NH EASY USER GUIDE: PHASE 2

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Welcome to the NH EASY User Guide (Phase 2)

About This Guide

The NH EASY User Guide (Phase 2) is designed to assist the Area Agencies and Case Management Agencies in navigating the system functionality related to service management for individuals receiving services in New Hampshire.

- ➢ Individual service management related activities include detailed processes 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 a list of Figures used throughout the User Guide, as well as descriptions for all statuses related to this phase.

Access to NH EASY

- ➢ Access to NH EASY is needed to complete the actions in this user guide.
- ➢ Please obtain your username and password or contact your Administrator to assist with user access.
- ➢ NH EASY URL/Application: https://nheasy.nh.gov

Help/General Navigation

- ➢ Hovering over an icon will expose a tool tip describing the action icon (e.g., View/Edit, Delete).
- ➢ 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: Service Management Dashboards

The **Service Management Dashboard** serves as the gateway by which Area Agencies and Case Management Agencies can access all service management functionalities available within the NH EASY application. It is the summary page which enables workers to track and manage the tasks associated with their specific organization and consists of various grids focusing on specific stages of the service management, case management assignment, Individualized Service Agreement (ISA), and service authorization processes.

The following processes associated with Dashboards will be discussed in this section:

- ➢ **Navigating to the Service Management Dashboard(s)**
- ➢ **Using the Dashboard Data Grids**
- ➢ **Additional Dashboard Functionality:**
    - o **Searching for an Individual Record**
    - o **Uploading Documents**
    - o **Viewing Upload History**

Section 1.1 Navigating to the Service Management Dashboard(s)

To access the Service Management Dashboard for your organization:

1. Upon initial log-in, the NH EASY system will display the 'At A Glance' screen as the landing page.
2. Click the **'View Dashboard'** button located within the Service Management banner at the center of the screen.
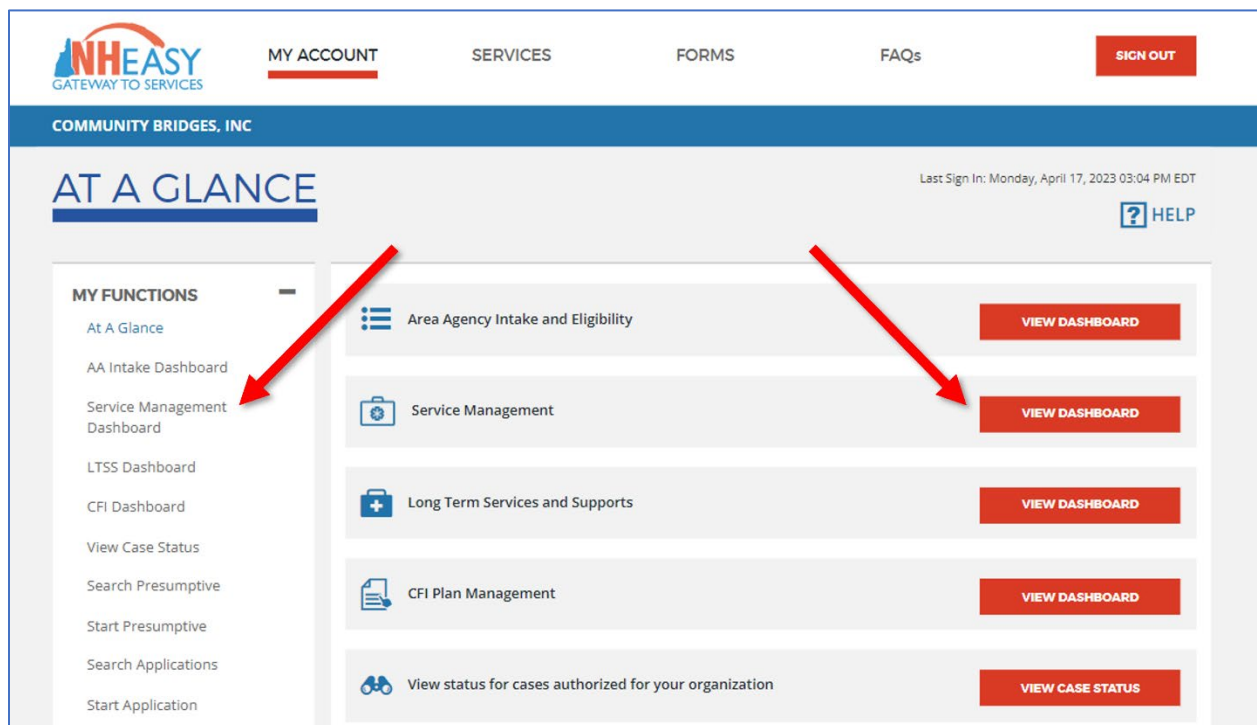

Figure 1: At A Glance

When working within any of the service management function related screens of the application, the dashboard will be accessible by selecting the **'Back to Service Management Dashboard'** link at the top of the screen.

Workers may also access the Service Management Dashboard from any other location within NH EASY unrelated to service management through the **'Service Management Dashboard'** link located below the **My Functions** header as shown above.

Section 1.2 Using the Dashboard Data Grids

On the Service Management Dashboard under the 'Open Activities' header, there are five activity-specific grids (listed from top to bottom): **Caseload, Medicaid, Individual Service Management, Service Authorizations,** and **Case Management Assignment.** 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 (AA) or Case Management Agency (CMA) is marked with a red asterisk (*). The Caseload grid for the AA Supervisor dashboard and CMA Supervisor dashboard displays information for the agency as a whole and are not worker-specific, whereas the Caseload grid for the Case Manager/Service Coordinator dashboard displays individuals specific to that worker.

The Service Management Dashboard is tailored to the particular role of the worker that is logged in to the NH EASY application. Certain grids and/or statuses displayed on the dashboard will depend on the user's role/permissions. Below are the dashboard versions by role:

- ➢ **NH EASY AA Supervisor Dashboard**
- ➢ **NH EASY Case Manager/Service Coordinator Dashboard**
- ➢ **NH EASY CMA Supervisor Dashboard**

Overall functionality of the dashboard remains the same across roles. The columns in the grids represent the total number of days the activity has been pending, or in the case of the Caseload and Medicaid grids, the columns represent the total count of individuals. The rows represent the status of the activity, or in the case of the Caseload and Medicaid grids, the caseload sub-type and the Medicaid openings or closures within the past month, respectively. The counts in each grid are hyperlinks. When selected, the corresponding search screen displays, populated with the information that applies to the listed search criteria.

The sections below provide an in-depth explanation of the overall layouts of each grid and how to use the information provided to efficiently identify and access activities. The grids are described by what is most logically expected to occur in the workflow, not by the order they are displayed on the dashboard (top to bottom).

Section 1.2.1 Caseload Grid

The Caseload grid, located on the top left corner of the dashboard, can be used to track the total number of individuals in an organization broken out by whether or not the individual is receiving waivered services. Case Managers and Service Coordinators will only see their own worker-specific caseload in this grid, whereas AA Supervisors and CMA Supervisors will see the caseload of their agency as a whole.

- **"Total"** indicates the volume of an agency's entire caseload. It is the sum of waivered and non-waivered individuals, including those not requesting services.
- **"Waivered Individuals"** includes the count of individuals who are receiving waivered services, indicated by a case management type of 'Waiver.'
- **"Non-waivered Individuals"** includes those who are receiving no services or non-waivered services, indicated by a case management type of 'Targeted' or 'Family Support.'

Section 1.2.2 Medicaid Grid

The Medicaid grid, located on the top right corner of the dashboard, can be used to track the number of records that have had their Medicaid eligibility open or closed within the last month.

Section 1.2.3 Individual Service Management Grid

The Individual Service Management grid, located on the middle-left area of the dashboard, can be used to track the progress of individual records throughout the service management workflow.

The grid displays service management records grouped by status and the total number of days elapsed since that record moved into a certain status. Each step involved in the service management process is reflected by an individual service management status. Statuses are listed within the grid in the order they are most logically expected to occur in the workflow.

INDV SERVICE MGMT	Count By Calendar Days		
	0-7	8-14	>14
Service Decision Pending	0	0	0
CMA Assignment In Progress	0	3	0
ISA Upload Pending	0	0	0
Assessments Upload Pending	0	0	0
Intake Completion Pending	0	0	0
No Services Requested	0	2	0

Through this grid, users have the ability to view service management records that are managed by their agency and are in progress. Service management records that are completed, indicated by a status of 'Open,' will not be displayed on the dashboard but can be accessed through the Individual Service Management Search. Service management records will be rolled off from this grid once they have reached a status of 'Open' or 'Closed' (both not dashboard displaying statuses). However, workers can always locate completed records (open and closed) through the Individual Service Management Search screen (*Section 1.3.1 Searching for an Individual Service Management Record*).

Section 1.2.4 Case Management Assignment Grid

The Case Management Assignment grid, located on the bottom left corner of the dashboard, can be used to track the progress of a record throughout the Case Management Assignment workflow. This grid is only visible on the AA Supervisor and CMA Supervisor dashboards and will not be visible on the Case Manager/Service Coordinator dashboard.

The grid displays case management records grouped by status and the total number of days elapsed since that record moved into a certain status. Each step involved in the case management assignment process is reflected by a case management level status. Statuses are listed within the grid in the order they are most logically expected to occur in the workflow.

CASE MGMT ASSIGNMENT	Count by Calendar Days		
	0-7	8-14	>14
CMA Assignment Pending	3	2	1
Incoming Acceptance Pending	2	1	0
Outgoing Acceptance Pending	1	0	0
CMA Assignment Rejected	0	1	0
CM Assignment Pending	2	0	4

Through this grid, users have the ability to view case management assignments that are managed by their agency. Case management assignments that have been accepted will no longer be displayed on the dashboard of the initiating agency and will be displayed on the dashboard of the receiving agency. Case management assignments will be rolled off from this grid once they have reached a status of 'Completed' (not a dashboard displaying status). However, workers can always locate completed records through the Case Management Search screen (*Section 2.1 Searching for an Individual's CMA Assignment*).

Section 1.2.5 Service Authorizations Grid

The Service Authorizations grid, located on the middle right area of the dashboard, can be used to track the progress of service authorizations (SA) before and after being submitted to BDS for approval.

The grid displays SAs grouped by status and the total number of days elapsed since the SA moved into a certain status. Each step involved in the SA process is reflected by a SA status. Statuses are listed within the grid in the order they are most logically expected to occur in the workflow.

SERVICE AUTHS Count by Calendar Days	0-7	8-14	>14
Draft	4	2	8
More Info Needed	2	3	7
BDS Review Pending	3	5	4
BDS Approval Pending	2	4	5
Funding Availability Pending	5	3	1
Denied	2	1	0
Void	1	0	1

Through this grid, users have the ability to view SAs that are managed by their organization. Service authorizations that are closed – meaning they have become inactive or termed – will not be displayed on the dashboard. Any SA with a status of 'Void' or 'Denied' that has not had a status update in 90 days will automatically be rolled off from this grid. However, workers can always locate closed, voided, or denied SAs through the Service Authorization Search screen (*Section 6.1 Searching for a Service Authorization*).

Section 1.3 Additional Dashboard Functionality

In addition to the dashboard grids, there are buttons located at the bottom of the dashboard which offer additional functionality to search for an individual record, upload documents, and view upload history *(part of a future phase/user guide)*.
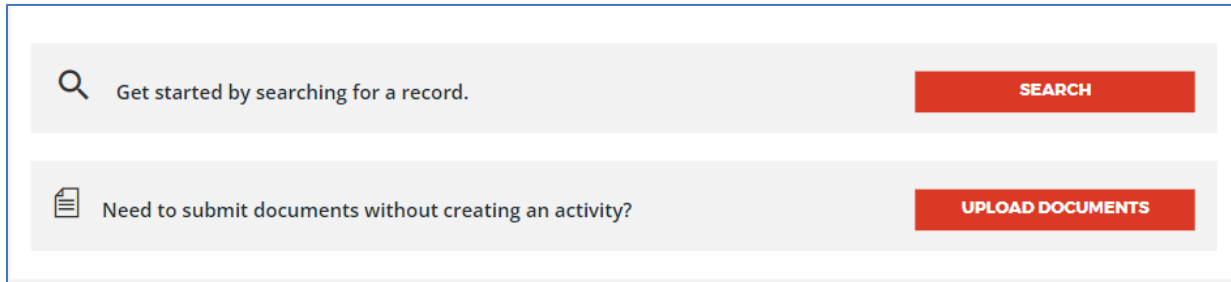

Figure 2: Additional Dashboard Functionality

Section 1.3.1 Searching for an Individual Service Management Record

The search feature on the Service Management Dashboard provides users an efficient way to access the various Search screens from one place. When clicking this button from the dashboard, the landing Search page is the **Individual Service Management Search**. However, the type of Search screen can be changed by toggling through the following Search Type options:

- **Case Management** – See *Section 2.1 Searching for an Individual's CMA Assignment* for further details on how to search for a case management assignment.
- **Service Authorization** – See *Section 6.1 Searching for a Service Authorization* for further details on how to search for a service authorization.
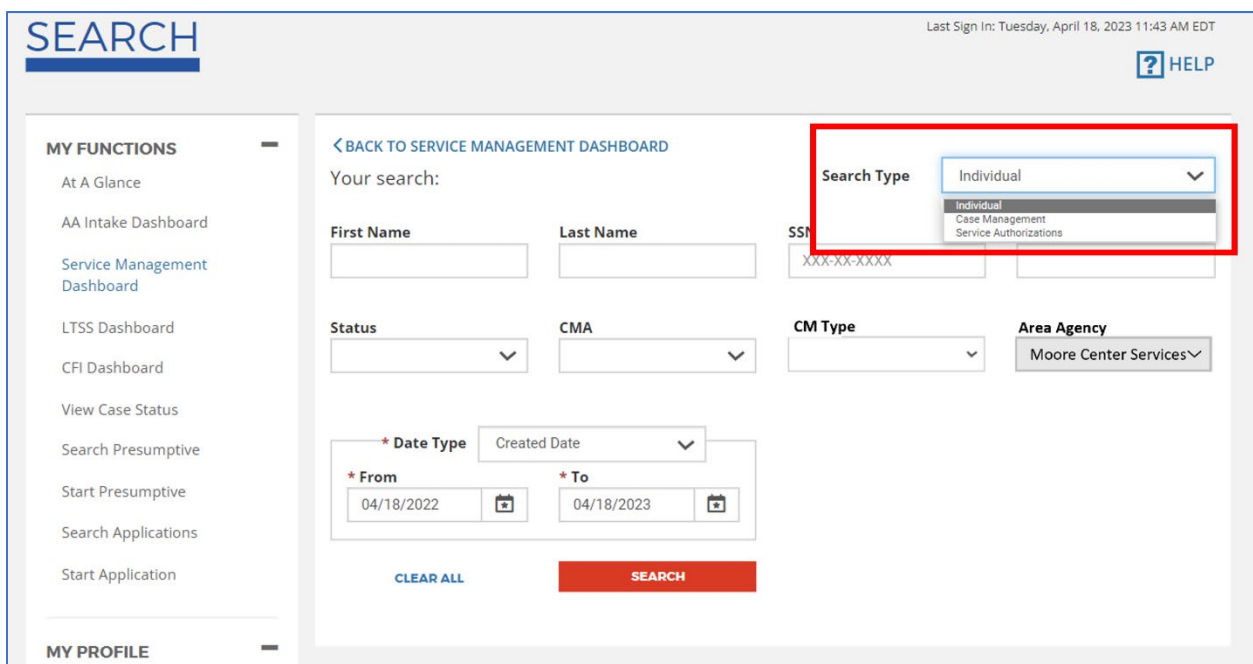
Figure 3: Search Landing Page

The Individual Service Management Search allows users to search for individuals assigned to their Area Agency, Case Management Agency, and/or Caseload depending on the user's role and permission level.

Figure 4: Individual Service Management Search

To search for an individual service management record:

1. Select **'Individual'** from the Search Type drop-down if it is not automatically populated.
2. Enter the individual's information into one or more of the various search criteria fields. The only required field is Date Type, from which you can select between Created Date, Status Updated Date, or Medicaid Dates Between.
   NOTE: You may only search for individuals belonging to your agency.
3. Click the **'Search'** button to conduct the search based on the information entered into the search criteria. This will expose a list of individuals with information that matches the search criteria. You can customize the View and Sort by options for the results listed in this grid.
   NOTE: The search results will be limited to individuals belonging to your agency.
   a. If the search returns no results, "*No results found for the above search criteria*" will appear in the results grid.
   b. Click the **'Clear All'** button to clear the previously entered search criteria and initiate a new search by different criteria.
4. Click on the individual's **hyperlinked name** in the 'Name-INDV ID' column to access the individual service management record.

Section 1.3.2 Uploading Documents

The document upload feature on the Service Management Dashboard provides users the ability to upload and submit stand-alone documents to BDS related to the service management process for any given individual.

Users can use this functionality to upload ISA documents, HRST and SIS assessments, and any other general documentation to an individual service management record.

To upload a document:

1. Click the **'Upload Documents'** button located on the bottom right of the Service Management Dashboard.
2. From the Individual Lookup screen, search for the individual you wish to upload documents for by first name/last name or any other criteria listed and click **'Search.'**
3. From the Lookup Search Results, select the upload document icon from the Action column for your individual.

Figure 5: Individual Lookup Results

4. The Documents to Upload screen will display with the demographic information of the individual listed at the top of the page.
   NOTE: The Documents to Upload screen may also be accessed through the Individual Service Management page by clicking the 'Upload Document' button in the Services & Supports Summary (*Figure 17*). Proceed as normal with the steps below when uploading a document from that screen.
   a. When accessing Documents to Upload from the Individual Service Management screen, click the 'Back to Service Management' link at the top of the page at any point in time to return to the individual service management record.
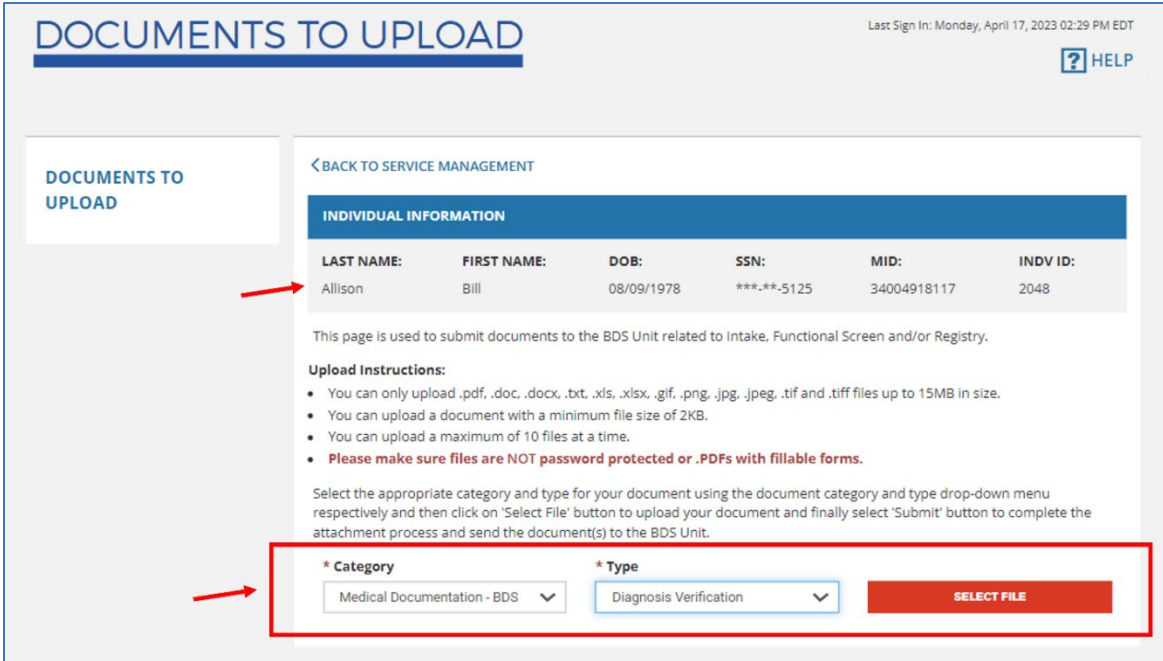
Figure 6: Uploading a Document

5. Select the appropriate document category and type from the respective drop-downs and click **'Select File.'**
6. Once a file has been attached, a summary table will display the information of the upload.
7. Once all documents have been attached, click **'Submit'** to finalize the upload process and send the documents to BDS.

Section 1.3.3 Viewing Upload History
This functionality will be part of a future phase/user guide.

Section 2: CMA Assignment

The **Case Management Agency (CMA) Assignment** function allows Area Agencies to assign case management responsibilities of an individual to a CMA. The Area Agency has the ability to perform this action through the individual's **Activity Log** within the **Individual Service Management** screen.

The following processes associated with CMA Assignments will be discussed in this section:

- ➢ **Searching for an individual's CMA Assignment**
- ➢ **Assigning a CMA for an individual**
- ➢ **Cancelling a CMA Assignment**
- ➢ **Accepting or Rejecting an individual**
- ➢ **Changing a CMA Assignment**
- ➢ **Unassigning a CMA Assignment**

Section 2.1 Searching for an Individual's CMA Assignment

The Case Management Search screen allows Area Agency and Case Management Agency workers to search for the individuals that are managed by their respective agencies and understand the progress of the CMA assignment. The search results will list all the individuals that are yet to be accepted or have already been accepted to the respective agency.

This screen can be accessed in one of two ways:
1. From the Service Management Dashboard, click on a hyperlinked value in the Case Management Assignment grid to search for records in that specific CMA status.
2. From the Service Management Dashboard, click the **'Search'** button from the 'Get started by searching for a record' banner.
    a. You will be redirected to the Individual Service Management Search. Change the Search Type located in the top right of the screen to **'Case Management.'**

To search for an individual's CMA Assignment:

1. Search for the case management assignment in the top grid by the individual's **First Name, Last Name, SSN, MID, Status, CMA, Area Agency,** and/or **Dates** (CMA Start Date or Status Updated Date) and click **Search**.
    a. By default, this screen retrieves current CMA information. To retrieve historical CMA information, select '**Include History**.'
    b. 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.

Figure 7: Case Management Search Criteria

2. Search results will appear in the bottom grid by **Name, Individual ID, Status, Current CMA, Receiving CMA, Start Date, End Date,** and **Area Agency**.

   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 agency or caseload, depending on the user's permissions.

Figure 8: Case Management Search Results

3. Upon locating the record in the results, click on the **hyperlinked name**. Clicking the hyperlink will redirect you to one of two screens depending on the CMA level status of the record (See *Table 1* below for further details):

a. Redirects to the **Individual Service Management** page (*Figure 16*) where you may view the details of the individual service management record and CMA history (*Figure 15*).
b. Redirects to the **CMA Assignment** screen (*Figure 11* and *Figure 12*) *ONLY* if the record has a CMA status of 'CMA Acceptance Pending' (incoming) where the logged-in agency needs to accept/reject the assignment.

Table 1: CMA Search Hyperlink Functionality

Status	Hyperlink Functionality	Description
CMA Assignment Pending	Hyperlink redirects user to **Individual Service Management** screen (*Figure 16*).	On that screen, AA roles will have the ability to assign a CMA through the Activity Log.
CMA Acceptance Pending (Incoming)	Hyperlink redirects user to the **CMA Assignment** screen (*Figure 11* and *Figure 12*).	On that screen, the AA Supervisor or CMA Supervisor will have the ability to accept or reject the CMA assignment for that individual.
CMA Acceptance Pending (Outgoing)	Hyperlink redirects user to the **Individual Service Management** screen (*Figure 16).*	On that screen, AA users or CMA Supervisor (whoever made the CMA assignment) will have the ability to view the individual service management record and/or cancel the assignment they had initiated.
CMA Assignment Rejected	Hyperlink redirects user to the **Individual Service Management** screen (*Figure 16*).	On that screen, AA users or CMA Supervisor (whoever made the CMA assignment) will have the ability to view the individual service management record and/or re-assign a different CMA.
CM Assignment Pending	Hyperlink redirects user to the **Individual Service Management** screen (*Figure 16).*	On that screen, the CMA Supervisor or AA Supervisor will have the ability to view the individual service management record and assign a Case Manager.

Section 2.2 Assigning a CMA for an Individual

AA Supervisors, AA Case Managers, and CMA Supervisors will have the ability to assign CMAs through the Service Management Activity Log in NH EASY. CMA Case Managers/Service Coordinators will not have access to this function.

To assign a CMA for an individual:

1. Locate the individual through the Individual Service Management Search or the CMA Assignment Search.
   NOTE: An individual service management record can be accessed in multiple ways from the Service Management Dashboard, as explained in *Section 1: Service Management Dashboards*.
2. Access the individual service management record by clicking on the individual's name from the search results.

3. You will be redirected to the Individual Service Management page, where you may scroll down to the Activity Log accordion.
4. Select **'Assign CMA'** from the Activity drop-down, select the receiving Case Management Agency from the CMA drop-down, and click the **'Add'** button.

Figure 9: Activity Log - Assigning a CMA

Once the activity has been added, the action will be reflected in the Activity Log grid above with an automated comment "CMA: [*name of CMA selected*]." The service management record will be displayed on the initiating agency's Service Management Dashboard under the Case Management Assignment grid with the status of 'Outgoing Acceptance Pending' and displayed on the receiving agency's Service Management Dashboard under the Case Management Assignment grid with the status of 'Incoming Acceptance Pending.'

Section 2.3 Cancelling a CMA Assignment

CMA assignments that are in progress – meaning they have not yet been accepted or rejected by the receiving CMA – can be cancelled only by the agency that initiated the assignment.

AA Supervisors, AA Case Managers, and CMA Supervisors will have the ability to cancel CMA assignments, whereas CMA Case Managers/Service Coordinators will not have access to this function.

Assignments can be cancelled by accessing the Individual Service Management page and selecting the 'Cancel CMA' activity under the Activity Log accordion. When the activity is saved successfully, the CMA assignment will be cancelled.

Figure 10: Activity Log - Cancelling a CMA

Once the activity has been added, the action will be reflected in the Activity Log grid with an automated comment "CMA: [*name of CMA selected*]." The service management record will be displayed on the initiating agency's Service Management Dashboard under the Case Management Assignment grid with an updated status of 'CMA Assignment Pending.' The record will no longer be displayed on the receiving agency's Service Management Dashboard.

Once the activity has been saved, the Activity Log grid above will list 'CMA Cancelled' with the name and date of the user who made the change and an automated comment displaying the name of the CMA to which the assignment was cancelled.

Section 2.4 Accepting or Rejecting an Individual

Once a CMA assignment has been initiated, the individual service management record will be listed with a status of 'Outgoing Acceptance Pending' under the Case Management Assignment grid of the initiating agency and with a status of 'Incoming Acceptance Pending' under the Case Management Assignment grid of the receiving agency.
NOTE: Only the receiving agency can either accept or reject the transfer.

To accept an individual:

1. On the Service Management Dashboard under the Case Management Assignment grid, navigate to the row of records with a status of 'Incoming Acceptance Pending' and click on a hyperlinked number according to the respective Count by Days range.
2. You will be redirected to the Case Management Assignment Search where you may click on the individual's name from the search results.
3. On the CMA Assignment screen, select 'Yes' from the 'Accept?' drop-down and click the 'Submit' button.
4. Click 'OK' on the confirmation pop-up message.

Figure 11: Accepting the CMA Assignment

As soon as the CMA Assignment is accepted, the individual's entire record will be made available to the CMA and the status moves to 'CM Assignment Pending.'

To reject an individual:

1. On the Service Management Dashboard under the Case Management Assignment grid, navigate to the row of records with a status of 'Incoming Acceptance Pending' and click on a hyperlinked number according to the respective Count by Days range.
2. You will be redirected to the Case Management Assignment Search where you may click on the individual's name from the search results.
3. On the CMA Assignment screen, select **'No'** from the 'Accept?' drop-down, select a reason for rejection in the **'Rejected Reason'** drop-down, and click the **'Submit'** button.
4. Click **'OK'** on the confirmation pop-up message.

Figure 12: Rejecting the CMA Assignment

As soon as the assignment is rejected, the receiving CMA will no longer see the individual's record in their Service Management Dashboard and the status of the individual's CMA Assignment reverts to 'CMA Assignment Pending.'

Section 2.5 Changing a CMA Assignment

After a CMA has accepted a CMA assignment for an individual, they have the ability to change the individual over to another CMA, if necessary.

AA Supervisors, AA Case Managers, and CMA Supervisors will have the ability to change CMAs, whereas CMA Case Managers/Service Coordinators will not have access to this function.

To change an individual to a different CMA:

1. Locate the individual through the Individual Service Management Search or the Case Management Assignment Search screens.
2. Access the individual service management record by clicking on the individual's name from the search results.
3. You will be redirected to the Individual Service Management page. Scroll down to the Activity Log accordion.
4. Select **'Change CMA'** from the Activity drop-down, select the receiving Case Management Agency from the CMA drop-down, select the reason for the change from the Reason drop-down, and click the **'Add'** button.

Figure 13: Activity Log - Changing a CMA

Once the activity has been added, the Activity Log grid above will list 'CMA Change Initiated' with the name and date of the user who made the change and an automated comment displaying the name of the new CMA selected.

Section 2.6 Unassigning a CMA Assignment

Area Agencies have the ability to unassign a CMA from an individual only after that CMA has accepted the assignment. This will be indicated by the CMA level status: if the CMA status is in 'CM Assignment Pending' or 'CMA Completed,' the Area Agency will be able to unassign the CMA.

AA Supervisors and AA Case Managers will have the ability to unassign CMAs, whereas CMA Supervisors and CMA Case Managers/Service Coordinators will not have access to this function.

To unassign a CMA:

1. Locate the individual through the Individual Service Management Search or the Case Management Assignment Search screens.
2. Access the individual service management record by clicking on the individual's name from the search results.
3. You will be redirected to the Individual Service Management page. Scroll down to the Activity Log accordion.
4. Select **'Unassign CMA'** from the Activity drop-down. The assigned Case Management Agency will be displayed in the CMA drop-down. Select a reason for unassigning and click the **'Add'** button to finalize the process.
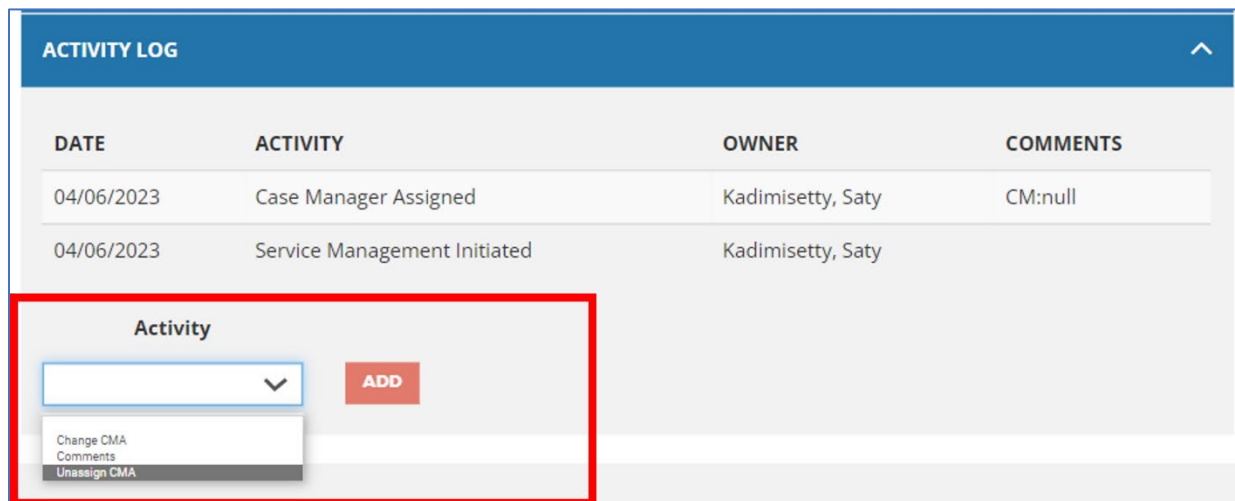
Figure 14: Activity Log - Unassigning a CMA

Once the activity has been added, permissions to manage and view information for that individual will be removed from that CMA, and the Area Agency is responsible for assigning a new CMA (See *Section 2.2* for instructions on how to assign a CMA).

Section 2.7 Skipping a CMA Assignment

If the request to change CMAs was rejected by the receiving CMA, and the initiating CMA would like to keep the individual, they may do so by skipping the CMA assignment.

When a CMA changes an accepted individual from their agency to another CMA, the CMA status is updated to 'CMA Acceptance Pending' and the previously assigned CM/SC is automatically removed. If

the receiving CMA rejects the assignment, however, the CMA status is updated to 'CMA Assignment Rejected' and the individual remains assigned to the initiating CMA. If the initiating CMA decides to keep the individual in their organization (and not change CMAs again), the user can skip the CMA assignment since the individual is already assigned to their agency. Doing so will update the CMA status to 'CM Assignment Pending' and the initiating CMA will be responsible for assigning (or re-assigning) a Case Manager/Service Coordinator.

AA Supervisors, AA Case Managers, and CMA Supervisors will have access to this function, whereas CMA Case Managers will not have the ability to skip a CMA assignment.

To bypass the CMA Assignment process:

1. Locate the individual through the Individual Service Management Search or the Case Management Assignment Search screens.
2. Access the individual service management record by clicking on the individual's name from the search results.
3. You will be redirected to the Individual Service Management page. Scroll down to the Activity Log accordion.
4. Select **'Skip CMA Assignment'** from the Activity drop-down. The assigned Case Management Agency, which should be your logged-in agency, will be displayed in the CMA drop-down. Click the **'Add'** button to finalize the process.

Section 2.8 Viewing CMA Assignment History

To view an individual's CMA assignment history, click on the **'CMA History'** button on the Services & Supports Summary of the Individual Service Management page (*Figure 17*). This will expose the CMA Assignment History screen (*Figure 15*), which will contain the history of CMA assignment activities and statuses for a given individual.

Case Management Assignment History

CURRENT CMA: Brain Injury Association

SEQ #	HISTORY SEQ #	STATUS	CMA	START DATE	END DATE	CHANGE REASON	UPDATED BY	UPDATED DATE
1	4	Completed	Brain Injury Association	09/20/2022	00/00/0000		Tim Williams	09/21/2022
1	3	CM Assignment Pending	Brain Injury Association	09/20/2022	00/00/0000		Tim Williams	09/20/2022
1	2	CMA Acceptance Pending	Brain Injury Association	00/00/0000	00/00/0000		Tim Williams	09/17/2022
1	1	CMA Assignment Pending		00/00/0000	00/00/0000		Tim Williams	09/15/2022

Figure 15: CMA Assignment History

Section 3: Managing the Individual

The **Individual Service Management** screen will serve as a holistic, '360 degree' view of an individual's case, including Individualized Service Agreements (ISA), functional screens and HRST/SIS assessments, service authorizations, basic demographic/diagnosis information, and representative information. This information will be displayed in accordion-style sections that will be collapsible to the user.

To access an individual service management record from the Service Management Dashboard:

1. Search for an individual using the Individual Service Management Search (described further in *Section 1.3.1 Searching for an Individual Service Management Record*).
   NOTE: You can also access the Individual Service Management Search by clicking on a hyperlinked value in the Individual Search Management grid on your Service Management Dashboard.
2. Click on the individual's hyperlinked name to be redirected to the individual service management record.

Figure 16: Service Management – Services & Supports Tab

Section 3.1 Managing Case Manager/Service Coordinator Information

The AA Supervisor or CMA Supervisor can assign a Case Manager/Service Coordinator (CM/SC) through the Services & Supports Summary on the Services & Supports tab of the Individual Service Management screen. The Services & Supports Summary will always be exposed and will include high-level information related to the individual's service and case management.

Figure 17: Services & Supports Summary

To assign a CM/SC:

1. Select the appropriate CM/SC from the **'Case Manager'** drop-down in the Services & Supports Summary.
   NOTE: The Case Manager field is only enabled for users with the role of AA Supervisor or CMA Supervisor, and will only be accessible to modify for CMA Supervisors who accepted the individual to their agency.
2. Click the **'Save'** button to save changes to the record. Saved changes will be captured in the individual's Activity Log.

Section 3.2 Managing Case Management Type and Current Need for Services

Once the CM/SC is assigned, the CM/SC can manage the individual's service management information.

To change an individual's case management type:

1. Select the appropriate case management type from the **'Case Management Type'** drop-down in the Service and Supports Summary (*Figure 17*). This field can be updated at any time after the initial value is set from the NH EASY Diagnosis Information screen.
   NOTE: Once a service authorization for Case Management services has been approved, this field will automatically update to 'Waiver.'
2. Click the **'Save'** button to save changes to the record. Saved changes will be captured in the individual's Activity Log.

To manage the individual's current need for services:

1. Select the appropriate response from the **'Need CM Services Now?'** drop-down in the Service and Supports Summary (*Figure 17*). This field can be updated at any time after the initial value is set from the NH EASY Diagnosis Information screen.

NOTE:

      a. If you change the response to this question and the service management status is NOT 'No Services Requested,' there will be no impact.

      b. If you change the response from 'No' to 'Yes' and the service management status is 'No Services Requested'

          i. The service management status will advance to 'ISA Upload Pending'

         ii. The CMA status will advance to 'CMA Assignment Pending' and the existing CMA and CM will be removed *ONLY* if Medicaid is open for the individual.

             1. If Medicaid is not open for the individual, the CMA, CM, and CMA status will remain unchanged.

2. Click the **'Save'** button to save changes to the record. Saved changes will be captured in the individual's Activity Log.

Section 3.3 Using the Service Management Activity Log

The Activity Log accordion on the Services & Supports tab of the Individual Service Management screen will display the history of actions taken on an individual service management record (*Figure 18*). This grid will list both system-generated activities as well as activities manually added by the user. Below the Activity Log grid, the user can take certain actions related to the individual's service management record (based on the user's security role and the current status of the record).

Figure 18: Services & Supports – Activity Log

To add an activity to the Activity Log, select an activity from the **'Activity'** drop-down:

- Select **'Comments'** to add a comment at any time, irrespective of service management status. This will expose the required **'Comments'** field for you to enter your comment.
    - Click the **'Add'** button to add the comment to the individual's Activity Log.
- Select **'Assign CMA'** to assign the individual to a CMA. See *Section 2.2* for more information.
  NOTE: This option is only enabled if the CMA status is in 'CMA Assignment Pending.'
- Select **'Cancel CMA'** to rescind a CMA assignment only before it has been accepted or rejected. See *Section 2.3 Cancelling a CMA Assignment* for more information.
  NOTE: This option is only enabled if the CMA status is in 'CMA Acceptance Pending.'
- Select **'Change CMA'** to assign the individual to a different CMA. See *Section 2.5 Changing a CMA Assignment* for more information.
  NOTE: This option is only enabled if the CMA status is in 'CM Assignment Pending' or 'Completed.'
- Select **'Unassign CMA'** to unassign a CMA only after the CMA assignment has been accepted. See *Section 2.6 Unassigning a CMA Assignment* for more information.
  NOTE: This option is only enabled if the CMA status is in 'CM Assignment Pending' or 'Completed.'
- Select **'Skip CMA Assignment'** to maintain an individual within your agency after the request to change CMAs was rejected by the other CMA. See *Section 2.7 Skipping a CMA Assignment* for more information.
  NOTE: This option is only enabled if the CMA status is in 'CMA Rejected.'

Section 3.4 Managing Demographic Information

The Demographics Tab of the Individual Service Management screen will contain information related to the individual's Demographics, Diagnoses, Representatives, and Authorized Representatives. Case managers/service coordinators will have the ability to edit the information directly from each section.
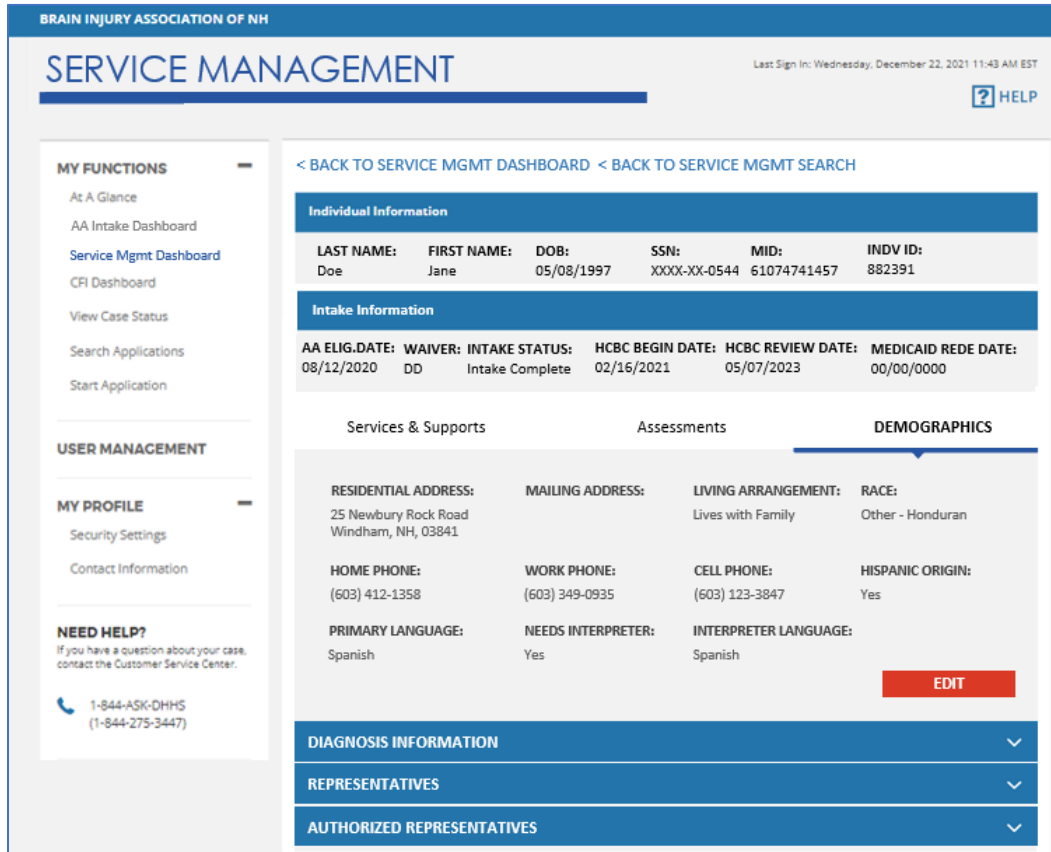
Figure 19: Service Management – Demographics Tab

The Demographics Summary on the Demographics tab of the Individual Service Management screen will always be exposed and will include high-level information related to the individual's demographics, which are pulled from the individual's intake.
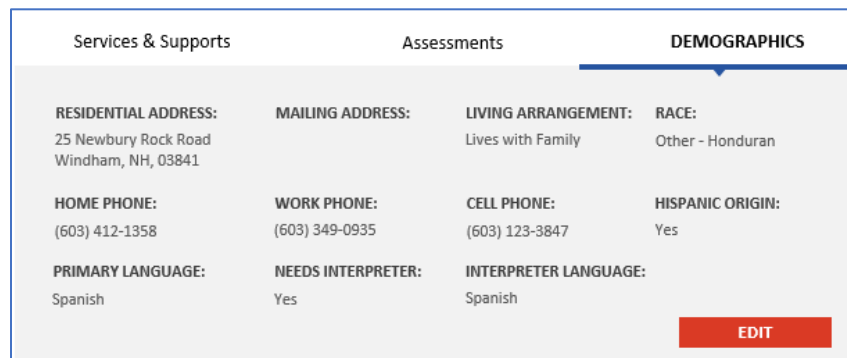
Figure 20: Demographics Summary

To edit the individual's Demographic information:

1. Click on the **'Edit'** button in the Demographics Summary (*Figure 20*) to open the **'Edit Demographics'** pop-up. This button will always be enabled.

Figure 21: Edit Demographics Pop-Up

2. Edit the necessary fields on the **'Edit Demographics'** pop-up (*Figure 21*).
3. Click the **'Save'** button to save the demographic info to the individual's record. This button will be enabled once all required fields are entered or any changes have been made. Any changes made on this pop-up will automatically be reflected in the NH EASY Intake – Demographic Information screen.
4. Click the **'Cancel'** button to close the Edit Demographics pop-up and return to the Individual Service Management screen without saving any newly entered information.

Section 3.5 Managing Diagnosis Information

The Diagnosis Information accordion on the Demographics tab of the Individual Service Management screen will display the individual's Diagnosis information on file.

Figure 22: Demographics – Diagnosis Information

To view/edit an existing diagnosis:

1. Click the **'Edit'** icon in the Action column of the Diagnosis Information accordion to expose the Diagnosis Details pop-up for a given row (*Figure 22*).
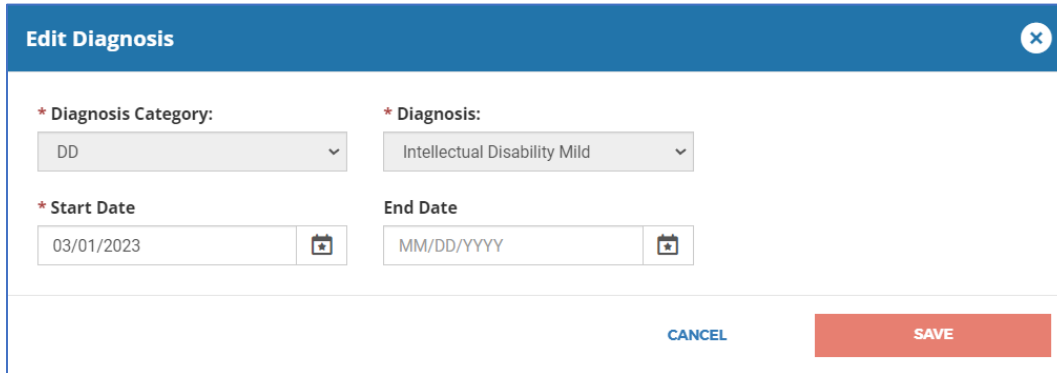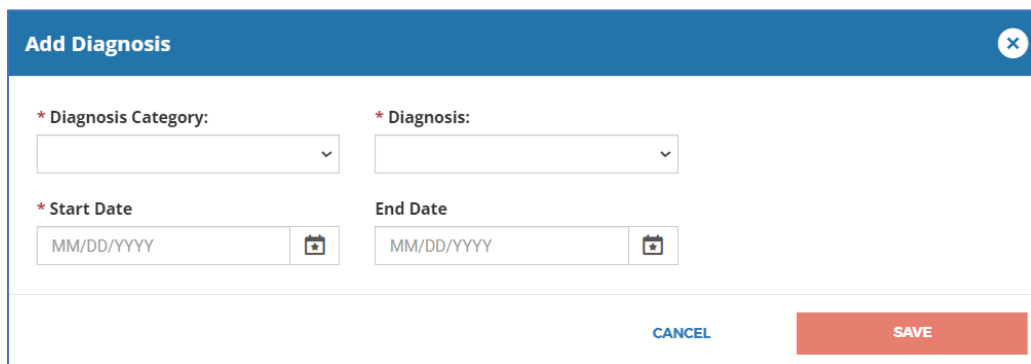
Figure 23: Diagnosis Details Pop Up

2. Make the necessary edits on the Diagnosis Details pop-up (*Figure 23*).
   NOTE: Only the Start Date and End Date may be edited after a diagnosis is saved.
3. Click the **'Save'** button to save the edits to the individual's record. This button will be enabled once all required fields are entered or any change has been made.
4. Click the **'Cancel'** button to close the Diagnosis Details pop-up and return to the Individual Service Management screen without saving any newly entered information.

To add a new diagnosis:

1. Click the **'Add New'** button below the Diagnosis Information grid to launch the Diagnosis Details pop-up. This button will always be enabled.

2. Complete all the required fields on the Diagnosis Details pop-up (denoted by a red asterisk).
3. Click the **'Save'** button to save the diagnosis to the individual's record. This button will be enabled once all required fields are entered.
4. Click the **'Cancel'** button to close the Diagnosis Details pop-up and return to the Individual Service Management screen without saving any newly entered information.

Section 3.6 Managing Representatives

The Representatives accordion on the Demographics tab of the Individual Service Management screen will list the individual's representative information. The user will have the ability to add, edit, or view representative information from this section.

Figure 24: Demographics – Representatives

Representatives will be listed by **Name, Type, Relationship, Mailing Address,** and **Updated Date.** You may customize the View and Sort by options for the representatives listed in this grid.

To add a new representative to an individual's record:

1. Click the **'Add New'** button below the Representatives grid (*Figure 24*) to expose the Representative Details pop-up. This button will always be enabled.

Figure 25: Representative Details Pop-Up

2. Complete all required fields (denoted by a red asterisk) on the Representative Details pop-up (*Figure 25*).
3. Click the **'Save'** button to save the representative information entered. This button will be enabled once all required fields are entered. The new representative will now be displayed in the Representatives grid.
4. Click the **'Cancel'** button to close the Representative Details pop-up and return to the Individual Service Management screen without saving any newly entered information.

To edit an existing representative:

1. Click the **'Edit'** icon in the Actions column of the Representatives grid (*Figure 24*). This will expose the 'Representative Details' pop-up for a given row.
2. Edit the necessary fields on the Representative Details pop-up (*Figure 25*).
3. Click the **'Save'** button to save any changes.
4. Click the **'Cancel'** button to close the Representative Details pop-up and return to the Individual Service Management screen without saving any newly entered information.

To delete an existing representative:

1. Click the **'Delete'** icon in the Actions column of the Representatives grid (*Figure 24*).
2. A warning pop-up with the following language will be exposed: "Are you sure you want to delete this representative?"
   a. Click **'Cancel'** to return to the Individual Service Management screen without removing the representative from the individual's record.
   b. Click **'Continue'** to close the pop-up and return to the Individual Service Management screen where the selected representative will no longer be listed.

Section 3.7 Viewing Authorized Representatives

The Authorized Representatives accordion on the Demographics tab of the Individual Service Management screen will display the individual's authorized representative(s) that were entered in New HEIGHTS with the Alternate Payee type as 'Conservator,' 'Guardian,' or 'Authorized Representative.' This section will be read-only to NH EASY users.

Figure 26: Demographics – Authorized Representatives

Authorized representatives will be displayed by **Name, Type, Address, Phone-Email,** and **Updated Date.** The user can customize the View and Sort by options for the authorized representatives listed in this grid. If the grid is empty, the individual may not have an authorized representative saved in New HEIGHTS, or BDS has not yet entered this information in New HEIGHTS.

Section 3.8 Closing an Individual Service Management Record

An individual service management record may be closed in the event that the individual is no longer requesting services, moved out of the state, or passed away. **NOTE:** Only the AA Supervisor will have the ability to close a service management record.

To close a service management record:

1. Access the **AA Intake Dashboard.**
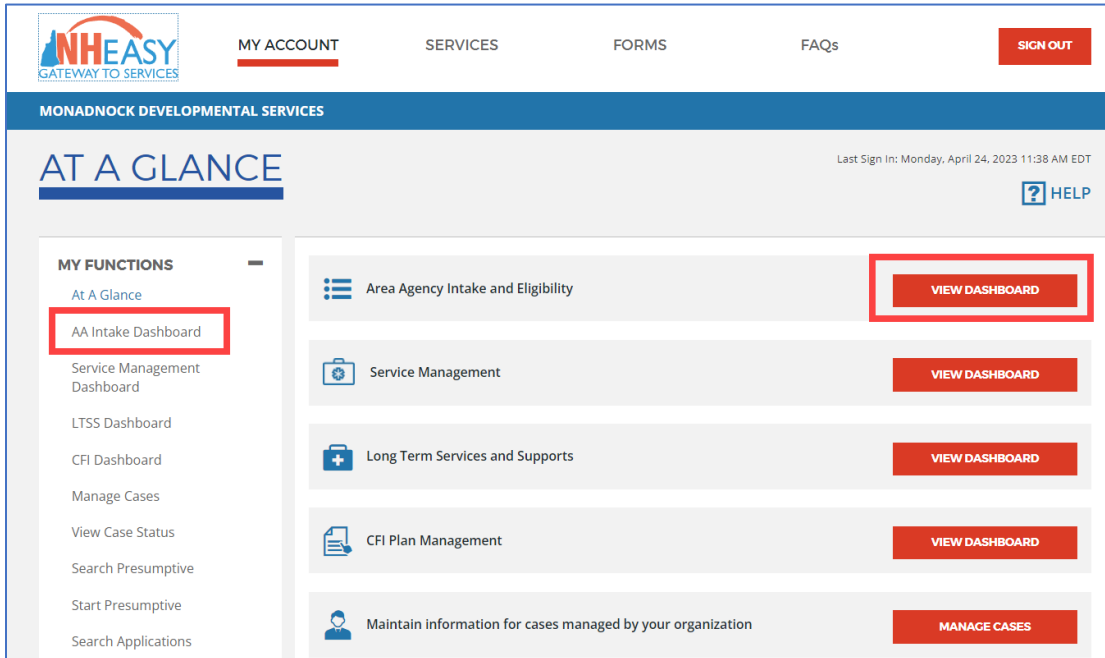
2. Near the bottom of the AA Intake Dashboard, select **'Intake'** from the Search Existing Activities drop-down and click the **'Search'** button to navigate to the Intake Search.
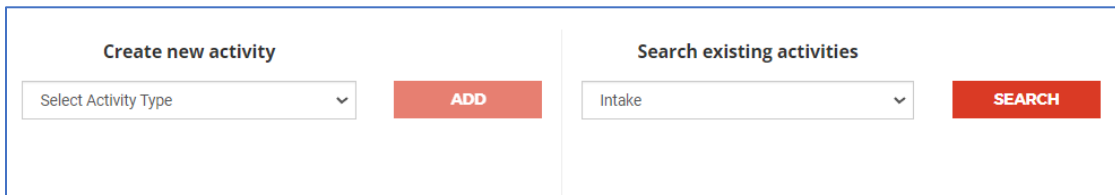
3. On the Intake Search screen, conduct your search for the individual using the provided search criteria and click the **'Search'** button. The search results will display below.
   a. If the search returns no results, "*No results found for the above search criteria.*" will appear in the results grid. You may select the 'Clear All' button to clear the search results and conduct a new search.

4. Click on the individual's hyperlinked name in the Intake search results. You will be redirected to the individual's Intake Activity Log.

5. Select **'Close Intake'** from the Activity drop-down. This will enable the Reason drop-down, which will be required.
NOTE: 'Close Intake' will be available in the Activity drop-down only after the intake is marked 'Complete - Approved' or 'Complete - Conditionally Approved'

6. Select the appropriate closure reason from the Reason drop-down.

Activity	* Reason	
Close Intake ⌄	⌄	ADD
	Deceased	
	Moved Out of State	
	No Longer Requesting Services	

7. Click **'Add'** to close the service management record and add the activity to the Intake Activity Log.
   a. The intake, service management, and CMA status will all advance to 'Closed.'
   b. Approved service authorizations will also advance to 'Closed' status and be end-dated with the date the intake was closed. However, service authorizations not yet approved by BDS will advance to 'Withdrawn' status.
   c. No further action can be taken on the individual service management record.

Section 4: Individualized Service Agreement (ISA)

Section 4.1 Managing/Uploading ISAs

As part of this phase/user guide, the Individualized Service Agreement (ISA) process will only require Case Managers/Service Coordinators to upload the ISA to an individual's record.

The ISA accordion on the Services & Supports tab of the Individual Service Management screen will list the ISAs that have been uploaded for an individual within the past three years from the current system date.

NOTE: Only documents uploaded through the Document Upload screen with a category of 'Service Agreement' will be displayed in this grid.

Figure 27: Services & Supports - Individualized Service Agreement (ISA)

To upload an ISA:

1. Access the **Document Upload** screen by clicking the 'Upload Document' button in the Services & Supports Summary on the Individual Service Management screen.
   NOTE: You can also access the Document Upload screen by clicking the 'Upload Documents' button at the bottom of the Service Management Dashboard, as described in *Section 1.3.2 Uploading Documents*.
2. Select **'Service Agreement - BDS'** from the Category drop-down.
3. Select the appropriate ISA type from the Type drop-down.
4. Click the **'Select File'** button to select the document from your local computer.
5. Click **'Submit'** to upload the document to the individual's record.

The uploaded ISA will now be listed under the ISA accordion of the Individual Service Management screen. To view an ISA, click on the **PDF icon** in the Actions column. Clicking the PDF icon will open a PDF of the completed ISA in a separate window.

Section 5: Assessments

Case Managers/Service Coordinators will complete or upload all required assessments related to an individual's service management. Assessments are managed using the Assessments tab of the Individual Service Management screen, which will include assessments associated with the individual's case (*Figure 28*).

Figure 28: Service Management – Assessments Tab

Section 5.1 Managing/Creating Functional Screens

Case Managers/Service Coordinators can manage an individual's Functional Screen(s) using the Functional Screen accordion on the Assessments tab of the Individual Service Management screen. This section will display Functional Screen assessments associated with the individual and initiated within the past three years of the current system date (*Figure 29*). You may also create a new Functional Screen, if needed.

Figure 29: Assessments – Functional Screen

To view an existing Functional Screen:

1. Click the hyperlink labeled **'In Progress'** or **'Submitted'** under the Status column of the Functional Screen grid.
    NOTE: You may only view 'In Progress' or 'Submitted' Functional Screens.
    a. Click the **'In Progress'** hyperlink to access the Functional Screen landing page for that existing Functional Screen where you may continue to view/edit the Functional Screen.
    b. Click the **'Submitted'** hyperlink to open a PDF of the completed Functional Screen in a separate window.

To create a new Functional Screen:

1. Click the **'Create New'** button under the Functional Screen grid (*Figure 29*).
   NOTE: This button will be enabled if all Functional Screens listed are in 'Submitted' or 'FS Cancelled' status and disabled if there is at least one Functional Screen with a status of 'In Progress'
2. You will be redirected to the Functional Screen Activity Log. Click the **'Next'** button to start a new Functional Screen for that individual (*Figure 30*).

Figure 30: Functional Screen Activity Log

Section 5.2 Managing/Uploading HRST & SIS Assessments

As part of this phase/user guide, the assessment process will require Case Managers/Service Coordinators to upload assessments to an individual's record.

The HRST and SIS accordions on the Assessments tab of the Individual Service Management screen will display the individual's Health Risk Screening Tool (HRST) assessments that have been uploaded within the past three years from the current system date, and the three most recently uploaded Supports Intensity Scale (SIS) assessments, respectively.

Figure 31: Assessments – HRST

Figure 32: Assessments – SIS

To upload an assessment:

1. Access the **Document Upload** screen by clicking the **'Upload Document'** button in the Services & Supports Summary on the Individual Service Management screen.
   NOTE: You can also access the Document Upload screen by clicking the 'Upload Documents' button at the bottom of the Service Management Dashboard, as described in *Section 1.3.2 Uploading Documents*.
2. Select **'Assessments – BDS'** from the Category drop-down.
3. Select the appropriate assessment type from the Type drop-down.
4. Click the **'Select File'** button to select the document from your local computer.
5. Click **'Submit'** to upload the document to the individual's record.

The uploaded assessment will now be listed under its respective accordion on the Individual Service Management screen. To view an assessment, click on the **PDF icon** in the Actions column. Clicking the PDF icon will open a PDF of the completed assessment in a separate window.

Section 6: Service Authorizations

Service Authorizations (SA) can be accessed and managed in NH EASY in several ways:

1. From the Service Management Dashboard:
   a. Search for an individual using the Individual Service Management Search (further described in *Section 1.3.1 Searching for an Individual Service Management Record*), click on the individual's hyperlinked name, and go to the Service Authorizations accordion.
   b. Search for a SA using the Service Authorizations Search (further described in *Section 6.1 Searching for a Service Authorization*) and click on the individual's hyperlinked name.
2. From the Service Management Dashboard Service Authorizations grid, click on a hyperlinked value in the grid, and click on the individual's hyperlinked name (*Section 1: Service Management Dashboards*).

Figure 33: Services & Supports – Service Authorizations

The **Service Authorizations** accordion on the Services & Supports tab of the Individual Service Management screen will list the SAs that have been requested for the individual. This section will only include SAs from the Review Date to the past 12 months. You can customize the View and Sort by options for the SAs listed in this grid. You may also toggle between the various pages (1-10) or click the 'Next' button to display the SA results of the next page.

Figure 34: Services & Supports – Service Authorization Summary

The **Service Authorization Summary** accordion on the Services & Supports tab of the Individual Service Management screen displays a financial summary of an individual's Service Authorizations. This section will only include Service Authorizations from the Review Date to the past 12 months.

The following data elements will be displayed in the Service Authorization Summary:

- **Approved** – The sum of dollars on all open SAs for the individual with a status of Approved
- **Pending** – The sum of dollars on all SAs for the individual with a status of BDS Review Pending, BDS Approval Pending, Funding Availability Pending, or More Information Needed
    - SAs with a status of Closed, Approved, Void, Denied, or Withdrawn will be excluded
- **Total** – The sum of dollars on all open SAs for the individual that are Approved or Pending

Section 6.1 Searching for a Service Authorization

The Service Authorization Search allows users to search for SAs created for individuals assigned to their Area Agency or Case Management Agency depending on the user's role and permission level. To access the Service Authorization Search screen, click on the **'Search'** button near the bottom of the Service Management Dashboard.

Figure 35: Service Authorization Search

To search for a SA on the Service Authorization Search screen:

1. Select **'Service Authorizations'** from the Search Type drop-down.
2. Enter the SA information into one or more of the various search criteria fields. The only required field is Date Type, from which you can select between Service Dates Between or Status Updated Date.
   NOTE: You may only search for SAs for individuals belonging to your agency.
3. Click the **'Search'** button to conduct the search based on the information entered into the search criteria. This will expose a list of results of SAs with information that matches the search criteria. You can customize the View and Sort by options for the results listed in this grid.
   NOTE: The search results will be limited to individuals belonging to your agency.
   a. If the search returns no results, "*No results found for the above search criteria*" will appear in the results grid.
   b. Click the **'Clear All'** button to clear the previously entered search criteria and initiate a new search by different criteria.
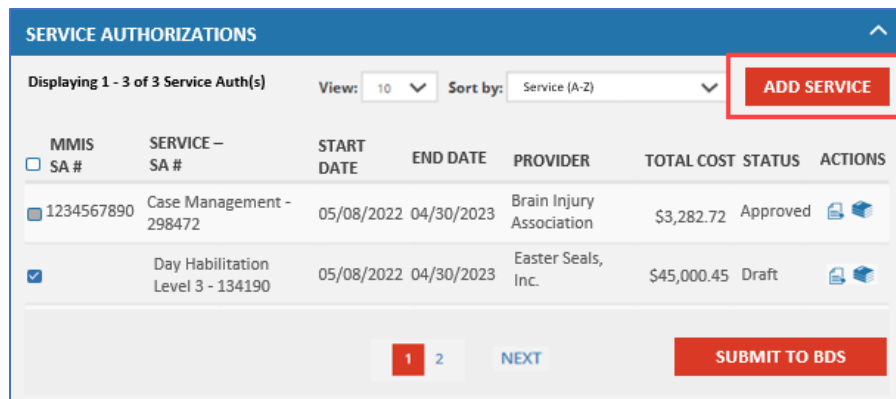
45

4. Click on an individual's hyperlinked name in the 'Name-INDV ID' field to access the Service Authorization Details screen for that particular SA.

Section 6.2 Adding New Service Authorizations

The Service Authorization Details screen will contain all necessary service information for a particular SA. It can be accessed when adding or editing a SA from the Service Authorizations accordion of the Individual Service Management screen (*Figure 33*), or through the Service Authorization Search (*Figure 35*).

To add a new SA:

1. Click the **'Add Service'** button above the Service Authorizations grid on the Individual Service Management screen (*Figure 33*).
   NOTE: This button is enabled only if the individual's level of care determination is approved and the HCBS Review Date has been added to the individual's HCBC screen in New HEIGHTS. Clicking this button opens the Service Authorization Details screen.

2. Complete all required fields (denoted by a red asterisk) on the Service Authorization Details screen (*Figure 36*).

Figure 36: Service Auth Details – Adding/Editing a Service Auth (Fixed Rate)

3. Click the **'Save'** button to save the SA to the individual's record. Upon clicking 'Save,' NH EASY will conduct a check to determine if the SA end date is before or beyond the HCBS review date.
    a. If the SA end date is beyond the HCBS review date, you will be required to update the End Date to be before the HCBS Review Date.
    b. If the SA end date is before the HCBS review date, the SA will be saved to the individual's record. New SAs will be displayed as a new entry (row) in the Service Authorizations grid of the Individual Service Management screen.
4. Click the **'Cancel'** button to exit the Service Authorization Details screen. Clicking this button will expose a warning pop-up with the following language: "Are you sure you want to leave this page without saving?"
    a. Click **'Cancel'** to continue editing the SA.
    b. Clicking **'Continue'** to close the Service Authorization Details screen and return to the Individual Service Management screen without saving any newly entered information.

Section 6.3 Submitting Service Authorizations to BDS

Service Authorizations can be submitted to BDS through the following ways:

1. From the Individual Service Management screen:
   a. Click the checkbox(es) on the left hand side of the SA in the Service Authorizations grid.
      NOTE: Checkboxes will be selectable only when the SA is in 'Draft' or 'More Info Needed' status and all other required data elements have been entered.
   b. Click the **'Submit to BDS'** button below the Service Authorizations grid.

2. From the Service Authorization Details screen (*Figure 36*):
   a. Click the **'Submit to BDS'** button.

On both screens, the **'Submit to BDS'** button will be enabled if the SA is in 'Draft' or 'More Info Needed' status and after all required fields, including the Provider field, have been completed. This button will be disabled for all other statuses. Clicking this button submits the SA to BDS and updates the status to 'BDS Review Pending.'

Section 6.4 Editing Service Authorizations

A SA can be modified as long as it is not in 'Approved,' 'Withdrawn,' or 'Voided' status.

To edit a SA:

1. Access the Service Authorization Details screen by:
   a. Clicking the **'View/Edit'** icon in the Actions column of the Service Authorizations accordion on the Individual Service Management screen; OR,

b. Clicking on an individual's hyperlinked name in the 'Name-INDV ID' field in the search results of the Service Authorization Search screen (*Figure 35*).

2. Edit the necessary fields on the Service Authorization Details screen (*Figure 36*).
3. Click the **'Save'** button to save any changes to the record. Changes made to the existing SA will be saved and reflected in the Service Authorizations grid on the Individual Service Management screen.
REMINDER: The SA End Date cannot be beyond the HCBS Review Date.

Section 6.5 Withdrawing Service Authorizations

To withdraw a SA:

1. Access the Service Authorization Details screen by:
   a. Clicking the **'View/Edit'** icon in the Actions column of the Service Authorizations accordion on the Individual Service Management screen (*Figure 33*); OR,
   b. Clicking on an individual's hyperlinked name in the 'Name-INDV ID' field in the search results of the Service Authorization Search screen (*Figure 35*).
2. Select **'Withdrawn'** from the Status drop-down field on the Service Authorization Details screen (*Figure 36*).
3. Click the **'Save'** button to save any changes to the record. Changes made to the existing SA will be saved and reflected in the Service Authorizations grid on the Individual Service Management screen.
REMINDER: This action can only be done if the SA has not yet been approved by BDS (i.e., the SA is in Draft, More Info Needed, BDS Review Pending, BDS Approval Pending, or Funding Availability Pending status).

Section 6.6 Viewing Service Authorization History

To view the history of a SA, click the **'Service Authorization History'** icon in the Actions column of the Service Authorizations accordion on the Individual Service Management screen (*Figure 33*). Clicking this icon will launch the 'Service Authorization History' screen as a pop-up (*Figure 37*), where the user can view the history of changes made to a given SA.

Service Authorization History						⊗

SERVICE: Residential Level 4

TOTAL UNITS	START DATE	END DATE	PROVIDER	STATUS	UPDATED BY	UPDATED DATE
365	05/08/2022	04/30/2023	Farmsteads..	BDS Review Pending	Tim Williams	04/30/2022
365	05/08/2022	04/30/2023	Farmsteads..	Draft	Tim Williams	02/15/2022
260	05/08/2022	04/30/2023	Farmsteads..	Draft	Tim Williams	01/20/2022

Figure 37: Service Authorization History

Section 7: NH EASY User Management

Each AA and CMA will have one **Administrator** who oversees the access of all other users within the agency. Administrators will have the ability to manage roles, add new users, and edit users' access levels from the NH EASY User Management screen. The Administrator can also reset passwords and terminate access. Each agency, whether an AA or CMA, can only have one Administrator at a time.
NOTE: Only individuals with the Administrator role will have access/visibility to the NH EASY User Management screen.

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 and CMA organization levels for Administrators to control user access:

- **CMA Case Manager/Service Coordinator** – This new role will have the ability to upload ISAs and HRST/SIS assessments, manage service authorizations, and respond to the 'Service Decision Pending' question for individuals who are not requesting services or are requesting services and do not have Medicaid. The CMA CM/SC will *NOT* have access to any of the Phase 1 functions from the AA Intake Dashboards except for the Functional Screen.
- **CMA Supervisor** – This new role will have all abilities of the CMA CM/SC described above, as well as the ability to assign a CMA, cancel or change a CMA assignment, accept or reject assignments to their CMA, and assign individuals to CMA CMs/SCs. The CMA Supervisor will *NOT* have access to any of the Phase 1 functions from the AA Intake Dashboards except for the Functional Screen.
- **AA Case Manager** – This new role will have the ability to upload ISAs and HRST/SIS assessments, manage service authorizations, and respond to the 'Service Decision Pending' question, as well as manage all CMA assignment functions except assigning a CM/SC. The AA Case Manager will *NOT* have access to any of the Phase 1 functions from the AA Intake Dashboards except for the Functional Screen.
- **AA Supervisor** (existing role previously known as AA Coordinator in Phase 1 will have increased permissions) – This role will have all abilities of the AA Case Manager described above, and will be responsible for CMA assignments and assigning CM/SCs for individuals receiving Family Support Case Management. The AA Supervisor will have access to all Phase 1 functions from the AA Intake Dashboards and is the only role with the ability to close a service management record.

Section 7.2 Adding New Users

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

Figure 38: 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 39: 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 (*Figure 38*).
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 Deleting Existing Users

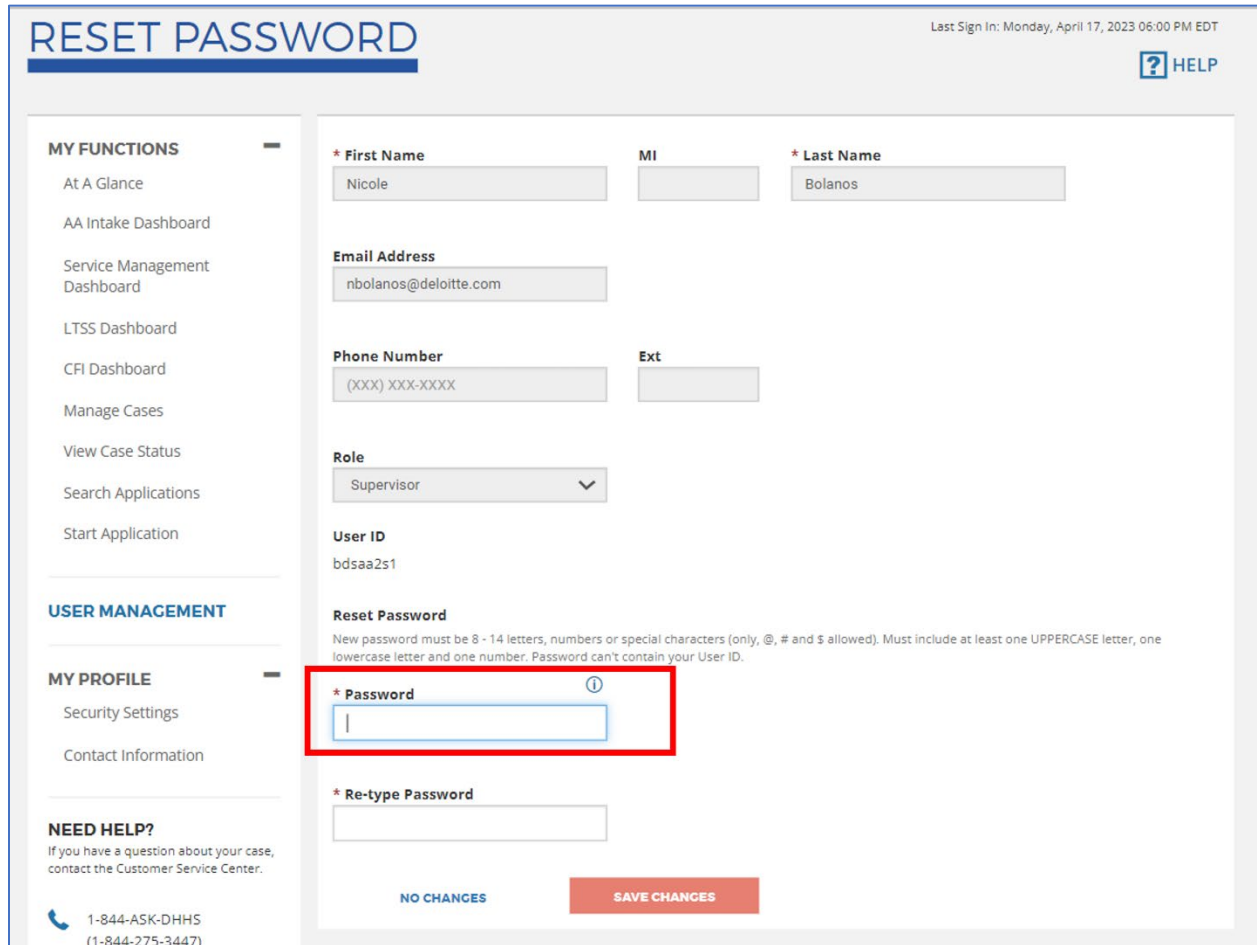Administrators will have the ability to delete users in NH EASY.

Figure 40: Deleting a User Account

To delete a 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 (*Figure 38*).
2. 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.
3. 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

Table 2: Glossary of Terms

Term	Definition
AA	Area Agency
ABD	Acquired Brain Disorder
ADL	Activities of Daily Living
API	Application Programming Interface
BDS	Bureau of Developmental Services
CFI	Choices for Independence
CM	Case Manager
CMA	Case Management Agency
DAADS	Designated Area Agency Delivery System
DD	Developmental Disabilities
DHHS	Department of Health and Human Services
FS	Functional Screen
HCBC	Home and Community Based Care
HCBS	Home and Community Based Services
He-M 1001	Certification Standards for Community Residences
He-M 503	Rules governing DD eligibility and service delivery
He-M 507	Rules governing Community Participation Services
He-M 521	Rules governing residential and/or combined services provided in family home
He-M 522	Rules governing ABD eligibility and service delivery
He-M 525	Rules governing Participant Directed and Managed Services (PDMS)
HRST	Health Risk Screening Tool
IADL	Instrumental Activities of Daily Living
IHS	In Home Supports
ISA	Individualized Service Agreement
LOC	Level of Care
MID	Medicaid Identification Number
MMIS	Medicaid Management Information System
PA	Prior Authorization
PDMS	Participant Directed and Managed Services
RID	Recipient Identification Number
RT	Reference Table
SA	Service Authorization
SIS	Supports Intensity Scale
SC	Service Coordinator
TCM	Targeted Case Management

Section 9: Appendix

Section 9.1 List of Figures

Section 9.2 Status Descriptions

Table 3: Individual Service Management Level Statuses

Status	Description
Service Decision Pending	This status indicates the Area Agency needs to review the answer to whether the individual needs services now on the Individual Service Management page. This status is assigned to all records that have had a status of 'No Services Requested' for 12 months.
CMA Assignment In Progress	This status indicates that the CMA assignment is in progress and being tracked under the Case Management Assignment grid on the dashboard. • the Area Agency needs to assign the CMA *OR* • the CMA needs to accept/reject the CMA assignment *OR* • the CMA needs to assign a Case Manager/Service Coordinator
ISA Upload Pending	This status indicates that the Individualized Service Agreement needs to be uploaded by the Case Manager/Service Coordinator.
Assessments Upload Pending	This status indicates that the Case Manager/Service Coordinator needs to upload the HRST and SIS assessments.
Intake Completion Pending	This status indicates that the individual has completed the CMA assignment, uploaded the ISA and assessments, but the intake is not complete (the individual does not have Medicaid; has not been approved for HCBS; or does not have at least one service accepted from the registry).
No Services Requested	This status indicates the individual is not requesting services at this moment. The AA answered 'No' to the question: "Does the individual need services now?" on the Intake Diagnosis page, or subsequently on the Individual Service Management screen.
Open	CMA assignment is complete, the ISA has been uploaded, and the intake is complete. *Not a dashboard displaying status.*
Closed	This status indicates that the service management record has been closed. This action will occur systematically, not by the user. *NOTE:* When an individual's intake is closed, the service management record will subsequently also be closed. *Not a dashboard displaying status.*

Table 4: Case Management Assignment (CMA) Level Statuses

Status	Description	NH EASY Activity Drop-Down Options
CMA Assignment Pending	Individual has been found He-M 522 or He-M 503 eligible, has Medicaid, and needs services now. The Area Agency needs to assign a Case Management Agency.	• Assign CMA • Comments
CMA Acceptance Pending *(incoming)*	A Case Management Agency (CMA) was assigned as a CMA and needs to accept or reject the assignment.	• Comments
CMA Acceptance Pending *(outgoing)*	An Agency (AA or CMA) assigned a Case Management Agency (CMA), and that CMA needs to accept or reject the assignment.	• Cancel CMA • Comments

Status	Description	NH EASY Activity Drop-Down Options
CMA Assignment Rejected	CMA rejected the assignment.	• Assign CMA • Skip CMA Assignment • Comments
CM Assignment Pending	CMA has accepted the assignment and the CMA Supervisor needs to assign a Case Manager or Service Coordinator.	• Change CMA • Unassign CMA *(AA only)* • Comments
Completed	The CMA has accepted the assignment and successfully assigned a Case Manager/Service Coordinator, or the Area Agency was assigned and has successfully assigned a Case Manager. *Not a dashboard displaying status.*	• Change CMA • Unassign CMA *(AA only)* • Comments
Closed	When an individual's intake is closed, the service management record will subsequently also be closed. *Not a dashboard displaying status.*	

Table 5: Service Authorization Level Statuses

Status	Description	EASY Action/Status Dropdown Options	HEIGHTS Action Dropdown Options
Draft	Service Authorization request was created but not submitted to BDS.	Withdraw	Nothing
BDS Review Pending	Case Manager/Service Coordinator submitted a Service Authorization to BDS.	Withdraw	• Submit for Approval • More Info Needed • Approved • Denied • Funding Availability Pending BDS Supervisor role will have access to all values. BDS Staff role will only have access to 'Submit for Approval' and 'More Info Needed.'
BDS Approval Pending	Service Authorization has been reviewed by BDS staff and is awaiting Authorizer approval.	Withdraw	• More Info Needed • Approved • Denied • Funding Availability Pending

Status	Description	EASY Action/Status Dropdown Options	HEIGHTS Action Dropdown Options
Funding Availability Pending	Funding is not available for the Service Authorization at this time.	Withdraw	• More Info Needed • Approved • Denied
More Info Needed	BDS requires additional information from the Case Manager before making a decision on the Service Authorization.	Withdraw	• Approved • Denied
Approved	BDS approved the Service Authorization. *Not a dashboard-displaying status.*	Nothing	Void
Denied	BDS denied the Service Authorization.	Nothing	Nothing
Withdrawn	Case Manager withdrew the Service Authorization. Can only be done when in Draft, More Info Needed, BDS Review Pending, BDS Approval Pending, and Funding Availability Pending status. *Not a dashboard-displaying status.*	Nothing	Nothing
Void	BDS has voided the Service Authorization after having approved it. Can only be done when in Approved status.	Nothing	Nothing
Closed	Approved SAs will be updated to 'Closed' once they have become inactive/termed (End Date has passed current system date). **NOTE:** When an individual's intake is closed, the service management record will subsequently also be closed. SAs not yet approved by BDS will advance to 'Withdrawn' status while approved SAs will advance to 'Closed' status and be end-dated with the date the service management record was closed.	Nothing	Void

Status	Description	EASY Action/Status Dropdown Options	HEIGHTS Action Dropdown Options
	Not a dashboard-displaying status.		