details: Test

Details		
Subject: Test	Priority: Medium	
Location:	Status: Active	
Time		
Start: 4/23/2009 01:00	End: 4/23/2009 02:00	
Show As: Busy	All Day: No	
Concerning		
Client:	Case Reference:	
Attendees		
Action	Attendee	Status
<a href="#">Remove</a>	<a href="#">provider provider</a>	Accepted
Comments		

4. Click **Delete** button. **Delete Activity** page displays with message *Are you sure you want to delete this activity?*

**Delete Activity: Test**

Are you sure you want to delete this activity?



5. Click **Yes** button. **Events** page displays and Activity is removed.

**Important Information**

Be sure to check your Calendar on a regular basis in case there have been deleted Activities. Deleted activities are automatically removed from a User's Calendar without system notification.

**Note:**

- Users having access rights to a Child's Case may delete an Event on the Child's Calendar, even if they did not create the Calendar Event. Users may not delete a Calendar Event on another User's calendar even if they have been invited to the Event.

**NOTES**

Notes are used to provide additional information regarding the Case. Notes are viewed by Users that have assigned access rights to the Case.



Notes are not meant to be an area for Users to record their Case/Progress Notes.

A Note is stored and later viewable in the location where it was created (e.g., Child Home page, Integrated Case, IFSP, Service Authorization). A Note created in an IFSP Case cannot be viewed from the Child's Integrated Case or the Child Homepage.

**Important Information - Sensitive Information/Information Extraneous to Early Intervention**

It is important to recognize when adding Notes to a Child's case that there may be sensitive or extraneous information communicated or known about the Child that does not directly relate to the Early Intervention Program. Early Intervention Officials and Early Intervention Providers are responsible for being aware of and adhering to other confidentiality requirements that may apply to information included in children's early intervention records.

When disclosing or re-disclosing any information, including entering Notes in NYEIS, the Early Intervention Official or Early Intervention Provider *must* consider whether disclosure is necessary for the provision of early intervention services to the Child and/or family by the receiving party. For example, certain types of protected health information or family circumstances may not be necessary or appropriate to share with other Early Intervention Providers, and in these circumstances, would not be appropriate to record Notes in NYEIS.

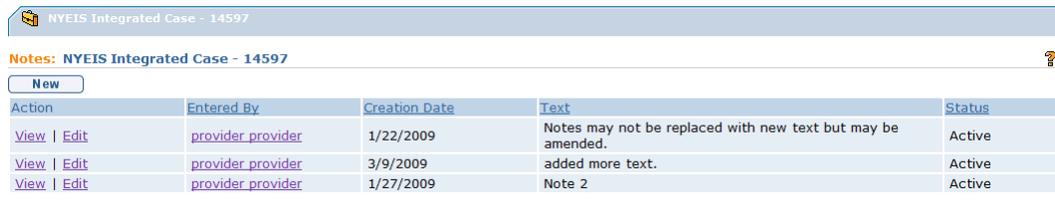
A Note cannot be edited after it is created. If a change needs to be made to an original Note, the new Note text is added at the end. Notes are viewed by everyone that has access rights to the Case.

**Exception**

Currently not available to all NYEIS User roles.

## Creating Notes

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Notes** from the Navigation Bar. **Notes** page displays.



Action	Entered By	Creation Date	Text	Status
<a href="#">View</a>   <a href="#">Edit</a>	provider provider	1/22/2009	Notes may not be replaced with new text but may be amended.	Active
<a href="#">View</a>   <a href="#">Edit</a>	provider provider	3/9/2009	added more text.	Active
<a href="#">View</a>   <a href="#">Edit</a>	provider provider	1/27/2009	Note 2	Active

3. Click **New** button. **Create Note** page displays.



**Create Note: NYEIS Integrated Case - 14597**

Note Text

\*Text:

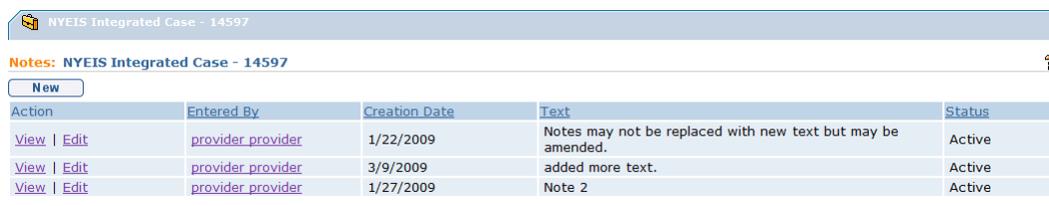
4. Type **Text** in **Note Text** section.
5. Click **Save** button to save Note and return to **Notes** page with new Note listed.

OR

Click **Save & New** button to save Note and create a new Note.

## Viewing Notes

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, *Displaying Integrated Case Home Page*** for further information.
2. Click **Notes** from the Navigation Bar. **Notes** page displays.



Action	Entered By	Creation Date	Text	Status
<a href="#">View</a>   <a href="#">Edit</a>	provider provider	1/22/2009	Notes may not be replaced with new text but may be amended.	Active
<a href="#">View</a>   <a href="#">Edit</a>	provider provider	3/9/2009	added more text.	Active
<a href="#">View</a>   <a href="#">Edit</a>	provider provider	1/27/2009	Note 2	Active

3. Click **View** link under **Action** column for Note to display. **View Note** page displays.



Details
Entered By: provider provider
Creation Date: 4/10/2009
Status: Active

**Notes History**

On: 04-10-2009 08:51:47  
 Created By: provider provider  
 Created as a result of: User note  
 This is a note section

4. Review information.
5. Click **Close** button. **Notes** page displays.

### **Exception**

Currently not available to all NYEIS User roles.

## Editing Notes

The text for Notes cannot be edited. New text is appended (added to the bottom) and original text is set to the **History Note** section.

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, *Displaying Integrated Case Home Page*** for further information.
2. Click **Notes** from the Navigation Bar. **Notes** page displays.

NYEIS Integrated Case - 14597

Notes: NYEIS Integrated Case - 14597

New

Action	Entered By	Creation Date	Text	Status
<a href="#">View</a>   <a href="#">Edit</a>	provider provider	1/22/2009	Notes may not be replaced with new text but may be amended.	Active
<a href="#">View</a>   <a href="#">Edit</a>	provider provider	3/9/2009	added more text.	Active
<a href="#">View</a>   <a href="#">Edit</a>	provider provider	1/27/2009	Note 2	Active

3. Click **Edit** link under **Action** column for Note to change. **Modify Note** page displays with original Note listed under **Note History** section.

Modify Note: NYEIS Integrated Case - 14597

[Save](#) [Cancel](#)

**Details**

Entered By: provider provider      Creation Date: 4/10/2009

**Note Text**

\*Text:

**Note History**

On: 04-10-2009 08:51:59  
 Created By: provider provider  
 Created as a result of: User note  
 Text #2

[Save](#) [Cancel](#)

4. Apply necessary changes to **Details** section. Type new **Text** in **Note Text** section.
5. Click **Save** button. Note is saved. **Notes** page displays.
6. Click **View** link under **Action** column to display the updated note.

View Note: NYEIS Integrated Case - 14597

[Edit](#) [Delete](#) [Close](#)

**Details**

Entered By: provider provider      Status: Active  
 Creation Date: 1/22/2009

**Notes History**

On: 01-22-2009 13:33:09  
 Created By: provider provider  
 Notes may not be replaced with new text but may be amended.  
 On: 04-10-2009 08:55:42  
 Modified By: provider provider  
 Modified as a result of: User note  
 Amendment Text

[Edit](#) [Delete](#) [Close](#)

## Deleting Notes



When a Note is deleted, the entire Note with its history is removed from the Live System. Notes will be stored in the NYEIS database and can be retrieved by the State Administrators. Only certain Users with access rights may delete Notes.

**Exception**  
Currently not available to all NYEIS User roles.

1. Display the Child's Integrated Case Home Page. See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Notes** from the Navigation Bar. **Notes** page displays.

NYEIS Integrated Case - 14597				
Notes: NYEIS Integrated Case - 14597				
New				
Action	Entered By	Creation Date	Text	Status
<a href="#">View</a>   <a href="#">Edit</a>	provider provider	1/22/2009	Notes may not be replaced with new text but may be amended.	Active
<a href="#">View</a>   <a href="#">Edit</a>	provider provider	3/9/2009	added more text.	Active
<a href="#">View</a>   <a href="#">Edit</a>	provider provider	1/27/2009	Note 2	Active

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

View Note: NYEIS Integrated Case - 14597	
<a href="#">Edit</a>	<a href="#">Delete</a> <a href="#">Close</a>
Details	
Entered By: <a href="#">provider provider</a>	Status: Active
Creation Date: 4/10/2009	
Notes History	
On: 04-10-2009 08:51:47 Created By: provider provider Created as a result of: User note This is a note section	
<a href="#">Edit</a>	<a href="#">Delete</a> <a href="#">Close</a>

4. Click **Delete** button. **Delete Note** page displays with the message *Are you sure you want to delete this note?*

**Delete Note: NYEIS Integrated Case - 14597**

Are you sure you want to delete this note?

[Yes](#) [No](#)

5. Click **Yes** button. **Notes** page displays with Note deleted.

## TASKS (OPEN TASKS SUMMARY)

The Open Task Summary page displays a list of the tasks that are open and would need to be actioned before the Integrated Case can be Transferred or Closed.

The page also lists all User-Created tasks that are associated with the Child's case. It includes Tasks created by a User on the Child's Home page, Integrated Case Home page, IFSP Home page, and Service Authorization Home page. All User-Created tasks must also be closed. Keep in mind that a User-Created Task can be manually closed by the person who is assigned the Task.  See **Unit 1: Getting Started, Closing a Task** for further information.

Second, it offers a way for the User to create a Task. Note that when a User creates a task, the record of that task will only be found in the location where the task was generated (in this case, the Child's Integrated Case).  See **Unit 1: Getting Started, Creating a Task** for further information on Tasks.

### Viewing Open Tasks

1. Display Integrated Case Home Page.  Refer to **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Tasks** on the Navigation menu of the Integrated Case Home page. **Open Task Summary** page displays.

NYEIS Integrated Case - 62464			
Open Task Summary: NYEIS Integrated Case - 62464			
The following tasks for the Integrated Case, any IFSP's, or Service Authorizations must be actioned before the Integrated Case can be closed.			
New			
Task ID	Source Case Reference	Task Subject	Task Assignment
67339	<a href="#">64005</a>	Accept/Reject Audiology - Basic Service Authorization for Derek Stewart in Albany	258_ServiceAuthorizations (Children's Health Care)
88635	<a href="#">62469</a>	Provider John Bobecks_QA Test Agency has rejected the assignment of Service Authorization 62469 for Derek Stewart	John Bobeck (Albany)

The page list all of the currently open Tasks associated with the Integrated Case that must be actioned before the system will allow the Integrated Case to be Transferred or Closed.

#### Important Information

The Open Tasks Summary page does not display all open Tasks associated with the Child's case. It only displays Open Tasks that are required to be actioned before the IC is Transferred or Closed. It also displays any User-Created Tasks that were created.

Four columns display information about the Task:

**Task ID** – the system-created unique Task identifier.

**Source Case Reference** – the case/folder that the Task is associated with. Examples are Integrated Case, IFSP, or Service Authorization. Click the link to determine what type of case the Task is related to.

**Task Subject** – a description of the specific task.

**Task Assignment** – specifies the location of the Task, and the Municipality or Provider who currently ‘owns’ the Task.

Task Assignment
258_ServiceAuthorizations (Children's Health Care)

In the first Task example listed above (67339), the location is ‘258\_ServiceAuthorizations’ work queue of agency ‘Children’s Health Care’. The number preceding the Work Queue name (e.g., ‘258’) refers to the agency’s State ID number.

Task Assignment
John Bobeck (Albany)

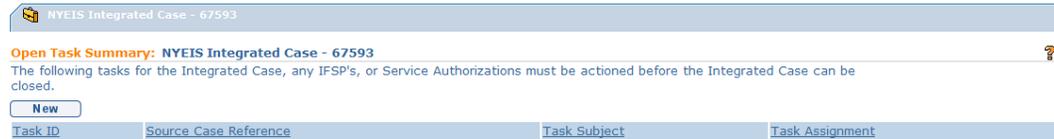
In the second Task example listed above (88635), the location is User John Bobeck’s Assigned To or Reserved By inbox. The User is associated with the ‘Albany’ agency. In this case, the agency is Albany municipality. If John worked for a provider agency such as Children’s Health Care, it would display as ‘John Bobeck (Children’s Health Care)’. If John was an Individual Provider it would display ‘John Bobeck (Bobeck, John)’.

## Creating a Task

### **Exception**

Currently not available to all NYEIS User roles.

1. Display Integrated Case Home Page.  Refer to **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Tasks** from the Navigation menu. **Open Tasks Summary** page displays.



NYEIS Integrated Case - 67593

**Open Task Summary: NYEIS Integrated Case - 67593**

The following tasks for the Integrated Case, any IFSP's, or Service Authorizations must be actioned before the Integrated Case can be closed.

Task ID	Source Case Reference	Task Subject	Task Assignment
---------	-----------------------	--------------	-----------------

3. Click **New** button. **Create User Task** page displays.  Refer to **Unit 1: Getting Started, Creating a Task** for instructions.

- navigation
- Home
- Attachments
- Case Participants
- Communications
- Events
- Notes
- Assign Evaluator For MDE
- Child's Completed Evaluations
- Eligibility
- IFSP's
- Tasks
- Transfers
- Transitions
- Mediations
- Impartial Hearings
- User Roles
- Status History
- Municipality of Fiscal Responsibility
- Protected Health Information Restrictions
- Protected Health Information Authorizations
- Health Assessments
- Case Lifecycle Status

## ASSIGN EVALUATOR FOR MDE

 See **Unit 5: Evaluation** for detail.

## CHILD'S COMPLETED EVALUATIONS

 See **Unit 5: Evaluation** for detail.

## ELIGIBILITY

 See **Unit 5: Evaluation** for detail.

## IFSPs

 See **Unit 6: IFSP & Service Authorizations** for detail.

## TRANSFERS

 See **Unit 7: Transfers & Transitions** for detail.

## TRANSITIONS

 See **Unit 7: Transfers & Transitions** for detail.

## MEDIATIONS

 See **Unit 14: Due Process** for detail.

## IMPARTIAL HEARINGS

 See **Unit 14: Due Process** for detail.

**Features selected above are not available to all Users.**

**Exception**

Currently not available to all NYEIS User roles.

**USER ROLES**

User Roles allow authorized users to view information on the history and current EIO/D and Service Coordinator. The User Roles feature is also used to change the Supervisor of a Child's Case who is the Child's Early Intervention Official Designee (EIO/D). This function will *not* change any other User's role in NYEIS.



If a change in EIO/D *must* occur, the change *must* be completed in NYEIS because tasks are dependent on this assignment. If an EIO/D is changed and there are outstanding tasks, each task *must* be manually forwarded to the new EIO/D.

**Important Information**

For the initial assignment of the EIO/D, be sure to always use the system generated 'Assign EIO/D' task to manage that assignment, not the 'New EIO/D' button on the User Roles page. Use of the 'New EIO/D' button is fine for subsequent changes to the initial EIO/D assignment.

 See **Unit 10: Municipal Administration** for further information.

**STATUS HISTORY**

The Status History page provides an historical view of when the Integrated Case was opened, and when it was closed. An Integrated Case may be opened and closed several times during the child's participation in the Early Intervention program.

 See **Unit 10: Municipal Administration, Closing a Case and Re-opening a Closed Case for more information regarding these two processes.**

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Status History** from the Navigation Bar. **Status History** page displays.

NYEIS Integrated Case - 46080			
Status History: NYEIS Integrated Case - 46080			
Status	From	To	Closure Reason
Draft	6/3/2011		
Closed	6/3/2011	6/3/2011	EI Evaluation found Child not eligible
Draft	12/21/2010	6/3/2011	

**Note:**

- An Integrated Case with a **Status** of **Draft** is Open and indicates that the child’s case is ‘In Progress’.

**Exception**  
Currently not available to all NYEIS User roles.

**MUNICIPALITY OF FISCAL RESPONSIBILITY**

This feature is used to assign financial responsibility for a Child in foster care, a homeless Child or a Child in a residential facility licensed or operated by a State Agency to the correct Municipality.

A Municipality is assigned based on the Child’s address when a Child is entered into the System. The Municipality assigned takes on financial responsibility for the Child. For a Child in foster care, residential care or a homeless child, the Municipality of financial responsibility *is* the Municipality in which the Child or the Child’s family lived, *at the time* the Child was placed in foster care, residential care or the family became homeless. This Municipality may be different than the Municipality of the Child’s *current* address.

 See **Unit 10: Municipal Administration** for further information on this topic.

## PROTECTED HEALTH INFORMATION RESTRICTIONS

**Exception**

Currently not available to all NYEIS User roles.

If there is an active restriction, there will be a notice section on the Child Homepage indicating that an information disclosure restriction applies.

Child Homepage: Marjorie Thomas - 143

Notice

Information Disclosure Restrictions Apply

Child Information

First Name:	Marjorie	Middle Name:	
Last Name:	Thomas	Suffix:	

Contact

Address:	5774 Western Rd Albany (Albany) New York 10001	Phone Number:	518 090-8887
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Child Information

Child's Referral Date:	9/20/2010	Child's Case Status:	
Date of Birth:	4/8/2010	Gender:	Female
Calculated Age of Child:	0 Years, 5 Months	Birth Last Name:	
Ethnic Origin:	Not Hispanic or Latino	Child's Dominant Language:	
Child's Living Arrangement:		Municipality of Residence:	Albany
Child's School District:		Caregiver's Name (If other than parent):	

### Important Information

Once a protected Health Information Restriction is placed on a Child Case, it cannot be deleted. A deletion changes the status to cancelled; however, the record of the restriction is still available to be viewed.

**Exception**

Currently not available to all NYEIS User roles.

### Recording a Protected Health Information Restriction

1. Display the Child's Integrated Case Home Page. See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Protected Health Information Restrictions** from the Navigation Bar. **Restrictions on Protected Health Information Disclosures** page displays.

NYEIS Integrated Case - 2827

Restrictions on Protected Health Information Disclosures: NYEIS Integrated Case - 2827

Record

Action	Case Reference Number	Restriction Date	Restriction Status
--------	-----------------------	------------------	--------------------

3. Click **Record** button. **Record Restriction on Protected Health Information Disclosures** page displays with the following sections: **Protected Health Information Restriction Details, Associated Files** and **Comments**.

**Record Restriction on Protected Health Information Disclosures** ?

Save Cancel

**Protected Health Information Restriction Details**

\*Information Restricted from Disclosure Details:

\*Restriction Date:  

**Associated Files**

File Location:	<input type="text"/>	Document Location:	<input type="text"/>
File Reference:	<input type="text"/>	Document Reference:	<input type="text"/>

**Comments**

Save Cancel

- Enter appropriate information using **Tab** key to navigate from field-to-field. *Fields requiring data entry are marked with an asterisk. A field can also be required based on logic that will not have an asterisk. Date fields must be formatted as **mm/dd/yyyy** format.*

**Information Restricted from Disclosure Details** field *must* be completed with a short description or title of the information that is restricted (e.g., HIV Status, Autism Diagnosis, Psychological Evaluation Results).

Associated Files may be described and attached.

- Click **Save** button. **Restrictions on Protected Health Information Disclosures** page displays.

## Viewing a Protected Health Information Restriction

- Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
- Click **Protected Health Information Restrictions** from the Navigation Bar. **Restrictions on Protected Health Information Disclosures** page displays.

NYEIS Integrated Case - 2827

**Restrictions on Protected Health Information Disclosures: NYEIS Integrated Case - 2827** ?

Record

Action	Case Reference Number	Restriction Date	Restriction Status
<a href="#">View</a>   <a href="#">Edit</a>	2827	10/14/2009	Active

- Click **View** link under **Action** column for Restriction. **View Restriction on Protected Health Information Disclosures** page displays.

**View Restriction on Protected Health Information Disclosures** ?

Protected Health Information Restriction Details	
Information Restricted from Disclosure Details:	HIV Status
Restriction Date:	10/14/2009

Associated Files	
File Location:	Document Location:
File Reference:	Document Reference:

Comments

- Review information.
- Click **Close** button. **Restrictions on Protected Health Information Disclosures** page displays.

**Exception**

Currently not available to all NYEIS User roles.

**Editing a Protected Health Information Restriction**

- Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, *Displaying Integrated Case Home Page*** for further information.
- Click **Protected Health Information Restrictions** from the Navigation Bar. **Restrictions on Protected Health Information Disclosures** page displays.

NYEIS Integrated Case - 2827			
Restrictions on Protected Health Information Disclosures: NYEIS Integrated Case - 2827			
<input type="button" value="Record"/>			
Action	Case Reference Number	Restriction Date	Restriction Status
<a href="#">View</a>   <a href="#">Edit</a>	2827	10/14/2009	Active

- Click **Edit** link under **Action** column for Restriction. **Modify Restriction on Protected Health Information Disclosures** page displays.

**Note:**

- Only users with appropriate access rights may edit Protected Health Information Restrictions.

**Modify Restriction on Protected Health Information Disclosures** ?

---

**Protected Health Information Restriction Details**

\*Information Restricted from Disclosure Details:

\*Restriction Date:  

**Associated Files**

File Location:  Document Location:

File Reference:  Document Reference:

**Comments**

4. Apply necessary changes.
5. Click **Close** button. **Restrictions on Protected Health Information Disclosures** page displays.

### Deleting a Protected Health Information Restriction

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Protected Health Information Restrictions** from the Navigation Bar. **Restrictions on Protected Health Information Disclosures** page displays.

 NYEIS Integrated Case - 2827

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**Restrictions on Protected Health Information Disclosures: NYEIS Integrated Case - 2827** ?

Action	Case Reference Number	Restriction Date	Restriction Status
<a href="#">View</a>   <a href="#">Edit</a>	2827	10/14/2009	Active

3. Click **View** link under **Action** column for Restriction. **View Restriction on Protected Health Information Disclosures** page displays.

**View Restriction on Protected Health Information Disclosures** ?

---

**Protected Health Information Restriction Details**

Information Restricted from Disclosure Details: HIV Status

Restriction Date: 10/14/2009

**Associated Files**

File Location:  Document Location:

File Reference:  Document Reference:

**Comments**

- Click **Delete** button. **Remove Restriction on Protected Health Information Disclosures** page displays with the message *Are you sure you want to remove this Restriction?*

**Remove Restriction on Protected Health Information Disclosures**

Are you sure you want to remove this Restriction?

**Note:**

- Only users with appropriate access rights may delete a Protected Health Information Restriction.
- Click **Yes** button. **View Restrictions on Protected Health Information Disclosures** page displays.
  - Click **Close** button. **Restrictions on Protected Health Information Disclosures** page displays. **Restriction Status** is set to **Canceled**.

**PROTECTED HEALTH INFORMATION AUTHORIZATIONS**

If there is an information disclosure on a Child’s Case and there has been permission obtained to release information contained in the restriction, this authorization *must* be captured here.

Exception  
Currently not available to all NYEIS User roles.

**Recording a Protected Health Information Authorization**

- Display the Child's Integrated Case Home Page. See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
- Click **Protected Health Information Authorizations** from the Navigation Bar. **Authorizations on Protected Health Information** page displays.

Authorizations on Protected Information: NYEIS Integrated Case - 2827

Action	Case Reference	Authorization Date	Status
<input type="button" value="Record"/>			

3. Click **Record** button. **Select Authorizing Participant** page displays.

Select Authorizing Participant NYEIS Integrated Case - 2827 

If the authorizing participant is a case participant, please select from below.

Case Participant:

If the authorizing participant is registered on the system, please select from below.

Participant:   

If the authorizing participant is not registered on the system, please enter the authorizing participant name below.

Participant Name:

### Important Information

The parent/legal guardian must be the authorizing Participant. If the parent is already a Case Participant they will be listed in the **Case Participant** drop down. If the parent is not listed, they will need to be entered in the **Participant Name** field.

4. Select from one of the following:

- If **Authorizing Participant** (parent/legal guardian) is already a Case Participant, click **Case Participant** drop down. Select Participant (e.g., Child, Physician, and Committee on Preschool Special Education (CPSE) chairperson).

#### Attention

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

- If **Authorizing Participant** (parent/legal guardian) 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. 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. **Select Authorizing Participant** page displays with correspondent name. Click **Clear**  icon to clear selected name.
- If **Authorizing Participant** (parent/legal guardian) is not registered in the System, type **Authorizing Participant Name**. *Authorizing Participant is automatically registered as a person in the System. Authorizing Participant is only associated with Case. Authorizing Participant does not display in a search.* After a communication is created for a new participant, the participant is available in Case Participant drop down.

5. Click **Next** button. **Record Protected Information Authorization** page displays with the following sections: **Authorization Details, Person/Entity Authorized to Receive/Use Protected Information, Associated Files** and **Comments**.

**Record Protected Information Authorization** NYEIS Integrated Case - 2827

Save Save & New Cancel

**Authorization Details**

\*Authorization Type: Health Information \*Authorization Description:

\*Authorization Purpose: \*Authorization Date: 10/13/2009

Authorization Expiration Date: 10/13/2009

**Person/Entity Authorized to Receive/Use Protected Information**

Name: Tiffany Martin-15

Address:

E-Mail Address:

Phone Number:

**Associated Files**

File Location: File Reference:

Document Location: Document Reference:

**Comments**

Save Save & New Cancel

6. Enter appropriate information using **Tab** key to navigate from field-to-field. *Fields requiring data entry are marked with an asterisk. A field can also be required based on logic that will not have an asterisk. Date fields must be formatted as **mm/dd/yyyy** format.*
7. Click **Save & New** button to add additional Authorizations.

OR

Click **Save** button. **Authorizations on Protected Information** page displays.

### Viewing a Protected Health Information Authorization

**Exception**  
Currently not available to all NYEIS User roles.

1. Display the Child's Integrated Case Home Page. See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Protected Health Information Authorizations** from the Navigation Bar. **Authorizations on Protected Health Information** page displays.

**Authorizations on Protected Information: NYEIS Integrated Case - 2827**

Record

Action	Case Reference	Authorization Date	Status
<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Revoke</a>	2827	10/13/2009	Active

3. Click **View** link under **Action** column for Authorization. **View Protected Information Authorization** page displays.

**View Protected Information Authorization** NYEIS Integrated Case - 2827 ?

Authorization Details	
Authorization Type:	Health Information
Authorization Purpose:	Treatments
Authorization Expiration Date:	10/13/2009
Authorization Description:	HIV
Authorization Date:	10/13/2009

Person/Entity Authorized to Receive/Use Protected Information	
Name:	Tiffany Martin-15
Address:	
E-Mail Address:	
Phone Number:	

Associated Files	
File Location:	File Reference:
Document Location:	Document Reference:

**Comments**

- Review information.
- Click **Close** button. **Authorizations on Protected Health Information** page displays.

Exception  
Currently not available to all NYEIS User roles.

**Editing a Protected Health Information Authorization**

- Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
- Click **Protected Health Information Authorizations** from the Navigation Bar. **Authorizations on Protected Health Information** page displays.

**Authorizations on Protected Information:** NYEIS Integrated Case - 2827 ?

Record			
Action	Case Reference	Authorization Date	Status
<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Revoke</a>	2827	10/13/2009	Active

- Click **Edit** link under **Action** column for Authorization. **Modify Protected Information Authorization** page displays.

**Note:**

- Only users with appropriate access rights may edit a Protected Health Information Authorization.

**Modify Protected Information Authorization** NYEIS Integrated Case - 2827

Save Cancel

**Authorization Details**

\*Authorization Type: Health Information \*Authorization Description: HIV

\*Authorization Purpose: Treatments \*Authorization Date: 10/13/2009

Authorization Expiration Date: 10/13/2009

**Person/Entity Authorized to Receive/Use Protected Information**

Participant: Tiffany Martin-15

Address:

E-Mail:

Phone Number:

**Associated Files**

File Location: File Reference:

Document Location: Document Reference:

**Comments**

Save Cancel

4. Apply necessary changes.
5. Click **Close** button. **Authorizations on Protected Health Information** page displays.

### Revoking a Protected Health Information Authorization

1. Display the Child's Integrated Case Home Page. See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Protected Health Information Authorizations** from the Navigation Bar. **Authorizations on Protected Health Information** page displays.

**Authorizations on Protected Information: NYEIS Integrated Case - 2827**

Record

Action	Case Reference	Authorization Date	Status
<a href="#">View</a>   <a href="#">Edit</a>   <a href="#">Revoke</a>	2827	10/13/2009	Active

3. Click **Revoke** link under **Action** column for Authorization. **Revoke Protected Information Authorization** page displays with the message *Are you sure you want to revoke this Authorization?*

### Revoke Protected Information Authorization NYEIS Integrated Case - 2827

Are you sure you want to revoke this Authorization?

Yes No

**Notes:**

- Only users with appropriate access rights may revoke a Protected Health Information Authorization.
- Click Yes button. Authorizations on Protected Health Information page displays. Status is set to Canceled.

**HEALTH ASSESSMENTS**

Health Assessments pages are **NOT** associated with a Child's Multidisciplinary Evaluation. Information on the required Health Assessment (which is part of the MDE) *must* be entered into NYEIS in the **External Evaluation** section of the MDE, documented in the **Comments** section of the **Physical Domain** field in the **Developmental Assessment** section of the MDE or in the scanned copy of the completed MDE report that should be attached to the MDE in NYEIS.

Health Assessment pages can be completed by authorized Users to document any additional Health Assessments completed for the Child any time after eligibility has been established. In addition, documentation of ongoing assessments of a child's developmental status performed by a provider can be documented using the Health Assessment pages. Any diagnostic information (ICD codes) captured on the Health Assessment pages will ultimately be available to view on the child's Home Page as well to select upon invoicing for services delivered.

**Creating Health Assessments**

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Health Assessments** from the Navigation Bar. Additional Health Assessment(s) page displays.

NYEIS Integrated Case - 22805				
Additional Health Assessment(s): NYEIS Integrated Case - 22805				
New				
Action	Clinician	Affiliation	Date Completed	Status

- Click **New** button. **Additional Health/Developmental Information** page displays with the following sections: **Child Details, Parental Consent, Health/Developmental Information Submitter Details, Health Assessment, Developmental Assessment, Evaluation Diagnosis Results** and **General Comments**.

**Additional Health/Developmental Information**

Save Cancel

**Child Details**

Name: Nicole Barnes Date of Birth: 1/1/2009

**Parental Consent**

Information is submitted with informed parental consent on record?:

**Health/Developmental Information Submitter Details**

\*Date Evaluation Conducted:

\*Clinician Name:

Affiliation Name:

Address:

Profession:

If Not, Other Profession:

Area Code:  \*Phone Number:  Extension:

**Health Assessment**

\*Health Assessment Performed?:

If a health assessment was performed, comments are required.

- Navigate from field-to-field using **Tab** key to fill in information. Required fields are marked with an asterisk. Date fields must be formatted as **mm/dd/yyyy** format.

If there has been a diagnosis established while completing an additional health assessment, it may be entered using the **EI Eligible ICD Codes** (codes that make a Child eligible for the Early Intervention Program) or by entering an **Other Eligible Diagnosis Code**. If other ICD code is recorded, a justification is not required.

Any diagnostic information (ICD codes) captured on the Health Assessment pages will ultimately be available to view on the child's Home Page as well to select upon invoicing for services delivered.

- Click **Save** button. Additional Health Assessment(s) page displays.

## Viewing Health Assessments

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Health Assessments** from the Navigation Bar. **Additional Health Assessment(s)** page displays.

NYEIS Integrated Case - 22805

**Additional Health Assessment(s):** NYEIS Integrated Case - 22805

[New](#)

Action	Clinician	Affiliation	Date Completed	Status
<a href="#">View</a> <a href="#">Edit</a>	Mark Peterson		10/10/2009	Active

3. Click **View** link under **Action** column for specific Assessment. **Additional Health/Developmental Information** page displays.

**Additional Health/Developmental Information**

[Edit](#) [Delete](#) [Close](#)

**Child Details**

Name: Nicole Barnes Date of Birth: 1/1/2009

**Parental Consent**

Information is submitted with informed parental consent on record?:

**Health/Developmental Information Submitter Details**

Date Evaluation Conducted: 10/10/2009  
 Clinician Name: Mark Peterson  
 Affiliation Name:  
 Address:  
 Profession:  
 If Not, Other Profession:

Area Code: Phone Number: 555-555-1212 Extension:

**Health Assessment**

Health Assessment Performed?: **Yes**

If a health assessment was performed, comments are required.  
 Performed.

**Developmental Assessment**

Developmental Assessment Performed?: **No**

If a developmental assessment was performed, comments are required.

4. Review Assessment.
5. Click **Close** button. **Additional Health Assessment(s)** page displays.

## Editing Health Assessments

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Health Assessments** from the Navigation Bar. **Additional Health Assessment(s)** page displays.

NYEIS Integrated Case - 22805

**Additional Health Assessment(s):** NYEIS Integrated Case - 22805 

[New](#)

Action	Clinician	Affiliation	Date Completed	Status
<a href="#">View</a> <a href="#">Edit</a>	Mark Peterson		10/10/2009	Active

3. Click **Edit** link under **Action** column for specific Assessment. **Additional Health/Developmental Information** page displays.

**Additional Health/Developmental Information** 

[Save](#) [Cancel](#)

**Child Details**

Name: Nicole Barnes Date of Birth: 1/1/2009

**Parental Consent**

Information is submitted with informed parental consent on record?:

**Health/Developmental Information Submitter Details**

\*Date Evaluation Conducted: 10/10/2009 

\*Clinician Name: Mark Peterson

Affiliation Name:

Address:  

Profession:

If Not, Other Profession:

Area Code:  \*Phone Number: 555-555-1212 Extension:

**Health Assessment**

\*Health Assessment Performed?: Yes

If a health assessment was performed, comments are required.

Performed.

4. Apply necessary changes.
5. Click **Save** button. **Additional Health Assessment(s)** page displays.

## Deleting Health Assessments

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, Displaying Integrated Case Home Page** for further information.
2. Click **Health Assessments** from the Navigation Bar. **Additional Health Assessment(s)** page displays.

NYEIS Integrated Case - 22805

Additional Health Assessment(s): NYEIS Integrated Case - 22805

New

Action	Clinician	Affiliation	Date Completed	Status
<a href="#">View</a> <a href="#">Edit</a>	Mark Peterson		10/10/2009	Active

3. Click **View** link under **Action** column for specific Assessment. **Additional Health/Developmental Information** page displays.

Additional Health/Developmental Information

[Edit](#) [Delete](#) [Close](#)

**Child Details**

Name: Nicole Barnes Date of Birth: 1/1/2009

**Parental Consent**

Information is submitted with informed parental consent on record?:

**Health/Developmental Information Submitter Details**

Date Evaluation Conducted: 10/10/2009  
 Clinician Name: Mark Peterson  
 Affiliation Name:  
 Address:  
 Profession:  
 If Not, Other Profession:

Area Code: Phone Number: 555-555-1212 Extension:

**Health Assessment**

Health Assessment Performed?: Yes  
 If a health assessment was performed, comments are required.  
 Performed.

**Developmental Assessment**

Developmental Assessment Performed?: No  
 If a developmental assessment was performed, comments are required.

4. Click **Delete** button. **Cancel Additional Health/Developmental Information** page displays with the message *Are you sure you want to cancel this Additional Health/Developmental Information?*

Cancel Additional Health/Developmental Information

Are you sure you want to cancel this Additional Health/Developmental Information?

[Yes](#) [No](#)

5. Click **Yes** button. **Additional Health Assessment(s)** page displays. **Status** for Assessment is set to **Canceled**.

Additional Health Assessment(s): NYEIS Integrated Case - 22805

New

Action	Clinician	Affiliation	Date Completed	Status
<a href="#">View</a> <a href="#">Edit</a>	Mark Peterson	ABC Company	10/10/2009	Canceled

## CASE LIFECYCLE STATUS

The Case Lifecycle Status provides a convenient summary of Case ‘events’ that have occurred during the life of the child’s Integrated Case. Events that are tracked in the Lifecycle Status include:

<b>Event</b>	<b>Status Achieved When ...</b>
EIO/D Assigned	Assign EIO/D Task is completed
Service Coordinator Assigned	Accept/Reject Service Coordination Task is Accepted by Agency
MDE Agency Assigned	MDE Assignment is Accepted by the Agency
MDE Agency Rejection	MDE Assignment is Rejected by the assigned Agency
MDE Submitted	MDE Evaluation Agency submits the MDE
MDE Rejected	EIO/D has Rejected the submitted MDE
MDE Approved	EIO/D has Approved the submitted MDE
Interim IFSP	Interim IFSP is Approved by the EIO/D
IFSP Initial Submitted	IFSP is Submitted to the EIO/D for approval
IFSP Initial Approved	IFSP is approved by the EIO/D
IFSP 6 Month Review Submitted	IFSP is Submitted to the EIO/D for approval
IFSP 6 Month Review Approved	IFSP is approved by the EIO/D
IFSP 12 Month Review Submitted	IFSP is Submitted to the EIO/D for approval
IFSP 12 Month Review Approved	IFSP is approved by the EIO/D
IFSP 18 Month Review Submitted	IFSP is Submitted to the EIO/D for approval
IFSP 18 Month Review Approved	IFSP is approved by the EIO/D
IFSP 24 Month Review Submitted	IFSP is Submitted to the EIO/D for approval
IFSP 24 Month Review Approved	IFSP is approved by the EIO/D
IFSP 30 Month Review Submitted	IFSP is Submitted to the EIO/D for approval
IFSP 30 Month Review Approved	IFSP is approved by the EIO/D
IFSP 36 Month review Submitted	IFSP is Submitted to the EIO/D for approval
IFSP 36 Month Review	IFSP is approved by the EIO/D

Approved	
Transfer to other municipality	Transfer record is created by the Transferring county
Transfer from other municipality	Transfer is accepted by the Receiving county

Whereas the Status displayed on the My Cases page displays the most recent Case Lifecycle event, this page displays a history of all events that have occurred on the child's case.

1. Display the Child's Integrated Case Home Page.  See **Unit 1: Getting Started, *Displaying Integrated Case Home Page*** for further information.
2. Click **Case Lifecycle Status** from the Navigation Bar. **Case Lifecycle Status** page displays with the most recent event listed at the top.

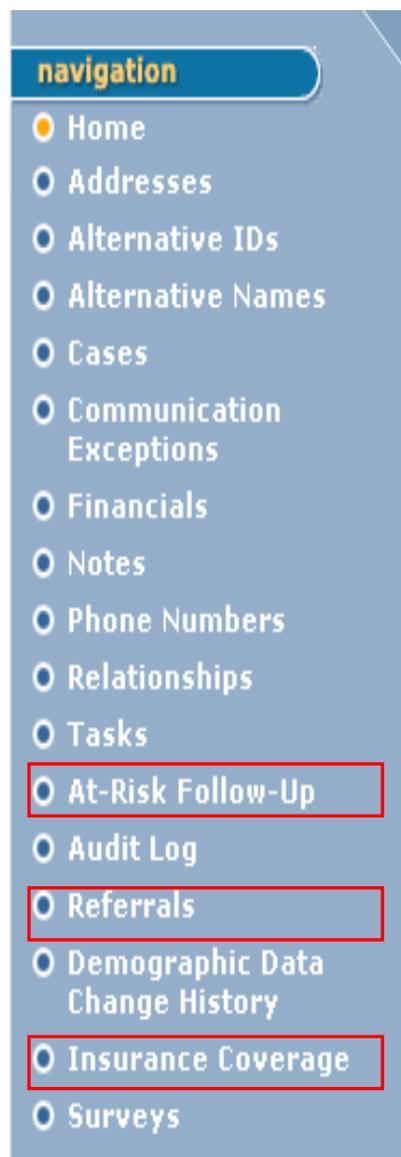
Case Lifecycle Status NYEIS Integrated Case - 87068 		
Status	Effective Date	Municipality
Initial IFSP Approved	6/23/2011 16:33	Albany
Initial IFSP Submitted	6/23/2011 16:33	Albany
MDE Approved	6/23/2011 16:28	Albany
MDE Submitted	6/23/2011 16:26	Albany
MDE Agency Assigned	6/23/2011 16:17	Albany
Service Coordinator Assigned	6/23/2011 16:16	Albany
EIO/D Assigned	6/23/2011 16:08	Albany

### Notes:

- The Status page does not display when the Integrated Case was opened or closed. To view that history, select Status History in the Navigation Bar.  See **Status History**.
- The Case Lifecycle Status events may not occur in the same sequence for every case. For example, a child may have an Interim IFSP approved on a date prior to the MDE Accepted. In that scenario, the Interim IFSP event will be listed before the MDE Approved event.
- Some Case Lifecycle Status events may appear multiple times. For example, the Service Coordinator Assigned event will be listed when the Initial Service Coordinator is assigned, and again when the Ongoing Service Coordinator is assigned.
- When an Integrated Case is Transferred, the Receiving County can view the Integrated Case event history achieved in the Transferring County.

## CHILD HOME PAGE

### Child Home Page Navigation Bar



#### **At-Risk Follow Up**

 **See Unit 3: At-Risk Children** for detail.

#### **Referrals**

 **See Unit 2: Referral & Intake** for detail.

#### **Insurance Coverage**

 **See Unit 10: Municipal Administration** for detail.

## Child Home Page

The Home page displays the child’s personal information, such as Contacts, Demographics, Family Information, Insurance, Eligibility, Diagnosis, and other useful information relevant to maintaining the child’s record.

The ability to change Child information on the Child Home Page is limited to certain User roles in NYEIS. Users not authorized to edit Child information, need to submit a data change request.  See **Data Change Request from Provider View of Child Homepage** for further information.

**Exception**  
Currently not available to all NYEIS User roles.

## Editing Child Homepage

1. Display Child Home Page.  See **Unit 1: Getting Started, Displaying Child Home Page** for further information.

**Child Homepage: Sarah Abercrombie - 455** [Edit](#) [Register Sibling](#)

Child Name	
First Name:	Sarah
Middle Name:	
Last Name:	Abercrombie
Suffix:	

Contact	
Address:	145 Sanford Lane Albany (Albany) New York 10001
Phone Number:	518 777-9999

Child Information	
Child's Referral Date:	10/14/2010
Date of Birth:	10/11/2010
Calculated Age of Child:	0 Years, 6 Months
Ethnic Origin:	Hispanic or Latino
Child's Living Arrangement:	
Child's School District:	
Caregiver's Relationship:	
Child's Case Status:	
Gender:	Female
Birth Last Name:	
Child's Dominant Language:	
Municipality of Residence:	Albany
Caregiver's Name (If other than parent):	
Date of Death:	

**Race**  
Black or African American

Family Information	
Mother's First Name:	Mary Beth
Mother's Date Of Birth:	
Mother's Dominant Language:	
Father's First Name:	Frank
Father's Last Name:	
Father's Date Of Birth:	
Father's Dominant Language:	
Is a Parent Proficient in English?:	Yes
Preferred Communication:	
Alternate Parent Contact Name:	
Phone Number of Alternate Contact Person:	
Alternate Contact's Relationship to Child:	

Insurance Information	
Medicaid Eligible?:	No
Other Insurance Coverage?:	No

2. Click Edit button. Modify Child page displays.

Modify Child: Sarah Abercrombie - 455



Save Cancel

Child's Information			
Child's Referral Date:	10/14/2010	*Child First Name:	Sarah
Child Middle Name:		*Child Last Name:	Abercrombie
Suffix:		Birth Last Name (If Different):	
*Gender:	Female	*Date of Birth:	10/11/2010
Child's Dominant Language:		Child's Date of Death:	
Calculated Age of Child:	0	*Ethnicity:	Hispanic or Latino
*Race:	American Indian or Alaskan Native Asian Black or African American Native Hawaiian or Other Pacific Islander White	Caregiver's Name (If other than parent):	
Child's Living Arrangement:		Caregiver's Relationship:	
Child's School District:			
Family Information			
Mother's First Name:	Mary Beth	Mother's Last Name:	Abercrombie
Mother's Date Of Birth:		Mother's Dominant Language:	
Father's First Name:	Frank	Father's Last Name:	
Father's Date Of Birth:		Father's Dominant Language:	
Is a Parent Proficient in English?:	Yes	Preferred Communication:	
Alternate Parent Contact Name:		Phone Number of Alternate Contact Person:	
Alternate Contact's Relationship to Child:			
Insurance Information			
Declined to Give Insurance Information: <input type="checkbox"/>			
Primary Care Physician			
PCP Name:		PCP Phone:	
Child's Place of Birth			
Birth Hospital (if born in New York):		Location of Birth (if born outside of New York):	
State of Birth (if not born in New York):		Birth County:	
Country of Birth:		Birth Weight:	
Hospitalization Status At Time of Referral:		If Hospitalized, Facility Name:	
If Not Hospitalized, Discharge Date:			
At Risk Information			
Is Child At Risk?:	No	If Closed, Closure Reason::	
Closure Date:			
Communication Exception			
Communication Exceptions Present::	No		
Child Outcomes			
Cohort Sample Year:		Child Eligible for EI?:	
Entry Form Completed?:		Exit Form Completed?:	
Foster Care			
Is Child in Foster Care?:			
Foster Care Agency Name:		Foster Care Worker Name:	
Foster Care Agency Address:		Foster Care Agency Phone:	
Comments			

Save Cancel

- Apply necessary changes or new information to **Child's Information**, **Family Information**, **Insurance Information**, **Primary Care Physician**, **Child's Place of Birth**, **Child Outcomes**, **Foster Care**, and/or **Comments** sections.

**Important Information**

- If the child is in foster care, the Foster Care cluster **must** be completed to provide accurate contact information. Information on the foster family should also be recorded in the **Child's Living Arrangement, Caregiver Relationship** and **Caregiver's Name (if Other than Parent)** fields.
- The child's municipality of fiscal responsibility may need to be changed. 📖 *See Unit 10: Municipal Administration, Municipality of Fiscal Responsibility* for further information.
- Regarding editing the child homepage to include information on a surrogate parent:
  - a) There is currently no specific field in NYEIS to indicate that a surrogate parent has been assigned and the name of the surrogate.
  - b) This information should be detailed in the comments section of the child's homepage.
  - c) If parental rights have been terminated, the child's homepage may need to be edited in the "Family Information" cluster for mother and/or father information, as this information is pulled into the service authorizations.
  - d) The surrogate parents' information should be entered in place of the parents' information, and the information regarding the parents (whose rights have been terminated) should be deleted.
  - e) Information should also be captured in the comments section indicating that the individual is the surrogate parent that has been appointed by the municipality and that parental rights have been terminated.
- Information in the Child Outcomes cluster should be completed when the child is included in a cohort sample year.

4. Click **Save** button. **Child Home** page displays.

**EXCEPTION**  
Currently not available to all NYEIS User roles.

## ADDRESSES

### Creating Addresses

1. Display Child Home Page.  See **Unit 1: Getting Started, Displaying Child Home Page** for further information.

Child Homepage: Sarah Abercrombie - 455 Edit Register Sibling

Child Name	
First Name:	Sarah
Middle Name:	
Last Name:	Abercrombie
Suffix:	

Contact	
Address:	145 Sanford Lane Albany (Albany) New York 10001
Phone Number:	518 777-9999

Child Information	
Child's Referral Date:	10/14/2010
Date of Birth:	10/11/2010
Calculated Age of Child:	0 Years, 6 Months
Ethnic Origin:	Hispanic or Latino
Child's Living Arrangement:	
Child's School District:	
Caregiver's Relationship:	
Child's Case Status:	
Gender:	Female
Birth Last Name:	
Child's Dominant Language:	
Municipality of Residence:	Albany
Caregiver's Name (If other than parent):	
Date of Death:	

Race  
Black or African American

Family Information	
Mother's First Name:	Mary Beth
Mother's Date Of Birth:	
Father's First Name:	Frank
Father's Date Of Birth:	
Is a Parent Proficient in English?:	Yes
Alternate Parent Contact Name:	
Alternate Contact's Relationship to Child:	
Mother's Last Name:	Abercrombie
Mother's Dominant Language:	
Father's Last Name:	
Father's Dominant Language:	
Preferred Communication:	
Phone Number of Alternate Contact Person:	

Insurance Information	
Medicaid Eligible?:	No
Other Insurance Coverage?:	No

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

Addresses: Sarah Abercrombie - 455 ?

New

Action	Primary	Type	Address	City	From	To
<a href="#">View</a>   <a href="#">Edit</a>	Yes	Registered	765 Terrace Ln	Albany	10/14/2010	

3. Click **New** button. **Create Addresses** page displays.

Create Address: Sarah Abercrombie - 455 ?

Save Save & New Cancel

Details	
Type:	Physical
From:	11/17/2010
Primary:	<input type="checkbox"/>
To:	

Address:

Comments

Save Save & New Cancel

4. Enter appropriate information for the following sections using **Tab** key to navigate from section to section: **Details**, **Address** and **Comments**. Select the type of address being recorded from the **Type** field drop-down menu.

The **From:** date field auto populated with today's date; it can be changed. *Date fields must be formatted as mm/dd/yyyy format.* Click the **Primary** checkbox to indicate that the address is the primary mailing address.

### Important Information

- Only one address can be designated as Primary.
- A Primary address is required in order for the system to include an address in a Communication Template. *See **Communications, Creating MS Word Communication** for more information.*

5. Click **Search**  icon in **Address** section to confirm address information for the **Primary Address** and **Mailing Address** fields. *A Primary Address must be entered in the address section.* **Address Validation** page displays.

**Address Validation**  
Validate an entered address with USPS



Address Line 1:	<input type="text"/>	Address Line 2:	<input type="text"/>
*City:	<input type="text"/>	*State:	<input type="text"/>
*County:	<input type="text"/>	*Zip:	<input type="text"/>
Census Tract:	<input type="text"/>		

Action	Formatted Address Value

Use the **Tab** key to move from field-to-field to fill in information. *City, State, County and Zip are required fields. Address 1 is the street number and name; Address 2 is the apartment number, suite #, etc. Census Tract field will not be used at this time.* Click **Submit** button. *Validation of address takes place immediately upon submission.* The lower section of the page provides a list of available addresses. The first address listed in the results is the address that was manually entered. Select this address if the other addresses do not match from validation process. Click **Select** link under **Action** column. Address displays.

### Important Information

- Regarding addresses and children in Foster Care:
  - a) If parental rights are still in place and the child was in foster care upon referral to the EIP:
  - b) An additional address for the biological parents should be added from the Address link off the child's homepage navigation bar.
  - c) The type of address should be "physical" (the parents' physical address) and the user should not select "primary" (as the primary

address would be the address of the child's residence foster care address).

- d) Information should be entered into the comments section when creating the additional address to indicate that this is the biological parents' address.
  - e) Information that the biological parents' address has been entered as an additional address should be included in the comments section of the child's homepage.
- If a child is placed in foster care after being referred to the EIP:
    - a) The current address information should be edited to change the type of address to "referral address" indicating that this was the address at the time of referral.
    - b) A new address should then be created with a type of "physical" (physical address of the child). The primary check box must be selected.
    - c) The foster care cluster on the child's homepage must be completed.

6. Click **Save** button to save Address and return to **Addresses** page with new address listed.

Or

Click **Save & New** button to save Address and create a new Address.

**Notes:**

- Child data cannot be edited through the IFSP Amendment process.
- The ability to change Child information on the Child Home Page is limited to certain User roles in NYEIS. Users not authorized to edit Child information need to submit a data change request.  See ***Data Change Request from the Child Homepage (Provider View)*** for further information.

## Viewing Addresses

1. Display Child Home Page.  See **Unit 1: Getting Started, Displaying Child Home Page** for further information.
2. Click **Addresses** from the Navigation Bar. **Addresses** page displays.

Addresses: Sarah Abercrombie - 455 

[New](#)

Action	Primary	Type	Address	City	From	To
<a href="#">View</a>   <a href="#">Edit</a>	Yes	Registered	765 Terrace Ln	Albany	10/14/2010	

3. Click **View** link under **Action** column for the Alternative Name to display. **View Alternative Name** page displays.

View Address: Sarah Abercrombie - 455 

[Edit](#) [Close](#)

Details	
Type:	Registered
From:	10/14/2010
Address:	765 Terrace Ln Albany (Albany) New York 10001
Census Tract:	
To:	
Primary:	Yes

**Comments**

[Edit](#) [Close](#)

4. Review information.
5. Click **Close** button. **Addresses** page displays.

Exception  
Currently not available to all NYEIS User roles.

## Editing Addresses

1. Display Child Home Page.  See **Unit 1: Getting Started, Displaying Child Home Page** for further information.
2. Click **Addresses** from the Navigation Bar. **Addresses** page displays.

Addresses: Sarah Abercrombie - 455 ?

[New](#)

Action	Primary	Type	Address	City	From	To
<a href="#">View</a>   <a href="#">Edit</a>	No	Record Location	145 Sanford Lane	Albany	11/17/2010	
<a href="#">View</a>   <a href="#">Edit</a>	Yes	Registered	765 Terrace Ln	Albany	10/14/2010	

3. Click **Edit** link under **Action** column of Address to change. **Modify Address** page displays.

Modify Address: Sarah Abercrombie - 455 ?

[Save](#) [Cancel](#)

**Details**

Type:	Record Location <span style="float: right;">▼</span>	Primary:	<input type="checkbox"/>
From:	11/17/2010 	To:	<input type="text"/> 

**Address**

Address: 145 Sanford Lane  
Albany (Albany)  
New York 10001 

**Comments**

Alternate living location. ↑  
↓

[Save](#) [Cancel](#)

4. Apply necessary changes to **Details**, **Address** or **Comments** sections.
5. Click **Save** button. **Addresses** page displays.

## Deleting Addresses

**Exception**  
Currently not available to all NYEIS User roles.

1. Display Child Home Page.  See **Unit 1: Getting Started, Displaying Child Home Page** for further information.
2. Click **Addresses** from the Navigation Bar. **Addresses** page displays.

Addresses: Sarah Abercrombie - 455 ?

[New](#)

Action	Primary	Type	Address	City	From	To
<a href="#">View</a>   <a href="#">Edit</a>	Yes	Physical	145 Sanford Lane	Albany	11/10/2010	
<a href="#">View</a>   <a href="#">Edit</a>	No	Registered	765 Terrace Ln	Albany	10/14/2010	

3. Click **Edit** button. **Modify Address** page displays. Enter a date in the **To** field. The date should represent the last known day that the address was valid. *Date fields must be formatted as **mm/dd/yyyy** format.*

Modify Address: Sarah Abercrombie - 455 ?

[Save](#) [Cancel](#)

**Details**

Type:	Record Location <span style="float: right;">▼</span>	Primary:	<input type="checkbox"/>
From:	11/17/2010 	To:	<input type="text"/> 

**Address**

Address: 145 Sanford Lane  
Albany (Albany)  
New York 10001 

**Comments**

Alternate living location.

[Save](#) [Cancel](#)

4. Click **Save** button. **Addresses** page displays with the **To** date field displaying the recorded end date for the address.

Addresses: Sarah Abercrombie - 455 ?

[New](#)

Action	Primary	Type	Address	City	From	To
<a href="#">View</a>   <a href="#">Edit</a>	Yes	Physical	145 Sanford Lane	Albany	11/10/2010	11/17/2010
<a href="#">View</a>   <a href="#">Edit</a>	No	Registered	765 Terrace Ln	Albany	10/14/2010	

**Notes:**

- After end dating a Primary address, you must designate another address as Primary. There must be at least one Primary address.

- The ability to change Child information on the Child Home Page is limited to certain User roles in NYEIS. Users not authorized to edit Child information need to submit a data change request.  See *Demographic Data Change Request from the Child Homepage (Provider View)* for further information.
- Child data cannot be edited through the IFSP Amendment process.

## ALTERNATIVE IDs

 See **Unit 10: Municipal Administration, Alternate ID's from the Child Home Page** for further information.

## ALTERNATIVE NAMES

Alternate Names record lists the child's registered name as well as all other alternative names or aliases for the child. The Alternative Name Type "Registered" is assigned to the name recorded for the child in the Referral and cannot be deleted. However, certain municipal roles are able to end date the child's current "Registered" name and afterward a new "Registered" name can be recorded.  See *Editing Alternative Names*.

**Exception**  
Currently not available to all NYEIS User roles.

## Creating Alternative Names

1. Display Child Home Page.  See **Unit 1: Getting Started, Displaying Child Home Page** for further information.

Child Homepage: Sarah Abercrombie - 455

[Edit](#) [Register Sibling](#)

Child Name	
First Name:	Sarah
Last Name:	Abercrombie
Middle Name:	
Suffix:	

Contact	
Address:	145 Sanford Lane Albany (Albany) New York 10001
Phone Number:	518 777-9999

Child Information	
Child's Referral Date:	10/14/2010
Date of Birth:	10/11/2010
Calculated Age of Child:	0 Years, 6 Months
Ethnic Origin:	Hispanic or Latino
Child's Living Arrangement:	
Child's School District:	
Caregiver's Relationship:	
Child's Case Status:	
Gender:	Female
Birth Last Name:	
Child's Dominant Language:	
Municipality of Residence:	Albany
Caregiver's Name (If other than parent):	
Date of Death:	

Race  
Black or African American

Family Information	
Mother's First Name:	Mary Beth
Mother's Date Of Birth:	
Father's First Name:	Frank
Father's Date Of Birth:	
Is a Parent Proficient in English?:	Yes
Alternate Parent Contact Name:	
Alternate Contact's Relationship to Child:	
Mother's Last Name:	Abercrombie
Mother's Dominant Language:	
Father's Last Name:	
Father's Dominant Language:	
Preferred Communication:	
Phone Number of Alternate Contact Person:	

Insurance Information	
Medicaid Eligible?:	No
Other Insurance Coverage?:	No

2. Click **Alternative Names** from the Navigation Bar. **Alternative Names** page displays.

Alternative Names: Jim Tarey - 30000087

[New](#)

Action	First Name	Middle Name	Last Name	Type	Status	From	To
<a href="#">View</a>   <a href="#">Edit</a>	Jim	Edward	Tarey	Registered	Active		
<a href="#">View</a>   <a href="#">Edit</a>	Jim	E	Jimbo	Stage Name	Active	3/9/2009	3/9/2009

3. Click **New** button. **Create Alternative Name** page displays.

Create Alternative Name: Jim Tarey - 30000087

[Save](#) [Save & New](#) [Cancel](#)

Details	
*Type:	Registered
Title:	
*First Name:	
Middle Name:	
*Last Name:	
Suffix:	
Initials:	
*From:	4/20/2009
To:	4/20/2009

Comments	

[Save](#) [Save & New](#) [Cancel](#)

4. Enter appropriate information for the following sections using **Tab** key to navigate from field-to-field: **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. Date fields must be formatted as *mm/dd/yyyy* format.

- Click **Save** button to save Alternative Name and return to **Alternative Names** page with new name listed.

OR

Click **Save & New** button to save Alternative Name and create a new Alternative Name.

**Notes:**

- The ability to change Child information on the Child Home Page is limited to certain User roles in NYEIS. Users not authorized to edit Child information need to submit a data change request.  See **Data Change Request from the Child Homepage (Provider View)** for further information.
- Child data cannot be edited through the IFSP Amendment process.

**Exception**  
Currently not available to all NYEIS User roles.

**Viewing Alternative Names**

- Display Child Home Page.  See **Unit 1: Getting Started, Displaying Child Home Page** for further information.
- Click **Alternative Names** from the Navigation Bar. **Alternative Names** page displays.

Alternative Names: Jim Tarey - 30000087 

New							
Action	First Name	Middle Name	Last Name	Type	Status	From	To
<a href="#">View</a>   <a href="#">Edit</a>	Jim	Edward	Tarey	Registered	Active		
<a href="#">View</a>   <a href="#">Edit</a>	Jim	E	Jimbo	Stage Name	Active	3/9/2009	3/9/2009

- Click **View** link under **Action** column for the Alternative Name to display. **View Alternative Name** page displays.

View Alternative Name: Jim Tarey - 30000087 ?

Details			
Type:	Stage Name	Title:	Mr.
First Name:	Jim	Middle Name:	E
Last Name:	Jimbo	Suffix:	
Initials:	JEJ	Status:	Active
From:	3/9/2009	To:	3/9/2009

Comments

4. Review information.
5. Click **Close** button. **Alternative Names** page displays.

Exception  
Currently not available to all NYEIS User roles.

**Editing Alternative Names**

- Important Information**
- An Alternative Name classified with the type of “Registered” cannot be changed to a different *type* (e.g., alias).
  - End dating the current “Registered” name and creating a new “Registered” name will change the name on all of the Child’s cases (i.e., Integrated Case, IFSP and Service Authorization).
  - Only certain municipal roles have the ability to end date the current “Registered” name and create a new one.

1. Display Child Home Page. See **Unit 1: Getting Started, Displaying Child Home Page** for further information.
2. Click **Alternative Names** from the Navigation Bar. **Alternative Names** page displays.

Alternative Names: Jim Tarey - 30000087 ?

Action	First Name	Middle Name	Last Name	Type	Status	From	To
<a href="#">View</a>   <a href="#">Edit</a>	Jim	Edward	Tarey	Registered	Active		
<a href="#">View</a>   <a href="#">Edit</a>	Jim	E	Jimbo	Stage Name	Active	3/9/2009	3/9/2009

3. Click **Edit** link under **Action** column for Alternative Name to change. **Modify Alternative Name** page displays.

Modify Alternative Name: Jim Tarey - 3000087 ?

Save Cancel

Details	
*Type: Registered	Title:
*First Name: Jim	Middle Name: Edward
*Last Name: Tarey	Suffix:
Initials: JET	*From:
To:	

Comments

Save Cancel

4. Apply necessary changes to **Details** section.
  - a. A date must be recorded in the “From Date” field. This field records the effective date of the new Alternative Name record.
5. Click **Save** button. **Alternative Names** page displays.

**Note:**

- If you want to keep a history of Alternative Names, simply record a date in the **To:** field. Then create a new Alternative Name record with the desired change to the name.

**Exception**

Currently not available to all NYEIS User roles.

### Deleting Alternative Names

An Alternative Name record is actually not deleted but rather the status is changed to “Canceled”. This is done to preserve a visible history of Alternative Names recorded for the child. The Alternative Name with a Type of “Registered” cannot be deleted (i.e., Canceled).

1. Display Child Home Page.  See **Unit 1: Getting Started, Displaying Child Home Page** for further information.
2. Click **Alternative Names** from the Navigation Bar. **Alternative Names** page displays.

Alternative Names: Jim Tarey - 30000087 ?

[New](#)

Action	First Name	Middle Name	Last Name	Type	Status	From	To
<a href="#">View</a>   <a href="#">Edit</a>	Jim	Edward	Tarey	Registered	Active		
<a href="#">View</a>   <a href="#">Edit</a>	Jim	E	Jimbo	Stage Name	Active	3/9/2009	3/9/2009

- Click **View** link under **Action** column for the Alternative Name to display. **View Alternative Name** page displays.

View Alternative Name: Jim Tarey - 30000087 ?

[Edit](#) [Delete](#) [Close](#)

Details	
Type: Stage Name	Title: Mr.
First Name: Jim	Middle Name: E
Last Name: Jimbo	Suffix:
Initials: JEJ	Status: Active
From: 3/9/2009	To: 3/9/2009

Comments	
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Close</a>	

- Click **Delete** button. **Delete Alternative Name** page displays with the message *Are you sure you want to delete this alternative name?*

Delete Alternative Name: Jim Tarey - 30000087

Are you sure you want to delete this alternative name?

[Yes](#) [No](#)

- Click **Yes** button. **Alternative Names** page displays with **Status** changed to **Canceled**.

Alternative Names: Jim Tarey - 30000087 ?

[New](#)

Action	First Name	Middle Name	Last Name	Type	Status	From	To
<a href="#">View</a>   <a href="#">Edit</a>	Jim	E	Jimbo	Stage Name	Canceled	3/9/2009	3/9/2009
<a href="#">View</a>   <a href="#">Edit</a>	James		Tarey	Alias	Active	4/20/2009	4/20/2009
<a href="#">View</a>   <a href="#">Edit</a>	Jim	Edward	Tarey	Registered	Active	4/20/2009	

## CASES

1. Display Child Home Page.  See **Unit 1: Getting Started, Displaying Child Home Page** for further information.

**Child Homepage: Jim Tarey - 30000087** Edit Register Sibling

**Notice**  
Information Disclosure Restrictions Apply

**Child Name**

First Name:	Jim	Middle Name:	Edward
Last Name:	Tarey	Suffix:	

**Contact**

Address:	1 Main Street Albany (Albany) New York 12208	Phone Number:	555 555 5555
----------	--	---------------	--------------

**Child Information**

Child's Referral Date:	12/16/2008	Child's Case Status:	
Date of Birth:	1/12/2008	Gender:	Male
Calculated Age of Child:	1 Years 3 Months	Birth Last Name:	
Ethnic Origin:	Not Hispanic or Latino	Child's Dominant Language:	
Child's Living Arrangement:	Parent	Municipality of Residence:	Albany
Child's School District:	ALBANY CITY SD	Caregiver's Name (If other than parent):	

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

**Cases: Dean Torres - 203**

Case Reference	Type	Owner	Start Date	Status
<a href="#">6659</a>	NYEIS Integrated Case	To Be Assigned	10/21/2010	Draft
<a href="#">6661</a>	Individualized Family Service Plan (IFSP)	To Be Assigned	10/21/2010	Active

3. Select **Case Reference** number next to NYEIS Integrated Case will in the **Type** column will display the child's **Integrated Case Home Page**.  See **Unit 1: Getting Started** for further information.

## COMMUNICATION EXCEPTIONS FROM THE CHILD HOME PAGE

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

Exception  
Currently not available to all NYEIS User roles.

### Creating Communication Exceptions

1. Display Child Home Page.  See **Unit 1: Getting Started, Displaying Child Home Page** for further information.



2. Click **Communication Exceptions** from the Navigation Bar. **Communication Exceptions** page displays.

Communication Exceptions: Jim Tarey - 30000087 

[New](#)

Action	Method	Reason	From	To	Status
<a href="#">View</a>   <a href="#">Edit</a>	Hard Copy	Sight Disability	3/9/2009		Active
<a href="#">View</a>   <a href="#">Edit</a>	Phone	Hearing Disability	1/22/2009		Active

3. Click **New** button. **Create Communication Exception** page displays.

Create Communication Exception: Jim Tarey - 30000087 

[Save](#) [Save & New](#) [Cancel](#)

**Details**

\*Method:  \*Reason:

\*From:   To:

**Comments**

[Save](#) [Save & New](#) [Cancel](#)

4. Enter appropriate information for the following sections using **Tab** key to navigate from field-to-field: **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. Date fields must be formatted as **mm/dd/yyyy** format.*
5. Click **Save** button to save Communication Exception and return to **Communication Exceptions** page with new exception listed.

OR

Click **Save & New** button to save Communication Exception and create a new Communication Exception.

### Notes:

- If there is a Communication Exception, the exception is noted on the **Child Homepage**. Scroll to the **Communication Exception** section. **Yes** displays.
- The ability to change Child information on the Child Home Page is limited to certain User roles in NYEIS. Users not authorized to edit Child information need to submit a data change request.  *See **Data Change Request from the Child Homepage (Provider View)*** for further information.
- Child data cannot be edited through the IFSP Amendment process.

## Viewing Communication Exceptions

1. Display Child Home Page.  *See **Unit 1: Getting Started, Displaying Child Home Page*** for further information.
2. Click **Communication Exceptions** from the Navigation Bar. **Communication Exceptions** page displays.

Communication Exceptions: Jim Tarey - 30000087 

Action	Method	Reason	From	To	Status
<a href="#">View</a>   <a href="#">Edit</a>	Hard Copy	Sight Disability	3/9/2009		Active
<a href="#">View</a>   <a href="#">Edit</a>	Phone	Hearing Disability	1/22/2009		Active

3. Click **View** link under **Action** column for the Communication Exception to display. **View Communication Exception** page displays.

**View Communication Exception:** Jim Tarey - 30000087 ?

[Edit](#) [Delete](#) [Close](#)

Details	
Method:	Data Transfer
Reason:	Not Required by Client
From:	4/20/2009
To:	
Status:	Active

**Comments**

[Edit](#) [Delete](#) [Close](#)

4. Review information.
5. Click **Close** button. **Communication Exceptions** page displays.

Exception  
Currently not available to all NYEIS User roles.

**Editing Communication Exceptions**

1. Display Child Home Page. See **Unit 1: Getting Started, Displaying Child Home Page** for further information.
2. Click **Communication Exceptions** from the Navigation Bar. **Communication Exceptions** page displays.

**Communication Exceptions:** Jim Tarey - 30000087 ?

[New](#)

Action	Method	Reason	From	To	Status
<a href="#">View</a>   <a href="#">Edit</a>	Hard Copy	Sight Disability	3/9/2009		Active
<a href="#">View</a>   <a href="#">Edit</a>	Phone	Hearing Disability	1/22/2009		Active

3. Click **Edit** link under **Action** column for Communication Exception to change. **Modify Communication Exception** page displays.

**Modify Communication Exception:** Jim Tarey - 30000087 ?

[Save](#) [Cancel](#)

Details	
*Method:	<input type="text" value="Data Transfer"/>
*Reason:	<input type="text" value="Not Required by Client"/>
*From:	<input type="text" value="4/20/2009"/>
To:	<input type="text"/>

**Comments**

[Save](#) [Cancel](#)

4. Apply necessary changes to **Details** and **Comments** sections.
5. Click **Save** button. Communication Exception is saved. **Communication Exception** page displays.

**Exception**  
Currently not available to all NYEIS User roles.

## Deleting Communication Exceptions

1. Display Child Home Page.  See **Unit 1: Getting Started, Displaying Child Home Page** for further information.
2. Click **Communication Exceptions** from the Navigation Bar. **Communication Exceptions** page displays.

Communication Exceptions: [Jim Tarey - 30000087](#) 

[New](#)

Action	Method	Reason	From	To	Status
<a href="#">View</a>   <a href="#">Edit</a>	Hard Copy	Sight Disability	3/9/2009		Active
<a href="#">View</a>   <a href="#">Edit</a>	Phone	Hearing Disability	1/22/2009		Active

3. Click **View** link under **Action** column for the Communication Exception to display. **View Communication Exception** page displays.

View Communication Exception: [Jim Tarey - 30000087](#) 

[Edit](#) [Delete](#) [Close](#)

Details	
Method:	Data Transfer
Reason:	Not Required by Client
From:	4/20/2009
To:	
Status:	Active

**Comments**

[Edit](#) [Delete](#) [Close](#)

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

**Delete Communication Exception:** [Jim Tarey - 30000087](#)

Are you sure you want to delete this communication exception?

[Yes](#) [No](#)

5. Click **Yes** button. **Communication Exceptions** page displays with **Status** changed to **Canceled**.

Communication Exceptions: [Jim Tarey - 30000087](#) 

[New](#)

Action	Method	Reason	From	To	Status
<a href="#">View</a>   <a href="#">Edit</a>	Data Transfer	No Fixed Abode	4/20/2009		Canceled
<a href="#">View</a>   <a href="#">Edit</a>	Fax	Not Required by Client	4/20/2009		Active

## FINANCIALS

### Important Information:

While NYEIS continues to be the initial point of entry for newly submitted claims of all types (General Service, Service Coordination, Transportation, Respite, ATD) any General Service and/or Service Coordination claiming submitted on or after 4/1/2013 is managed by a State Fiscal Agent for Provider payment and insurance billing. As it pertains to General Service or Service Coordination billing, the financial information available in NYEIS and explained below pertains to and is consistent with only those claims submitted to NYEIS up to 3/31/2013.

Vendor-based claims such as Transportation, Respite and ATD services continue to be managed entirely through NYEIS, and the information below is applicable regardless of when the claim was submitted.

For questions relating further claims processing managed to the State Fiscal Agent, please visit <https://www.eibilling.com/>

#### Exception

Currently not available to all NYEIS User roles.

Financials allows a User to view a summary of invoices and payments for the child.

1. Display Child Home Page.  Refer to **Unit 1: Getting Started, Displaying Child Home Page** for further information.
2. Click **Financials** from the Navigation Bar. **Financial** page displays.

#### Child Financials: Dean Torres - 203

Account Summary	
Total Amount Invoiced & Approved:	396.00
Total Payments to Provider:	396.00
Total Service Payments to Provider:	396.00
Total Respite Payments to Provider:	0.00
Total Transportation Payments to Provider:	0.00
Total AT Device Payments to Provider:	0.00
Total Payment Received from Insurance :	0.00
Total Payment Received from Medicaid:	0.00
Total Payment Received from DOH:	0.00
Municipality Contribution:	396.00

## Adding and Modifying Financial information

 Refer to **Unit 12: Municipal Financials, Financial Claiming** for further information.

### NOTES FROM THE CHILD HOME PAGE

**Exception**  
Currently not available to all NYEIS User roles.

1. Display Child Home Page.  Refer to **Unit 1: Getting Started, Displaying Child Home Page** for further information.



The screenshot shows the 'Child Homepage' for Jim Tarey (ID: 30000087). On the left is a navigation menu with options like Home, Addresses, Alternative IDs, etc. The main content area includes a 'Notice' section with 'Information Disclosure Restrictions Apply', a 'Child Name' section with fields for First Name (Jim), Middle Name (Edward), Last Name (Tarey), and Suffix, and a 'Contact' section with Address (1 Main Street, Albany (Albany), New York 12208) and Phone Number (555 555 5555). Buttons for 'Edit' and 'Register Sibling' are visible.

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

**Notes:** Dean Torres - 203

[New](#)

Action	Entered By	Date	Text	Status
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">shawna thomton</a>	10/26/2010	Notes for the child that are viewable to providers and MUNI staff are here.	Active

 Refer to **Integrated Case Homepage Notes** for further information.

## PHONE NUMBERS

**Exception**  
Currently not available to all NYEIS User roles.

### Creating Phone Numbers

1. Display Child Home Page.  Refer to **Unit 1: Getting Started, Displaying Child Home Page** for further information.



**Child Homepage: Sarah Abercrombie - 455**

**Child Name**

First Name: Sarah Middle Name: Last Name: Abercrombie Suffix: Phone Number: 518 777-9999

**Contact**

Address: 145 Sanford Lane Albany (Albany) New York 10001

**Child Information**

Child's Referral Date: 10/14/2010 Child's Case Status: Date of Birth: 10/11/2010 Gender: Female Calculated Age of Child: 0 Years, 6 Months Birth Last Name: Ethnic Origin: Hispanic or Latino Child's Dominant Language: Child's Living Arrangement: Municipality of Residence: Albany Child's School District: Caregiver's Name (if other than parent): Caregiver's Relationship: Date of Death:

**Race**

Black or African American

**Family Information**

Mother's First Name: Mary Beth Mother's Last Name: Abercrombie Mother's Date of Birth: Mother's Dominant Language: Father's First Name: Frank Father's Last Name: Father's Date of Birth: Father's Dominant Language: Is a Parent Proficient in English?: Yes Preferred Communication: Alternate Parent Contact Name: Phone Number of Alternate Contact Person: Alternate Contact's Relationship to Child:

**Insurance Information**

Medicaid Eligible?: No Other Insurance Coverage?: No

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

**Phone Numbers: Barnaby Jones - 449**

[New](#)

Action	Primary	Type	Area Code	Phone Number	Extension	From	To	Status
<a href="#">View</a>   <a href="#">Edit</a>	Yes	Home	518	333-9999		10/1/2010		Active

3. Click **New** button. **Create Phone Number** page displays.

**Create Phone Number: Barnaby Jones - 449**

[Save](#) [Save & New](#) [Cancel](#)

**Details**

\*Type:  Primary:  \*From:  To:  \*Phone:  Extension:

**Comments**

[Save](#) [Save & New](#) [Cancel](#)

4. Enter appropriate information for the following sections using **Tab** key to navigate from field-to-field: **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. Date fields must be formatted as **mm/dd/yyyy** format.*

- Click **Save** button to save Phone Number and return to **Phone Numbers** page with new phone number listed.

Or

Click **Save & New** button to save Phone Number and create a new Phone Number.

### Notes:

- Click the **Primary** check box to make the phone number the primary contact number.
- The ability to change Child information on the Child Home Page is limited to certain User roles in NYEIS. Users not authorized to edit Child information need to submit a data change request.  *Refer to **Data Change Request from the Child Homepage (Provider View)** for further information.*
- Child data cannot be edited through the IFSP Amendment process.

## Viewing Phone Numbers

- Display Child Home Page.  *Refer to **Unit 1: Getting Started, Displaying Child Home Page** for further information.*

navigation		Child Homepage: Sarah Abercrombie - 455																																																																																			
<ul style="list-style-type: none"> <li>Home</li> <li>Addresses</li> <li>Alternative IDs</li> <li>Alternative Names</li> <li>Cases</li> <li>Communication Exceptions</li> <li>Financials</li> <li>Notes</li> <li>Phone Numbers</li> <li>Relationships</li> <li>Tasks</li> <li>At-Risk Follow-Up</li> <li>Audit Log</li> <li>Referrals</li> <li>Demographic Data Change History</li> <li>Insurance Coverage</li> <li>Surveys</li> </ul>	<div style="text-align: right;"> <input type="button" value="Edit"/> <input type="button" value="Register Sibling"/> </div> <table border="1"> <tr> <th colspan="2">Child Name</th> </tr> <tr> <td>First Name:</td> <td>Sarah</td> </tr> <tr> <td>Last Name:</td> <td>Abercrombie</td> </tr> <tr> <td>Middle Name:</td> <td></td> </tr> <tr> <td>Suffix:</td> <td></td> </tr> <tr> <th colspan="2">Contact</th> </tr> <tr> <td>Address:</td> <td>145 Sanford Lane Albany (Albany) New York 10001</td> </tr> <tr> <td>Phone Number:</td> <td>518 777-9999</td> </tr> <tr> <th colspan="2">Child Information</th> </tr> <tr> <td>Child's Referral Date:</td> <td>10/14/2010</td> </tr> <tr> <td>Date of Birth:</td> <td>10/11/2010</td> </tr> <tr> <td>Calculated Age of Child:</td> <td>0 Years, 6 Months</td> </tr> <tr> <td>Ethnic Origin:</td> <td>Hispanic or Latino</td> </tr> <tr> <td>Child's Living Arrangement:</td> <td></td> </tr> <tr> <td>Child's School District:</td> <td></td> </tr> <tr> <td>Caregiver's Relationship:</td> <td></td> </tr> <tr> <td>Child's Case Status:</td> <td>Female</td> </tr> <tr> <td>Gender:</td> <td>Female</td> </tr> <tr> <td>Birth Last Name:</td> <td></td> </tr> <tr> <td>Child's Dominant Language:</td> <td></td> </tr> <tr> <td>Municipality of Residence:</td> <td>Albany</td> </tr> <tr> <td>Caregiver's Name (If other than parent):</td> <td></td> </tr> <tr> <td>Date of Death:</td> <td></td> </tr> <tr> <th colspan="2">Race</th> </tr> <tr> <td colspan="2">Black or African American</td> </tr> <tr> <th colspan="2">Family Information</th> </tr> <tr> <td>Mother's First Name:</td> <td>Mary Beth</td> </tr> <tr> <td>Mother's Date Of Birth:</td> <td></td> </tr> <tr> <td>Father's First Name:</td> <td>Frank</td> </tr> <tr> <td>Father's Date Of Birth:</td> <td></td> </tr> <tr> <td>Is a Parent Proficient in English?:</td> <td>Yes</td> </tr> <tr> <td>Alternate Parent Contact Name:</td> <td></td> </tr> <tr> <td>Alternate Contact's Relationship to Child:</td> <td></td> </tr> <tr> <td>Mother's Last Name:</td> <td>Abercrombie</td> </tr> <tr> <td>Mother's Dominant Language:</td> <td></td> </tr> <tr> <td>Father's Last Name:</td> <td></td> </tr> <tr> <td>Father's Dominant Language:</td> <td></td> </tr> <tr> <td>Preferred Communication:</td> <td></td> </tr> <tr> <td>Phone Number of Alternate Contact Person:</td> <td></td> </tr> <tr> <th colspan="2">Insurance Information</th> </tr> <tr> <td>Medicaid Eligible?:</td> <td>No</td> </tr> <tr> <td>Other Insurance Coverage?:</td> <td>No</td> </tr> </table>	Child Name		First Name:	Sarah	Last Name:	Abercrombie	Middle Name:		Suffix:		Contact		Address:	145 Sanford Lane Albany (Albany) New York 10001	Phone Number:	518 777-9999	Child Information		Child's Referral Date:	10/14/2010	Date of Birth:	10/11/2010	Calculated Age of Child:	0 Years, 6 Months	Ethnic Origin:	Hispanic or Latino	Child's Living Arrangement:		Child's School District:		Caregiver's Relationship:		Child's Case Status:	Female	Gender:	Female	Birth Last Name:		Child's Dominant Language:		Municipality of Residence:	Albany	Caregiver's Name (If other than parent):		Date of Death:		Race		Black or African American		Family Information		Mother's First Name:	Mary Beth	Mother's Date Of Birth:		Father's First Name:	Frank	Father's Date Of Birth:		Is a Parent Proficient in English?:	Yes	Alternate Parent Contact Name:		Alternate Contact's Relationship to Child:		Mother's Last Name:	Abercrombie	Mother's Dominant Language:		Father's Last Name:		Father's Dominant Language:		Preferred Communication:		Phone Number of Alternate Contact Person:		Insurance Information		Medicaid Eligible?:	No	Other Insurance Coverage?:	No
Child Name																																																																																					
First Name:	Sarah																																																																																				
Last Name:	Abercrombie																																																																																				
Middle Name:																																																																																					
Suffix:																																																																																					
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Child's Referral Date:	10/14/2010																																																																																				
Date of Birth:	10/11/2010																																																																																				
Calculated Age of Child:	0 Years, 6 Months																																																																																				
Ethnic Origin:	Hispanic or Latino																																																																																				
Child's Living Arrangement:																																																																																					
Child's School District:																																																																																					
Caregiver's Relationship:																																																																																					
Child's Case Status:	Female																																																																																				
Gender:	Female																																																																																				
Birth Last Name:																																																																																					
Child's Dominant Language:																																																																																					
Municipality of Residence:	Albany																																																																																				
Caregiver's Name (If other than parent):																																																																																					
Date of Death:																																																																																					
Race																																																																																					
Black or African American																																																																																					
Family Information																																																																																					
Mother's First Name:	Mary Beth																																																																																				
Mother's Date Of Birth:																																																																																					
Father's First Name:	Frank																																																																																				
Father's Date Of Birth:																																																																																					
Is a Parent Proficient in English?:	Yes																																																																																				
Alternate Parent Contact Name:																																																																																					
Alternate Contact's Relationship to Child:																																																																																					
Mother's Last Name:	Abercrombie																																																																																				
Mother's Dominant Language:																																																																																					
Father's Last Name:																																																																																					
Father's Dominant Language:																																																																																					
Preferred Communication:																																																																																					
Phone Number of Alternate Contact Person:																																																																																					
Insurance Information																																																																																					
Medicaid Eligible?:	No																																																																																				
Other Insurance Coverage?:	No																																																																																				

 - recent items - John King - 500014 |

- Click **Phone Numbers** from the Navigation Bar. **Phone Numbers** page displays.

Phone Numbers: Barnaby Jones - 449

Action	Primary	Type	Area Code	Phone Number	Extension	From	To	Status
<a href="#">View</a>   <a href="#">Edit</a>	Yes	Home	518	333-9999		10/1/2010		Active

3. Click **View** link under **Action** column for the Phone Number to display. **View Phone Number** page displays.

View Phone Number: Barnaby Jones - 449

[Edit](#) [Delete](#) [Close](#)

Details	
Type:	Home
From:	10/1/2010
Phone:	518 333-9999
Status:	Active
Primary:	Yes
To:	
Extension:	

Comments

[Edit](#) [Delete](#) [Close](#)

4. Review information.
5. Click **Close** button. **Phone Numbers** page displays.

Exception  
Currently not available to all NYEIS User roles.

### Editing Phone Numbers

1. Display Child Home Page.  Refer to Unit 1: Getting Started, *Displaying Child Home Page* for further information.

Child Homepage: Sarah Abercrombie - 455

[Edit](#) [Register Sibling](#)

Child Name	
First Name:	Sarah
Middle Name:	
Last Name:	Abercrombie
Suffix:	

Contact	
Address:	145 Sanford Lane Albany (Albany) New York 10001
Phone Number:	518 777-9999

Child Information	
Child's Referral Date:	10/14/2010
Date of Birth:	10/11/2010
Calculated Age of Child:	0 Years, 6 Months
Ethnic Origin:	Hispanic or Latino
Child's Living Arrangement:	
Child's School District:	
Caregiver's Relationship:	
Child's Case Status:	
Gender:	Female
Birth Last Name:	
Child's Dominant Language:	
Municipality of Residence:	Albany
Caregiver's Name (If other than parent):	
Date of Death:	

Race

Black or African American

Family Information	
Mother's First Name:	Mary Beth
Mother's Date Of Birth:	
Father's First Name:	Frank
Father's Date Of Birth:	
Is a Parent Proficient in English?:	Yes
Alternate Parent Contact Name:	
Alternate Contact's Relationship to Child:	
Mother's Last Name:	Abercrombie
Mother's Dominant Language:	
Father's Last Name:	
Father's Dominant Language:	
Preferred Communication:	
Phone Number of Alternate Contact Person:	

Insurance Information	
Medicaid Eligible?:	No
Other Insurance Coverage?:	No

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

Phone Numbers: Barnaby Jones - 449

Action	Primary	Type	Area Code	Phone Number	Extension	From	To	Status
<a href="#">View</a>   <a href="#">Edit</a>	Yes	Home	518	333-9999		10/1/2010		Active

3. Click **Edit** link under **Action** column for Phone Numbers to change. **Modify Phone Number** page displays.

Modify Phone Number: Barnaby Jones - 449

**Details**

Type:	Home	Primary:	<input checked="" type="checkbox"/>
From:	10/1/2010	To:	
Phone:	518 333-9999	Extension:	

**Comments**

4. Apply necessary changes to **Details** and **Comments** sections.
5. Click **Save** button. Phone number is saved. **Phone Numbers** page displays.

### Deleting Phone Numbers

Exception  
Currently not available to all NYEIS User roles.

1. Display Child Home Page. Refer to **Unit 1: Getting Started, Displaying Child Home Page** for further information.

Child Homepage: Sarah Abercrombie - 455

**Child Name**

First Name:	Sarah	Middle Name:	
Last Name:	Abercrombie	Suffix:	

**Contact**

Address:	145 Sanford Lane Albany (Albany) New York 10001	Phone Number:	518 777-9999
----------	---	---------------	--------------

**Child Information**

Child's Referral Date:	10/14/2010	Child's Case Status:	
Date of Birth:	10/11/2010	Gender:	Female
Calculated Age of Child:	0 Years, 6 Months	Birth Last Name:	
Ethnic Origin:	Hispanic or Latino	Child's Dominant Language:	
Child's Living Arrangement:		Municipality of Residence:	Albany
Child's School District:		Caregiver's Name (if other than parent):	
Caregiver's Relationship:		Date of Death:	

**Race**

Black or African American

**Family Information**

Mother's First Name:	Mary Beth	Mother's Last Name:	Abercrombie
Mother's Date of Birth:		Mother's Dominant Language:	
Father's First Name:	Frank	Father's Last Name:	
Father's Date of Birth:		Father's Dominant Language:	
Is a Parent Proficient in English?:	Yes	Preferred Communication:	
Alternate Parent Contact Name:		Phone Number of Alternate Contact Person:	
Alternate Contact's Relationship to Child:			

**Insurance Information**

Medicaid Eligible?:	No
Other Insurance Coverage?:	No

2. Click **Phone Numbers** from the Navigation Bar. **Phone numbers** page displays.

Phone Numbers: Barnaby Jones - 449 ?

[New](#)

Action	Primary	Type	Area Code	Phone Number	Extension	From	To	Status
<a href="#">View</a>   <a href="#">Edit</a>	Yes	Home	518	333-9999		10/1/2010		Active

3. Click **View** link under **Action** column for the Phone Number to display. **View Phone numbers** page displays.

View Phone Number: Barnaby Jones - 449 ?

[Edit](#) [Delete](#) [Close](#)

Details	
Type:	Home
From:	10/1/2010
Phone:	518 333-9999
Status:	Active
Primary:	Yes
To:	
Extension:	

Comments

[Edit](#) [Delete](#) [Close](#)

4. Click **Delete** button. **Delete Phone Number** page displays with the message *Are you sure you want to delete this phone number?*

Delete Phone Number: Barnaby Jones - 449

Are you sure you want to delete this phone number?

[Yes](#) [No](#)

Click **Yes** button. **Phone numbers** page displays with **Status** changed to **Canceled**.

Phone Numbers: Barnaby Jones - 449 ?

[New](#)

Action	Primary	Type	Area Code	Phone Number	Extension	From	To	Status
<a href="#">View</a>   <a href="#">Edit</a>	No	Home	518	333-9999		10/1/2010		Canceled

## RELATIONSHIPS

Relationships allows a User to document sibling (only) relationships. The User searches and selects the related child and NYEIS automatically creates the relationship Type to Sibling.

**Exception**  
Currently not available to all NYEIS User roles.

### Creating Relationships

1. Display Child Home Page.  Refer to **Unit 1: Getting Started, Displaying Child Home Page** for further information.

**Child Homepage: Sarah Abercrombie - 455** Edit Register Sibling

Child Name	
First Name:	Sarah
Last Name:	Abercrombie
Middle Name:	
Suffix:	

Contact	
Address:	145 Sanford Lane Albany (Albany) New York 10001
Phone Number:	518 777-9999

Child Information	
Child's Referral Date:	10/14/2010
Date of Birth:	10/11/2010
Calculated Age of Child:	0 Years, 6 Months
Ethnic Origin:	Hispanic or Latino
Child's Living Arrangement:	
Child's School District:	
Caregiver's Relationship:	
Child's Case Status:	
Gender:	Female
Birth Last Name:	
Child's Dominant Language:	
Municipality of Residence:	Albany
Caregiver's Name (If other than parent):	
Date of Death:	

Race  
Black or African American

Family Information	
Mother's First Name:	Mary Beth
Mother's Date Of Birth:	
Father's First Name:	Frank
Father's Date Of Birth:	
Is a Parent Proficient in English?:	Yes
Alternate Parent Contact Name:	
Alternate Contact's Relationship to Child:	
Mother's Last Name:	Abercrombie
Mother's Dominant Language:	
Father's Last Name:	
Father's Dominant Language:	
Preferred Communication:	
Phone Number of Alternate Contact Person:	

Insurance Information	
Medicaid Eligible?:	No
Other Insurance Coverage?:	No

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

**Relationships: Jim Tarey - 3000087** New

Action	Related Person	Type	From	To	Status
<a href="#">View</a>   <a href="#">Edit</a>	Millie Millie	Sibling	1/1/2009		Active

3. Click **New** button. **Create Relationship** page displays.

**Create Relationship: Tiffany Martin-15 - 110** Save Save & New Cancel

Details	
*Related Person:	<input type="text"/>
To:	<input type="text"/>
*From:	<input type="text"/>
End Reason:	<input type="text"/>

Comments	
<input type="text"/>	

Save Save & New Cancel

- Enter appropriate information for the following sections using **Tab** key to navigate from field-to-field: **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. Date fields must be formatted as **mm/dd/yyyy** format.*
- Click **Save** button to save Relationship and return to **Relationships** page with new relationship listed.

OR

Click **Save & New** button to save Relationship and create a new relationship.

## Viewing Relationships

- Display Child Home Page.  Refer to **Unit 1: Getting Started, Displaying Child Home Page** for further information.
- Click **Relationships** from the Navigation Bar. **Relationships** page displays.

Relationships: Jim Tarey - 30000087 

Action	Related Person	Type	From	To	Status
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Millie Millie</a>	Sibling	1/1/2009		Active

- Click **View** link under **Action** column for the Relationship to display. **View Relationship** page displays.

**navigation**

---

**recent items**

- [Ned Martin - 336](#)
- [Charles Awesomest - 339](#)
- [Charles Awesome - 339](#)
- [Billy Buttons - 353](#)

**View Relationship: Billy Buttons - 353** 

[Edit](#) [Delete](#) [Close](#)

---

**Details**

Related Person: <a href="#">Ned Martin</a>	Type: Sibling
From: 1/1/2010	To:
End Reason:	Status: Active

---

**Comments**

[Edit](#) [Delete](#) [Close](#)

- Review information.
- Click **Close** button. **Relationships** page displays.

**Exception**  
Currently not available to all NYEIS User roles.

## Editing Relationships

1. Display Child Home Page. Refer to **Unit 1: Getting Started, Displaying Child Home Page** for further information.
2. Click **Relationships** from the Navigation Bar. **Relationships** page displays.

Relationships: Jim Tarey - 30000087

[New](#)

Action	Related Person	Type	From	To	Status
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Millie Millie</a>	Sibling	1/1/2009		Active

3. Click **Edit** link under **Action** column for Relationship to change. **Modify Relationship** page displays.

Create Relationship: Billy Buttons - 353

[Save](#) [Save & New](#) [Cancel](#)

**Details**

\*Related Person:

\*From:

To:

End Reason:

**Comments**

[Save](#) [Save & New](#) [Cancel](#)

4. Apply necessary changes to **Relationship Details** and **Comments** sections.
5. Click **Save** button. Relationship is saved. **Relationships** page displays.

**Exception**  
Currently not available to all NYEIS User roles.

## Deleting Relationships

1. Display Child Home Page. Refer to **Unit 1: Getting Started, Displaying Child Home Page** for further information.
2. Click **Relationships** from the Navigation Bar. **Relationships** page displays.

Relationships: Jim Tarey - 30000087

[New](#)

Action	Related Person	Type	From	To	Status
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Millie Millie</a>	Sibling	1/1/2009		Active

3. Click **View** link under **Action** column for the Relationship to display. **View Relationship** page displays.

4. Click **Delete** button. **Delete Relationship** page displays with the message *Are you sure you want to delete this relationship?*

5. Click **Yes** button. **Relationships** page displays with **Status** changed to **Canceled**.

Action	Related Person	Type	From	To	Status
<a href="#">View</a>   <a href="#">Edit</a>	<a href="#">Tanya Keeper</a>	Sibling	5/21/2010		Canceled

## TASKS

Tasks provides an alternate way for the user to create a Task. When a user creates a task, the record of that task will only be found in the location where the task was generated (e.g. Child Home page, IFSP, Service Authorization). For example, the record of a task created from the Child Home page will not be viewable from the child's IFSP.

If the user assigns the task to themselves by checking the 'Reserve to me' option, the task will appear in the user's **Reserved Tasks** inbox. It is also displayed on the user's Home page in the **My Tasks** cluster. If the user assigns the task to another user, it will be displayed in their **Assigned Tasks** inbox.

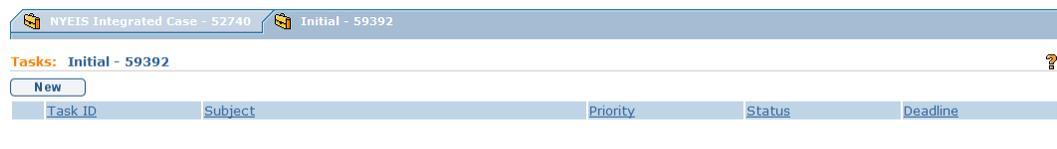
Refer to **Unit 1: Getting Started** for further information on Tasks.

## Adding Tasks

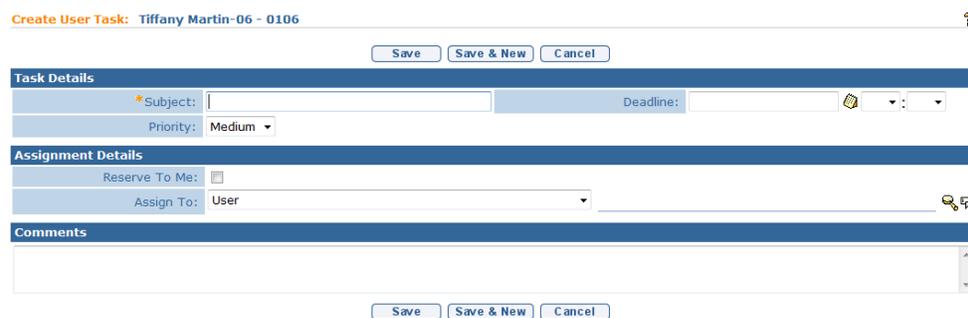
### **Exception**

Currently not available to all NYEIS User roles.

1. Display Child Home Page.  Refer to **Unit 1: Getting Started, Displaying Child Home Page** for further information.
2. Click **Tasks** from the Navigation Bar. **Tasks** page displays.



3. Click **New** button. **Create User Task** page displays the sections **Task Details**, **Assignment Details** and **Comments**.



In the **Task Details** section, a User can create a **Deadline** which displays as a **Due Date** in the workspace of the User that the task was assigned. **Priority** can be selected but does not show up in the workspace of the User the task was assigned. However, **Priority** will be viewable when the User assigned to the Task views the Task.

4. 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.*

### **Important Information**

A Task is assigned to User on the System. Click **Reserve to Me** from the **Assignment Details** section to assign a Task to yourself. [Otherwise, select the appropriate assignee type from the **Assign To** field prior to initiating the search. The **Search** page varies depending on option selected in the **Assign To** field. Only registered users in NYEIS may be assigned a task.]

- Click **Search**  icon. A search page or a list of choices displays.

If a search page displays, enter **Search Criteria**. Click **Search** button. **Search Results** display. Click **Select** link under **Action** column. **Assign To** field is populated.

If a list of options display, click **Select** link under **Action** column to select appropriate data. **Assign To** field is populated. **Create User Task** page displays with selected data displayed.

- Click **Save** button to save current Task and return to the **Tasks** page.

OR

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

## Viewing Tasks

- Display Child Home Page.  Refer to **Unit 1: Getting Started, Displaying Child Home Page** for further information.
- Click **Tasks** from the Navigation Bar. **Tasks** page displays.



Task ID	Subject	Priority	Status	Deadline
26373	Task to be completed	Medium	Open	
26374	Task #2	Medium	Open	

- Click **Task ID** link from **Tasks** page. **Task Home** page displays.



Subject
MK Task

OR

*Open Tasks also display under **My Tasks** section of **My Workspace** 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.

- When viewing the **Task Home** page, a User may navigate to view the **Child Homepage** by selecting the **Participant Home Page** in the **Supporting Information** section.
- **Recent items** on the Navigation Bar displays the most recent items visited.

## AT-RISK FOLLOW UP

 Refer to **Unit 3: At-Risk Children** for information on this topic.

## AUDIT LOG

Audit Logs allow a User to see who has interacted with the Child's case. It includes the User Name, the Time the record was accessed, and the Child Name. There is no editable information in the Audit Log.

1. Display Child Home Page.  Refer to **Unit 1: Getting Started, Displaying Child Home Page** for further information.
2. Click **Audit Log** from the Navigation Bar. **Audit Log** page displays.

[View Person Audit Log: Smith Jane - 246](#)

Access List		
User Name	Time Accessed	Child Name
Shawna Thornton	10/29/2010 13:00	Smith Jane
Art Art	6/15/2010 16:51	Smith Jane
Art Art	6/15/2010 16:48	Smith Jane
Art Art	4/20/2010 12:15	Smith Jane

## REFERRALS

The Referral menu item provides links to the Child Referral entry and can also be used to create a Re-Referral.  Refer to **Unit 2: Referral & Intake, Creating a Re-Referral** for information on this topic.

## DEMOGRAPHIC DATA CHANGE REQUEST FROM THE CHILD HOME PAGE (PROVIDER VIEW)

This feature is available from the Navigation bar on the provider view of the Child Home Page. The ability to change Child information on the Child Home Page is limited to certain User roles in NYEIS. Users not authorized to edit Child information need to submit a Data Change Request.

A history of prior changes to the child can be accessed via the **Demographic Data Change History** link, seen on the navigation bar of the child's home page. This history is view-only; it cannot be modified.

### Creating a Data Change Request

1. Display the Child Home Page. Click **Data Change Requests** from the Navigation Bar. **View List of Provider Requests To Change Child Data** page displays.



View List of Provider Requests To Change Child Data

Action	Provider Name	Request Date	Request Status	Status Date
<a href="#">New</a>				

2. Click **New** button. **Create Request to Change Child Data** page displays with the following sections: **Request Details** and **Child Details**. Information is read only.

Create Request To Change Child Data

[Save](#) [Cancel](#)

Request Details	
Provider Name: All Families First	State ID: 28416
NPI: 1234551	

Child Details	
Child's First Name: Tiffany	Child's Last Name: Martin-170

Request Details - Please be specific

---

[Save](#) [Cancel](#)

3. Type in the **Request Details - Please be specific** field in the **Child Details** section. Users *must* be as specific as possible and enter the name of the field to be changed along with the changes required (e.g., Please change Primary Care Physician information to Dr. Clayton 123 Main Street Albany NY 12205 (518) 555-1212).
4. Click **Save** button. **View List of Provider Requests To Change Child Data** page displays.

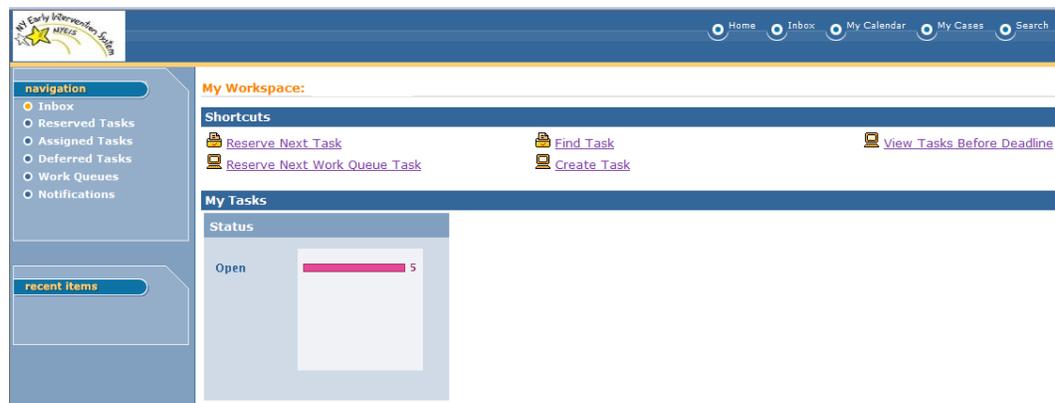
### Important Information

Submitting the Data Change Request initiates workflow that creates a Task in the Municipality's **ChildChangeRequest Work Queue**. NYEIS Users assigned to the **ChildChangeRequest Work Queue** will check the request and make any necessary changes to the **Child Home Page**. The User who submitted the change request can view the Child Home Page to see the changes that have been applied.

## Municipality Accepting Data Change Request

Users that are assigned to the **ChildChangeRequest Work Queue** can process change request tasks.

1. Click **Inbox** from the Navigation Bar. **My Workspace** page displays.



2. Click **Work Queues** from the Navigation Bar. **My Work Queues** page displays.

My Work Queues: John USER ?

Action	Name	Subscription Date
<a href="#">View</a>   <a href="#">Reserve Next Task</a>	Albany_AtRiskFollowUp	10/15/2009 15:47
<a href="#">View</a>   <a href="#">Reserve Next Task</a>	Albany_ChildChangeRequest	10/15/2009 15:47
<a href="#">View</a>   <a href="#">Reserve Next Task</a>	Albany_ContractExpire	10/15/2009 15:47
<a href="#">View</a>   <a href="#">Reserve Next Task</a>	Albany_EIOD	10/15/2009 15:47
<a href="#">View</a>   <a href="#">Reserve Next Task</a>	Albany_FailedHearing	10/15/2009 15:47
<a href="#">View</a>   <a href="#">Reserve Next Task</a>	Albany_FiscalManager	10/15/2009 15:47
<a href="#">View</a>   <a href="#">Reserve Next Task</a>	Albany_FiscalStaff	10/15/2009 15:47
<a href="#">View</a>   <a href="#">Reserve Next Task</a>	Albany_LateInvoiceWaivers	10/15/2009 15:47
<a href="#">View</a>   <a href="#">Reserve Next Task</a>	Albany_MonitorInvoiceAging	10/15/2009 15:47
<a href="#">View</a>   <a href="#">Reserve Next Task</a>	Albany_NewAtRisk	10/15/2009 15:47
<a href="#">View</a>   <a href="#">Reserve Next Task</a>	Albany_NewCase	10/15/2009 15:47
<a href="#">View</a>   <a href="#">Reserve Next Task</a>	Albany_ProviderFlag	10/15/2009 15:47
<a href="#">View</a>   <a href="#">Reserve Next Task</a>	Albany_ProviderRestriction	10/15/2009 15:47
<a href="#">View</a>   <a href="#">Reserve Next Task</a>	Albany_Referral	10/15/2009 15:47
<a href="#">View</a>   <a href="#">Reserve Next Task</a>	Albany_ReviewVoucher	10/15/2009 15:47

- Click **View** link from **Action** column next to the **ChildChangeRequest** work queue. **Work Queue Tasks** page displays.

Work Queue Tasks: Schenectady\_ChildChangeRequest ?

Action	Task ID	Subject	Priority	Status	Deadline
<a href="#">Reserve</a>	<a href="#">11320</a>	Child Data Change Request Submitted for Jennifer Hudson		Open	

- Click **Reserve** link from **Action** column for the Child's change request. **Reserve Task** page displays.
- Type **Comments** (*Optional*).
- Click **Reserve** button to reserve task and return to **Work Queue Tasks** page.

OR

Click **Reserve&View** button to display **Task Home** page.

- Click **Manage Child Data Change Request** link from the **Primary Action** section. **Manage Provider Request to Change Child Data** page displays.

Manage Provider Request to Change Child Data: Jennifer Hudson - 2739 ?

[Save](#) [Cancel](#)

Request Details	
Provider Name: Schenectady Early Caregivers	State ID: 3328
NPI: 58488	Request Status: Request Accepted <span style="float: right;">▼</span>

Child Details
Child's Name: Jennifer Hudson

Request Details - Please be specific  
The Child's mother has an alternate cell phone number of 518-999-0011.

[Save](#) [Cancel](#)

- Choose **Request Accepted**, **Request Refused** or **Request Canceled** from **Request Status** drop down. Providers will not receive electronic notification; however, they will immediately see any changes made. *The Child change needs to be manually completed regardless of the status selected.*

9. Click **Save** button. User's Home Page displays.
10. If the request has been accepted, make the change to the Child's Home Page.  
Make changes

## INSURANCE COVERAGE FROM THE CHILD HOME PAGE

Although authorized municipal users continue to have the ability to access and add/edit a child's commercial insurance information, it is the responsibility of the Service Coordinator to review with the family the insurance requirements in New York State Public Health and Insurance Law and collect and document insurance information in NYEIS. Service Coordinators must also update insurance information, as needed, but no less than every six months with review of the IFSP.

### Creating Child Commercial Insurance Coverage

#### Important Information

While this feature is more commonly managed by the child's Service Coordinator, these same functions can also be performed by select Municipal Staff. The following information below can also be found in *Unit 10 – Municipal Administration*.

If the Child's plan is Medicaid Managed Care, this information still must be captured in NYEIS by adding the Managed Care as Commercial Insurance Coverage and selecting **Yes** in the field **Plan Medicaid Managed Care?** However, the User must first enter the Child's Medicaid information either by processing the CIN Results Task or by manually entering this information.  See *Creating Child Medicaid Coverage* for further instruction.

1. Search for the Child using the NYEIS search functionality.  See **Unit 1: Getting Started, Searching** for search instructions and tips.
2. Click **Reference Number** link in the Search Results for appropriate Child. **Child Homepage** displays.



3. Click **Insurance Coverage** from the Navigation Bar. **Commercial Insurance Coverage** page displays.



4. Click **New Commercial Coverage** button. **Search Insurance Provider** page displays. Enter search criteria for desired Insurance Company and click **Search** button. See **Unit 1: Getting Started, Searching** for search instructions and tips.



Click the **Select** link in the **Action** column of the Insurance Company to be added.

5. **Create Commercial Insurance Coverage** page displays. The following sections display: **Commercial Insurance Details, Policy Holder Details, Policy Holder Address, Employer Details, Comments and Prior Authorization Notes**. *Fields requiring data entry are marked with an asterisk. A field can also be required based on logic that will not have an asterisk.*

6. Navigate from field-to-field in **Create Commercial Insurance Coverage** page using **Tab** key to enter information. *Date fields must be formatted as mm/dd/yyyy format.*

#### Commercial Insurance Details section:

- To select an **Insurance Company Address**, click **Search** icon. **Address List** page displays all addresses associated with the company. Click **Select** link under **Action** column next to the correct address. Insurance Company address displays.
- **Insurance Sequence Number** is captured to direct NYEIS in which order claiming is to occur. For example, if a Child has two Commercial Insurance policies, one policy *must* be claimed to (primary or 1) before the other (secondary or 2). Commercial Insurance *must* always be claimed to first. When editing Third Party Insurance, it is important to remember to change the sequence as needed to ensure appropriate claiming.
- **Plan Regulated by New York State** field –select **Yes** if the Insurance Plan is regulated by NYS Law. If **No** is selected, Claims will not be sent unless the **Parental Consent to Bill** field is **Yes**.
- If the plan is not regulated by NYS law, and the parent has given consent to bill (they have been advised that payments for services could be applied towards annual and lifetime caps), select **Yes** in the **If not regulated by NYS Law or self-funded, does parent give consent to bill?** field. Parental consent only applies if Plan is not regulated by NYS.
- **Is Plan Child Health Plus?** and **Is Plan Medicaid Managed Care?** fields *are required and defaulted to No*.

**Policy Holder Details** section:

- **Policy Number for Billing, Group Number, Relationship to Policy Holder, and Effective Date From** *must* always be entered.
- If **Relationship to Policy Holder** is not “Self”, then the **Policyholder’s Name, Child’s ID Number, Policy Holder Date of Birth, Policy Holder Gender, and Policy Holder Address** *must* be entered.

**Policy Holder Address** section:

- **Address** *must* be entered when the **If Relationship to Policy Holder** field is not “Self”.

**Employer Details** section:

- If the insurance policy is through an employer, **Employer Name, Employer Phone Number and Employer Address** *must* be entered.

**Comments** section:

- Additional details can be captured on a Child’s insurance coverage.

**Prior Authorization Notes** section:

- Notes on any known information regarding Prior Authorization (if it’s needed, when it was requested, if it was approved or denied) can be entered. Prior Authorization Details are also captured for Child’s Insurance Coverage in the Prior Authorization/Referral pages.

7. Click **Search**  icon to enter **Policy Holder Address and Employer Address**. **Address Validation** page displays.

**Address Validation** ms  
 Validate an entered address with USPS

Address Line 1: <input type="text"/>	Address Line 2: <input type="text"/>
*City: <input type="text"/>	*State: <input type="text"/>
*County: <input type="text"/>	*Zip: <input type="text"/>
Census Tract: <input type="text"/>	

Action

Use the **Tab** key to navigate from field-to-field to fill in information. **City, State, County and Zip** are required fields. **Census Tract** field will not be used at this time. Click **Submit** button. Validation of address takes place

*immediately upon submission.* The lower section of the page provides a list of available addresses. The first address listed in the results is the address that was manually entered. Select this address if the other addresses do not match from validation process. Click **Select** link under **Action** column. Address displays.

8. Click **Save** button. **View Commercial Insurance Coverage** page displays.

View Commercial Insurance Coverage: Lila Rouse - 132 ?

Commercial Insurance Details	
Insurance Company Name:	Empire BCBS
Insurance Company Address:	500 Corporate St Albany (Albany) New York 12205
Insurance Plan Name:	Empire BCBS
Plan Regulated by New York State?:	Yes
Is Plan Child Health Plus?:	No
Parental Consent To Bill:	
Insurance Sequence Number:	1
Insurance Type:	Commercial
Claim Filing:	Commercial Insurance
Is Plan Medicaid Managed Care?:	No
Subrogation Notice Date Sent:	2/28/2012
Subrogation Notice Scheduled?:	No

Policy Holder Details	
Policy Holder Name:	Lila Rouse
Group Number:	
Child's ID Number:	
Effective From Date:	1/1/2011
Primary Care Provider Name:	
Policy Holder Date of Birth:	
Policy Number for Billing:	483753894
Policyholder Relationship to Child:	Self
Policy Holder Gender:	Female
Effective To Date:	12/31/2011
Address:	
Policy Holder Phone Number:	

Employer Details	
Employer Name:	
Address:	
Employer Phone Number:	

**Comments**

**Prior Authorization Notes**

OR

Click **Save & New** button to add additional coverage.

## Creating Child Medicaid Coverage

1. Search for the Child using the NYEIS search functionality.  See **Unit 1: Getting Started, Searching** for search instructions and tips.
2. Click **Reference Number** link in the Search Results for appropriate Child. **Child Homepage** displays.



Child Homepage: Kevin Bondman - 500020

[Edit](#) [Register Sibling](#)

**Child Information**

First Name:	Kevin	Middle Name:	
Last Name:	Bondman	Suffix:	

**Contact**

Address:	ewr ert Albany (Albany) New York 10001	Phone Number:	518 333-0000
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**Child Information**

Child's Referral Date:	12/6/2010	Child's Case Status:	
Date of Birth:	12/1/2010	Gender:	Male
Calculated Age of Child:	0 Years, 0 Months	Birth Last Name:	
Ethnic Origin:	Not Hispanic or Latino	Child's Dominant Language:	
Child's Living Arrangement:		Municipality of Residence:	Albany
Child's School District:		Caregiver's Name (If other than parent):	
Caregiver's Relationship:		Date of Death:	

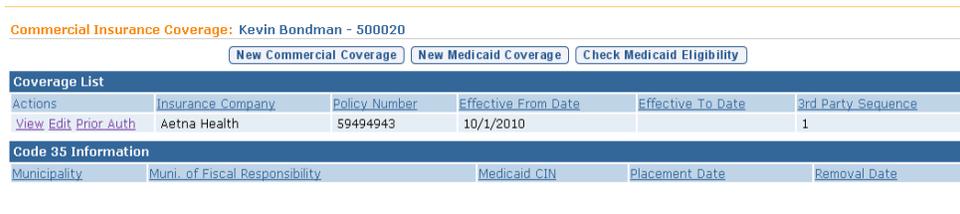
**Race**

American Indian or Alaskan Native

**Family Information**

Mother's First Name:	Jill	Mother's Last Name:	
Mother's Date Of Birth:		Mother's Dominant Language:	

3. Click **Insurance Coverage** from the Navigation Bar. **Commercial Insurance Coverage** page displays.



Commercial Insurance Coverage: Kevin Bondman - 500020

[New Commercial Coverage](#) [New Medicaid Coverage](#) [Check Medicaid Eligibility](#)

**Coverage List**

Actions	Insurance Company	Policy Number	Effective From Date	Effective To Date	3rd Party Sequence
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Aetna Health	59494943	10/1/2010		1

**Code 35 Information**

Municipality	Muni. of Fiscal Responsibility	Medicaid CITN	Placement Date	Removal Date

4. Click **New Medicaid Coverage** button. **Create Medicaid Coverage** page displays with the following sections: **Medicaid Coverage Details** and **Comments**.

Create Medicaid Coverage: Kevin Bondman - 500020 ?

Save Save & New Cancel

Medicaid Coverage Details	
*Medicaid CIN: <input type="text"/>	Does the Child Have Other Insurance?: <input type="checkbox"/>
*Effective From Date: <input type="text"/>	Medicaid Type: <input type="text"/>
Effective To Date: <input type="text"/>	Spend Down Date: <input type="text"/>
Recertification Date: <input type="text"/>	

Comments

Save Save & New Cancel

5. Enter all known information. **Medicaid CIN** and **Effective From Date** and *must* be entered.
6. Click **Save** button. **View Medicaid Coverage** page displays.

OR

Click **Save & New** button to add additional coverage.

7. Click **Close** button. **Commercial Insurance Coverage** page displays.

### Important Information

If a Child has Medicaid Managed Care, the Medicaid information needs to be recorded first as outlined in this section. Next, the Managed Care information **MUST** still be entered as Commercial Insurance Coverage. See *Creating Child Commercial Insurance Coverage* for further instruction.

### Checking Medicaid Eligibility – (Currently inactive)

NYEIS automatically submits a request to Office of Temporary and Disability Assistance (OTDA) when an EIO/D is assigned. For children with Medicaid coverage, a CIN request is sent automatically every 6 months. For children with no Medicaid coverage, a CIN request is sent automatically every month. Users are informed of system-initiated CIN search results via a Task that is created in the <Municipality>\_MedicaidCIN work queue.

A user can also initiate a check for Medicaid CIN information at any time. Search results are communicated via a Task that is created in the user's **Assigned Tasks** inbox. See *Viewing/Selecting Medicaid Eligibility Request Results* for more information about viewing the search results when the search is user initiated and system initiated.

**Check Medicaid Eligibility** button generates an electronic request to the NYS Office of Temporary and Disability Assistance (OTDA) to check if the Child has or had Medicaid Coverage. If the Child has or had Medicaid, the request in return provides the Child’s Medicaid CIN and effective from/to dates to the initiator of the request.

1. Search for the Child using the NYEIS search functionality.  See **Unit 1: Getting Started, Searching** for search instructions and tips.
2. Click **Reference Number** link in the Search Results for appropriate Child. **Child Homepage** displays.



**Child Homepage: Kevin Bondman - 500020**

[Edit](#) [Register Sibling](#)

**Child Information**

First Name:	Kevin	Middle Name:	
Last Name:	Bondman	Suffix:	

**Contact**

Address:	ewr ert Albany (Albany) New York 10001	Phone Number:	518 333-0000
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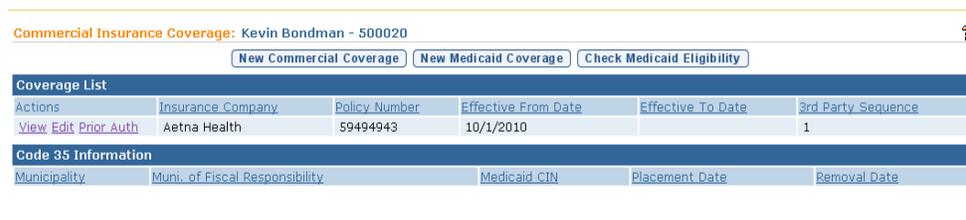
**Child Information**

Child's Referral Date:	12/6/2010	Child's Case Status:	
Date of Birth:	12/1/2010	Gender:	Male
Calculated Age of Child:	0 Years, 0 Months	Birth Last Name:	
Ethnic Origin:	Not Hispanic or Latino	Child's Dominant Language:	
Child's Living Arrangement:		Municipality of Residence:	Albany
Child's School District:		Caregiver's Name (If other than parent):	
Caregiver's Relationship:		Date of Death:	

**Family Information**

Mother's First Name:	Jill	Mother's Last Name:	
Mother's Date Of Birth:		Mother's Dominant Language:	

3. Click **Insurance Coverage** from the Navigation Bar. **Commercial Insurance Coverage** page displays.



**Commercial Insurance Coverage: Kevin Bondman - 500020**

[New Commercial Coverage](#) [New Medicaid Coverage](#) [Check Medicaid Eligibility](#)

**Coverage List**

Actions	Insurance Company	Policy Number	Effective From Date	Effective To Date	3rd Party Sequence
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Aetna Health	59494943	10/1/2010		1

**Code 35 Information**

Municipality	Muni. of Fiscal Responsibility	Medicaid CIN	Placement Date	Removal Date

4. Click **Check Medicaid Eligibility** button. **Submit Medicaid CIN Request** page displays with the message *Are you sure you want to submit a Medicaid CIN Request?*

5. Click **Yes** button. The System creates a request for Medicaid Eligibility to OTDA. **Commercial Insurance Coverage** page displays. The request is sent electronically. The response will not be immediate; OTDA will check if the Child requested has a CIN. If the Child does have a CIN, a response record will be returned. The User that initiated the request will receive a task to validate the eligibility response for the Child.
6. Click **Home** from the Menu Bar. User Home Page displays.

#### **Important Information**

This feature has been temporarily disabled and is not currently operational

### **Viewing/Selecting Medicaid Eligibility Request Results**

The system automatically searches the Office of Temporary and Disability Assistance (OTDA) Welfare Management System database when the child's Integrated Case is opened. If Medicaid Coverage is found, a task is created to the Municipality's MedicaidCIN work queue that directs the user (such as the EIO/D) to view and select the Medicaid Coverage results, and add it to the Child's Insurance Coverage.

The Medicaid Coverage results will contain the Child's name and Date of Birth. This is to help the user validate that this is the correct Medicaid CIN for the Child. The user will review the results and select if any Medicaid Coverage should be added.

1. Log in to NYEIS. User Home Page displays.
2. When the Medicaid CIN requests is system initiated, click **Inbox** on the Navigation Bar. Click the **Work Queues** button. The **My Work Queues** page displays. Select the **View** link next to the <Municipality>\_Medicaid CIN work queue.

OR

When the Medicaid CIN requests is user initiated, click **Inbox** on the Navigation Bar. Click the **Assigned Tasks Inbox** button.

3. Navigate to the task *The CIN results have been received for <child name>*. Select the **Reserve** link under the **Action** column. Click the **Reserve & View** button to reserve the task. The **Task Home** page displays.

Task Home: ReviewCINResults - 2112

**Manage**

[Add Comment](#)    [Reserve](#)    [Forward](#)    [Restart](#)  
[Close](#)    [Un-Reserve](#)    [Defer](#)

**Subject**

The CIN results have been received for Damarion Dickson

**Details**

Task ID:	2112	Status:	Open
Priority:		Deadline:	
Reserved By:		Last Assigned:	12/10/2009 11:20
Time Worked:	00:00 <a href="#">[Change]</a>		

**Primary Action**      **Supporting Information**

[Review OTDA CIN Results](#)

- Click **Review OTDA CIN Results** link under the **Primary Action** Column. **Medicaid Eligibility Results List** page displays. Results of the request are listed in the **Results** section.

Home    Inbox    My Calendar    My Cases    Search    About    Log Out

**Medicaid Eligibility Results List**

**Child Details**

Name:	Jack Smith
Date Of Birth:	7/27/2007
Medicaid CIN:	EC999U

**Coverage List**

Insurance Company	Policy Number	Effective From Date	Effective To Date	3rd Party Sequence
Medicaid		8/5/2009		95

**Results**

<input type="checkbox"/>	First Name	First Name	Date of Birth	Medicaid CIN	Eligible From	Eligible To
<input type="checkbox"/>	Smith	Jack	7/27/2007	EC999U	12/1/2009	2/28/2010

[Register](#)    [Complete Registration](#)

- The user should sort by the **Medicaid CIN** column in the **Results** cluster first as there may be more than one Child returned in the results depending on the search criteria that was entered. Because there may be more than one Medicaid eligibility period, the User should select the checkbox next to each eligibility period that does not already exist for the Child in NYEIS. Click the **Register** button to add the coverage to the Coverage List.

## Medicaid Eligibility Results List

Child Details						
Name:					Jack Smith	
Date Of Birth:					7/27/2007	
Medicaid CIN:					EC999U	
Coverage List						
Insurance Company	Policy Number	Effective From Date	Effective To Date	3rd Party Sequence		
Medicaid		12/1/2009	2/28/2010	95		
Medicaid		8/5/2009		95		
Results						
<input type="checkbox"/>	First Name	First Name	Date of Birth	Medicaid CIN	Eligible From	Eligible To

6. Click the **Complete Registration** button to end the task. **Complete OTDA Results Review** page displays. Click **Yes** button to close the task or click the **No** button to continue with the task.

Complete OTDA Results Review					
Are you sure you want to complete the Review of these OTDA Medicaid Results?					
<input type="button" value="Yes"/>		<input type="button" value="No"/>			

### Important Information

Existing CIN results tasks can be used to add/update Medicaid policy information; however, for new Medicaid CIN results, this feature has been temporarily disabled and is not currently operational.

If, when attempting to add CIN results for a child, you receive a message that the CIN is already in use, that means another child registered in NYEIS has been assigned the CIN you are trying to add. Please call the NYEIS Help Desk for assistance in identifying and resolving the conflict.

## Viewing Child Insurance Coverage

1. Search for the Child using the NYEIS search functionality.  See **Unit 1: Getting Started, Searching** for search instructions and tips.
2. Click **Reference Number** link in the Search Results for appropriate Child. **Child Homepage** displays.



**Child Homepage: Kevin Bondman - 500020**

[Edit](#) [Register Sibling](#)

**Child Information**

First Name:	Kevin	Middle Name:	
Last Name:	Bondman	Suffix:	

**Contact**

Address:	ewr ert Albany (Albany) New York 10001	Phone Number:	518 333-0000
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**Child Information**

Child's Referral Date:	12/6/2010	Child's Case Status:	
Date of Birth:	12/1/2010	Gender:	Male
Calculated Age of Child:	0 Years, 0 Months	Birth Last Name:	
Ethnic Origin:	Not Hispanic or Latino	Child's Dominant Language:	
Child's Living Arrangement:		Municipality of Residence:	Albany
Child's School District:		Caregiver's Name (If other than parent):	
Caregiver's Relationship:		Date of Death:	

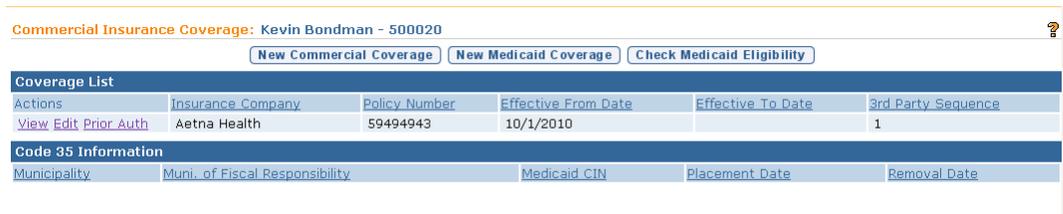
**Race**

American Indian or Alaskan Native

**Family Information**

Mother's First Name:	Jill	Mother's Last Name:	
Mother's Date of Birth:		Mother's Dominant Language:	

3. Click **Insurance Coverage** from the Navigation Bar. **Commercial Insurance Coverage** page displays.



**Commercial Insurance Coverage: Kevin Bondman - 500020**

[New Commercial Coverage](#) [New Medicaid Coverage](#) [Check Medicaid Eligibility](#)

**Coverage List**

Actions	Insurance Company	Policy Number	Effective From Date	Effective To Date	3rd Party Sequence
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Aetna Health	59494943	10/1/2010		1

**Code 35 Information**

Municipality	Muni. of Fiscal Responsibility	Medicaid CIN	Placement Date	Removal Date

4. Click **View** link under **Action** column for specific Insurance. If a Commercial Insurance is selected, the **View Commercial Insurance Coverage** page displays. If Medicaid Coverage is selected, **View Medicaid Coverage** page displays.
5. Click **Close** button when finished viewing information. **Commercial Insurance Coverage** page displays.
6. Click **Home** from the Navigation Bar. **Child Homepage** displays.

## Editing Child Insurance Coverage

1. Search for the Child using the NYEIS search functionality.  See **Unit 1: Getting Started, Searching** for search instructions and tips.
2. Click **Reference Number** link in the Search Results for appropriate Child. **Child Homepage** displays.



**Child Homepage: Kevin Bondman - 500020**

[Edit](#) [Register Sibling](#)

**Child Information**

First Name:	Kevin	Middle Name:	
Last Name:	Bondman	Suffix:	

**Contact**

Address:	ewr art Albany (Albany) New York 10001	Phone Number:	518 333-0000
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**Child Information**

Child's Referral Date:	12/6/2010	Child's Case Status:	
Date of Birth:	12/1/2010	Gender:	Male
Calculated Age of Child:	0 Years, 0 Months	Birth Last Name:	
Ethnic Origin:	Not Hispanic or Latino	Child's Dominant Language:	
Child's Living Arrangement:		Municipality of Residence:	Albany
Child's School District:		Caregiver's Name (If other than parent):	
Caregiver's Relationship:		Date of Death:	

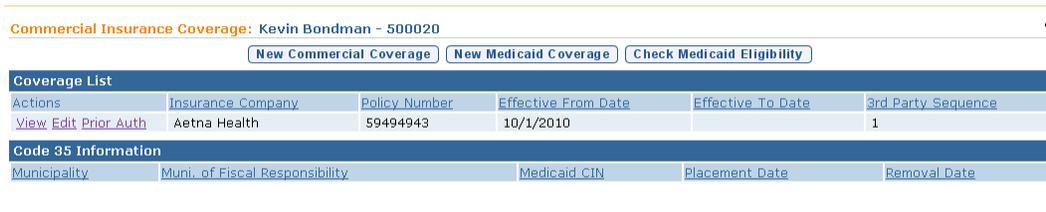
**Race**

American Indian or Alaskan Native

**Family Information**

Mother's First Name:	Jill	Mother's Last Name:	
Mother's Date Of Birth:		Mother's Dominant Language:	

3. Click **Insurance Coverage** from the Navigation Bar. **Commercial Insurance Coverage** page displays.



**Commercial Insurance Coverage: Kevin Bondman - 500020**

[New Commercial Coverage](#) [New Medicaid Coverage](#) [Check Medicaid Eligibility](#)

**Coverage List**

Actions	Insurance Company	Policy Number	Effective From Date	Effective To Date	3rd Party Sequence
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Aetna Health	59494943	10/1/2010		1

**Code 35 Information**

Municipality	Muni. of Fiscal Responsibility	Medicaid CIN	Placement Date	Removal Date

4. Click **Edit** link under **Action** column for specific Insurance to edit.

If Commercial Insurance coverage is selected, the **Modify Child Commercial Insurance Coverage** page displays. Apply necessary changes. Click **Save** button. **Commercial Insurance Coverage** page displays.

OR

If Medicaid Coverage is selected, the **Modify Medicaid Coverage** page displays. Apply necessary changes. Click **Save** button. **Commercial Insurance Coverage** page displays.

5. Click **Home** from the Navigation Bar. **Child Homepage** displays.

### Important Information

If claiming to the insurance provider has occurred, it is suggested that the existing insurance record be end dated, and the changes made in a new insurance record for the child.

### Deleting Child Insurance Coverage

1. Search for the Child using the NYEIS search functionality.  See **Unit 1: Getting Started, Searching** for search instructions and tips.
2. Click **Reference Number** link in the Search Results for appropriate Child. **Child Homepage** displays.



**Child Homepage: Kevin Bondman - 500020**

[Edit](#) [Register Sibling](#)

**Child Information**

First Name:	Kevin	Middle Name:	
Last Name:	Bondman	Suffix:	

**Contact**

Address:	ewr ert Albany (Albany) New York 10001	Phone Number:	518 333-0000
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**Child Information**

Child's Referral Date:	12/6/2010	Child's Case Status:	
Date of Birth:	12/1/2010	Gender:	Male
Calculated Age of Child:	0 Years, 0 Months	Birth Last Name:	
Ethnic Origin:	Not Hispanic or Latino	Child's Dominant Language:	
Child's Living Arrangement:		Municipality of Residence:	Albany
Child's School District:		Caregiver's Name (If other than parent):	
Caregiver's Relationship:		Date of Death:	

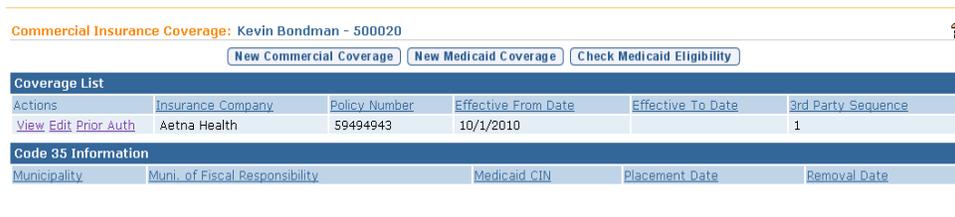
**Race**

American Indian or Alaskan Native

**Family Information**

Mother's First Name:	Jill	Mother's Last Name:	
Mother's Date Of Birth:		Mother's Dominant Language:	

3. Click **Insurance Coverage** from the Navigation Bar. **Commercial Insurance Coverage** page displays.



**Commercial Insurance Coverage: Kevin Bondman - 500020**

[New Commercial Coverage](#) [New Medicaid Coverage](#) [Check Medicaid Eligibility](#)

**Coverage List**

Actions	Insurance Company	Policy Number	Effective From Date	Effective To Date	3rd Party Sequence
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Aetna Health	59494943	10/1/2010		1

**Code 35 Information**

Municipality	Muni. of Fiscal Responsibility	Medicaid CIN	Placement Date	Removal Date

4. Click **View** link under **Action** column for specific Insurance. If a Commercial Insurance is selected, the **View Commercial Insurance**

**Coverage** page displays. If Medicaid Coverage is selected, **View Medicaid Coverage** page displays.

- Click **Delete** button. **Delete Medicaid/Commercial Insurance Policy** page displays the message *Are you sure you want to delete this policy and all related information (prior authorizations, service not covered, PCDP Referrals)?* Click **Yes** button. **Commercial Insurance Coverage** page displays.
- Click **Home** from the Navigation Bar. **Child Homepage** displays.

### Important Information

If claiming to the insurance provider has occurred, it is suggested that the existing insurance record be end dated, and the changes made in a new insurance record for the child.

## Creating Services Not Covered

Some EI services will not be covered at all by certain insurance companies or only a specific number of visits will be covered before the maximum benefit coverage has been reached. In these cases, a User can create a Service Not Covered in NYEIS. These services will not be claimed for payment to the insurance company.

## Commercial Insurance Coverage

- Click **View** link under **Action** column for Commercial Insurance Coverage. **View Commercial Insurance Coverage** page displays.

The screenshot displays the 'View Commercial Insurance Coverage' page for Kevin Bondman - 500020. The page is divided into several sections:

- Navigation Bar:** Includes 'Insurance Coverage', 'Services Not Covered' (circled in red), 'Authorizations', and 'Referrals'.
- Page Header:** 'View Commercial Insurance Coverage: Kevin Bondman - 500020' with 'Edit', 'Delete', and 'Close' buttons.
- Commercial Insurance Details:**
  - Insurance Company Name: Aetna Health
  - Insurance Company Address: 500 Broadway, Albany (Albany), New York 12200
  - Insurance Plan Name: Aetna Health
  - Plan Regulated by New York State: Yes
  - Is Plan Child Health Plus?: No
  - Parental Consent To Bill:
  - Insurance Sequence Number: 1
  - Insurance Type: Commercial
  - Claim Filing: Commercial Insurance
  - Subrogation Notice Date Sent: 12/15/2010
  - Is Plan Medicaid Managed Care?: No
- Policy Holder Details:**
  - Policy Holder Name: June Bondman
  - Policy Holder ID Number: 59494943

- Click **Services Not Covered** from the Navigation Bar. **Insurance Services Not Covered** page displays.

**Insurance Services Not Covered** Kevin Bondman - 500020 ?  
 Aetna Health - 300001

Action	Service Type	Method	QP	From Date	To Date

3. Click **New** button. **Create Insurance Service Not Covered** page displays. *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. **Start Date** is required.*

**Create Insurance Service Not Covered** Kevin Bondman - 500020 ?

Service Details	
Service Type:	<input type="text"/>
Method:	<input type="text"/>
QP:	<input type="text"/>
Reason Not Covered:	<input type="text"/>
*Start Date:	<input type="text"/>
End Date:	<input type="text"/>

4. Enter data as appropriate
5. Click **Save** button. **Insurance Services Not Covered** page displays.
6. Click **Save & New** button to add additional Services Not Covered.

**Important Information**

Services Not Covered is corrected by entering the same date in the Effective From and To Date fields.

The services of Service Coordination, Special Instruction, Respite and Transportation do not need to be entered into NYEIS as “Services Not Covered”.

## Viewing Services Not Covered

### Commercial Insurance Coverage

1. Click **View** link under **Action** column for Commercial Insurance Coverage. **View Commercial Insurance Coverage** page displays.

**View Commercial Insurance Coverage: Kevin Bondman - 500020**

[Edit](#) [Delete](#) [Close](#)

**Commercial Insurance Details**

Insurance Company Name:	Aetna Health	Insurance Sequence Number:	1
Insurance Company Address:	500 Broadway Albany (Albany) New York 12200	Insurance Type:	Commercial
Insurance Plan Name:	Aetna Health	Claim Filing:	Commercial Insurance
Plan Regulated by New York State:	Yes	Subrogation Notice Date Sent:	12/15/2010
Is Plan Child Health Plus?:	No	Is Plan Medicaid Managed Care?:	No
Parental Consent To Bill:			

**Policy Holder Details**

Policy Holder Name:	June Bondman	Policy Holder ID Number:	59494943
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2. Click **Services Not Covered** from the Navigation Bar. **Insurance Services Not Covered** page displays.

**Insurance Services Not Covered Kevin Bondman - 500020**

Aetna Health - 300001

[New](#)

Action	Service Type	Method	QP	From Date	To Date
<a href="#">View</a>	Family Counseling			10/1/2010	

3. Click **View** link under **Action** column. **View Insurance Service Not Covered** page displays.

**View Insurance Service Not Covered Kevin Bondman - 500020**

[Edit](#) [Close](#)

**Service Details**

Service Type:	Family Counseling	Method:	
QP:		Reason Not Covered:	Not a Covered Service
Start Date:	10/1/2010	End Date:	

[Edit](#) [Close](#)

4. Click **Close** button. **Insurance Services Not Covered** page displays.

## Editing Services Not Covered

### Commercial Insurance Coverage

1. Click **View** link under **Action** column for Commercial Insurance Coverage. **View Commercial Insurance Coverage** page displays.

**View Commercial Insurance Coverage: Kevin Bondman - 500020**

Navigation: Insurance Coverage, **Services Not Covered**, Authorizations, Referrals

Buttons: Edit, Delete, Close

**Commercial Insurance Details**

Insurance Company Name:	Aetna Health	Insurance Sequence Number:	1
Insurance Company Address:	500 Broadway Albany (Albany) New York 12200	Insurance Type:	Commercial
Insurance Plan Name:	Aetna Health	Claim Filing:	Commercial Insurance
Plan Regulated by New York State:	Yes	Subrogation Notice Date Sent:	12/15/2010
Is Plan Child Health Plus?:	No	Is Plan Medicaid Managed Care?:	No
Parental Consent To Bill:			

**Policy Holder Details**

Policy Holder Name:	June Bondman	Policy Holder ID Number:	59494943
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2. Click **Services Not Covered** from the Navigation Bar. **Insurance Services Not Covered** page displays.

**Insurance Services Not Covered Kevin Bondman - 500020**

Aetna Health - 300001

Buttons: New

Action	Service Type	Method	QP	From Date	To Date
<a href="#">View</a>	Family Counseling			10/1/2010	

3. Click **View** link under **Action** column. **View Insurance Service Not Covered** page displays.

**View Insurance Service Not Covered Kevin Bondman - 500020**

Buttons: Edit, Close

**Service Details**

Service Type:	Family Counseling	Method:	
QP:		Reason Not Covered:	Not a Covered Service
Start Date:	10/1/2010	End Date:	

Buttons: Edit, Close

4. Click **Edit** button. **Modify Insurance Service Not Covered** page displays. *Fields requiring data entry are marked with an asterisk. A field can also be required based on logic that will not have an asterisk.*

Modify Insurance Service Not Covered Kevin Bondman - 500020 

Service Details	
Service Type:	Family Counseling
Method:	
QP:	
Reason Not Covered:	Not a Covered Service
*Start Date:	10/1/2010 
End Date:	

5. Apply necessary changes.
6. Click **Save** button. **View Insurance Service Not Covered** page displays.
7. Click **Close** button. **Insurance Services Not Covered** page displays.

### Creating Prior Authorization/Referrals

The Municipality should enter any information into NYEIS regarding known requirements to ensure coverage of the service (e.g., an insurance company requires prior authorization, and/or a script for a service type or a Referral before agreeing to cover). When this information is entered as required by the insurance company to ensure coverage, in order for NYEIS to begin billing for the service, the required Prior Authorization/Referral and/or Script must be documented as received in NYEIS.

### Commercial Insurance Coverage –Prior Authorizations/Referral Required

1. Search for the Child using the NYEIS search functionality.  See **Unit 1: Getting Started, Searching** for search instructions and tips.
2. Click **Reference Number** link in the Search Results for appropriate Child. **Child Homepage** displays.

**Child Homepage: Kevin Bondman - 500020**

[Edit](#) [Register Sibling](#)

**Child Information**

First Name: Kevin Middle Name: Last Name: Bondman Suffix:

**Contact**

Address: ewr ert Albany (Albany) New York 10001 Phone Number: 518 333-0000

**Child Information**

Child's Referral Date: 12/6/2010 Child's Case Status: Date of Birth: 12/1/2010 Gender: Male Calculated Age of Child: 0 Years, 0 Months Birth Last Name: Ethnic Origin: Not Hispanic or Latino Child's Dominant Language: Child's Living Arrangement: Municipality of Residence: Albany Child's School District: Caregiver's Name (if other than parent): Caregiver's Relationship: Date of Death:

**Race**

American Indian or Alaskan Native

**Family Information**

Mother's First Name: Jill Mother's Last Name: Mother's Date Of Birth: Mother's Dominant Language:

3. Click **Insurance Coverage** from the Navigation Bar. **Commercial Insurance Coverage** page displays.

**Commercial Insurance Coverage: Kevin Bondman - 500020**

[New Commercial Coverage](#) [New Medicaid Coverage](#) [Check Medicaid Eligibility](#)

**Coverage List**

Actions	Insurance Company	Policy Number	Effective From Date	Effective To Date	3rd Party Sequence
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Aetna Health	59494943	10/1/2010		1

**Code 35 Information**

Municipality	Muni. of Fiscal Responsibility	Medicaid CIN	Placement Date	Removal Date

4. Click **View** link under **Action** column for Commercial Insurance Coverage. **View Commercial Insurance Coverage** page displays.

**View Commercial Insurance Coverage: Kevin Bondman - 500020**

[Edit](#) [Delete](#) [Close](#)

**Commercial Insurance Details**

Insurance Company Name: Aetna Health Insurance Sequence Number: 1 Insurance Company Address: 500 Broadway Albany (Albany) New York 12200 Insurance Type: Commercial Insurance Plan Name: Aetna Health Claim Filing: Commercial Insurance Plan Regulated by New York State: Yes Subrogation Notice Date Sent: 12/15/2010 Is Plan Child Health Plus?: No Is Plan Medicaid Managed Care?: No Parental Consent To Bill:

**Policy Holder Details**

Policy Holder Name: June Bondman Policy Holder ID Number: 59494943

5. Click **Prior Authorizations/Referral** from the Navigation Bar. **Prior Authorizations/Referrals** page displays.

**Prior Authorizations/Referrals:** Kevin Bondman - 500020 ?  
Aetna Health - 300001

Service Details						
Action	Service Type	Method	QP	Prior Authorization Required	PCP Referral Required	Script Required

Prior Authorizations					
Action	PA Number	SA Number	Insurance Company Name	Status	PA Service Type

Primary Care Physician Referrals		
Action	PCP Referral Number	SA Number

6. Click **New** button. **Create PA / PCP Referral / Script Required** page displays.

**Create PA / PCP Referral / Script Required** Kevin Bondman ?

Service Details			
Service Type:	<input type="text"/>	Method:	<input type="text"/>
QP:	<input type="text"/>	Prior Authorization Required:	<input type="checkbox"/>
Primary Care Physician Referral Required:	<input type="checkbox"/>	Script Required:	<input type="checkbox"/>

7. Enter data as appropriate.
8. Click **Save** button. **Prior Authorizations/Referrals** page displays.

OR

Click **Save & New** button to enter additional PA / PCP Referral / Script Required.

## **Commercial Insurance Coverage – Create Prior Authorization**

If the need for a Prior Authorization for a service has been entered into NYEIS and a Service Authorization is created that requires a request for Prior Authorization from Commercial Insurance, the EIO/D receives notification through a task to request Prior Authorization for the Child and may forward this task to the service coordinator to document the prior authorization as received.

### **Important Information**

The Prior Authorization workflow task, called Prior Authorization, is directed to the EIO/D.  See **Appendix H** for further information about the workflow.

1. Search for the Child using the NYEIS search functionality.  See **Unit 1: Getting Started, Searching** for search instructions and tips.
2. Click **Reference Number** link in the Search Results for appropriate Child. **Child Homepage** displays.



**Child Homepage: Kevin Bondman - 500020**

[Edit](#) [Register Sibling](#)

**Child Information**

First Name:	Kevin	Middle Name:	
Last Name:	Bondman	Suffix:	

**Contact**

Address:	ewr ert Albany (Albany) New York 10001	Phone Number:	518 333-0000
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**Child Information**

Child's Referral Date:	12/6/2010	Child's Case Status:	
Date of Birth:	12/1/2010	Gender:	Male
Calculated Age of Child:	0 Years, 0 Months	Birth Last Name:	
Ethnic Origin:	Not Hispanic or Latino	Child's Dominant Language:	
Child's Living Arrangement:		Municipality of Residence:	Albany
Child's School District:		Caregiver's Name (If other than parent):	
Caregiver's Relationship:		Date of Death:	

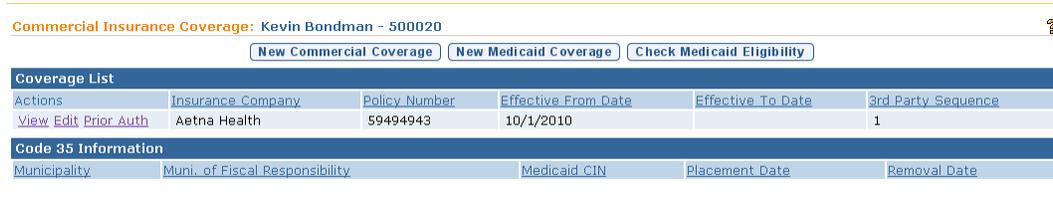
**Race**

American Indian or Alaskan Native

**Family Information**

Mother's First Name:	Jill	Mother's Last Name:	
Mother's Date Of Birth:		Mother's Dominant Language:	

3. Click **Insurance Coverage** from the Navigation Bar. **Commercial Insurance Coverage** page displays.



**Commercial Insurance Coverage: Kevin Bondman - 500020**

[New Commercial Coverage](#) [New Medicaid Coverage](#) [Check Medicaid Eligibility](#)

**Coverage List**

Actions	Insurance Company	Policy Number	Effective From Date	Effective To Date	3rd Party Sequence
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Aetna Health	59494943	10/1/2010		1

**Code 35 Information**

Municipality	Muni. of Fiscal Responsibility	Medicaid CIN	Placement Date	Removal Date

4. Click **View** link under **Action** column for Commercial Insurance Coverage. **View Commercial Insurance Coverage** page displays.



**View Commercial Insurance Coverage: Kevin Bondman - 500020**

[Edit](#) [Delete](#) [Close](#)

**Commercial Insurance Details**

Insurance Company Name:	Aetna Health	Insurance Sequence Number:	1
Insurance Company Address:	500 Broadway Albany (Albany) New York 12200	Insurance Type:	Commercial
Insurance Plan Name:	Aetna Health	Claim Filing:	Commercial Insurance
Plan Regulated by New York State:	Yes	Subrogation Notice Date Sent:	12/15/2010
Is Plan Child Health Plus?:	No	Is Plan Medicaid Managed Care?:	No
Parental Consent To Bill:			

**Policy Holder Details**

Policy Holder Name:	June Bondman	Policy Holder ID Number:	59494943
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- Click **Prior Authorizations/Referral** from the Navigation Bar. **Prior Authorizations/Referrals** page displays.

**Prior Authorizations/Referrals:** Kevin Bondman - 500020 ?

Aetna Health - 300001

[New](#)

Service Details						
Action	Service Type	Method	OP	Prior Authorization Required	PCP Referral Required	Script Required
<a href="#">View</a> <a href="#">Edit</a>	ATD	Basic Group Developmental with 1:1 Aide (59 min or less)		Yes	Yes	Yes

[New Prior Authorization](#) [Create 278 Request](#)

Prior Authorizations						
Action	PA Number	SA Number	Insurance Company Name	Status	PA Service Type	
<a href="#">New Primary Care Physician Referral</a>						

Primary Care Physician Referrals		
Action	PCP Referral Number	SA Number

- Click **New Prior Authorization** button. **Create Prior Authorization** page displays. *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.*

**Create Prior Authorization:** Kevin Bondman - 500020 ?

[Save](#) [Save & New](#) [Cancel](#)

Details	
Prior Authorization Number:	<input type="text"/>
Status:	<input type="text"/>
*Start Date:	<input type="text"/>
*Service Authorization Number:	<input type="text"/>
*Prior Authorization Certification Type:	<input type="text"/>
*End Date:	<input type="text"/>
Number of Authorized Visits:	<input type="text" value="0"/>
Related Prior Authorization Number:	<input type="text"/>
Service Type:	<input type="text"/>
Delay Reason:	<input type="text"/>
Denial Reason:	<input type="text"/>

[Save](#) [Save & New](#) [Cancel](#)

**Prior Authorization Number** *must* be entered after the request has been made and the Authorization Number is issued. A Municipality may not have this information while initially entering data in this page.

To select a **Service Authorization Number**, click **Search**  icon. **Select Service Authorization Number** page displays. Click **Select** link under **Action** column for correct Service Authorization

**Prior Authorization Certification Type** field indicates if the Prior Authorization request is **Initial**, **Renewal** or **Revised**.

**Related Prior Authorization Number** field captures any previously issued Authorization Number that may be useful when requesting additional authorization.

**Number of Authorized Visits** field should be used to capture the total number of visits authorized by Commercial Insurance, not the total number of authorized visits on the Service Authorization.

**Important Information**

- If a prior authorization is submitted and denied, the service should be recorded as a “service not covered”.  See *Services Not Covered* for further information.
- User subscribed to the Muni\_FiscalManager work queue will receive a Notification when the number of Authorized Visits minus the number of claimed visits reaches 3.

**Delay Reason** field captures the reason there was a delay in processing by Commercial Insurance.

**Denial Reason** field captures the denial if the Prior Authorization request is denied.

**Important Information**

If a Prior Authorization is required and submitted for and then denied, the service should then be entered under “Services Not Covered”.

Click **Save** button. **Prior Authorizations/Referrals** page displays.

OR

Click **Save & New** button to enter additional Prior Authorizations.

**Commercial Insurance Coverage – Create 278 Request**

**Important Information**

This feature has been temporarily disabled and is not currently operational.

## Commercial Insurance Coverage – New Primary Care Physician Referral

Once a service has been agreed to as appropriate for a child/family and the resulting Service Authorization is issued, the Municipality should enter any information into NYEIS regarding specific requirements to ensure coverage of services (e.g., an insurance company requires prior authorization or a Referral before they will agree to cover a service).

If the need for a New Primary Care Physician Referral for a service has been entered into NYEIS and a Service Authorization is created that requires a request for a Primary Care Physician Referral, the child’s Service Coordinator receives notification through a Task to request PCP Referral for the Child.

### Important Information

The Primary Care Physician Referral workflow task, called PCP Referral, is directed to the child’s Service Coordinator.  See **Appendix H** for further information about the workflow.

1. Search for the Child using the NYEIS search functionality.  See **Unit 1: Getting Started, Searching** for search instructions and tips.
2. Click **Reference Number** link in the Search Results for appropriate Child. **Child Homepage** displays.



**Child Homepage: Kevin Bondman - 500020** Edit Register Sibling

Child Information	
First Name:	Kevin
Middle Name:	
Last Name:	Bondman
Suffix:	

Contact	
Address:	ewr ert Albany (Albany) New York 10001
Phone Number:	518 333-0000

Child Information	
Child's Referral Date:	12/6/2010
Date of Birth:	12/1/2010
Calculated Age of Child:	0 Years, 0 Months
Ethnic Origin:	Not Hispanic or Latino
Child's Living Arrangement:	
Child's School District:	
Caregiver's Relationship:	

Race	
American Indian or Alaskan Native	

Family Information	
Mother's First Name:	Jill
Mother's Last Name:	
Mother's Date Of Birth:	
Mother's Dominant Language:	

3. Click **Insurance Coverage** from the Navigation Bar. **Commercial Insurance Coverage** page displays.

Commercial Insurance Coverage: Tiffany Martin-08 - 0108

Actions	Insurance Company	Policy Number	Effective From Date	Effective To Date	3rd Party Sequence
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Community Blue	101018	1/1/2009	12/31/2009	1
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Medicaid		1/1/2009	12/31/2009	95

[New Commercial Coverage](#) [New Medicaid Coverage](#) [Check Medicaid Eligibility](#)

4. Click **View** link under **Action** column for Commercial Insurance Coverage. **View Commercial Insurance Coverage** page displays.

View Commercial Insurance Coverage: Kevin Bondman - 500020

[Edit](#) [Delete](#) [Close](#)

Commercial Insurance Details	
Insurance Company Name:	Aetna Health 500 Broadway Albany (Albany) New York 12200
Insurance Company Address:	Aetna Health
Insurance Plan Name:	Yes
Plan Regulated by New York State:	No
Is Plan Child Health Plus?:	Parental Consent To Bill:
Insurance Sequence Number:	1
Insurance Type:	Commercial
Claim Filing:	Commercial Insurance
Subrogation Notice Date Sent:	12/15/2010
Is Plan Medicaid Managed Care?:	No

Policy Holder Details	
Policy Holder Name:	June Bondman
Policy Holder ID Number:	59494943

5. Click **Prior Authorizations/Referral** from the Navigation Bar. **Prior Authorizations/Referrals** page displays.

Prior Authorizations/Referrals: Fatima Smithwick - 3000010

BCBS - 30004

[New](#)

Service Details						
Action	Service Type	Method	QP	Prior Authorization Required	PCP Referral Required	Script Required
<a href="#">View</a> <a href="#">Edit</a>	Assistive Technology		Audiologist	Yes	No	No

[New Prior Authorization](#) [Create 278 Request](#)

Prior Authorizations					
Action	PA Number	SA Number	Insurance Company Name	Status	PA Service Type
<a href="#">View</a> <a href="#">Edit</a>	1018	41472	Empire Blue Cross Blue Shield		
<a href="#">View</a> <a href="#">Edit</a>	1083	274	Empire Blue Cross Blue Shield		
<a href="#">View</a> <a href="#">Edit</a>	101018	1025	Empire Blue Cross Blue Shield		

[New Primary Care Physician Referral](#)

Primary Care Physician Referrals		
Action	PCP Referral Number	SA Number
<a href="#">Delete</a>	23	1025

6. Click **New Primary Care Physician Referral** button. **Create Primary Care Physician Referral** page displays. **SA Number** and **PCP Referral Number** are *required* fields. **PCP Referral Number** may be the referring physicians NPI number.

Create Primary Care Physician Referral Fatima Smithwick - 3000010

**Details**

\*SA Number:

\*PCP Referral Number:

[Save](#) [Cancel](#)

- To select an **SA Number**, click **Search**  icon. **Select Service Authorization Number** page displays. Click **Select** link under **Action** column for correct Service Authorization Number. **Create Primary Care Physician Referral** page displays.
- Click **Save** button. **Prior Authorizations/Referrals** page displays.

## Viewing Prior Authorization / Referrals

### Commercial Insurance Coverage – View Service Details

- Search for the Child using the NYEIS search functionality.  See **Unit 1: Getting Started, Searching** for search instructions and tips.
- Click **Reference Number** link in the Search Results for appropriate Child. **Child Homepage** displays.



Child Homepage: Kevin Bondman - 500020

[Edit](#) [Register Sibling](#)

**Child Information**

First Name:	Kevin	Middle Name:	
Last Name:	Bondman	Suffix:	

**Contact**

Address:	ewr ert Albany (Albany) New York 10001	Phone Number:	518 333-0000
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**Child Information**

Child's Referral Date:	12/6/2010	Child's Case Status:	
Date of Birth:	12/1/2010	Gender:	Male
Calculated Age of Child:	0 Years, 0 Months	Birth Last Name:	
Ethnic Origin:	Not Hispanic or Latino	Child's Dominant Language:	
Child's Living Arrangement:		Municipality of Residence:	Albany
Child's School District:		Caregiver's Name (If other than parent):	
Caregiver's Relationship:		Date of Death:	

**Race**

American Indian or Alaskan Native

**Family Information**

Mother's First Name:	Jill	Mother's Last Name:	
Mother's Date Of Birth:		Mother's Dominant Language:	

- Click **Insurance Coverage** from the Navigation Bar. **Commercial Insurance Coverage** page displays.

Commercial Insurance Coverage: Tiffany Martin-08 - 0108 

**Coverage List**

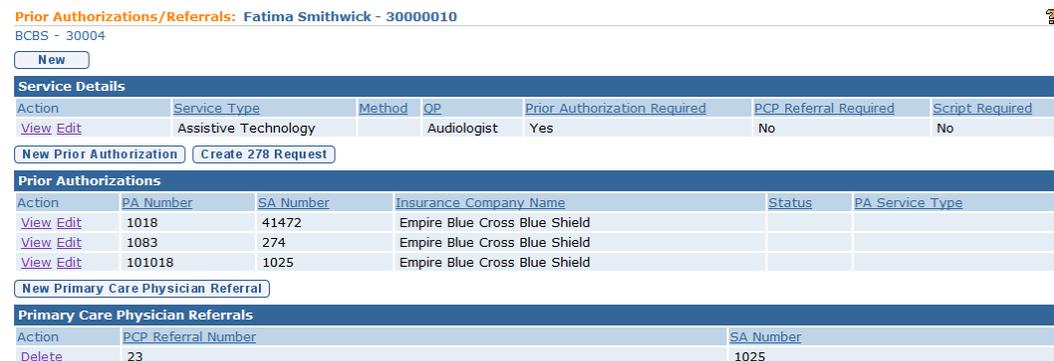
Actions	Insurance Company	Policy Number	Effective From Date	Effective To Date	3rd Party Sequence
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Community Blue	101018	1/1/2009	12/31/2009	1
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Medicaid		1/1/2009	12/31/2009	95

[New Commercial Coverage](#) [New Medicaid Coverage](#) [Check Medicaid Eligibility](#)

- Click **View** link under **Action** column for Commercial Insurance Coverage. **View Commercial Insurance Coverage** page displays.



5. Click **Prior Authorizations/Referral** from the Navigation Bar. **Prior Authorizations/Referrals** page displays.



6. Click **View** link under **Action** column for **Service Details**. **View PA / PCP Referral / Script Required** page displays.



7. Click **Close** button. **Prior Authorizations/Referrals** page displays.
8. Click **Home** from the Menu Bar. User Home Page displays.

## **Commercial Insurance Coverage – View Prior Authorization**

1. Search for the Child using the NYEIS search functionality. See **Unit 1: Getting Started, Searching** for search instructions and tips.
2. Click **Reference Number** link in the Search Results for appropriate Child. **Child Homepage** displays.

- Click **Insurance Coverage** from the Navigation Bar. **Commercial Insurance Coverage** page displays.

Commercial Insurance Coverage: Tiffany Martin-08 - 0108

Actions	Insurance Company	Policy Number	Effective From Date	Effective To Date	3rd Party Sequence
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Community Blue	101018	1/1/2009	12/31/2009	1
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Medicaid		1/1/2009	12/31/2009	95

[New Commercial Coverage](#) [New Medicaid Coverage](#) [Check Medicaid Eligibility](#)

- Click **View** link under **Action** column for Commercial Insurance Coverage. **View Commercial Insurance Coverage** page displays.

View Commercial Insurance Coverage: Kevin Bondman - 500020

**navigation**

- [Insurance Coverage](#)
- [Services Not Listed](#)
- [Prior Authorizations/Referrals](#)

**recent items**

- [Kevin Bondman - 500020](#)

**Commercial Insurance Details**

Insurance Company Name:	Aetna Health 500 Broadway Albany (Albany) New York 12200	Insurance Sequence Number:	1
Insurance Company Address:	Aetna Health	Insurance Type:	Commercial
Insurance Plan Name:	Aetna Health	Claim Filing:	Commercial Insurance
Plan Regulated by New York State:	Yes	Subrogation Notice Date Sent:	12/15/2010
Is Plan Child Health Plus?:	No	Is Plan Medicaid Managed Care?:	No
Parental Consent To Bill:			

**Policy Holder Details**

Policy Holder Name:	June Bondman	Policy Holder ID Number:	59494943
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- Click **Prior Authorizations/Referral** from the Navigation Bar. **Prior Authorizations/Referrals** page displays.

Prior Authorizations/Referrals: Fatima Smithwick - 3000010

BCBS - 30004

[New](#)

**Service Details**

Action	Service Type	Method	QP	Prior Authorization Required	PCP Referral Required	Script Required
<a href="#">View</a> <a href="#">Edit</a>	Assistive Technology		Audiologist	Yes	No	No

[New Prior Authorization](#) [Create 278 Request](#)

**Prior Authorizations**

Action	PA Number	SA Number	Insurance Company Name	Status	PA Service Type
<a href="#">View</a> <a href="#">Edit</a>	1018	41472	Empire Blue Cross Blue Shield		
<a href="#">View</a> <a href="#">Edit</a>	1083	274	Empire Blue Cross Blue Shield		
<a href="#">View</a> <a href="#">Edit</a>	101018	1025	Empire Blue Cross Blue Shield		

[New Primary Care Physician Referral](#)

**Primary Care Physician Referrals**

Action	PCP Referral Number	SA Number
<a href="#">Delete</a>	23	1025

- Click **View** link under **Action** column for specific **Prior Authorizations**. **View Prior Authorization** page displays.

**View Prior Authorization:** Fatima Smithwick - 3000010  
 BCBS - 30004

[Close](#) [Edit](#) [Delete](#)

Details	
Prior Authorization Number:	1018
Commercial Insurance Company Name:	Empire Blue Cross Blue Shield
Start Date:	1/1/2008
Prior Authorization Certification Type:	Initial
Status:	
Denial Reason:	
Service Authorization Number:	41472
Commercial Insurance Policy Number:	201
End Date:	6/1/2008
Related Prior Authorization Number:	
Delay Reason:	
Service Type:	

Services Used	
Number of Authorized Visits:	11
Number of Authorized Visits Remaining :	11
Number of Authorized Visits Used:	0

[Close](#) [Edit](#) [Delete](#)

7. Click **Close** button. **Prior Authorizations/Referrals** page displays.

## Editing Prior Authorization / Referrals

### Commercial Insurance Coverage – Edit Service Details

1. Search for the Child using the NYEIS search functionality. See **Unit 1: Getting Started, Searching** for search instructions and tips.
2. Click **Reference Number** link in the Search Results for appropriate Child. **Child Homepage** displays.
3. Click **Insurance Coverage** from the Navigation Bar. **Commercial Insurance Coverage** page displays.

**Commercial Insurance Coverage:** Tiffany Martin-08 - 0108

Coverage List					
Actions	Insurance Company	Policy Number	Effective From Date	Effective To Date	3rd Party Sequence
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Community Blue	101018	1/1/2009	12/31/2009	1
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Medicaid		1/1/2009	12/31/2009	95

[New Commercial Coverage](#) [New Medicaid Coverage](#) [Check Medicaid Eligibility](#)

4. Click **View** link under **Action** column for Commercial Insurance Coverage. **View Commercial Insurance Coverage** page displays.

**navigation**

- [Insurance Coverage](#)
- [Services Not Covered](#)
- [Prior Authorizations/Referral](#)

**recent items**

- [Kevin Bondman - 500020](#)

**View Commercial Insurance Coverage:** Kevin Bondman - 500020 [Edit](#) [Delete](#) [Close](#)

**Commercial Insurance Details**

Insurance Company Name:	Aetna Health 500 Broadway Albany (Albany) New York 12200	Insurance Sequence Number:	1
Insurance Company Address:		Insurance Type:	Commercial
Insurance Plan Name:	Aetna Health	Claim Filing:	Commercial Insurance
Plan Regulated by New York State:	Yes	Subrogation Notice Date Sent:	12/15/2010
Is Plan Child Health Plus?:	No	Is Plan Medicaid Managed Care?:	No
Parental Consent To Bill:			

**Policy Holder Details**

Policy Holder Name:	June Bondman	Policy Holder ID Number:	59494943
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- Click **Prior Authorizations/Referral** from the Navigation Bar. **Prior Authorizations/Referrals** page displays.

**Prior Authorizations/Referrals: Fatima Smithwick - 3000010** ?

BCBS - 30004

[New](#)

Service Details						
Action	Service Type	Method	QP	Prior Authorization Required	PCP Referral Required	Script Required
<a href="#">View</a> <a href="#">Edit</a>	Assistive Technology		Audiologist	Yes	No	No

[New Prior Authorization](#) [Create 278 Request](#)

Prior Authorizations					
Action	PA Number	SA Number	Insurance Company Name	Status	PA Service Type
<a href="#">View</a> <a href="#">Edit</a>	1018	41472	Empire Blue Cross Blue Shield		
<a href="#">View</a> <a href="#">Edit</a>	1083	274	Empire Blue Cross Blue Shield		
<a href="#">View</a> <a href="#">Edit</a>	101018	1025	Empire Blue Cross Blue Shield		

[New Primary Care Physician Referral](#)

Primary Care Physician Referrals		
Action	PCP Referral Number	SA Number
<a href="#">Delete</a>	23	1025

- Click **Edit** link under **Action** column for specific **Service Details**. **Modify PA / PCP Referral / Script Required** page displays.

**Modify PA / PCP Referral / Script Required** ?

Service Details	
Service Type:	Assistive Technology
Method:	
QP:	Audiologist
Prior Authorization Required:	<input checked="" type="checkbox"/>
Primary Care Physician Referral Required:	<input type="checkbox"/>
Script Required:	<input type="checkbox"/>

[Save](#) [Cancel](#)

- Apply necessary changes.
- Click **Save** button. **Prior Authorizations/Referrals** page displays.

### Commercial Insurance Coverage – Edit Prior Authorization

- Search for the Child using the NYEIS search functionality. See **Unit 1: Getting Started, Searching** for search instructions and tips.
- Click **Reference Number** link in the Search Results for appropriate Child. **Child Homepage** displays.
- Click **Insurance Coverage** from the Navigation Bar. **Commercial Insurance Coverage** page displays.

**Commercial Insurance Coverage: Tiffany Martin-08 - 0108** ?

Coverage List					
Actions	Insurance Company	Policy Number	Effective From Date	Effective To Date	3rd Party Sequence
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Community Blue	101018	1/1/2009	12/31/2009	1
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Medicaid		1/1/2009	12/31/2009	95

[New Commercial Coverage](#) [New Medicaid Coverage](#) [Check Medicaid Eligibility](#)

- Click **View** link under **Action** column for Commercial Insurance Coverage. **View Commercial Insurance Coverage** page displays.

**View Commercial Insurance Coverage: Kevin Bondman - 500020**

[Edit](#) [Delete](#) [Close](#)

**Commercial Insurance Details**

Insurance Company Name:	Aetna Health	Insurance Sequence Number:	1
Insurance Company Address:	500 Broadway Albany (Albany) New York 12200	Insurance Type:	Commercial
Insurance Plan Name:	Aetna Health	Claim Filing:	Commercial Insurance
Plan Regulated by New York State:	Yes	Subrogation Notice Date Sent:	12/15/2010
Is Plan Child Health Plus?:	No	Is Plan Medicaid Managed Care?:	No
Parental Consent To Bill:			

**Policy Holder Details**

Policy Holder Name:	June Bondman	Policy Holder ID Number:	59494943
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- Click **Prior Authorizations/Referral** from the Navigation Bar. **Prior Authorizations/Referrals** page displays.

**Prior Authorizations/Referrals: Fatima Smithwick - 3000010**

BCBS - 30004

[New](#)

**Service Details**

Action	Service Type	Method	QP	Prior Authorization Required	PCP Referral Required	Script Required
<a href="#">View</a> <a href="#">Edit</a>	Assistive Technology		Audiologist	Yes	No	No

[New Prior Authorization](#) [Create 278 Request](#)

**Prior Authorizations**

Action	PA Number	SA Number	Insurance Company Name	Status	PA Service Type
<a href="#">View</a> <a href="#">Edit</a>	1018	41472	Empire Blue Cross Blue Shield		
<a href="#">View</a> <a href="#">Edit</a>	1083	274	Empire Blue Cross Blue Shield		
<a href="#">View</a> <a href="#">Edit</a>	101018	1025	Empire Blue Cross Blue Shield		

[New Primary Care Physician Referral](#)

**Primary Care Physician Referrals**

Action	PCP Referral Number	SA Number
<a href="#">Delete</a>	23	1025

- Click **Edit** link under **Action** column for specific **Prior Authorizations**. **Modify Prior Authorization** page displays.

**Modify Prior Authorization: Tiffany Martin-08 - 0108**

[Save](#) [Cancel](#)

**Details**

Prior Authorization Number:		Status:	
*Start Date:	10/12/2009	*Service Authorization Number:	170300
*Prior Authorization Certification Type:	Initial	*End Date:	10/21/2009
Number of Authorized Visits:	0	Related Prior Authorization Number:	
Prior Authorization Service Type:	Surgical		
Delay Reason:			
Denial Reason:			

[Save](#) [Cancel](#)

- Apply necessary changes.
- Click **Save** button. **Prior Authorizations/Referrals** page displays.

**Important Information**

If claiming to the insurer has occurred, and the Prior Authorization information has changed, it is recommended that the existing prior Authorization record be end-dated and new Prior Authorization information is added.

**Deleting Prior Authorization / Referrals**

**Commercial Insurance Coverage – Delete Service Details Required**

1. Search for the Child using the NYEIS search functionality. See **Unit 1: Getting Started, Searching** for search instructions and tips.
2. Click **Reference Number** link in the Search Results for appropriate Child. **Child Homepage** displays.
3. Click **Insurance Coverage** from the Navigation Bar. **Commercial Insurance Coverage** page displays.

Commercial Insurance Coverage: Tiffany Martin-08 - 0108

Coverage List					
Actions	Insurance Company	Policy Number	Effective From Date	Effective To Date	3rd Party Sequence
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Community Blue	101018	1/1/2009	12/31/2009	1
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Medicaid		1/1/2009	12/31/2009	95

4. Click **View** link under **Action** column for Commercial Insurance Coverage. **View Commercial Insurance Coverage** page displays.

View Commercial Insurance Coverage: Kevin Bondman - 500020

Commercial Insurance Details	
Insurance Company Name:	Aetna Health
Insurance Company Address:	500 Broadway Albany (Albany) New York 12200
Insurance Plan Name:	Aetna Health
Plan Regulated by New York State:	Yes
Is Plan Child Health Plus?:	No
Parental Consent To Bill:	
Insurance Sequence Number:	1
Insurance Type:	Commercial
Claim Filing:	Commercial Insurance
Subrogation Notice Date Sent:	12/15/2010
Is Plan Medicaid Managed Care?:	No
Policy Holder Details	
Policy Holder Name:	June Bondman
Policy Holder ID Number:	59494943

5. Click **Prior Authorizations/Referral** from the Navigation Bar. **Prior Authorizations/Referrals** page displays.

**Prior Authorizations/Referrals: Fatima Smithwick - 3000010** ?

BCBS - 30004

[New](#)

Service Details						
Action	Service Type	Method	QP	Prior Authorization Required	PCP Referral Required	Script Required
<a href="#">View</a> <a href="#">Edit</a>	Assistive Technology		Audiologist	Yes	No	No

[New Prior Authorization](#) [Create 278 Request](#)

Prior Authorizations					
Action	PA Number	SA Number	Insurance Company Name	Status	PA Service Type
<a href="#">View</a> <a href="#">Edit</a>	1018	41472	Empire Blue Cross Blue Shield		
<a href="#">View</a> <a href="#">Edit</a>	1083	274	Empire Blue Cross Blue Shield		
<a href="#">View</a> <a href="#">Edit</a>	101018	1025	Empire Blue Cross Blue Shield		

[New Primary Care Physician Referral](#)

Primary Care Physician Referrals		
Action	PCP Referral Number	SA Number
<a href="#">Delete</a>	23	1025

- Click **View** link under **Action** column for specific **Service Details**. **View PA / PCP Referral / Script Required** page displays.

**View PA / PCP Referral / Script Required Fatima Smithwick - 3000010** ?

BCBS - 30004

Service Details			
Service Type:	Assistive Technology	Method:	
QP:	Audiologist	Prior Authorization Required:	Yes
Primary Care Physician Referral Required:	No	Script Required:	No

[Edit](#) [Delete](#) [Close](#)

- Click **Delete** button. **Confirm Delete that PA / PCP Referral / Script is Required** page displays with the message *Are you sure you want to delete this indicator that either a PA, PCP Referral or Prescription is required for this Child's Insurance Coverage?*

**Confirm Delete that PA / PCP Referral / Script is Required**

Are you sure you want to delete this indicator that either a PA, PCP Referral or Prescription is required for this Child's Insurance Coverage?

[Yes](#) [No](#)

- Click **Yes** button. **Prior Authorizations/Referrals** page displays.

### Commercial Insurance Coverage – Delete Prior Authorization

- Log in to NYEIS. User Home Page displays.
- Click **Child** link in **Search** section. **Child Search** page displays.
- Type all known information in **Search Criteria** section. Click **Search** button. Records matching display in **Search Results** section. *To search again, click **Reset** button.*

4. Click **Reference Number** link for appropriate Child. **Child Homepage** displays.
5. Click **Insurance Coverage** from the Navigation Bar. **Commercial Insurance Coverage** page displays.

Commercial Insurance Coverage: Tiffany Martin-08 - 0108 ?

BCBS - 30004

[New](#)

Actions	Insurance Company	Policy Number	Effective From Date	Effective To Date	3rd Party Sequence
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Community Blue	101018	1/1/2009	12/31/2009	1
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Medicaid		1/1/2009	12/31/2009	95

[New Commercial Coverage](#) [New Medicaid Coverage](#) [Check Medicaid Eligibility](#)

6. Click **View** link under **Action** column for Commercial Insurance Coverage. **View Commercial Insurance Coverage** page displays.

View Commercial Insurance Coverage: Kevin Bondman - 500020 Edit Delete Close

Commercial Insurance Details	
Insurance Company Name:	Aetna Health
Insurance Company Address:	500 Broadway Albany (Albany) New York 12200
Insurance Plan Name:	Aetna Health
Plan Regulated by New York State:	Yes
Is Plan Child Health Plus?:	No
Parental Consent To Bill:	
Insurance Sequence Number:	1
Insurance Type:	Commercial
Claim Filing:	Commercial Insurance
Subrogation Notice Date Sent:	12/15/2010
Is Plan Medicaid Managed Care?:	No
Policy Holder Details	
Policy Holder Name:	June Bondman
Policy Holder ID Number:	59494943

7. Click **Prior Authorizations/Referral** from the Navigation Bar. **Prior Authorizations/Referrals** page displays.

Prior Authorizations/Referrals: Fatima Smithwick - 3000010 ?

BCBS - 30004

[New](#)

Actions	Service Type	Method	QP	Prior Authorization Required	PCP Referral Required	Script Required
<a href="#">View</a> <a href="#">Edit</a>	Assistive Technology		Audiologist	Yes	No	No

[New Prior Authorization](#) [Create 278 Request](#)

Actions	PA Number	SA Number	Insurance Company Name	Status	PA Service Type
<a href="#">View</a> <a href="#">Edit</a>	1018	41472	Empire Blue Cross Blue Shield		
<a href="#">View</a> <a href="#">Edit</a>	1083	274	Empire Blue Cross Blue Shield		
<a href="#">View</a> <a href="#">Edit</a>	101018	1025	Empire Blue Cross Blue Shield		

[New Primary Care Physician Referral](#)

Actions	PCP Referral Number	SA Number
<a href="#">Delete</a>	23	1025

8. Click **View** link under **Action** column for specific **Prior Authorizations**. **View Prior Authorization** page displays.

**View Prior Authorization: Fatima Smithwick - 3000010**

BCBS - 30004

Close

Edit

Delete

Details			
Prior Authorization Number:	1018	Service Authorization Number:	41472
Commercial Insurance Company Name:	Empire Blue Cross Blue Shield	Commercial Insurance Policy Number:	201
Start Date:	1/1/2008	End Date:	6/1/2008
Prior Authorization Certification Type:	Initial	Related Prior Authorization Number:	
Status:		Delay Reason:	
Denial Reason:		Service Type:	
Services Used			
Number of Authorized Visits:	11	Number of Authorized Visits Used:	0
Number of Authorized Visits Remaining :	11		

Close

Edit

Delete

9. Click **Delete** button. **Delete Prior Authorization** page displays with the message *Are you sure you want to delete this prior authorization?*

**Delete Prior Authorization: Fatima Smithwick - 3000010**

Are you sure you want to delete this prior authorization?

Yes

No

10. Click **Yes** button. **Prior Authorizations/Referrals** page displays.

**Important Information**

If claiming to the insurer has occurred, and the Prior Authorization information has changed, it is recommended that the existing prior Authorization record be end-dated and new Prior Authorization information is added.

**Commercial Insurance Coverage – Delete Primary Care Physician Referral**

1. Log in to NYEIS. User Home Page displays.
2. Click **Child** link in **Search** section. **Child Search** page displays.
3. Type all known information in **Search Criteria** section. Click **Search** button. Records matching display in **Search Results** section. *To search again, click **Reset** button.*
4. Click **Reference Number** link for appropriate Child. **Child Homepage** displays.
5. Click **Insurance Coverage** from the Navigation Bar. **Commercial Insurance Coverage** page displays.

**Commercial Insurance Coverage: Tiffany Martin-08 - 0108** ?

Coverage List					
Actions	Insurance Company	Policy Number	Effective From Date	Effective To Date	3rd Party Sequence
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Community Blue	101018	1/1/2009	12/31/2009	1
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Prior Auth</a>	Medicaid		1/1/2009	12/31/2009	95

- Click **View** link under **Action** column for Commercial Insurance Coverage. **View Commercial Insurance Coverage** page displays.

**View Commercial Insurance Coverage: Kevin Bondman - 500020** Edit Delete Close

Commercial Insurance Details	
Insurance Company Name:	Aetna Health
Insurance Company Address:	500 Broadway Albany (Albany) New York 12200
Insurance Plan Name:	Aetna Health
Plan Regulated by New York State:	Yes
Is Plan Child Health Plus?:	No
Parental Consent To Bill:	
Insurance Sequence Number:	1
Insurance Type:	Commercial
Claim Filing:	Commercial Insurance
Subrogation Notice Date Sent:	12/15/2010
Is Plan Medicaid Managed Care?:	No

Policy Holder Details	
Policy Holder Name:	June Bondman
Policy Holder ID Number:	59494943

- Click **Prior Authorizations/Referral** from the Navigation Bar. **Prior Authorizations/Referrals** page displays.

**Prior Authorizations/Referrals: Fatima Smithwick - 3000010** ?

BCBS - 30004

Service Details						
Action	Service Type	Method	QP	Prior Authorization Required	PCP Referral Required	Script Required
<a href="#">View</a> <a href="#">Edit</a>	Assistive Technology		Audiologist	Yes	No	No

Prior Authorizations					
Action	PA Number	SA Number	Insurance Company Name	Status	PA Service Type
<a href="#">View</a> <a href="#">Edit</a>	1018	41472	Empire Blue Cross Blue Shield		
<a href="#">View</a> <a href="#">Edit</a>	1083	274	Empire Blue Cross Blue Shield		
<a href="#">View</a> <a href="#">Edit</a>	101018	1025	Empire Blue Cross Blue Shield		

Primary Care Physician Referrals		
Action	PCP Referral Number	SA Number
<a href="#">Delete</a>	23	1025

- Click **Delete** link under **Action** column for specific **Primary Care Physician Referrals**. **Delete PCP Referral** page displays with the message *Are you sure you want to delete this Primary Care Physician Referral?*

**Delete PCP Referral**

Do you want to delete this Primary Care Physician Referral?

- Click **Yes** button. **Prior Authorizations/Referrals** page displays.

**Note:**

- **Primary Care Physician Referrals** *cannot* be edited. They can *only* be deleted once created.

**Generating Subrogation Letters****Important Information**

This feature is no longer active in NYEIS

**Viewing and Printing Subrogation Letters****Important Information**

This feature is no longer active in NYEIS

**SURVEYS****Exception**

Currently not available to all NYEIS User roles.

This feature can be used to complete certain State Surveys in NYEIS. Surveys are associated with each Child's Integrated Case. Instead of paper surveys, NYEIS Users may respond to a State Survey for all or a sample of children using NYEIS. Surveys are posted to NYEIS by the State Administrator. When the feature is being used to conduct a survey or collect needed data, a link from the Child's Integrated Case 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.

**Important Information**

This feature is currently not being used for Child and Family outcomes.

**Taking Surveys**

1. Display Child Home Page.  Refer to **Unit 1: Getting Started, Displaying Child Home Page** for further information.

**Child Homepage: Tiffany Martin-153 - 129** Edit Register Sibling

Child Information	
First Name:	Tiffany
Middle Name:	
Last Name:	Martin-153
Suffix:	

Contact	
Address:	900 Main St Albany New York
Phone Number:	518 555-1212

Child Information	
Child's Referral Date:	5/12/2009
Date of Birth:	10/5/2008
Calculated Age of Child:	1 Years
Ethnic Origin:	Not Hispanic or Latino
Child's Living Arrangement:	Parent
Child's School District:	
Caregiver's Relationship:	Grandfather or Grandmother
Child's Case Status:	
Gender:	Female
Birth Last Name:	
Child's Dominant Language:	
Municipality of Residence:	Albany
Caregiver's Name (If other than parent):	
Date of Death:	

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

**Surveys: Jim Tarey - 30000087** ?

Completed Surveys			
Action	Survey Name	Date Completed	
Available Surveys			
Action	Name	Start Date	End Date
<a href="#">View</a>	Lou's EI Entry Survey	1/19/2009	1/19/2009
<a href="#">View</a>	Child's Outcome Entry Survey	1/15/2009	1/15/2009
<a href="#">View</a>	2008 Child Outcome Entry Summary	1/16/2009	1/16/2009
<a href="#">View</a>	Outcome Entry Summary Form	1/20/2009	12/31/2009
<a href="#">View</a>	Outome Exit Summary Form	1/20/2009	12/31/2009
<a href="#">View</a>	quote survey		2/9/2009
<a href="#">View</a>	EI Outcome Entry Survey	1/19/2009	1/19/2009

3. Click **View** link under **Action** column for Survey to complete from **Available Surveys** section. **View Survey Definition** page displays.

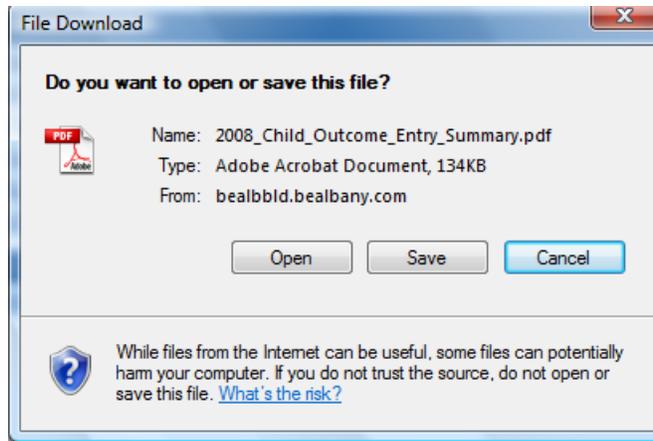
**View Survey Definition** Edit

Survey Details	
Current Survey:	<a href="#">2008 Child Outcome Entry Summary</a>
Participants:	Children and Family
Start Date:	1/16/2009
End Date:	1/16/2009
Date to end Data Capture:	12/31/2009
Survey Status:	inactive

Survey Description	
Description:	Child Outcome Entry Summary Form

Edit

4. Click **Current Survey** link from **Survey Details** section. **File Download** dialog box displays.



5. Click **Open** button. Survey opens in Adobe Reader or Adobe Acrobat.

Please fill out the following form. You cannot save data typed into this form.  
Please print your completed form if you would like a copy for your records.

New York State Department of Health - Early Intervention Program  
Child Outcomes ENTRY Summary Form

Please Write Legibly

*The ENTRY CHILD OUTCOMES SUMMARY FORM IS COMPLETED FOR CHILDREN IN OUTCOME COHORTS WHO ARE ELIGIBLE FOR THE EIP. The form should be completed at the IFSP team meeting to develop the INITIAL IFSP. Thank you for helping us to meet this Federal reporting requirement!*

1. Date Completed:  2. Child's Name:

3. Child's Date of Birth:  4. Child's Sex:  M  F 5. County/Borough/Residence:

6. IFSP Team Members: Check all members who participated and completed this form. If individual forms are being completed by each participant, please check only the box for the participant completing *this* form:  
 Parent(s)  Evaluator(s)  EIO/D  Service Coordinator  Service Provider(s)  Other:

7. Please rate the child's *STATUS* in each of the three functional areas, by selecting the number which *BEST DESCRIBES THE CHILD'S CURRENT BEHAVIORS AND SKILLS*:

7A. To what extent does this child show **POSITIVE SOCIAL EMOTIONAL SKILLS (INCLUDING RELATIONSHIPS)**, APPROPRIATE FOR HIS OR HER AGE and ACROSS A VARIETY OF SETTINGS AND SITUATIONS?

7B. To what extent does this child **ACQUIRE AND USE KNOWLEDGE AND SKILLS** APPROPRIATE FOR HIS OR HER AGE and ACROSS A VARIETY OF SETTINGS AND

6. Complete Survey by filling in responses.

### Important Information

Surveys can only be completed once. Surveys can not be deleted or edited once a Survey is submitted.

After completing, *do not* select **File, Save As** to save on local drive. Surveys *must* be saved to the NYEIS database both for the State to use the results and to ensure confidentiality of the Child data within a secure location.

7. Click **Submit** button. *Submit successful* message displays.
8. **Close** message dialog box. **Close** Adobe Reader or Adobe Acrobat. Survey displays under **Completed Surveys** section on **Surveys** page.