USER GUIDE / TRAINING MANUAL

NHEASY
GATEWAY TO SERVICES

TABLE OF CONTENTS

Welcome to the NH EASY User Guide!

About This Guide

This NH EASY User Guide is designed to assist the Area Agencies in navigating the system functionality to complete Individuals receiving services in New Hampshire.

- ➢ Individual supports and services related activities include detailed Process and Steps to complete system functionality.
- ➢ Screen and Dashboard visuals (labeled as Figures) will provide a summary of system functionality and navigation options.
- ➢ You may also refer to the Appendix, which includes frequently used dashboards / screens for processes completed in NH EASY.

Access to NH EASY

- ➢ Access to the NH EASY system is needed to complete the actions in this user guide.
- ➢ Obtain your username and password. Contact your AA Administrator to assist with user access.
- ➢ URL / Application : https://nheasy.nh.gov/#/

Help / General Navigation

- ➢ Hovering over an icon will expose a tool tip describing the action icon (e.g**., Initiate New Intake, Initiate Functional Screen, Launch Registry**).
- ➢ There will be a ❓ HELP on every page of the NH EASY application that helps the user to easily interact with the page
- ➢ Required fields are identified in the system by a * red asterisk
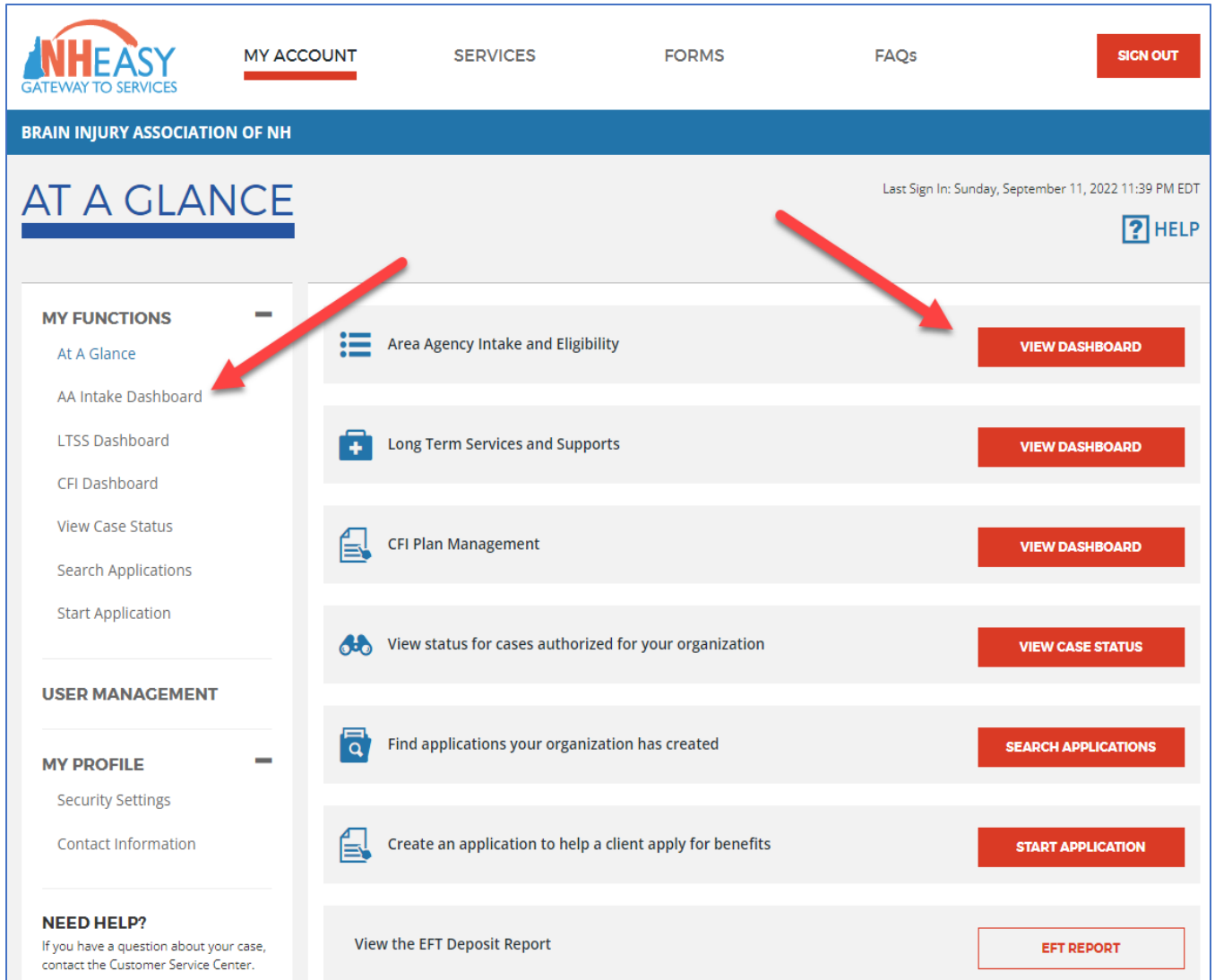
Section 1 : AA Intake Dashboard

1.1 Navigating to the AA Intake Dashboard

The **AA Intake Dashboard** serves as the gateway by which **Area Agencies (AA)** can access all Intake and Eligibility functionality available within the NH EASY application.

The **AA Intake Dashboard** serves as a summary page for the AA workers to access, track and manage tasks that are associated with their specific organization. AA workers can review, create and search for open activities as well as access information about their clients/individuals.

The **AA Intake dashboard** layout includes five activity-specific grids, drop-downs to create and search for activities, and sections to upload stand-alone documents, view upload history, import/export bulk data from the Area Agencies' internal systems to NH EASY, and view import history.

1. Upon initial log-in by the AA workers, NH EASY will display the **'At A Glance'** screen as the landing page.
2. To navigate to the **AA Intake Dashboard** after logging into the system, **'Select'** the **View Dashboard** button located within the *Area Agency Intake and Eligibility* banner at the center of the screen.

FIGURE 1 : NAVIGATING TO THE AA INTAKE DASHBOARD

From any other location within NH EASY, AA workers can also access **the AA Intake Dashboard** through the 'AA Intake Dashboard' link located below the My Functions header as shown above.

Also, the **AA Intake Dashboard** will be accessible from any Intake function screens with NH EASY by selecting the **'Back to the AA Intake Dashboard'** link at the top of each screen.

1.2 Using the Dashboard Data Grids

On the **AA Intake Dashboard** under the *Open Activities* header, there are five activity-specific grids titled **Initial Intakes, Intakes by Age, Registry Services, Correspondence** and **Transfers**. Each grid is populated with all the corresponding activities that are involved in that specific process. Any activity that requires an action by the logged in Area Agency is marked with a *red

asterisk. The grids display information for the Area Agency as a whole and are not AA worker-specific.

The columns in the grids represent the total number of days the activity has been pending, or in the case of the Registry Services grid, whether the service estimate approval is overdue, pending within the next 12 months, or beyond 12 months (as determined by the Date Services Needed). The rows represent the status of the activity, or in the case of the Correspondence grid, the activity type, and in the case of the Intakes by Age grid, the intake counts by the individual's age range. The counts in each grid are hyperlinks. When selected, the corresponding search screen displays, populated with all the activities that meet the criteria selected.

The sections below provide an in-depth explanation of the layouts of each grid and how to use the information provided to efficiently identify and access activities.

1.2.1 Using the Initial Intakes Grid

The **Initial Intakes** grid is in the top left corner of the **AA Intake Dashboard** under the *Open Activities* header. Intakes are considered "Initial" if individuals are newly established and being determined for 171A eligibility by the Area Agencies and waiver eligibility by the BDS unit.

Every step involved in the intake process is reflected by an intake status, which are listed in the 'Initial Intakes' grid on the **AA Intake Dashboard** for intake progress tracking. The grid displays the intakes grouped by status and the total number of days elapsed since the intake moved into a certain status.

Through this grid, area agencies can view intakes that are managed by their organization and are in progress, as well as intakes that were completed in the last 90 days. Any intake that is in progress and has not had a status updated in the last 90 days will be rolled off from this grid, however, AA workers can always locate those intakes from the **Search Existing Activities - Intake** function available on the **AA Intake Dashboard.**

NEW HAMPSHIRE DEPARTMENT OF HEALTH AND HUMAN SERVICES   INTEGRATION   1-844-ASK-DHHS

NHEASY GATEWAY TO SERVICES

MY ACCOUNT   SERVICES   FORMS   FAQs   SIGN OUT

NORTHERN HUMAN SERVICES

AA INTAKE DASHBOARD

Last Sign In: Monday, November 21, 2022 10:22 AM EST

? HELP

MY FUNCTIONS —

At A Glance

AA Intake Dashboard

LTSS Dashboard

CFI Dashboard

Manage Cases

View Case Status

Search Presumptive

Start Presumptive

Search Applications

Start Application

MY PROFILE —

Security Settings

NEED HELP?
If you have a question about your case, contact the Customer Service Center.

📞 1-844-ASK-DHHS
(1-844-275-3447)

LTSS QUESTIONS?
If you have a question about long term services and supports, contact the LTSS Unit.

📞 1-844-ASK-DHHS

Open Activities

INITIAL INTAKES   Count By Calendar Days

	0-5	6-30	31-90	No MA ⓘ
* AA Eligibility Info Pending	4	7	27	23
* Diagnosis Info Pending	3	4	9	14
* Functional Screen Pending	0	1	13	7
Functional Screen In Progress	4	3	20	16
Awaiting LOC Determination	1	10	8	9
* More Info Needed	0	0	12	0
Level Of Care Met	0	0	0	0
* Registry Creation Pending	1	2	8	4
* Service Creation Pending	1	1	4	1
Service Creation In Progress	0	1	2	2
Draft Acceptance Pending	0	1	7	3
* Projected Start Date Pending	0	2	3	1
Medicaid Approval Pending	0	1	0	0
Intake Complete	0	5	4	1

INTAKES BY AGE   Inactive for over 90 Days

	Count
Age 16-17 *	4
Age 18-19 *	7
Age 20-21 *	4

REGISTRY SERVICES   Count by Months (against DSN)

	Overdue	0-3	4-6	7-12	Future
* Draft	127	8	0	2	7
* More Info Needed From AA	11	0	0	0	1
Awaiting LOC Determination	123	24	2	4	0
Draft Acceptance Pending	● 217	68	4	5	1
Draft Not Accepted	14	4	0	1	1
* Projected Start Date Pending	31	6	0	0	0
Draft Accepted	122	12	4	2	1

CORRESPONDENCE   Count By Calendar Days

	0-5	6-10	11-14	>14
General	0	0	0	8
Eligibility	1	0	0	6
Functional Screen	1	0	0	0
Registry	1	0	0	2
Documentation	1	0	0	3
Other	1	0	0	0

TRANSFERS

	Count
Incoming Pending*	3
Outgoing Pending	21
Accepted ⓘ	18
Rejected ⓘ	17

Create new activity
Select Activity Type ⌄   ADD

Search existing activities
Select Activity Type ⌄   SEARCH

📄 Need to submit documents without creating an activity?   UPLOAD DOCUMENTS

📁 Need to view uploaded documents?   UPLOAD HISTORY

FIGURE 2 : AA INTAKE DASHBOARD : GRIDS

1.2.2 Using the Intakes by Age Grid

The **Intakes by Age** grid is located under the Initial Intakes grid of the **AA Intake Dashboard**. Initial Intake records are listed in this grid for individuals aged 16 to 21 whose intake status has not been updated in the last 90 days. Intakes that were inactive for the last 90 days will be rolled off from the Initial Intakes grid and will appear in the Intakes by Age grid if they belong to individuals aged 16 to 21. The columns in this grid consist of the total count of individual records in the age bands listed in each row. The rows in this grid consist of three age bands which will be used to track the ages of individuals in relation to the intake process. The following age bands will be displayed in this grid:

- **Ages 16-17**
- **Ages 18-19**
- **Ages 20-21**

Selecting a hyperlinked value within this grid redirects the user to the intake search results screen, which will be populated with the parameters selected from the dashboard and the resulting records displayed.

1.2.3 Using the Registry Services Grid

The Registry Services grid is located to the right of the Initial Intakes grid under the **Open Activities** header on the **AA Intake Dashboard**. This grid allows AA workers to track all activities related to the registry service draft acceptance process and displays services by *Status* and *Count by Months against Date Services Needed (DSN)*.

The Columns in this grid represent the Count by Months (against DSN) and consists of specific timeframes that will be used to group and track services with an upcoming date of need by comparing the DSN of a service to the current system month.

The *Count by Months* tracks the amount of time that has elapsed between the current system month and the DSN month. Month 0 is calculated as the current system month, Month 1 is the next system month, and so on. The time frames in this grid are:

- **Overdue**: This will list the count of services that are overdue. A service record is considered overdue if the current system month has passed the DSN month.
- **0-3**: This will list the count of services where the DSN falls in the next 3 months from the current system month.
- **4-6**: This will list the count of services where the DSN falls between 4 months plus the current system month and less than or equal to 6 months plus the current system month.

- **7-12:** This will list the count of services where the DSN falls between 7 months plus the current month and less than or equal to 12 months plus the current system month.
- **Future:** This will list the count of services where the DSN is greater than 12 months from the current system month.

The rows in this grid will be used to track the lifecycle of the *'Registry Service Draft Acceptance'* process. Not all the **Registry Service : Statuses** will be represented on the dashboard. Statuses that require Area Agency action will have a *red asterisk* next to them.

The following statuses will be displayed in this grid:

- Draft
- More Info Needed from AA
- Awaiting LOC Determination
- Draft Acceptance Pending
- Draft Not Accepted
- Projected Start Date Pending
- Draft Accepted

Selecting a hyperlinked value within the Count by Months section of the grid redirects the user to the **Service Search Results** screen, which will be populated with the parameters selected from the dashboard and the resulting records displayed.

1.2.4 Using the Correspondence Grid

The Correspondence grid is located just below the Registry Services grid under the **Open Activities** header of the **AA Intake Dashboard**. Through the Correspondence grid, the AA worker will be able to access all open correspondences that have been sent by the BDS Unit.

NOTE: This grid only takes into consideration correspondences that have been sent to the AA worker by the BDS Unit. Any message that has been sent to the BDS Unit by the AA can only be accessed using the Search functionality.

The rows in the Correspondence grid are grouped by type to help categorize the various communication exchanges that occur between Area Agencies and the BDS Unit, making messages easier to find and manage. The Count by Days columns on the Correspondence grid displays the length of time a specific unprocessed correspondence has been in the system. On the day a correspondence is initiated, the days counter will start until a response is made.

For a complete list of correspondence types, their significance, and a detailed explanation of correspondence features, see **Section 6 : Correspondence**.

1.2.5 Using the Transfers Grid

The Transfers grid is located just below the Correspondence Grid under the **Open Activities** header of the **AA Intake Dashboard**. The Transfers grid allows AA workers to track the progress of an individual transfer between two Area Agencies. The columns in this grid will have the total count of transfer records by its status. The rows in this grid will consist of Transfer statuses that will be used to track the lifecycle of the individual transfer process between the agencies. Statuses that require an action by the logged in agency will have a red asterisk next to the pending status.

The following statuses will be displayed in this grid:

- *Incoming Pending*
- *Outgoing Pending*
- *Accepted*
- *Rejected*

Statuses involved in the transfer process include both incoming and outgoing transactions. The Pending status is separated as *'Incoming Pending'* vs. *'Outgoing Pending'*, as the logged in agency will have to accept a transfer, which is an action that needs to be taken on a record by the AA workers. Outgoing transfers will be an informational record as a reminder that the logged in agency has successfully initiated the transfer and is waiting for the receiving agency to accept the individual. For the records in *'Accepted'* & *'Rejected' status*, the logged in agency will not have a specific action that needs to be taken on those records in the **Transfer screen**. Selecting a hyperlinked value within this grid redirects the user to the **Transfer Search : results screen**, which will be populated with the parameters selected from the dashboard and the resulting records displayed. For more details about transfer functionality, please refer to **Section 3 : Transfers**.

1.3 Creating New Activities

In addition to the five activity-specific data grids on the Dashboard, Area Agencies will have the ability to create new activities and submit them to the BDS Unit through the **'Create New Activity'** dropdown.

By selecting the dropdown menu, an Area Agency can generate the following activities for the individual they are currently managing/planning to manage:

- **Intake:** This selection will allow users to initiate a new Intake for an individual they manage. Once selected, the **'Add'** button will be enabled. When clicked, the user will be navigated to the **Individual Lookup screen**.

- **Functional Screen:** This selection will allow users to initiate a new functional screen for an individual they manage. Once selected, the *'Add'* button will be enabled. When clicked, the user will be navigated to the **Individual Lookup screen** to locate the individual information details that exists in the system.
- **Registry:** This selection will allow users to initiate a new Registry record for an individual they manage. Once selected, the *'Add'* button will be enabled. When clicked, the user will be navigated to the **Individual Lookup screen**.
- **Correspondence:** A correspondence should be created whenever an agency needs to contact the BDS Unit regarding an ongoing assessment/intake. If the AA worker selects Correspondence, an additional dropdown menu appears with the following values:
    - **Individual** – This option should be selected if the AA worker is sending a correspondence that relates directly to a specific individual managed by that agency.
    - **General** – This option should be selected if the AA worker is sending a correspondence that is a general message and does not relate directly to any specific individual managed by the logged in agency.

AA INTAKE DASHBOARD

? HELP

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Contact Information

NEED HELP?
If you have a question about your case, contact the Customer Service Center.

☎ 1-844-ASK-DHHS
(1-844-275-3447)

Open Activities

INITIAL INTAKES — Count by Calendar Days

	0-10	11-30	31-90	No MA ⓘ
AA Eligibility Info Pending*	7	0	6	2
Diagnosis Info Pending*	4	3	3	1
Functional Screen Pending*	11	0	21	4
Functional Screen In Progress*	6	2	0	2
Awaiting LOC Determination	11	0	4	0
More Info Needed*	4	5	2	0
Level of Care Met	2	3	1	0
Registry Creation Pending*	3	5	19	0
Service Creation Pending*	13	5	0	0
Service Creation In Progress	0	0	0	0
Draft Acceptance Pending	9	3	0	0
Projected Start Date Pending *	4	3	16	0
Medicaid Approval Pending	2	1	5	0
Intake Complete	10	2	0	7

INTAKES BY AGE — Inactive for Over 90 Days

	Count
Age 16-17*	18
Age 18-19*	21
Age 20-21*	14

REGISTRY SERVICES — Count by Months (against DSN)

	Overdue	0-3	4-6	7-12	Future
Draft*	8	14	16	60	46
More Info Needed from AA*	0	1	2	0	0
Awaiting LOC Determination	0	3	10	0	0
Draft Acceptance Pending	3	2	7	12	0
Draft Not Accepted	0	0	3	0	0
Projected Start Date Pending*	5	7	10	14	0
Draft Accepted	3	5	8	0	0

CORRESPONDENCE — Count by Calendar Days

	0-5	6-10	11-14	>14
General	3	1	1	0
Eligibility	2	7	0	3
Functional Screen	4	1	2	0
Registry	6	4	1	0
Documentation	5	7	0	4
Other	2	1	0	1

TRANSFERS

	Count
Incoming Pending *	2
Outgoing Pending	1
Accepted ⓘ	1
Rejected ⓘ	1

Transfers rejected in the last 90 days.

Create new activity

Select Activity Type ▼   ADD

Select Activity Type
Intake
Functional Screen
Registry Service
Correspondence

Search existing activities

Select Activity Type ▼   SEARCH

Select Activity Type
Intake
Functional Screen
Registry Service
Correspondence
Transfer

📄 Need to submit documents without creating an activity?   UPLOAD DOCUMENTS

📁 Need to view uploaded documents?   UPLOAD HISTORY

⬆ Need to import individuals' intake information to NH EASY?   IMPORT DATA

☁ Need to view uploaded imports?   IMPORT HISTORY

⬇ Need to export data from NH EASY?   EXPORT DATA

FIGURE 3 : AA INTAKE DASHBOARD : CREATE NEW ACTIVITIES

Once the activity has been selected, but before the AA worker can begin working on the activity, the AA worker is required to enter the individual information for whom the activity is being created. For detailed information on how to create and submit each type of activity, please refer to the respective functionality listed in their designated sections of this document.

1.4 Searching for Existing Activities

The Search existing activities dropdown, located to the right of the **'Create New Activity'** dropdown, enables Area Agencies to access the various **Search** screens. The value chosen from this dropdown limits the search to the activity that was selected, although the type of activity can be changed on the Search screen itself.

FIGURE 4 : AA INTAKE DASHBOARD : SEARCH EXISTING ACTIVITIES

The **Search** functionality is limited to activities assigned to or completed by the logged in Area Agency worker and is useful to locate records that may not populate in any of the **AA Intake Dashboard** grids. Using the search functionality, AA worker can view sent correspondences that have not been replied to, as well as intakes, functional screens, registries, registry services, and transfers that are in process or have been submitted. For example, to view a **Functional Screen** that is in a status of *'Submitted'*, or a **Correspondence** with a status of *'Processed'*, the Area Agency must use the **Search** functionality.

For detailed information on the functionality of searching for each type of activity, see the corresponding activity search function in the **Section 6 : Correspondence.**

1.5 Additional Dashboard Functionality

In addition to the **AA Intake Dashboard** functionality, there are five additional buttons located at the bottom of the **AA Intake Dashboard** that can be used by the Area Agency.
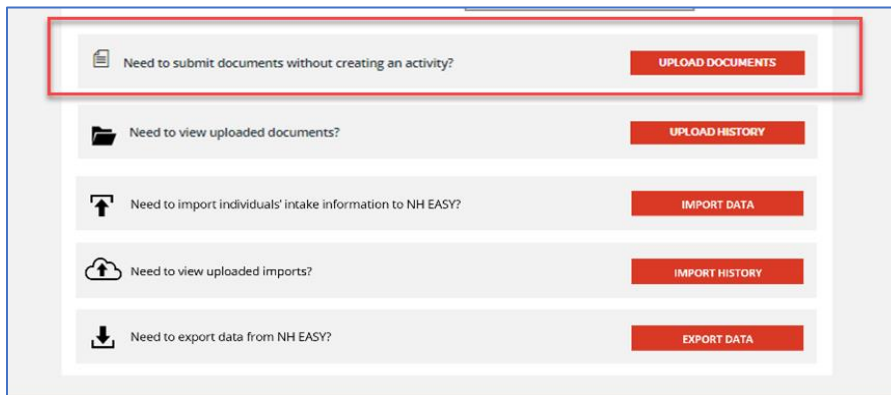
FIGURE 5 : AA INTAKE DASHBOARD : UPLOAD DOCUMENT

1.5.1 Using Upload Documents

The **Upload Documents** functionality gives the AA worker the ability to upload documents in a simple, time-effective manner. This resource should only be used to submit stand-alone forms and documents that are not part of an assessment. These documents can be general forms regarding an individual, or subsequent documents that have been requested to aid in medical determination. The provider can perform all generic document uploading from this central document upload location on the Dashboard. The document upload process is explained below.

1.5.1.1 Document Categorization

The Generic Document Upload functionality is performed from the **Document Upload Screen**.

- The BDS unit has identified 30+ distinct document types, which are grouped into seven document categories. These categories group documents by the type of information they contain. For example, two documents relate to the authorization needed for a BDS application; these documents are grouped into the Authorization - BDS category.
- While the options in this list may change over time, the following list includes the document categories and types as of documenting this user guide.

Document Category	Document Type
Certifications - BDS	HeM-521
	HeM-525
Fair Hearings - BDS	Fair Hearing Decision
	Fair Hearing Other
	Fair Hearing Summary
	Notice of Hearing
	Request for Fair Hearing
	Withdrawal of Appeal
Medical Documentation - BDS	Diagnosis Verification
	Medical History
	Healthcare Practitioner Note
	Other
Assessments - BDS	Neuropsychiatric Evaluation
	School Evaluation
	Self-Med Administration
	Risk Assessment
	SIS
	HRST

	SIB-R
	Other
	Life Safety Assessment
Authorizations - BDS	171-A Eligibility Letter
	Signed Functional Screen
	Authorization to Release Information
	Other
Plans - BDS	Risk Management
	Behavioral Support
	Transition
	Supervision
Service Agreement - BDS	ISA
	Telehealth Checklist
	Amendment
	Basic ISA
	Supplemental Documentation
Change of Status - BDS	Forms to be defined by BDS, no choices to start
	Change of Waiver
	Discharge to Community
	Termination
	Voluntary Withdrawal
	Case Management Agency Change Request
	Change of Address or Contact Information
Court Order	Guardianship

	171-B

FIGURE 6 : DOCUMENT UPLOAD : DOCUMENT TYPES

1.5.1.2 Uploading and Submitting a Document

FIGURE 7 : DOCUMENT UPLOAD

1.5.1.2 Uploading and Submitting a Document

To upload and submit a document to the BDS Unit:

1. Select the **Upload Documents** button located on the bottom right corner of the **AA Intake Dashboard**.
2. The Document Upload Individual Lookup screen will be displayed
3. Search for the individual by their First Name/Last Name/ any other criteria listed in the Individual look up search screen.
4. After all required information is entered, or once the individual record is found, select the upload action icon listed in the individual lookup search results.
5. The Documents to Upload screen displays with the demographic information of the individual
6. Select the category and type of document from their respective dropdowns and click on the 'Select File' button to upload a file
7. Once a document has been attached, the summary information of the document displays below the Category and Type dropdowns
   a. To remove a document that was incorrectly categorized or uploaded, select the Remove hyperlink located in the Action column
8. Once all documents have been uploaded, select the Submit button to send the documents to the BDS unit

1.5.2 Using Upload History
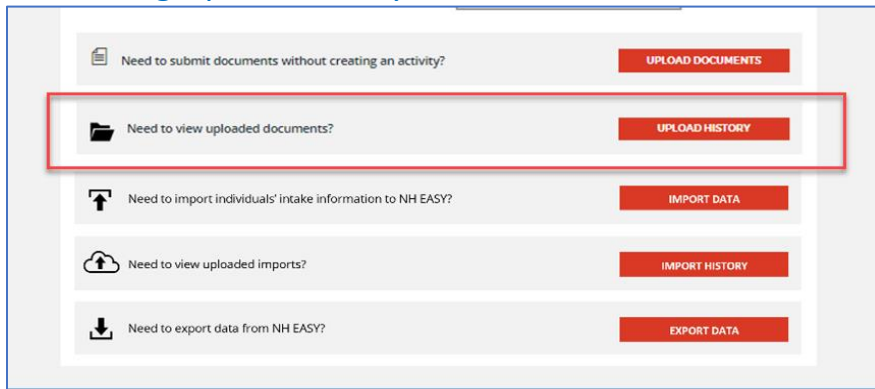
FIGURE 8 : DOCUMENT UPLOAD : UPLOAD HISTORY

The **Upload History** function gives the ability for AA workers to locate and view the history of all documents uploaded by their organization. Upload History will have the records of any uploaded documents along with the functional screen of a given individual.

1.5.2.1 Accessing this Function

Clicking on the **'Upload History'** button on the **AA Intake Dashboard**, right below the 'Upload Documents' banner, will open the **Upload History** screen.

1.5.2.2 Locate and View the Documents
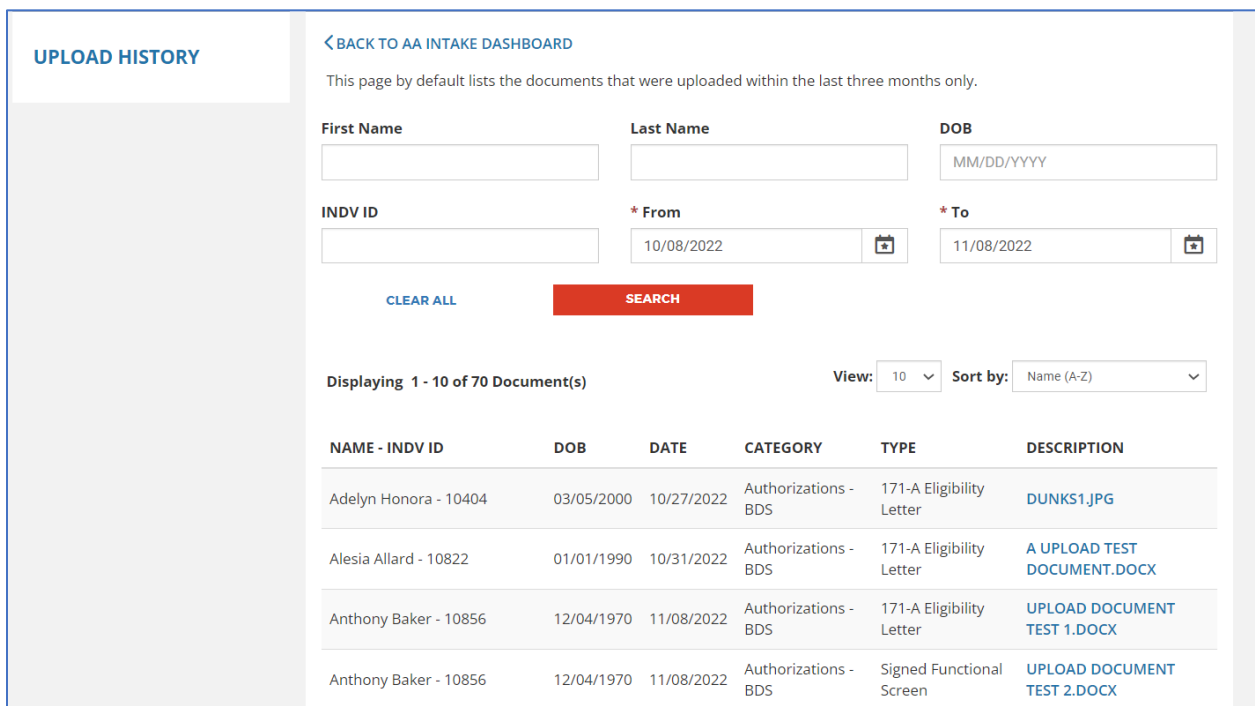
FIGURE 9 : DOCUMENT UPLOAD : LOCATE AND VIEW DOCUMENTS

1. As soon as the **Upload History** screen is accessed, documents that were uploaded in the last 30 days (by your organization) will be retrieved.
2. If you did not find the individual/document that you're looking for, you can always use the search criteria provided - (**First Name, Last Name, DOB, Individual ID, 'From and To'** - specify the date range that you think you have uploaded the document") and refine the default search criteria.
3. The description column in the search results will have a hyperlink. Clicking on that document description will open the document that was uploaded.
4. You can also sort the results using the **Sort By** dropdown provided within the search results.

1.5.3 Importing Data to NH EASY
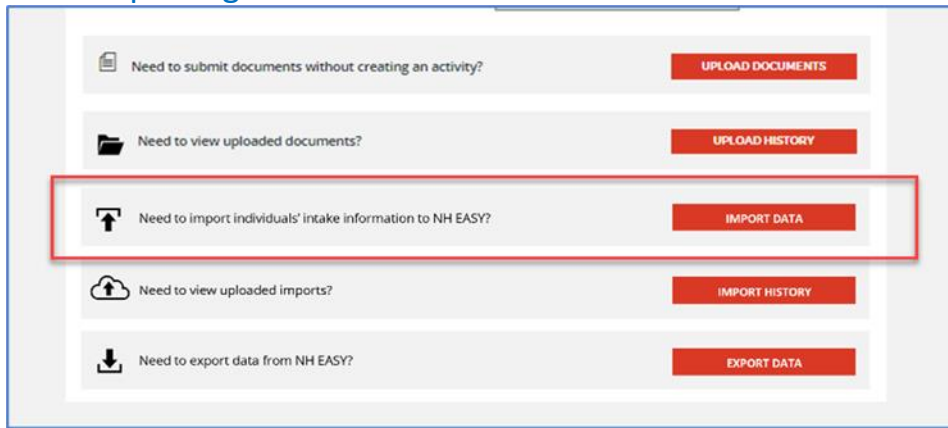
FIGURE 10 : DOCUMENT UPLOAD : IMPORTING DATA

The **Import Data** feature gives the ability for the AA worker to load records with preliminary demographic information collected into NH EASY from their external systems.

- For the data import to be successful, we should have all required information (at least until the 171A-Eligibility information) for a given record without any formatting issues in any of the data elements listed in the spreadsheet that is being uploaded to NH EASY.
- NH EASY will conduct data validation in two different ways:
    - **Real-Time Data Validation**
        - If the data listed in the file has any unexpected characters or if data is missing in any required data elements, you will receive an error message indicating the issue.
    - **Nightly Batch Data Validation**
        - If the data listed in the file already exists in the system, we will skip that record and process any other valid records in the file.
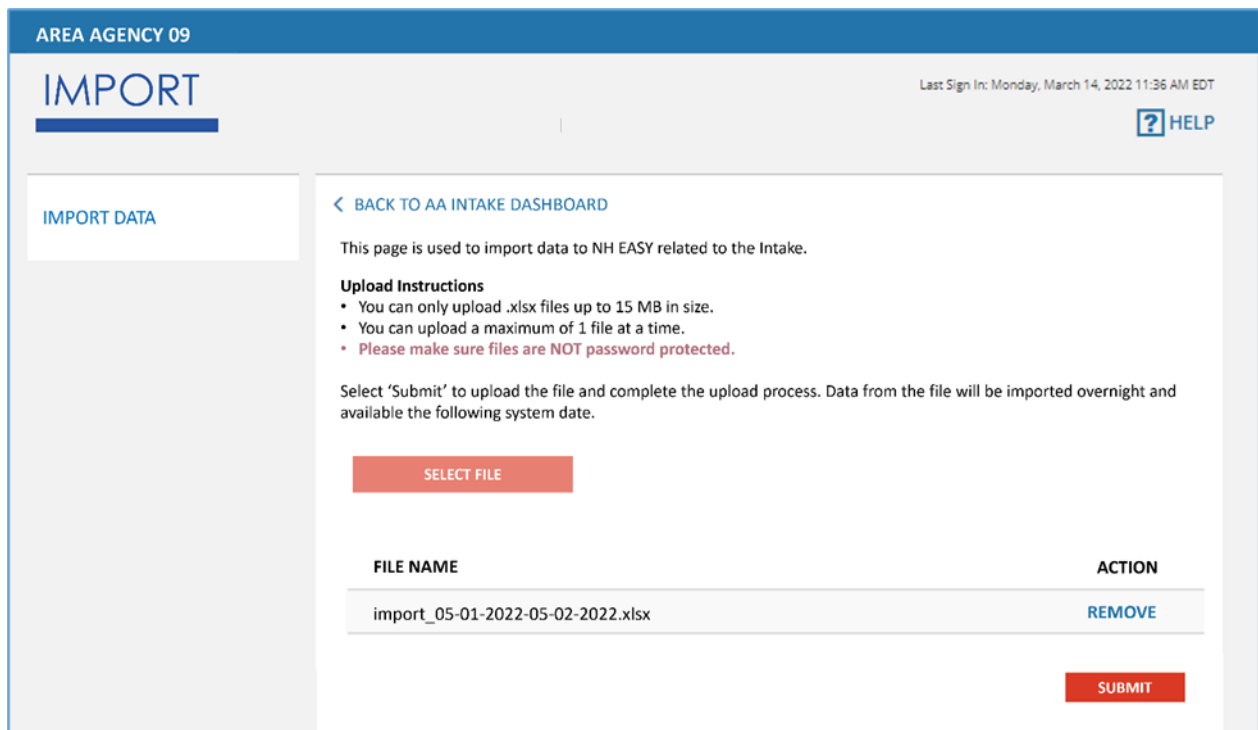
FIGURE 11 : IMPORT : DATA IMPORT

Steps to Import the Data into NH EASY (Admin User):

1. *'Select'* the **Import Data** button on the **AA Intake Dashboard** screen to launch the **'Import'** screen
2. The **Import Template** includes required fields. Upload files must be **.xslx** format.

   Import_Template.xls

3. Required Fields include First Name, Last Name, Gender, Date of Birth, Address, City, State, Zip Code, Eligibility Determination, Eligibility Reason, AA Eligibility Other Reason, Determination Date, Eligibility Review Date and Waiver.
4. Click on the *'Select File'* button and browse the file location on your computer to select the **.xslx** file that you want to upload into NH EASY.
   NOTE: If any error is shown on the screen, the file will not be loaded. Here is a description of the error types:
   '**Incorrect File**' error:
     - If the user uploads an **Incorrect File** (a file that does not confirm to requirements), the following error message will appear: *"File could not be uploaded. Please verify file requirements"*
     - The user may make corrections to the file, upload the corrected one, and attempt to import again.
   '**Incorrect Record**' error:
     - If the user uploads an **Incorrect Record** (a record within the file that does not conform to requirements), the following error message will appear:

> *"Missing required information on one or more records in the file that you're trying upload. Please check and try again."*
>
> - The user may attempt to upload that record in a subsequent file import.

5. Click the **'Submit'** button. The submit button is only enabled when file has been located and uploaded.
6. By clicking Submit the admin user will complete the import process and send the selected file to BDS for review.
7. Once submitted, a confirmation pop-up will appear: "File has successfully been uploaded."
8. If there are no errors, a confirmation pop-up will be displayed confirming the file has been loaded into the system.
   <u>**NOTE:**</u> Before uploading, a file can always be removed by clicking the **'Remove'** button under the Action column.

1.5.4 Checking Import History
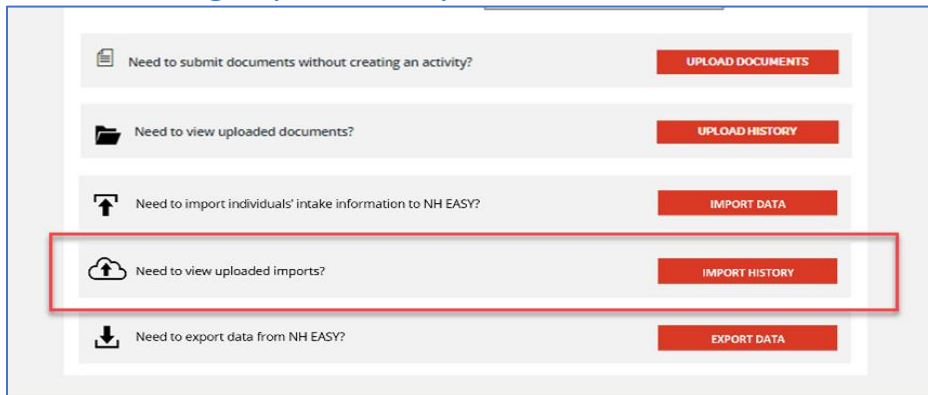
FIGURE 12 : IMPORT HISTORY

Data that was uploaded through the Import Data screen will be processed by the nightly batch job and progress of the import can be checked from the Import History screen at any time.

Steps to View the Import History:

1. Select the *'Import History'* button on the **AA Intake Dashboard** screen to launch the 'Import History' screen
2. By default, the 'From and To' date fields will be defaulted to the past month. You can always change the dates to locate the import file beyond a month.
3. Click the *'Search'* button.
4. Results will be retrieved for the search performed and listed below the search criteria
5. Results will include *'File name'* that you have uploaded, *'Date & Time'* of the upload, '*Status'* of the upload and finally *'Processed Report'*
6. Selecting the **Processed Report** listed in the results will open a detailed report that lists any exception records that failed to import.

1.5.5 Exporting Data from NH EASY
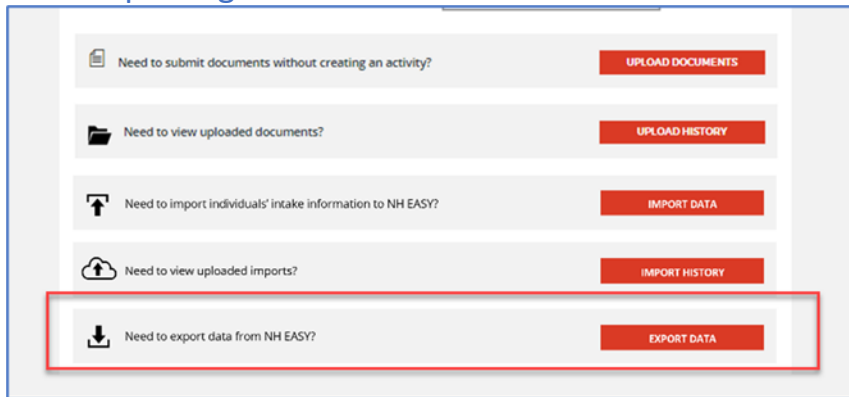
FIGURE 13 : EXPORTING DATA

You can export the bulk data of the individuals managed by your organization alone from NH EASY.

FIGURE 14 : EXPORT DATA

Steps to Export the Data from NH EASY:

1. Select the **'Export Data'** button on the **AA Intake Dashboard** to launch the **Export** screen
2. You can search for a particular individual by **First Name, Last Name, INDV ID** or search for bulk records by **Waiver and Town**
3. Select the category (**Individual/Intake, Diagnosis, Functional Screen, Registry Services and Registry Factors**) of data to export. You can choose to select one or all categories.
4. Enter the **'From'** and **'To'** dates with the period that you're looking for
5. Select the **'Format'** (.xls or .xlsx) in which you wish to download the data

6. Click the **'Submit'** button
7. Data that is retrieved will be downloaded onto your machine.

Section 2 : Intake Initiation and Eligibility NH EASY

The BDS Waiver Determination (Intake) process is initiated by an AA worker through NH EASY. The AA worker can initiate an intake from the **AA Intake Dashboard**.

FIGURE 15 : INTAKE DASHBOARD

2.1: Lookup Existing Individuals

NOTE: If an AA worker has already performed a lookup and confirmed the Individual is **'not known'**, proceed to Section 2.2 Establish a New Individual.

FIGURE 16 : INTAKE DASHBOARD : CREATE A NEW ACTIVITY

The **Individual Lookup** search will determine if an individual is known to NH EASY. Individual Lookup is divided into two sections: **Lookup Criteria** and **Lookup Results**.

- **Lookup Criteria** are the data points you select to search for existing Individuals.
- **Lookup Results** will appear in the bottom grid by **Name** – I**ndividual ID, Date of Birth, SSN (last four), MID, Area Agency, Intake Status,** and **Functional Screen Status**

The AA worker can identify if an individual has an existing intake or functional screen in progress. You will have the ability to take action related to the existing individual's **Intake, Functional Screen, Registry, Correspondence, Document Upload, and Document Upload History**.

FIGURE 17 : INDIVIDUAL LOOKUP

Steps to Lookup Existing Individuals:

1. Click on **'Intake'** from the **Create New Activity** dropdown on the **AA Intake Dashboard**
2. Lookup the Individual by performing a lookup using search in the top grid by **First Name, Last Name, Date of Birth, SSN,** and/or **MID**
   a. Click **'Search'** to conduct the search using the Lookup Criteria you provided in the boxes above
   b. Click **'Clear All'** to delete Lookup Criteria and begin a new search

3. Search results will appear in the bottom grid by **Name – Individual ID, Date of Birth, SSN (last four), MID, Area Agency, Intake Status, and Functional Screen Status**

NOTE: A message will notify you if the individual is not found. Refer to **Section 2.2: Establish New Individual** or click the prompt link to connect back to that guidance.

   a. Click the '**hyperlinked intake status'** to go to the Individual's Intake Activity Log
   b. Click the **'hyperlinked functional screen status'** to go to the Individual's Functional Screen Activity Log
      i. Hyperlinks will be enabled only for functional screen statuses that are '*In Progress'*

4. For Individuals in the **Lookup Results**, you may select an action icon from the **'Action'** column.

   Hovering over an icon will expose a tool tip describing the action icon (e.g., **Initiate New Intake, Initiate Functional Screen, Launch Registry**).

   Actions can be performed on the following:
   a. **Intake NOTE**: Icon enabled only if intake status is 'Completed' (i.e., a new intake cannot be initiated if a previous intake is still in progress)

   b. **Functional Screen NOTE**: Icon enabled only if functional screen status is 'FS Cancelled' or 'FS Submitted' or intake status is Functional Screen Pending

   c. **Registry NOTE:** Icon enabled only when intake status is beyond 'Diagnosis Info Pending'

   d. **Correspondence**

   e. **Upload Document**

   f. **Upload History NOTE:** Icon enabled only for individuals who have one or more documents uploads.

   If the individual you are looking up is *not known* to NH EASY, you may establish the person as a new Individual.

2.2 : Establish New Individuals

1. **'Click' the Establish New Individual** hyperlink at the top of the results grid on the new Individual Lookup screen in NH EASY

   a. Launches the Individual Information screen to capture additional required information (Refer to Figure 2.3 : Individual Lookup Screen).

2.2.1 : Enter Individual Information

On the **Individual Lookup : Individual Information Screen**, the AA worker will enter required additional information related to the new individual.

FIGURE 18 : INDIVIDUAL LOOKUP : INDIVIDUAL INFORMATION SCREEN

Steps to Enter Individual Information:

a. Enter the required fields marked by a *red asterisk, including the individual's **First Name, Last Name, Gender, and DOB.**
    NOTE: The other fields are optional but recommended to complete.

b. Click **'Next'** button to conduct a duplicate check to verify there are no existing intakes for the individual.
    NOTE: Button enabled only after all required fields are completed.

The following Duplicate Intake scenarios may occur:

Duplicate Intake In Progress with Same Agency (exact match found):

i.   Click **'Continue'** to select the intake belonging to the individual. You will be redirected to the last section of the intake that is in progress.

ii. Click **'Exit'** to close the pop-up and return to the **Individual Lookup : Individual Information** screen.

iii. ***'Establish a New Individual'*** will be disabled unless the results found are potential duplicates (not an exact match).

DUPLICATES CHECK

The information you have entered matches the information of the following individual(s) in the system. Selecting the duplicate intake will redirect you to the page where that intake was left off. Otherwise, click EXIT to close this window and return to the previous screen and/or contact the respective Area Agency manager for more information.

Please note: You will not have access to intakes initiated by other Area Agencies.

ESTABLISH AS NEW INDIVIDUAL

NAME	DOB	SSN	MID	WAIVER	INTAKE-STATUS	DATE	AA	
Jane Doe	05/08/1997	XXX-XX-0000	61074741457	DD	Demographic Info Pending	11/02/21	Pathways	CONTINUE >

EXIT

FIGURE 19 : DUPLICATES CHECK

a. Duplicate Intake Completed with Same Agency (exact match found):

i. Click **'Create New Intake'** to initiate a new intake for the individual. All the demographic information that was collected in the prior intake will pre-populate and be editable in the new intake.

ii. Click **'Exit'** to close the pop-up and return to the Individual Information screen.

iii. ***'Establish as New Individual'*** will be disabled unless the results found are potential duplicates (not an exact match).

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FIGURE 20 : DUPLICATES CHECK

b. Duplicate Intake 'In Progress' / 'Completed' with 'Different Agency' (exact match found)

   i.   *'Continue'* will be disabled. You may need to contact the Area Agency Administrator and request a transfer to your Area Agency.

   ii. *'Click'* to close the pop-up and return to the **Individual Information screen**.

   iii. *'Establish as New Individual'* will be disabled unless the results found are potential duplicates (not an exact match).
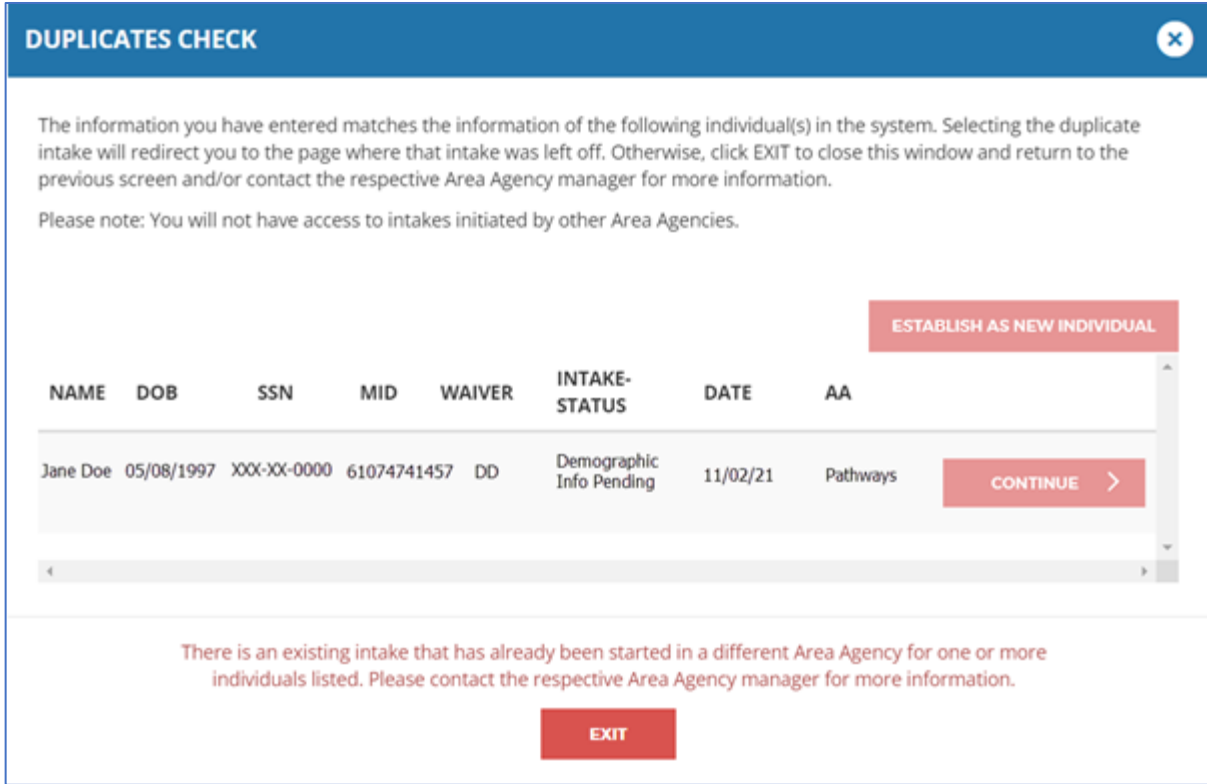
FIGURE 21 : DUPLICATES CHECK

c. Potential Duplicate Intake Completed with Same Agency (potential match found)

    i. If a potential match listed is correct:
        'Click' Create New Intake to initiate a new intake for the correct individual. All the demographic information that was collected in the prior intake will pre-populate and be editable in the new intake.

    ii. If no potential match listed is correct:
        'Click' Establish as New Individual to submit the previously entered information and establish the person as a new individual.

    ii. Click **'Exit'** to close the pop-up and return to the Individual Information screen.

d. Potential Duplicate Intake Completed with Different Agency (potential match found)

i. If a potential match listed is correct and with the same Area Agency, **'Click' Create New Intake** to initiate a new intake for the correct individual.
All the demographic information that was collected in the prior intake will pre-populate and be editable in the new intake.

ii. If a potential match listed is correct, but with a different Area Agency: **Create New Intake** will be disabled.
You may not create a new intake for the individual and may need to contact the other Area Agency for more information.

iii. If no potential match listed is correct, click **'Establish as New Individual'** to submit the previously entered information and establish the person as a new individual.

iv. Click **'Exit'** to close the pop-up and return to the Individual Information screen.

e. If no duplicate intake exists, continue creating the new intake for the individual as directed in the following **Additional Demographics** screen.

2.2.2 : Enter Additional Demographic Information

When the individual information has been entered and the individual is established, the AA worker will enter additional demographic information on the **Additional Demographic Information** screen.

FIGURE 22 : ADDITIONAL DEMOGRAPHIC INFORMATION

1. Enter the required fields marked by a red asterisk, including the **Individual's Home Address, Living Arrangements, Requested Waiver, AA Eligibility Determination Date, AA Eligibility Determination Status, and AA Eligibility Review Date**. The other fields are optional but recommended to complete.
NOTE: Depending on the Requested Waiver and AA Eligibility Determination Status selected, you may need to complete additional required fields (e.g., Reason, Please Specify)

2. **'Click' Next** to conduct a search against *New HEIGHTS* to check if the Individual has initiated a Medicaid Application. Button enabled when all required fields are completed.

    a. **If an exact match is found:**
    The individual's MID will display in the Individual Information header on the following intake screens.
    b. **If no match is found:**
    The MID will not display in the Individual Information header on the following intake screens.

    c. If **'Ineligible He-M 503'** or **'Ineligible He-M 522'** is selected from the AA Eligibility Determination Status drop-down, this means that the individual is considered ineligible for waivered services and you may not proceed any further unless the status is changed. The below pop-up will appear:
       i. Click *'OK'* to return to the **AA Intake Dashboard**
       ii. Click **'Cancel'** to return to the **Additional Demographic Information** screen.
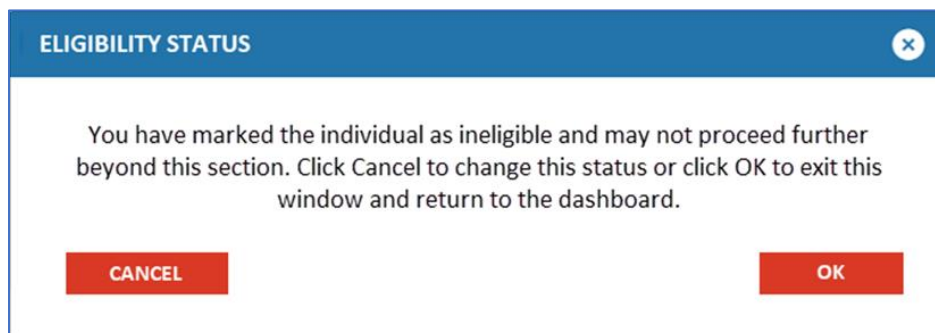
FIGURE 23: ELIGIBILITY STATUS : INELIGIBLE NOTIFICATION

    d. If '**Ineligible He-M 503**' or '**Ineligible He-M 522**' were not selected from the AA Eligibility Determination Status drop-down:
       i. **'Click'** and you will navigate to the **Diagnosis Information** screen.

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2.2.3 : Enter Diagnosis Information

The **Diagnosis Information** screen captures diagnoses information for an individual that is consistent with requirements for the Level of Care assessment.

NOTE: You are <u>required</u> to capture one piece of diagnosis information to proceed. Diagnosis is related to the Waiver that is selected.

FIGURE 24 : DIAGNOSIS INFORMATION SCREEN

Steps to Add a Diagnosis:

1. Click **'Add Diagnosis'** to display all diagnosis drop-down fields and add a new diagnosis for the individual.

2. Enter the required fields marked by a red asterisk*, including the individual's **Diagnosis Category, Diagnosis, and Start Date**. The other fields are optional but recommended to complete.
   NOTE: Depending on the Diagnosis Category and Diagnosis selected, you may need to complete additional required fields (e.g., Please Specify)

3. Click **'Save'** to save the information entered, which will populate into the summary grid below.

   a. Button enabled once all required fields are completed.
   b. **Click 'Cancel'** to clear and collapse all diagnosis drop-down fields.

3. The diagnoses entered will display in the summary grid by **Diagnosis Category, Diagnosis, Other (if applicable), Start Date, and End Date**. Each diagnosis row will have an **Edit** and **Remove** button.
   a. Click **'Edit'** to edit an existing diagnosis entry. You must click Save to save the edits.
   b. Click **'Remove'** to delete an existing diagnosis entry.
      i. Button enabled when more than one diagnosis is captured.
   c. **Answer the question**: "Does the individual need waivered services within the next 12 months?"

4. After all diagnoses have been added for the individual, Click **'Done'**. A validation will be performed based on the requested waiver.
   a. Button enabled when at least one diagnosis has been captured.

   b. If the waiver selected is **DD, ABD, or IHS**:
      A minimum of one diagnosis category must be associated with the respective waiver.

   c. If the waiver selected is N/A:
      A minimum of one diagnosis entry is required to enable the **'Done'** button.

   d. If entering initial diagnosis information for a new intake, you will be navigated to the **AA Intake Dashboard.**

   e. If accessing/editing an existing intake, **'Done'** will always be enabled.

5. Click **'Previous'** to return to the **Additional Demographic Information** screen.

2.3 : Intake Activity Log

The **Activity Log** screen is a landing page for accessing intakes from the **AA Intake Dashboard**. It is accessible only once an individual is established and the intake is created.

The AA worker can view actions already taken on the intake for a given individual, make comments to notify BDS, or request additional information/documentation as needed.

Steps to View an individual's Activity Log:

1. **Click** on a '**hyperlinked**' value from Initial Intakes grid of the **AA Intake Dashboard**.
   a. This launches **Intake Search** screen, which will populate with results associated with the intake status selected (Intake Search functionality further described in the following section).
   NOTE: You may also access the Intake Search screen by selecting 'Intake' from the Search Existing Activities drop-down on the AA Intake Dashboard.

2. **Click** on a '**hyperlinked**' name in the results grid of the **Intake Search** screen to launch an individual's Activity Log.

FIGURE 25 : ACTIVITY LOG

2.4 : Recording an Activity

The activities listed in the Activity Log grid can either be manually selected by the AA worker, generated by the system, or both.

1. To manually record an activity, **'Select'** an activity from the Activity dropdown. Options include:
    a. **Comments** *(User Designated)* – Allows the user to add comments at any given point in time irrespective of the intake status. Users may add comments regarding updates made to the intake or any new information that was received.
        i. Adding a comment to the Activity Log has no impact on the status of the assessment.
    b. **Information Sent to BDS** *(User Designated)* – Notifies BDS that the Area Agency has uploaded the requested information in order to make a decision on the individual's Level of Care eligibility.
        i. Enabled when intake status is **More Info Needed**
        ii. Changes intake status back to **Awaiting LOC Determination**

    c. **Withdraw** *(User Designated)* – Withdraws the intake, changing the intake status to **Withdrawn.**
        i. Connect this link to the task in **Activity Log.**

2. **'Enter'** a note in the corresponding Comments field, if applicable.
    a. Enabled and required if '**Comments'** or '**Withdrawn'** is selected from the activity drop-down
        i. If '**Withdrawn'** is selected, you must **'Select'** a **Reason** from the drop-down.

3. Click **'Add'** to save the activity/comment. The selected activity/comment should display in the Activity Log grid.
    a. Add button enabled once all required fields are completed.
    b. Once an activity has been added, it cannot be removed.

4. Click **'Next'** when you are finished. You will be navigated to the **Individual Information** screen.
    a. Button always enabled.

5. **'Click'** the *Navigation Links* at the top of the page ***'Back to AA Intake Dashboard'*** or ***'Back to Intake Search'*** to exit out of the intake entirely and be redirected to that respective screen.

Tracking the Progress of an Intake:

The following information is displayed in the Intake Activity Log grid once an activity has been manually added by a user or generated by the system:

- **Date:** The date the activity was added to the log. Dates are displayed in MM/DD/YYYY format.
- **Activity:** The title of the activity that was added/generated.
- **Worker:** The name of the AA worker who added the activity or performed the action that caused the system to add the activity.
- **Comments:** The text that was entered by the AA worker in the comment box besides the Activity drop-down or comments that were defaulted by the system.

When following the progress of an intake, the first row listed towards the top of the grid will always reflect the most recent action taken while the last row towards the bottom will always reflect the oldest activity. The oldest date for the last row listed with an activity of *"Initial Demographic Info Received"* reflects when the intake screen was initiated.

2.5 : Searching for an Existing Intake

The **Intake Search** screen functionality provides AA worker the ability to search, filter, and locate any intakes which were initiated by their organization that are in progress, completed, or withdrawn.

To navigate to the **Intake Search** screen and conduct a search, you may access this screen in the following ways:

1. From the **AA Intake Dashboard**, **Click** on a '**hyperlinked value'** on the Initial Intakes grid. This will launch the Intake Search, which will populate with the results associated with the intake status selected.

2. From the **AA Intake Dashboard**, **Click** on the '**Search Existing Activities'** drop-down and select **'Intake'** This will launch the **Intake Search.**
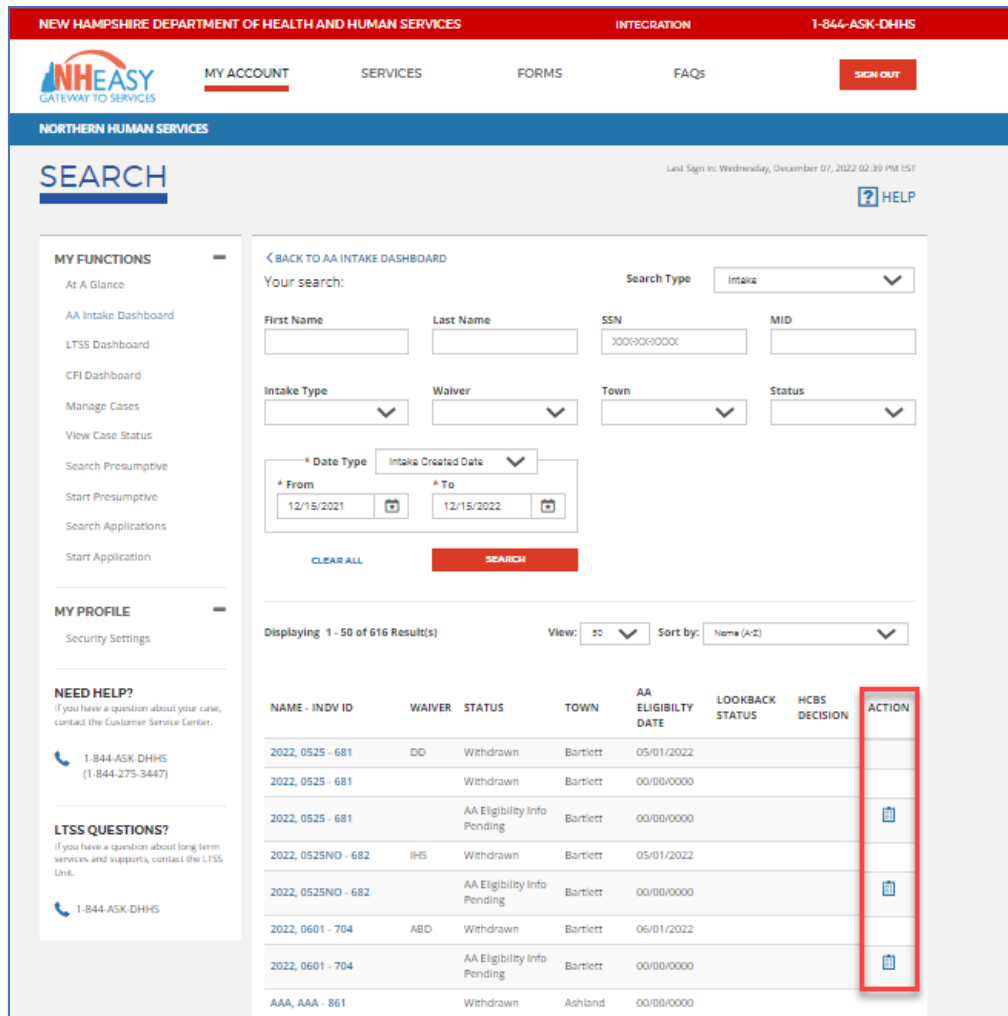
FIGURE 26 : SEARCH SCREEN

Steps to Initiate an Intake Search:

1. Search for the intake in the top grid by the individual's **First Name, Last Name, SSN, MID, Waiver, Status, and/or Town, Dates & Date Type.**
   a. Click **'Search'** to conduct the search based on information entered in the search criteria
   b. Click **'Clear All'** to delete information previously entered in the search criteria and conduct a new search
2. Search results will appear in the bottom grid by **Name, Waiver, Status, Town, AA, Eligibility Date, Lookback Status, and HCBS Decision**
   a. If the filtered search returns no results, *"No results found for the above search criteria."* will appear in the results grid.

3. The Action column allows you to take action on an individual. **'Select'** a functionality from the drop-down to take action on the Individual's **Intake, Functional Screen, Registry, Correspondence, Upload Document, or Upload History**.
4. Click **'Export'** Results button to download the search results in .xlsx format.

The following fields will be available in the export:

- Name
- Waiver
- Status
- Town
- AA Eligibility Date
- Medicaid Open
- HCBS Decision

5. AA workers can also use the same screen to conduct a '**Search**' for a different functionality in the Search Type drop-down, including:

- Functional Screen
- Registry Service
- Correspondence
- Transfer

Section 3: Functional Screen

As part of the new BDS functionality available in NH EASY, AA workers can now create and submit the **Functional Screen (FS)** assessment online. The assessment is administered to support the determination of BDS waiver eligibility for individuals seeking HCBS services.

3.1 Creating a New Functional Screen

To create a new **Functional Screen**, Area Agency users may follow these steps:

1. From the **AA Intake Dashboard**, navigate to the '**Create New Activity'** drop-down, select *'Functional Screen,'* and click '**Add**'.
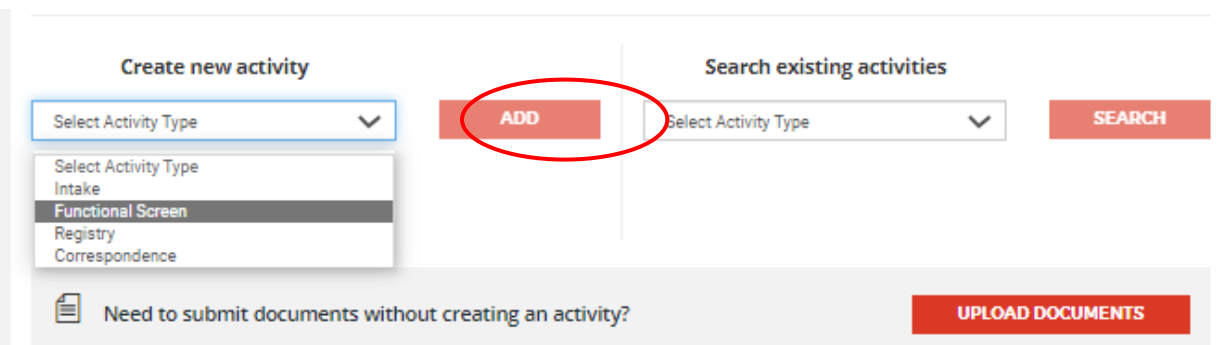
FIGURE 27 : FUNCTIONAL SCREEN : CREATE NEW

2. This will redirect you to the **Individual Lookup** screen where you must look up the individual's record in order to determine if they have an active functional screen on file before you can create a new one.

   a. Enter the filtered lookup criteria for the individual you wish to create an FS for, click **Search**, and retrieve their information in the Individual Lookup Results. See Section 2.1 Lookup Existing Individuals.

   b. If the individual you are looking up is *not known* to NH EASY, you may establish the person as a new individual. See Section 2.2 : Establish a New Individual for further instructions.

3. If the individual already has a functional screen that is in progress, you will see it listed under the Functional Screen Status Column with a hyperlink, you will see it listed in the **Functional Screen Status** column as *'In Progress.'* **Click** on that '**hyperlink'** to be redirected to that FS record. You must complete this existing FS before you can create a new one.

   NOTE: In this scenario, the **Functional Screen icon (** 📋 **)** will not be available in the **Action** column to initiate a new FS.

4. As long as there is no functional screen that is in progress and individual is known to the NH EASY, you can initiate a new functional screen. **'Select'** the **Functional Screen icon (📋)** from the **Action** column. This will initiate a new FS for that individual.

   NOTE: To access the Intake screens (Demographics, Eligibility, Diagnosis) from here, click the hyperlink under the **Intake Status** column.

3.2 : Completing a Functional Screen

To complete and submit a Functional Screen assessment, you must enter all the required information for **Sections A – I** and attach the required documents on the 'Review and Submit' page.

- **Individual Information Header –** This header is maintained and accessible across all sections of the assessment. It displays individual and contact information, which are both prepopulated from the Individual Information screen of the Intake.
- **Contact Information –** In order to access, click the blue drop-down arrow in the individual information header. Clicking on the arrow once more will hide the details from view.

FIGURE 29 : FIGURE 4.2 FUNCTIONAL SCREEN : CONTACT INFORMATION

3.2.1 : Functional Screen Activity Log

The **Functional Screen Activity Log** is the landing page whenever a functional screen is opened. It provides AA workers with a summary view of the status of the assessment and all actions performed on it, which helps keep track of what has been done to the assessment and why it has or has not been submitted.

This screen can be accessed in the following ways:

1. From the **AA Intake Dashboard**, **Click** on a '**hyperlinked value**' with a status of 'FS In Progress' on the Initial Intakes grid.

    a. This will launch the 'Functional Screen Search', which will populate with the results associated with the functional screen status selected.

    b. **Click** on a '**hyperlinked name'** in the Functional Screen Search results grid.

    c. This will launch the **'Functional Screen Activity Log'** for that individual.

2. From the **AA Intake Dashboard**, click on the Search Existing Activities drop-down and select 'Functional Screen.'

    a. This will launch the **Functional Screen Search**.

    b. Follow steps 1b and 1c above to access the **FS Activity Log**.

3.2.2 : Sections A - I

Upon initiating a Functional Screen, the **Activity Log** screen will be the landing page. From that screen, click **Next** or click **Section A: Services** from the **PART A** category from the left navigation menu to proceed to Sections A through I.

FIGURE 30 : FUNCTIONAL SCREEN : ACTIVITY LOG

The sections located under the **Part A** and **Part B** headers along the left side of the screen make up the content specific sections of the Functional Screen assessment. These sections must be completed in order and navigation between the sections can be done by **clicking** the '**Next'** and '**Previous'** buttons at the bottom of each section screen or by directly clicking on the completed sections listed in the left navigation on the function screen.

If **'None'** is enabled, the questions required to add details will be disabled. If you wish to provide information, please click 'None' again to enable all content boxes.

Once all the required fields of a section have been entered, the left navigation menu will display **Section Completion Indicators (see examples in Figure 31)** : green checkmarks used to track the progress of the FS.

FIGURE 31 : SECTION STATUS VIEW

The following information for **Sections A- I** must be entered to complete the **Functional Screen**:

- **Section A: Services** - This section provides information about the type of Residential and Day Services the applicant is receiving and what type of functional screen this assessment is.
    - **Target Waiver** will be prepopulated with the Waiver selected at the time of creating the intake. You may select a different value if the waiver has changed.

    NOTE: If the applicant *does not have a disability determination* from a qualified medical professional you will not be allowed to proceed to the remaining sections of the assessment.

- **Section B: Clinical Information** - This section provides information about any illnesses or other problems suffered by the individual that they have been diagnosed with.
    - Please review the individual's Diagnosis information **(Category, Diagnosis, Other, Start Date, and End Date)** before answering the remaining questions. Diagnoses are pre-populated with the information entered within the Intake.

- **Section C: Activities of Daily Living (ADLs)** - This section relates to the applicant's ability to manage regular activities related to personal care which are conducted on a daily basis.
    - Please refer to the **Level of Assistance Scale** when answering questions requiring a **Level of Assistance** drop-down.

- **Section D: Instrumental Activities of Daily Living (IADLs)** - This section relates to the applicant's ability to manage regular daily activities related to independent living such as grocery shopping, cooking, and laundry.
  - **Level of Assistance Scale** values (Glossary) differ by question. Refer to each question's individual scale to best answer the level of assistance needed for that question.

- **Section E: Employment/Volunteer** - This section provides information about the applicant's employment status and the need for assistance to perform employment-specific activities. This section concerns only those supports necessary for successful performance of job duties.

- **Section F: Communication and Cognition** - This section provides information about the applicant's cognition skills and their ability to listen and understand those around him/her.

- **Section G: Behaviors/Mental Health** - This section details the type and extent of erratic behavior of the individual, if any, such as aggressiveness towards self or others or their use of substances.

- **Section H: Risk to Community Safety** - This section provides information about the applicant's history of problematic behaviors that pose a risk to the safety of individuals within the community.

- **Section I: Attestation** - This section will serve as a signature page to attest, to the best of their knowledge, that the information provided is accurate and true.
  - If this is an initial functional screen, a change in need, or due to a lapse in services, a signature from a clinician is required.
    - If the clinician is from an outside organization without a user account for NH EASY, indicated by answering 'Yes' to the external clinician question, then you will be required to upload a PDF signed by that external clinician in the following section, Attach and Submit, along with the 171-A Eligibility letter.
    - If the clinician is not from an outside organization, indicated by answering 'No,' you will only be required to upload the 171-A Eligibility Letter.
  - If this functional screen is a regular 12-month renewal, a signature from the service coordinator is sufficient.
  - Phone number is optional but is recommended to be completed if the information is available.

While working in the FS**,** all required fields as indicated by a red asterisk* must be completed for the '**Next'** buttons to be enabled. In certain questions responses could become disabled depending on the value(s) that were selected. Selecting **'None'** for any of the questions will disable all other values for that question. Certain questions may expose a text box requiring additional supporting information. Clicking '**Next'** will save any newly entered information and allow you to proceed to the next section. Clicking **'Previous'** before saving will lose any newly

entered information and will return you to the previous section to view or edit previously entered information.

3.2.3 : Review and Submit

The '**Review and Submit'** section is the final portion of the **Functional Screen** and allows the Area Agency users to attach all required documentation and submit the FS to the Bureau of Developmental Services (BDS) for review.

To upload required documents and submit the functional screen to BDS:

1. Click '**Select File'** and select the file from your local PC that you would like to upload.
   NOTE: All initial functional screens must have the **171-A Eligibility Letter** (that was sent to families) attached.

2. The '**Functional Screen Signature Page'** is <u>required only if</u> both of the following conditions are met:
   a. The user answered **'Yes'** to the question *'Was this assessment conducted by an external clinician?'* on the **Attestation Section I** of the Functional Screen.
   b. The **Functional Screen Type** (selected in the first question of **Section A - Services**) is either *'Initial Functional Screen'* or *'Significant Change in Need.'*

3. If you have uploaded the incorrect file or need to remove the attachment for whichever reason before submitting the FS, click '**Remove'** to delete the document.

4. Once all required documents have been attached, click '**Submit'** to save the information and submit the Functional Screen to BDS.

FIGURE 32 : FUNCTIONAL SCREEN : ELIGIBILITY LETTER/ SIGNATURE PAGE : UPLOAD

To upload additional documentation:

1. Select the **Category** from the drop-down that best matches the document you are uploading. The category you select will filter the values listed in the Document Type for that specific category.

2. Select a **Document Type** from the drop-down that best matches the document you are uploading.

3. If you need to continue uploading additional documents, click **'+Add More'** and repeat Steps 1 and 2.

4. Once all documents have been attached, click **'Submit'** to finalize your document upload process and submit the functional screen assessment to BDS.

3.3 : Recording an Activity

The activities listed in the Activity Log grid can either be manually selected by the AA worker, generated by the system, or both.

1. To manually record an activity**,** select an activity from the **Activity dropdown**. Options include:
    a. **Cancel FS** *(User Designated)* – Allows the user to rescind the initial functional screen which was previously initiated. This activity can only be added by the individual who initiated the functional screen.
        i. Disabled if the functional screen has already been cancelled or submitted.
    b. **Comments** *(User Designated)* – Allows the user to add comments at any given point in time irrespective of the functional screen status. Users may add comments regarding updates made to the assessment or any new information that was received.
        i. Adding a comment to the Activity Log has no impact on the status of the assessment.
        ii. Always enabled.

FIGURE 33 : FUNCTIONAL SCREEN : ACTIVITY LOG

2. Enter a note in the corresponding **Comments** field, if applicable.
    a. Enabled and required if 'Comments' is selected from the **Activity** drop-down.

3. Click **Add** to save the activity/comment. The selected activity/comment should display in the Activity Log grid. Once an activity has been added, it cannot be removed.
    a. Add button enabled once all required fields are completed.

4. Click **Next** when you are finished. You will be navigated to Section A of the functional screen.
   a. Button always enabled.

5. Click the **Navigation Links** at the top of the page **'Back to AA Intake Dashboard'** or **'Back to Functional Screen Search'** to exit out of the functional screen entirely and be redirected to that respective screen.

3.3.1 : Tracking the Progress of a Functional Screen

The following information is displayed in the Activity Log grid once an activity has been manually added by a user or generated by the system:

- **Date:** The date the activity was added to the log. Dates are displayed in MM/DD/YYYY format.
- **Activity:** The title of the activity that was added/generated.
- **Owner:** The name of the AA worker who added the activity or performed the action that caused the system to add the activity.
- **Comments:** The text that was entered by the AA worker in the comment box besides the Activity drop-down or comments that were defaulted by the system.

When following the progress of a functional screen, the first row listed towards the top of the grid will always reflect the most recent action taken while the last row towards the bottom will always reflect the oldest activity. The oldest date for the last row listed with an activity of '**In Progress'** reflects when the functional screen was initiated.

3.4 : Searching for an Existing Functional Screen

The **Functional Screen Search** functionality provides Area Agencies with the ability to search, filter, and locate any functional screen records which were initiated by their organization that are in-progress or that have been completed. You may navigate to the **Functional Screen : Search** one of two ways:

1. From the **AA Intake Dashboard**, click on a *'hyperlinked value'* with a status of *'FS In Progress'* on the Initial Intakes grid. This will launch the **Functional Screen Search**, which will be populated with the status and dates associated with the count selected.
2. From the **AA Intake Dashboard**, click on the *'Search Existing Activities'* drop-down and select **Functional Screen.** This will launch the **Functional Screen Search**.

To Search for a Functional Screen:

1. Filter your search by the individual's **First Name, Last Name, SSN, MID, Waiver, Town, Status, Owner,** and/or **Dates** (the status updated date of the FS) and click '**Search.**'

   a. Click **'Clear All'** to delete the information previously entered in the search criteria and conduct a new search.

FIGURE 34 : FUNCTIONAL SCREEN : SEARCH

2. Search results will appear in the bottom grid by **Name, Waiver, Status, Town, Owner, AA Eligibility Date,** and **PDF.**

   a. You may sort the results using the **View** and **Sort By** drop-down menus. **View** controls the number of records displayed on the screen at one time. **Sort By** controls the order in which the results are listed in the grid.

   b. If the filtered search returned no results, the message *"No results found for the above search criteria."* will appear in the results grid. You may return to **Step 1.** to perform another search.
   NOTE: The results retrieved in the search are limited to individuals belonging to the logged-in user's organization.

3. Upon locating the FS record in the search results, you may take the following actions:

   a. Click the in the **PDF column** to view and download the assessment for that individual. The is only available for completed functional screens with a status of 'Submitted.'

   b. Click on the hyperlinked name of your individual within the results to be redirected to their **Functional Screen Activity Log**, Section 4.3 Functional Screen Activity Log

4. The *'Export Results'* button will allow you to download all the search results in .xlsx format. The following fields will be available in the export:
   - Name
   - Waiver
   - Status
   - Town
   - Owner
   - AA Eligibility Date

5. AA workers can also use the **Functional Screen Search** to navigate to other NH EASY Search screens. To conduct a search for a different activity, select one of the following values from the '**Search Type drop-down'** located in the top right-hand corner of the screen.
   - Intake
   - Registry Service
   - Correspondence
   - Transfer

Section 4 : Registry

The Registry is a list of individuals projected to need services under the DD, ABD, or IHS Medicaid waiver programs within the next five years from the current date. The Registry is used for estimating projected costs and is not equal to an individual's budget once they begin receiving actual services. Through NH EASY, AA workers create the **Registry** record for an individual and add services. Within 12 months of the date services needed, the AA worker submits the request to BDS. BDS then accepts the service draft through HEIGHTS and begins tracking projected and unused revenue.

The process of creating a Registry record for an individual and adding, editing, and searching for Registry services through NH EASY as well as submitting services to BDS are detailed below.

4.1 Creating a New Registry Record

Registry records should be entered to NH EASY for individuals who need services within the next five years. To create a new Registry record for an individual, Area Agency users may follow these steps:

1. From the **AA Intake Dashboard**, navigate to the *'Create New Activity'* drop-down, select **'Registry'** and click **'Add'**.
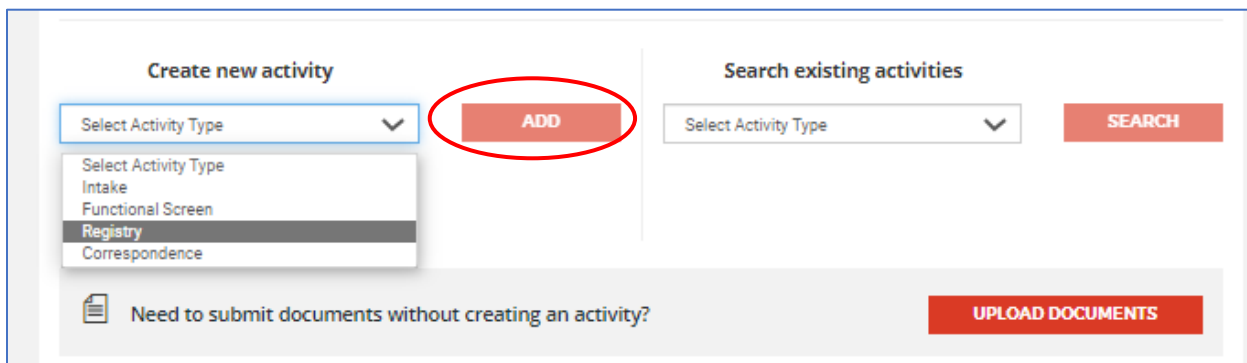
FIGURE 35 : REGISTRY : CREATING A NEW REGISTRY

2. This will redirect you to the **Individual Lookup** screen where you must search for the individual you wish to create a registry record for.

   a. Enter the desired lookup criteria, click '**Search'**, and retrieve the individual's information in the Individual Lookup Results. See Section 2.1 Looking Up Individuals for more detailed instructions.

   b. If the individual you are looking up is *not known* to NH EASY, you may establish the person as a new individual. See Section 2.2 : Establish New Individuals for further instructions.

3. From the Lookup Results, select the **Registry (　®　)** icon under the **Action** column for your individual.

Did not find the individual you are looking for? ESTABLISH NEW INDIVIDUAL

LOOKUP RESULTS:

NAME-INDV.ID	DOB	LAST FOUR SSN	MID	AREA AGENCY	INTAKE STATUS	FUNCTIONAL SCREEN STATUS	ACTION
Acker, Monty - 10316	04/30/2002			Brain Injury Association of NH	REGISTRY CREATION PENDING		📋 ®
Acker, Adam - 10317	12/31/2002			Brain Injury Association of NH	AWAITING LOC DETERMINATION	IN PROGRESS	®
Acker, Michelle - 10315	04/30/2002	2943	88095348327	Brain Injury Association of NH	DIAGNOSIS INFO PENDING	IN PROGRESS	

FIGURE 36 : REGISTRY : INDIVIDUAL LOOKUP

   a. If the individual has an existing **Registry** record, you will be redirected to that record in the Registry screen where you may make updates. See Section 4.3 Managing Registry Services for editing and managing registry services.

   b. If the individual does not have a **Registry** record on file, you will be redirected to a blank Registry screen to create a new entry.

   c. Continue to Section 4 :Registry for information on completing the Registry Information section.

   NOTE: An individual must have all Intake information completed, including demographics, AA eligibility, and diagnosis information, for the **Registry (　®　)** icon to appear.

4.2 Completing a Registry Record

The Registry screen is made up of five sections (displayed in the image below):

1. Individual Information Header (Read-only display)
2. Intake Information (Read-only display)
3. Registry Information
4. Service Information
5. Comments

4.2.1 Registry Information

The Registry Information section will be expanded upon entering the Registry screen. To finish creating a Registry record, the user is required to complete and save the Registry Information portion of the Registry. To do so:

1. If the individual is participating in the Participant Directed and Managed Services model, **select 'Yes'** in the **PDMS** field. Select 'No' if the individual is participating in the traditional service delivery model.
2. Enter a **Reason for Request**. A maximum of 2000 characters is allowed.
3. Enter the **Factors** according to the waiver that is being requested for the individual.
   a. DD/ABD factors are displayed on the screen by default. For the In-Home Supports waiver, click the plus sign next to IHS Factors to show applicable choices.
4. Click **Save.** You will not be able to save if any piece of required data is missing.

NOTE: User must select two Individual Factors, or one Individual and one Family factor in order to save and continue.

FIGURE 37 : REGISTRY : REQUEST

4.2.2 Service Information

To add a Registry service for an individual, expand the **Service Information section** on the **Registry screen** by clicking on the white dropdown arrow.

1. Click the '**Add Service**' button.
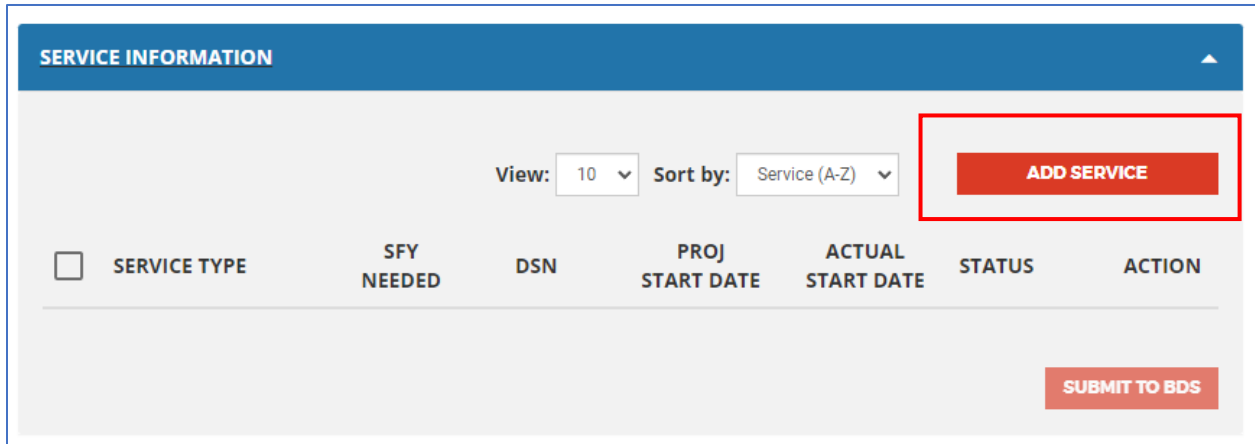
FIGURE 38 : REGISTRY : ADD SERVICE

2. You will be redirected to the **Service Details** page where you must enter all required fields for that service as indicated by a *red asterisk. Select the waiver, service type and category. Enter the date services needed and services frequency information.

NOTE: No dollars will appear for the AA worker. BDS's screens will show dollar estimates based on an average rate for each service type.

FIGURE 39 : REGISTRY : SERVICE DETAILS

3. Once you have finished, click '**Save'.** You will not be able to save if any piece of required data is missing. After saving, you will be redirected back to the **Registry screen** where the saved service will be listed in the **Service Information grid** section.
4. Repeat steps 1 - 3 until all expected services have been added for the individual.

4.2.3 Comments

Comments may be added to the Registry record if there are any additional supporting details for the information provided in the other sections. To add comments:

1. Expand the Comments section by **'clicking'** on the **white dropdown arrow.**
2. Enter the message in the **Comments** text box. A maximum of 1000 characters is permitted.
3. Click **Save.**
4. To edit the comment or add to previous entries in the future, repeat steps 1 - 3.

4.3 Managing Registry Services

Area Agency workers will have the ability to edit registry services, submit them to BDS for acceptance, and view their **Service History** through the Service Information grid of the Registry screen.

4.3.1 Editing a Registry Service

Registry services may be modified at any time point after being added to the **Registry record** so long as they have not been submitted to BDS for acceptance.

1. Under the Service Information grid, click the '**View/Edit**' icon under the **Action** column for the service row you plan to edit.

FIGURE 40 : REGISTRY : EDITING / SAVING

2. This will redirect you to **Service Details**, where you can modify the service data which was previously entered for the fields which are enabled.
3. Click **Save**. You will not be able to save if any piece of required data is missing

4.3.2 Adding the Projected Start Date

Once BDS has accepted the Draft, to enter the **Projected Start Date**, the Area Agency worker can utilize the Registry Services grid on the **AA Intake dashboard** to see all services with this status, or use the **Search Existing Activities** feature from the dashboard. The two methods are detailed below:

1. From the **AA Intake Dashboard**, **click** on a **'hyperlinked count'** for the status row of **'Projected Start Date Pending.'**
2. This will redirect you to the **Service Search**, where you can **click** the individual's **'hyperlinked name'** in the search results to navigate to their service record.

REGISTRY SERVICES	Count by Months (against DSN)				
	Overdue	0-3	4-6	7-12	Future
* Draft	9	36	0	0	1
* More Info Needed From AA	1	1	0	0	0
Awaiting LOC Determination	6	1	0	1	0
Estimate Acceptance Pending	0	0	0	0	0
Estimate Not Accepted	1	1	0	0	0
* Projected Start Date Pending	10	4	0	0	0
Estimate Accepted	2	3	0	0	0

FIGURE 41 : REGISTRY SERVICES GRID : SERVICE STATUSES

NAME	SERVICE TYPE	STATUS	DATE SERVICES NEEDED	PROJECTED START DATE	ACTUAL START DATE
LAST, SYSTEMTEST	Community Support Services	Projected Start Date Pending	10/27/2022	00/00/0000	00/00/0000
LAST, SYSTEMTEST	Community Integration Services	Projected Start Date Pending	10/20/2022	00/00/0000	00/00/0000
LAST, SYSTEMTEST	PDMS	Projected Start Date Pending	10/20/2022	00/00/0000	00/00/0000
LAST, SYSTEMTEST	Day	Projected Start Date Pending	10/13/2022	00/00/0000	00/00/0000

2. Once on their **Service Details** page, you may '**enter the projected start date**'. **Projected Start Date** can be changed so long as it is not in the past as displayed.

FIGURE 42 : REGISTRY SERVICE DETAILS : PROJECTED START DATE

3. From the **AA Intake Dashboard**, navigate to the Search Existing Activities drop-down, select *'Registry Service'* and click '**Add**'.

4. This will redirect you to the **Service Search**, where you can select '*Projected Start Date Pending'* from the **Status** drop-down in the search criteria to retrieve service records

missing a projected start date. You may filter the search further using additional search criteria if you choose.

5. Follow steps 1a and 1b to finish adding the projected start date.

4.3.3 Service History

Changes made to a Registry service will be captured in the **Service History** under the Service Information of the Registry screen in NH EASY. This information is for informational purposes and thus, read-only.

To view those changes:

1. Click the '**History'** icon (shown below) under the **Action** column for the service row in question.

2. A pop-up of the **Service History** (see below) will display with the following information:

    a. Frequency
    b. Unit Per
    c. Days per Week
    d. Date Services Needed
    e. Projected Start Date
    f. Change Reason – This field captures the reason selected by the user when the Projected Start Date is changed. Past entries of change reasons are recorded in this pop-up.
    g. Actual Start Date
    h. Status
    i. Updated By
    j. Updated Date

FIGURE 43 : REGISTRY : SERVICE HISTORY

3. Click **X** at the top to close the window and return to the main Registry screen.

4.3.4 Submitting to BDS

Services can be submitted to BDS for acceptance once the **Date Services Needed** falls within the next 12 months from the current date. If the DSN is more than 12 months away, the checkbox cannot be clicked. Each service can be submitted individually using the '**Submit to BDS'** button on the **Service Details** page or in batch using the checkboxes from the main Registry screen under the Service Information and then clicking '**Submit to BDS'.**
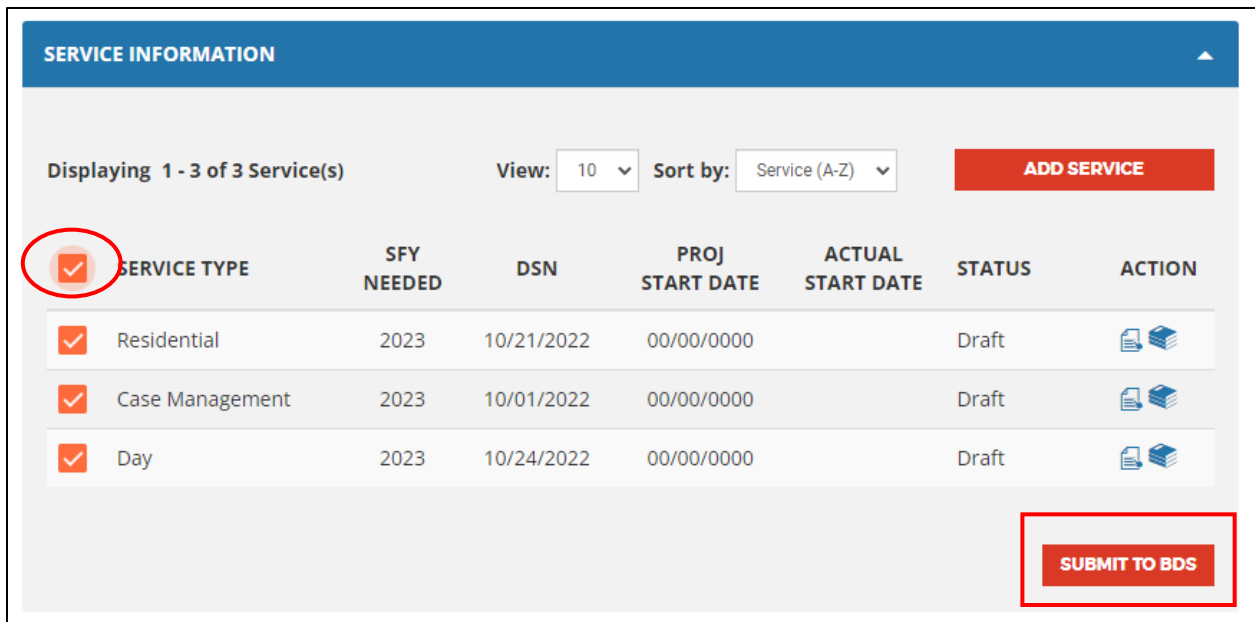
FIGURE 44 : REGISTRY : SUBMITTING TO BDS

BDS will receive notification that there are service drafts that need to be accepted. In order for BDS to accept the service draft, a **Functional Screen** must have been submitted and the individual must have been found to meet **Level of Care** requirements. Once those criteria are met, BDS will accept the service draft and the services will have a status of '*Projected Start Date Pending'*.

Alternatively, BDS can set the status to *'More Info Needed.'* Once this status updates, the fields in **Service Details** will become editable to the Area Agency again, and the AA worker can resubmit after making changes.

BDS cannot accept the draft until **Level of Care** has been approved. If **Level of Care** has not been approved upon submission, the status will change to '*Awaiting LOC Determination.'* When LOC has been approved, the status will change to *'Draft Acceptance Pending.'*

While the record is in those statuses, it cannot be edited. The Area Agency can only withdraw the request. Once BDS accepts the draft, the status will change to *'Projected Start Pending.'* When the Projected Start Date has been entered, the status will change to *'Draft Accepted.'*

4.4 Searching for Registry Services

The **Service Search** functionality provides AA workers the ability to search, filter, and locate any Registry services which were added by their organization and/or submitted to BDS. You may navigate to the **Service Search** screen one of two ways:

1. From the **AA Intake Dashboard**, click on a **'hyperlinked value'** on the Registry Services grid. This will launch the **Service Search**, which will be populated with the status and dates associated with the count selected.
2. From the **AA Intake Dashboard**, click on the '**Search Existing Activities**' drop-down and select **'Registry Service.'** This will launch the **Service Search**.

Steps to Search for a Registry Service:

1. Filter your search by the **Client Information: Individual's First Name, Last Name, SSN, and/or MID** or by **Service Information: Service Type, Status, Dates**, and/or **Missing Actual Start Date** (enabled only when status is 'Estimate Accepted') and click **'Search'**.

   a. Click **'Clear All'** to delete information previously entered in the search criteria and conduct a new search.

FIGURE 45 : REGISTRY : SERVICE SEARCH CRITERIA

2. Lookup results will appear in the bottom grid by **Name, Service Type, Status, Date Services Needed, Projected Start Date,** and **Actual Start Date**.

   a. You may sort the results using the **View** and **Sort By** drop-down menus. **View** controls the number of records displayed on the screen at one time. **Sort By** controls the order in which the results are listed in the grid.

   b. If the filtered search returns no results, *"No results found for the above search criteria."* will appear in the results grid. You may return to step 1 to perform another search.

   NOTE: The results retrieved in the search are limited to individuals belonging to the logged-in user's organization.

FIGURE 46 : REGISTRY : SEARCH RESULTS

3. Upon locating the record in the search results, click on the hyperlinked name of your individual within the results to be redirected to their **Service Details**.

4. The '**Export Results'** button will allow you to download all the search results in .xlsx format. The following fields will be available in the export:
    - Name - Individual ID
    - Service Type
    - Status
    - Date Services Needed
    - Projected Start Date
    - Actual Start Date
    - Status Date (of terminal status, if Withdrawn; Draft Accepted; Draft Not Accepted)

3. AA workers can also use the **Service Search** to navigate to other NH EASY **Search** screens. To conduct a search for a different activity, select one of the following values from the '**Search Type drop-down'** located in the top right-hand corner of the screen:
    - Intake
    - Functional Screen

- Correspondence
- Transfer

Section 5 : Correspondence

The **Correspondence** feature will serve as a cross-organizational method of communication between Area Agencies and BDS with screens being accessible to each organization's AA workers in the NH EASY and New HEIGHTS applications, respectively. Correspondence will enable AA and BDS workers to communicate with each other regarding an individual's eligibility, functional screen, registry, documentation, or other general topics unrelated to a single individual.

This guide details the process of creating, completing, processing, replying to, and searching for a correspondence online through NH EASY.

5.1 Creating a New Correspondence

To create a new **Correspondence**, use the **AA Intake Dashboard**, navigate to the *'Create New Activity'* drop-down, and select **'Correspondence.'** A second drop-down will appear requiring you to classify the correspondence as one of two types after which you will click '**Add**'.

- **Individual Correspondence** - Defined as those relating to a specific individual's record.
- **General Correspondence** - Defined as those regarding broader subjects unrelated to any one individual.

FIGURE 47 : CORRESPONDENCE : CREATE NEW CORRESPONDENCE

5.1.1 Individual Correspondence

If you classified the correspondence as 'Individual', you will be redirected to the **Individual Lookup screen** where you must look up the individual you are creating a correspondence about in order to link the correspondence to their record.
To do so:

1. Search for the individual you wish to create a correspondence for using the search criteria and retrieve their information in the Individual Lookup Results. See Section 2.1 Lookup Existing Individuals for more detailed instructions.
    a. if the individual you are looking up is *not known* to NH EASY, you may establish the person as a new individual. See Section 2.2 Establish New Individuals for further instructions.
2. From the Lookup Results, select the Correspondence (💬) icon under the Action column to initiate a correspondence for that individual.

FIGURE 48 : CORRESPONDENCE : INDIVIDUAL LOOKUP RESULTS

3. You will be redirected to an empty **Correspondence screen** where the information of the individual you selected from the Individual Lookup should be reflected in the Individual Information header located towards the top of the page.

3. **Answer** the required fields marked by a *red asterisk.
    a. Classify the topic of the correspondence by selecting a '***Type'*** from the drop-down.

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b. **'Enter a Subject line'** that describes at a high-level what the correspondence is about.

c. Type your full correspondence message in the '**Notes'** text box.
    Note: A maximum of 3000 characters is allowed.

3. Click **'Submit'** to save and send your correspondence to the Bureau of Developmental Services (BDS). Button enabled once all required fields are completed.

Please select a Type when a correspondence relates to specific individual. Enter a Subject and Note for your correspondence and select 'Submit' to send the message to the BDS unit.

Sender Organization

Monadnock Developmental Services

Receiver Organization

BDS Unit

Status

Unprocessed

Commenter

Bolanos, Nicole

Date

11/13/2022

* Type

* Subject

* Note (Remaining Characters:3000)

CANCEL   SUBMIT

FIGURE 49 : CORRESPONDENCE : SUBMITTING AN INDIVIDUAL CORRESPONDENCE

4. You may click '**Cancel'** before submitting to exit out of the **Correspondence screen** and return to the **AA Intake Dashboard**. This will lose any entered information.

5. Clicking this button prompts a warning pop-up with the following language: *"Are you sure you want to leave this page without saving?*

a. Select **'Cancel'** to return to the page and then <u>save your progress</u>.
      OR
b. Select **'Continue'** to proceed without saving.

5.1.2 : General Correspondence

If you classified the correspondence as **'General'**, you will be directly navigated to the **Correspondence screen** where you may enter your correspondence information.

To do so:
1. **Answer** the required fields marked by a *red asterisk.
    a. The correspondence **Type** will be classified as **'General'** by default.
    b. **Enter** a '**Subject line'** that describes at a high-level what the correspondence is about.
    c. Type your full correspondence message in the **Notes** text box.
        <u>Note</u>: A maximum of 3000 characters is allowed.

2. Click **Submit** to save and send your correspondence to the Bureau of Developmental Services (BDS). Button enabled once all required fields are completed.

FIGURE 50 : CORRESPONDENCE : SUBMITTING A GENERAL CORRESPONDENCE

3. Before submitting, you may click '**Cancel'** if you wish to exit out of the **Correspondence screen** and return to the **AA Intake Dashboard**. This will lose any entered information.

   a. Clicking this button prompts a warning pop-up with the following language: *"Are you sure you want to leave this page without saving?*
         i. Select *'Cancel'* to return to the page and save your progress.
            OR
         ii. Select *'Continue'* to proceed without saving."

5.2 : Searching for Existing Correspondences

The *Correspondence Search* provides Area Agencies with the ability to search, filter, and locate functional screen records initiated by their organization. This screen can be accessed in one of two ways:

1. From the **AA Intake Dashboard**, click on a **'hyperlinked value'** on the Correspondence grid.
2. From the **AA Intake Dashboard**, select *Correspondence* from the **'Search Existing Activities'** drop-down.

To Search for a Correspondence:

1. Search for the correspondence record in the top grid by the individual's **First Name, Last Name, SSN, MID, Type, Status,** and/or **Dates** (searches against the correspondence updated date) and click '**Search'**.

   a. Click **'Clear All'** to delete information previously entered in the search criteria and conduct a new search. This button clears all fields in the search criteria except for the **From** and **To** fields, which will default to show records from one month prior until the current system date.

2. Search results will appear in the bottom grid by **Name, Date, Type-Subject, Status, Sender,** and **Receiver**.

   a. You may sort the results using the **View** and **Sort By** drop-down menus. **View** controls the number of records displayed on the screen at one time. **Sort By** controls the order in which the results are listed in the grid.

b. If the filtered search returns no results, *"No results found for the above search criteria."* will appear in the results grid. You may return to step 1 to perform another search.

   NOTE: The results retrieved in the search are limited to individuals belonging to the logged-in user's organization.

3. Correspondences which include a thread of communications between BDS and Area Agencies will be displayed by a blue drop-down to the left. Clicking it will expose the thread of replies. Clicking it again will hide the thread of replies from view.

NAME - INDV ID	DATE	TYPE - SUBJECT	STATUS	SENDER	RECEIVER
∨ ROOSEVELT, ELEANORROOSEVELT, ELEANOR - 10850	11/07/2022	Functional Screen - Diagnosis	Processed	Community Partners	BDS Unit
ROOSEVELT, ELEANOR	11/07/2022	Functional Screen - Diagnosis	Replied	BDS Unit	Community Partners
ROOSEVELT, ELEANOR	11/07/2022	Functional Screen - Diagnosis	Unprocessed	Community Partners	BDS Unit

4. Upon locating the record in the results, click on its hyperlink. Individual correspondences will list a hyperlinked name while general correspondences will list a 'Not Specified' hyperlink. Clicking it will redirect you to:

   a. The **Correspondence page** where you may view the details of that correspondence in read-only mode.

   b. If a correspondence is part of a thread of replies for which it is NOT the most recent record, **clicking** on the **'hyperlink'** will open a pop-up displaying only the Note/Message of that correspondence.
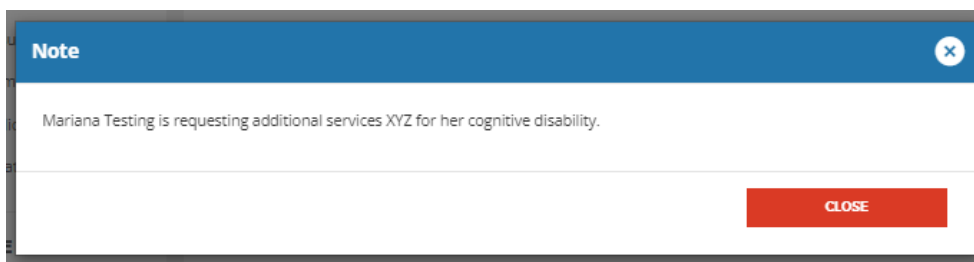
5. AA workers can also use the Correspondence Search to conduct a search for a different activity by selecting a different functionality in the **Search Type** drop-down, including:

- Intake

- Functional Screen
- Registry Service
- Transfer

5.2.1 Replying to a Correspondence

Once BDS replies, the new message notification will show on the **AA Intake Dashboard** under the respective Correspondence Type row. Area Agency users may click the count value from the Correspondence grid to view those messages.

This will redirect you to the Correspondence Search where you can **click** on a '**hyperlinked name**' from the results to access that unique correspondence record with all fields displaying as pre-populated and read-only.

To Reply to a Correspondence:

1. From the read-only correspondence entry, click the '**Reply**' button. You will be redirected to a new correspondence entry.

FIGURE 51 : CORRESPONDENCE : REPLYING TO A CORRESPONDENCE

2. On the new correspondence page, the following fields will be pre-populated and read-only:
   a. **Sender Organization** will reflect your Area Agency name
   b. **Receiver Organization** will populate to the BDS Unit
   c. **Status** will automatically be updated to 'Replied'
   d. **Commenter** will automatically populate to the current user's (your) name
   e. **Date** will automatically be updated to the current system date
   f. **Type** and **Subject** will reflect the same information that was entered for the original correspondence

3. Upon clicking **'Reply'**, the *Notes* field will become enabled. <u>Enter your full correspondence message</u> in the *Notes* text box.
   i. A maximum of 3000 characters is allowed.

4. Click '**Submit'** to save and send your correspondence to the Bureau of Developmental Services (BDS). Button enabled once all required fields are completed.
   a. Once clicked, a **confirmation pop-up** will appear with the following language: *"Thank you for your submission. A BDS Staff Member will contact you with any questions."*

5. Before submitting, you may click '**Cancel'** if you wish to exit out of the correspondence page and return to the Correspondence Search. This will lose any entered information.
   a. Clicking this button prompts a warning pop-up with the following language: *"Are you sure you want to leave this page without saving?*
      i. *Select 'Cancel' to return to the page and save your progress.* OR
      ii. *Select Continue to proceed without saving."*

5.2.2 Viewing/Processing a Correspondence

Area Agency users may view and/or process a correspondence by **clicking** on a '**hyperlinked name'** from the results in the Correspondence Search. Doing so will redirect the user to that **Correspondence record**, with all fields displaying as pre-populated and read-only.

To Process a Correspondence:

1. From the read-only correspondence entry, **click** the '**Processed'** button. You will be redirected to a new correspondence entry.
   a. **Enabled** for correspondences where the initial **Sender Organization** is an Area Agency

b. **Disabled** when creating a correspondence or when accessing correspondences within a thread which were initiated by the BDS Unit (i.e., initial **Sender Organization** is BDS)

Sender Organization

Community Crossroads

Receiver Organization

BDS Unit

Status

Unprocessed

Commenter

Admin, Community

Date

11/14/2022

* Type

Functional Screen

* Subject

Diagnosis

* Note (Remaining Characters:2945)

Do you need additional documentation for her diagnosis?

CANCEL   PROCESSED   REPLY

2. On the new correspondence page, the following fields will be prepopulated and read-only:
    a. **Sender Organization** field will reflect your Area Agency name
    b. **Receiver Organization** field will populate to the BDS Unit
    c. **Status** field will automatically be updated to 'Processed'
    d. **Commenter** field will automatically populate to the current user's (your) name
    e. **Date** field will automatically be updated to the current system date
    f. **Type** and **Subject** fields will reflect the same information that was entered for the original correspondence

3. Upon **clicking 'Processed'**, the *Notes* field will become enabled with the following message displayed: *"Processed on [MM/DD/YYYY]"* with the date being the current system date.

    a. You may add additional notes in the *Notes* text box and/or delete the automated message. A maximum of 3000 characters is allowed.

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* Type

Functional Screen ⌄

* Subject

Diagnosis

* Note (Remaining Characters:2977)

Processed on 11/14/2022

CANCEL   **SUBMIT**

---

4. Click **'Submit'** to save and send your correspondence to the Bureau of Developmental Services (BDS).

    a. Button enabled once all required fields are completed.

    b. Once clicked, a confirmation pop-up will appear with the following language: *"Thank you for your submission. A BDS Staff Member will contact you with any questions."* Clicking 'OK' returns you to the **AA Intake Dashboard**.

5. Before submitting, you may **click 'Cancel'** to exit out of the correspondence entry and return to the **Correspondence Search**. This will lose any entered information.

Note: Clicking this button prompts a warning pop-up with the following language: *"Are you sure you want to leave this page without saving? Select **'Cancel'** to return to the page and save your progress. Select **'Continue'** to proceed without saving."*

Section 6 : Transfers

The **Transfer** function will help Area Agencies move the responsibility of the individual they are managing from one agency to another. Only the Area Agency Administrator and Area Agency Supervisor roles have the permissions to perform this action through the individual's Intake **Activity Log screen**.

This guide details the process of initiating and searching for transfers for an individual from one agency to another through NH EASY. The following processes associated to **Transfers** will be discussed in this section:

6.1 Initiating a Transfer

Steps for Individual's Transfer from One Agency to Another:
Below are the steps for an Area Agency Administrator or AA Supervisor to initiate an individual's transfer from one agency to another:

1. Locate the individual through the Individual Lookup screen or Intake Search screen
   NOTE: An individual's intake can be accessed in various ways from the **AA Intake Dashboard**, as explained in the Dashboard section of this user guide. Please refer to Section 1 : AA Intake Dashboard

2. Access the individual's intake by clicking on the individual's name from the search results.

3. Select **'Transfer'** from the **_'Activity drop-down'_** on the **Activity Log screen**, select the receiving agency from the Agency drop-down, and click the 'Add' button.

FIGURE 53 : TRANSFERS : LOCATE INDIVIDUAL

Once the activity is added, that individual record will be displayed under the Transfers grid on the initiating agency's **AA Intake Dashboard** with the status as *'Outgoing Pending,'* and the individual will be displayed on the Transfers grid of the receiving agency's **AA Intake Dashboard** under *'Incoming Pending'* status.

6.2   Cancelling 'In Progress' Transfers

Transfers that are in progress can be cancelled only by the initiating Area Agency Administrator.

In progress transfer can be cancelled only by the initiating agency administrator. Transfer can be cancelled, by accessing the individual's intake and entering the 'Cancel Transfer' activity in the activity log screen. Individual's intake can be accessed in many ways from the AA Intake Dashboard as explained in the Dashboard section of this user guide, please refer to Section 1 : AA Intake Dashboard

Also, the in-progress transfers will be listed under Transfer's grid with 'Outgoing Pending' status for the initiated agency, accessing this record from the transfer search screen will provide access to the individual's intake activity log, by clicking on that individual name from the transfer search results screen.

In the Intake Activity Log screen, Initiating Agency Administrator will have access to 'Cancel Transfer' activity. Selecting 'Cancel Transfer' activity will display an agency drop-down field which will be a protected field defaulting the receiving agency(indicating from which agency this transfer is being cancelled) and then select 'Add' button. Once the activity is saved successfully, transfer will be cancelled.

6.3 Accepting or Rejecting Transfers

Once the Transfer is initiated by the initiating Area Agency, the individual record will be listed under *'Outgoing Pending'* status in the Transfers grid of the **AA Intake Dashboard**. The Transfer record will be listed under *'Incoming Pending'* status on the receiving Area Agency worker's **AA Intake Dashboard**. **NOTE:** Only the receiving agency can either accept or reject the transfer.

Steps to Accept a Transfer:

1. Locate the individual through the Individual Lookup screen or Intake Search screen
    NOTE: An individual's intake can be accessed in various ways from the **AA Intake Dashboard**, as explained in the Dashboard section of this user guide.

2. Access the **Transfer screen** by clicking on the individual's name in the **Transfer search results screen.**

3. Select **'Yes'** from the *'Accept Transfer?'* drop-down and click the **'Submit'** button.

4. Click **'OK'** on the confirmation pop-up message.

As soon as the transfer record is accepted, the initiating Area Agency will no longer have access to the individual's record and only the receiving Area Agency will gain access to that record.

FIGURE 54 : TRANSFERS : ACCEPTING

Steps to Reject a Transfer:

1. **Locate the individual through the Individual Lookup screen or Intake Search screen**
   NOTE: An individual's intake can be accessed in various ways from the **AA Intake Dashboard**, as explained in [Section 1 : AA Intake Dashboard](#) section of this user guide.
2. Access the Transfer screen by clicking on the individual's name in the Transfer search results screen.
3. Select **'No'** from the *'Accept Transfer?'* **drop-down**, enter the reason for rejection in the **'Rejected Reason' free-form text box**, and **click** the **'Submit'** button.
4. Click **'OK'** on the confirmation pop-up message.

As soon as the transfer record is rejected, the transfer record status will be updated to *'Rejected'* and that record will not be accessible to the receiving Area Agency anymore.

FIGURE 55 : TRANSFERS : ACCEPTING / REJECTING : REASON

6.4 Tracking 'In Progress' or 'Completed' Transfers

Transfers that are in status of '*In progress*' or '*Cancelled*' or '*Completed*' can be located only by the AA Administrator through the Transfer Search screen.

Transfer Search screen can be accessed in the following ways:

FIGURE 56 : TRANSFERS : SEARCH

From the Transfers Grid on the AA Intake Dashboard:

1. On the **AA Intake Dashboard**, the Transfers grid will list all transfers that are in progress under *'Outgoing Pending'* & *'Incoming Pending'* statuses

2. **Click** on the counts that were listed in the Transfers grid on the **AA Intake Dashboard**

3. This will launch the '**Transfers Search**' screen

4. Search results will appear in bottom grid of the same screen and be displayed by the columns; **Name - Indv. ID, DOB, Status, Initiating Area Agency, and Receiving Area Agency**.

   a. You may sort the results by using the **Sort By** drop-down provided in the search results grid.

5. **Clicking** on an **individual's name** of a **Pending Transfer** record from the search results will:

   a. Redirect the user to the **Intake Activity Log** if the transfer is initiated by the logged in agency; (Outgoing Transfer)

   OR

   b. Redirect the user to the 'Transfer' screen to accept or reject the individual if the logged in agency is the receiving agency. (Incoming Transfer)

From the Search Existing Activity on the AA Intake Dashboard:

1. On the AA Intake Dashboard, select 'Transfer' from the 'Search Existing Activities' drop-down to launch the Transfer Search screen. This screen provides the ability for users to search, filter, and locate the in progress or completed transfer records.

2. Complete any of the search criteria fields provided (i.e., **individual's First Name, Last Name, DOB, Individual ID, Status, and/or Dates**)

3. **Click 'Search'** to conduct the search based on the information entered in the search criteria.

4. Lookup results will appear in the bottom grid by **Name - Indv. ID, DOB, Status, Initiating Area Agency, and Receiving Area Agency**.

5. You may sort the results of the bottom grid using the **View** and **Sort By** features

6. If the search criteria entered did not result in any records, "No results found for the above search criteria" will appear in the results grid.

7. **Clicking** on a '**hyperlink'** within the results will redirect you to:

   a. The individual's **Intake Activity Log** if the transfer was initiated by your organization and is in a status of *'Pending'* or *'Rejected'*.

      i. You may cancel your transfer if '*Pending'* or re-initiate a new transfer if '*Rejected'* from this screen.

   b. The **Transfer screen** if the transfer was received by your organization and is in a status of *'Pending'*.

      i. You may '**accept'** or '**deny'** the transfer from this screen.

   <u>NOTE:</u> The Transfer Search results retrieved in the search screen include the individuals that are part of the transfer process in which the logged Area Agency is either an initiating Area Agency or receiving Area Agency.

Status	Hyperlink Functionality	Description
Pending (Incoming*)	Hyperlink redirects user to Transfer screen (*Figure 54 and Figure 55*).	Once on that screen, Admin users will have the ability to accept or reject the transfer of that individual into their organization.
Pending (Outgoing*)	Hyperlink redirects user to individual's Intake activity log (*Figure 25*).	Once on that screen, AA users will have the ability to view the individual's intake and/or cancel the transfer they had initiated.
Rejected (Incoming*)	No hyperlink	The individual still belongs to the external area agency and therefore the logged-in agency is not able

		to view the individual's intake activity log information.
Rejected (Outgoing*)	Hyperlink redirects user to individual's Intake activity log (*Figure 25*).	Once on that screen, AA/Admin users will have the ability to view the individual's intake and Admin users may re-initiate a new transfer to the same area agency or a different one.
Accepted (Incoming*)	Hyperlink redirects user to individual's Intake activity log (*Figure 25*).	Once on that screen, AA users will have the ability to view the individual's intake now that the individual has successfully been transferred to the logged-in area agency.
Accepted (Outgoing*)	No hyperlink.	The individual no longer belongs to the logged-in AA and therefore the logged-in AA is no longer able to view the individual's intake activity log information.
Cancelled (Incoming*)	No hyperlink.	The individual still belongs to the external area agency and therefore the logged-in AA is not able to view the individual's intake activity log information.
Cancelled (Outgoing*)	Hyperlink redirects user to Intake activity log (*Figure 25*).	Once on that screen, AA/Admin users will have the ability to view the individual's intake and Admin users may re-initiate a new transfer to the same area agency or a different one.

Section 7 : User Management

Each Area Agency will have one **Administrator Account** that manages access for all users within the agency. Administrators will have the ability to manage roles, add new users, reset passwords, and edit users' access levels from the NH EASY User Management screen. Each agency can only have one Administrator Account.

NOTE: Only the Administrator Account will have access/visibility to the NH EASY User Management screen and roles will be assigned to workers at the user level, not the organization level.

Section 7.1 Managing User Roles

As part of this phase/user guide, the following roles will be created in NH EASY at the AA organization levels for Administrators to assign user access:

Phase 1 Security Role Matrix

	AA Admin *	Intake Coordinator	AA Case Manager **	AA Supervisor
Intake Dashboard	Y	Y		Y
Individual Intake Data	Y	Y		Y
Functional Screen	Y	Y		Y
Registry Services	Y	N	Phase 2 Role	Y
Correspondence	Y	Y		Y
Document Upload	Y	Y		Y
Upload history	Y	Y		Y
Import Data	Y	N		N
Import History	Y	N		N
Export Data	Y	N		N
AATransfer	Y	N		Y

* There is only one admin account, this role cannot be assigned.

** The AA Case Manager role will be used in Phase 2. This role will not have access to any Phase 1 functionality.

Section 7.2 Adding New Users

Administrators will have the ability to add new users in NH EASY.

FIGURE 57: ADDING A NEW USER ACCOUNT

To add a new user:

1. Click the **'User Management'** link located on the left-hand side under the My Functions banner. You will see the list of users in your organization.
2. Select the **'Add New User'** button. You will be redirected to the Add New User screen.
3. Enter all required information for the user including their role and click the **'Add User'** button to save the information. The user account has now been created.
   a. See *Section 7.1 Managing User Roles* for further details on the distinct roles available.

Section 7.3 Updating User Credentials

Administrators will have the ability to update a user's password credentials for their NH EASY account.

FIGURE 58: UPDATING USER CREDENTIALS

To update a user's credentials:

1. Click the **'User Management'** link located on the left-hand side under the My Functions banner. You will see the list of users in your organization ().
2. Click the **'Reset Password'** link on the row for the individual you would like to update credentials for. You will be redirected to the Reset Password screen.
3. Enter and re-type the new password. The password must follow the criteria listed in the instructions shown.
4. Click the **'Save Changes'** button. The user's account credentials should now be updated.

Section 7.4 Updating User Information and Deleting Existing Users

Administrators will have the ability to update the information of users as well as delete users from NH EASY if needed.

FIGURE 59: REMOVING A USER ACCOUNT

To update a user's information:

1. Click the **'User Management'** link located on the left-hand side under the My Functions banner. You will see the list of users in your organization (*Figure 57*).
2. Click the **'Edit'** link on the row for the individual you would like to update information for. You will be redirected to the Update User Information screen.
3. Enter the new information from the editable fields and/or select an updated role. Click the **'Save Changes'** button to finalize updating the user account.

To delete a user:

4. Click the **'User Management'** link located on the left-hand side under the My Functions banner. You will see the list of users in your organization (*Figure 57*).
5. Click the **'Edit'** link on the row for the individual you would like to remove from NH EASY. You will be redirected to the Update User Information screen.
6. Select the **'Inactive'** radio button from under Status and click the **'Save Changes'** button. The user account has now been deleted and the user will no longer have access to their account.

Section 8 : Glossary

Term:	Definition:	Acronym:
'At a Glance'	Intake Landing Page : Summary View	-
AA	Area Agency	AA
AA Administrator	Each Area Agency will have an Administrator with corresponding permissions and access.	-
AA Intake Dashboard	Dashboard : Landing Page for AA Tasks : Navigation Home	-
AA Worker	Area Agency staff	-
AAIDD	American Association on Intellectual and Developmental Disabilities	AAID
ABD Waiver	Acquired Brain Disorder	ABD
Action	Displays a drop-down allowing the user to take action for that individual row.	-
Activity	"Activities" is a term used throughout this user guide in reference to any action/assessment performed on the individual during the AA/Waiver eligibility process.	-
Activity Grid	AA Agency Display : General (Non-worker specific)	-
ADL	Activities of Daily Living	ADL
API	Application Programming Interface	API
Area Agency	Regional Area Agencies	AA
BDS	Bureau of Development Services	BDS
BTS	Budget Tracking System	BTS
Case Management	Function and role of case management for Individuals receiving services	CM
CFI	Choices for Independence	CFI
DD Waiver	Developmental Disabilities	DD
DHHS	Department of Health and Human Services	DHHS
DOB	Displays the individual's date of birth in MM/DD/YYYY format.	DOB
DUCK	Division Unique Client Key	DUCK

Functional Screen	Displays the status of a functional screen(s). Will always display the most recent Functional Screen on file.	FS
Grid	View criteria by sectioned category	-
HCBS	Home and Community Based Services	HCBS
Help / Info ? HELP	Hovering over an icon will expose a tool tip describing the action icon.	-
He-M 1001	Certification Standards for Community Services	-
He-M 507	Rules governing Community Participation Services	-
He-M 521an	Rules governing residential and/or combined services provided in family home	-
He-M 525	Rules governing Participant Directed and Managed Services	PDMS
IHS Waiver	In Home Supports	IHS
HRST	Health Risk Screening Tool	HRST
Hyperlink	Blue underline (online PDF) indicates a clickable link	-
Individual	New Hampshire Resident	-
Individual ID	Unique Identifier in NH EASY	-
Intake	Process of determining an individual eligible for services	-
Intake Status	Displays the status of an intake(s). Will always display the most recent Intake on file.	-
ISA	Individual Service Agreement	ISA
Known / Not Known	Used to indicate an Individual information availability.	-
Level of Assistance Scale	Level of Assistance Scale	LOA
Lookup	Search / Find	-
MID	Displays the individual's 11-character Medicaid Identification number.	MID
Process	Process of determining an individual eligible for services	-
Search	Perform a Lookup / Find	
SIB-R: Scales of Independent Behavior	Scales of Independent Behavior	SIB-R
SIS	Supports Intensity Scale	SIS

SSN	9 Digit Social Security Number	SSN
User Designated	Restricted view	-

Section 9 : Appendix