NYEIS Quick Reference Guide

User Role Account Creation Process for Rendering Providers who are also Service Coordinators

A user account can be created for a Rendering Provider who provides EI services (such as Physical Therapy services) and also provides Service Coordination. The individual’s NYEIS user account can be set-up such that the user can; be assigned as the rendering provider to provide general services associated with their Qualified Profession / License, and view/access all of their assigned children and also be assigned as a child’s Service Coordinator.

- In order for an individual to be assignable as a service coordinator for any agency they work for, they must be assigned a User Role of PROV_ServiceCoordinator, have a User Type of Service Coordinator, and have the Provider Name field associated with their name.

- The individual must have the associated License and Professional Discipline/Qualified Personnel information recorded on their provider home page.

- The individual must also be registered on the Provider Employees/Contractors page of each agency that the individual will provide Service Coordination and/or render services for.

After all of these conditions are met, the individual will be:

- assignable as the Service Coordinator on any Service Coordination Service Authorization when the agency that the individual is employed/contracted by is selected as the Provider of Record for the SA.

- assignable as the Rendering Provider on any general Service Authorization when the agency that the individual is employed/contracted by is selected as the Provider of Record for the SA.

Municipal Steps for creating a Provider User Account for a Rendering Provider that delivers EI services (such as Physical Therapy services) and who also provides Service Coordination.

1. Display User Home page.

2. Confirm that the individual is a registered provider by clicking the Service Provider link in the Search cluster of the User Home page.

3. Confirm that the individual currently does not have a User Account by performing a User Search.
4. If the individual does not have a User Account, click **Create User** link from *My Shortcuts* section of the *User Home* page. **Create User** page displays.

5. Use the **Tab** key to navigate from field-to-field to enter information in the **Details** section. Follow the guidelines below for the specified field.

   - **First Name** – use individual’s full first name.
   - **Last Name** – use individual’s full last name.
   - **Location** - click **Search** icon and select ‘The State’. This is the default option.
   - **Municipality** – select the ‘Statewide’ option.
   - **User Type** - select the *‘Service Coordinator’* option.
   - **Provider Name** - search and select the individual’s name.
The following table summarizes the data that should be entered

<table>
<thead>
<tr>
<th>User Being Added</th>
<th>User Type</th>
<th>Municipality</th>
<th>Provider Name</th>
<th>User Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Coordinator / Rendering Provider</td>
<td>Service Coordinator</td>
<td>Statewide</td>
<td>Select the individuals name</td>
<td>PROV_Service Coordinator</td>
</tr>
</tbody>
</table>

- **Languages** – select one or more languages. To select multiple languages, press the Ctrl (Control) key and select each language.
- **Contact** – at a minimum, record the individual’s Business Phone Number.
- **User Name** – record the individual’s Health Commerce System (HCS) user name. **The spelling and character case must match exactly.** For example, ‘HCS222’, ‘hcs222’, and ‘Hcs222’ are each interpreted differently by the system. If the NYEIS User Name does not match exactly the HCS username, the individual will be prevented from logging in to NYEIS.
- **Role Name** – select the **PROV_Service Coordinator** role by clicking the Search icon. The User Roles pop-up page displays.
- **Password** and **Confirm Password** – the Password and Confirm Password fields are required to complete the User Account creation process. However the user is not required to enter a password when logging into NYEIS. **Do not record the individual’s HCS password!** Use the default word ‘password’ in each field.

6. Click **Save** button. The User Account is created. **User Home** page displays. To cancel operation and return to previous page, click **Cancel** button on **Create User** page.

**Agency Provider Steps needed in order for the municipality to create a Provider User Account for a Rendering Provider that delivers EI services (such as Physical Therapy services) and who also provides Service Coordination.**

The agency provider must add the service coordinator/rendering provider to their agency employee/contractor list. The individual must also be registered on the Provider Employees/Contractors page of each agency that the individual will provide Service Coordination and/or render services for.

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

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

• The Create an Employee feature does not create a NYEIS user account for the individual. The municipality must be contacted in order to have a NYEIS user account created for the individual.

1. Display Provider Home page. See My Provider Homepage section for information.
2. **Employees/Contractors** from the Navigation Bar. **Employees / Contractors** page displays for the current Provider.

<table>
<thead>
<tr>
<th>Action</th>
<th>Name</th>
<th>Profession/OE</th>
<th>Employment Type</th>
<th>Service Coordinator</th>
<th>SSN #</th>
<th>First Date</th>
<th>To Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Amy Dennis</td>
<td>Pediatrician</td>
<td>Contractor</td>
<td>No</td>
<td>4567</td>
<td>6/20/2011</td>
<td></td>
</tr>
<tr>
<td>View</td>
<td>Carol Fritz</td>
<td>Occupational</td>
<td>Employee</td>
<td>Yes</td>
<td>3251</td>
<td>8/1/2011</td>
<td></td>
</tr>
<tr>
<td>View</td>
<td>Carter, Melanie</td>
<td>Vision Certified Low Vision Specialist (ACREP)</td>
<td>Employee</td>
<td>No</td>
<td>454563</td>
<td>1/2/2011</td>
<td></td>
</tr>
<tr>
<td>View</td>
<td>Cranberry, Angela</td>
<td>Teacher of Students with Disabilities (6th - Grade 2)</td>
<td>Employee</td>
<td>No</td>
<td></td>
<td>8/4/2011</td>
<td></td>
</tr>
<tr>
<td>View</td>
<td>Andy, Jim</td>
<td>Teacher of Special Education</td>
<td>Employee</td>
<td>No</td>
<td>4/1/2011</td>
<td>3/31/2014</td>
<td></td>
</tr>
<tr>
<td>View</td>
<td>Deborah Yen</td>
<td>Occupational Therapist</td>
<td>Employee</td>
<td>No</td>
<td>2560</td>
<td>1/3/2011</td>
<td>12/31/2012</td>
</tr>
<tr>
<td>View</td>
<td>Thompson, Tina</td>
<td>Licensed Practical Nurse</td>
<td>Employee</td>
<td>No</td>
<td>8978699</td>
<td>6/10/2012</td>
<td></td>
</tr>
</tbody>
</table>

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

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

**Important Information**

Conducting a thorough provider search is very important. If a record already exists for a provider and you fail to find it, you will accidentally create a second record. A second record will cause the provider to not be assignable on Service Authorizations or prevent them from receiving tasks associated with the services provided to children.
Click

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

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

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

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

The NPI (National Provider Identification) is required. The License/Certification Number fields may or may not be required; it depends upon the Profession that is selected in the Primary Professional Information cluster.
Select the **Service Coordination** option in the **Profession** drop-down and record the provider’s QP License/Certification number.

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

8. If the provider’s record is complete, click the **Register New Employee** button. The **Register Employee** page displays with the question *Are you sure you want to register this employee?* Click **Yes** to complete the registration, or **No**. If **No** is selected the record will be saved to the **Pending Employee List** page.

The individual is now listed on the employee/contractor page for the agency. The user will be listed on the employee/contractor page twice. The user will be listed as qualified personnel and as a service coordinator for the agency. This will allow the user to be selected as a rendering provider on a service authorization and on a service coordination service authorization. The provider submits a request to the municipality to add a NYEIS user with the user type of Service Coordinator.

**Important Information:**
When the service coordinator/rendering provider clicks the "My Provider Homepage link", the individual providers homepage displays, not the home page of any agency that s/he is employed or contracted by. Clicking on the “My Cases” link displays all children that the individual has been assigned as Service Coordinator. It does not display children that have been assigned to render a service (such as Physical Therapy) for. In order to access the records of children assigned to render a service for, the individual performs a child search and can search by the child’s name, or use the wildcard character (%) to list all children that the provider is the rendering provider for.