

Home and Community Based Services (HCBS) Referral & Authorization Portal

User Guide – Guide to Edits

Summary: The HCBS Referral & Authorization Portal will undergo updates over time and with it, the User Guide will be updated. This document will serve as a catalog of those User Guide updates for quick reference. Items added in the most recent iteration of this document are highlighted.

Date Added	Section & Update	Update Summary
October 21, 2024	HCBS Provider, Care Manager, and Health Home Roles Page 4 Addition of information	Added language regarding user roles for authorization features.
October 21, 2024	Prior to Making a Referral Page 5 Addition of information	Added language clarifying expectations around consent for referrals.
October 21, 2024	Prior to Making a Referral Page 6 Addition of information	Added language to emphasize the care manager’s responsibilities in educating the child/youth/family and obtaining a clear understanding of their scope of need prior to creating the referral.
October 21, 2024	Child Case Page Page 12 Addition of information and screenshots	Updated the section to reflect the ability to add an HCBS provider agency contact and updated Child Case Page screenshots.
October 21, 2024	HCBS Provider Responds to a Referral	Added guidance for care managers when no agencies are available to accept the referral.

Date Added	Section & Update	Update Summary
	Page 25 Addition of Information	
October 21, 2024	Ongoing Monitoring of Service Page 32 Addition of section	Added Ongoing Monitoring of Service section to clarify care manager and HCBS provider expectations beyond referral process.
October 21, 2024	Authorization Process Page 35 Addition of section	Added Authorization Process section to explain the process of creating and submitting an authorization in the Referral & Authorization Portal.
August 20, 2024	Portal Access – Accessing the System Page 4 Removed information and screenshots	Removed information pertaining to IRAMS Access and assigning gatekeepers. Information has been moved to the New York State Department of Health Incident Reporting and Management System Access Guide .
August 20, 2024	Child Case Page Page 7 Updated screenshot	Updated screenshot of Child Case Page to reflect ability to add associated care managers.
August 20, 2024	Child Case Page – Filters Pages 7-9 Addition of language/screenshots	<p>The Child Case Page can be filtered to allow users to view their caseloads according to different criteria. Users can filter by designated counties, service types, service status, and organizations. Users can also use the filters to narrow down their search by Managed Care Plans, CMA, Health Home, and HCBS Agency. Users can add multiple filters to refine their search to specific criteria.</p> <p>To check the 'Service Status,' the toggle feature may be used to filter through referral eligible only, documents only, and recent HCBS activity only.</p>

Date Added	Section & Update	Update Summary
August 20, 2024	Child Case Page – Child/Youth Information Page 10 Addition of language	Note: For languages, the dropdown list is only a suggested list for autocomplete and users can manually enter any necessary value.
August 20, 2024	Child Case Page – Child/Youth Information Page 11 Addition of language and screenshots	The HHCM/C-YES will need to ensure that the HCBS Designated County has been correctly recorded. If any of the following situations apply, the care manager must manually change the designated county of the participant within the system: <ol style="list-style-type: none"> 1. If the participant's Medicaid county of residence is in NYC 2. If the participant's Medicaid county is listed as Special county in Medicaid (OMH) 3. If there is a discrepancy in Medicaid residence county with the county of the residence zip code Further instructions are provided on how to manually adjust the participant's Designated County to align with their county of residence.
August 20, 2024	Child Case Page – Care Team Member Information Pages 11-14 Addition of language/screenshots	Care manager contact information is now available in the Care Team Member Information section of the Child Case page. Instructions have been provided on how to add care managers into the system.
August 20, 2024	Child Case Page – Child/Youth's Family/Guardian Information Page 17 Addition of language	Though there is a drop-down provided for the "Relationship" under the 'Edit Parent/Guardian' section, users may choose to type free text in the box if they feel their situation is not accurately captured by the drop-down options.
August 20, 2024	Referral Creation – Review and Submission Page 22	Reminder that HHCM/C-YES should not send the referral to all designated providers and must only send the referral to HCBS providers that the family has consented to.

Date Added	Section & Update	Update Summary
	<p>Addition of language and a screenshot</p>	
<p>August 20, 2024</p>	<p>HCBS Provider Reviews & Responds to a Referral – Removal From the Agency Waitlist</p> <p>Page 28</p> <p>Addition of language and screenshots</p>	<p>Clarification that if an HCBS provider has waitlisted or declined a child/youth then another provider is selected to serve the child/youth, the child/youth will remain on the waitlisted agency's list for 15 days afterwards with "Not Selected" viewable.</p>
<p>August 20, 2024</p>	<p>Discharge Process – Viewer & Discharge Permissions</p> <p>Page 34</p> <p>Addition of language</p>	<p>The HHCM/C-YES will be alerted via the Daily Digest if one of their children/youth was discharged from HCBS service(s) on the previous day.</p>
<p>August 20, 2024</p>	<p>System Notifications – Daily Digest Emails</p> <p>Page 34</p> <p>Addition of language and updated screenshot</p>	<p>Daily Digest emails will now include a segment if a child/youth was discharged from service or if any Connections that were confirmed on the previous day, in addition to the existing statuses.</p>