



# Conducting a Therapist Search



## How To

Search for a Therapist using the 'Therapist Lookup' functionality in EI-Hub. A Therapist in EI-Hub's Case Management refers to any of the following:

- Rendering Provider
- Service Coordinators (Initial or Ongoing)
- Early Intervention Officials/Designees (EIO/D)

3/11/2022

# Therapist Search

## Job Aid

### HOW TO

- Search for a Therapist using the 'Therapist Lookup' functionality.

### NOTE

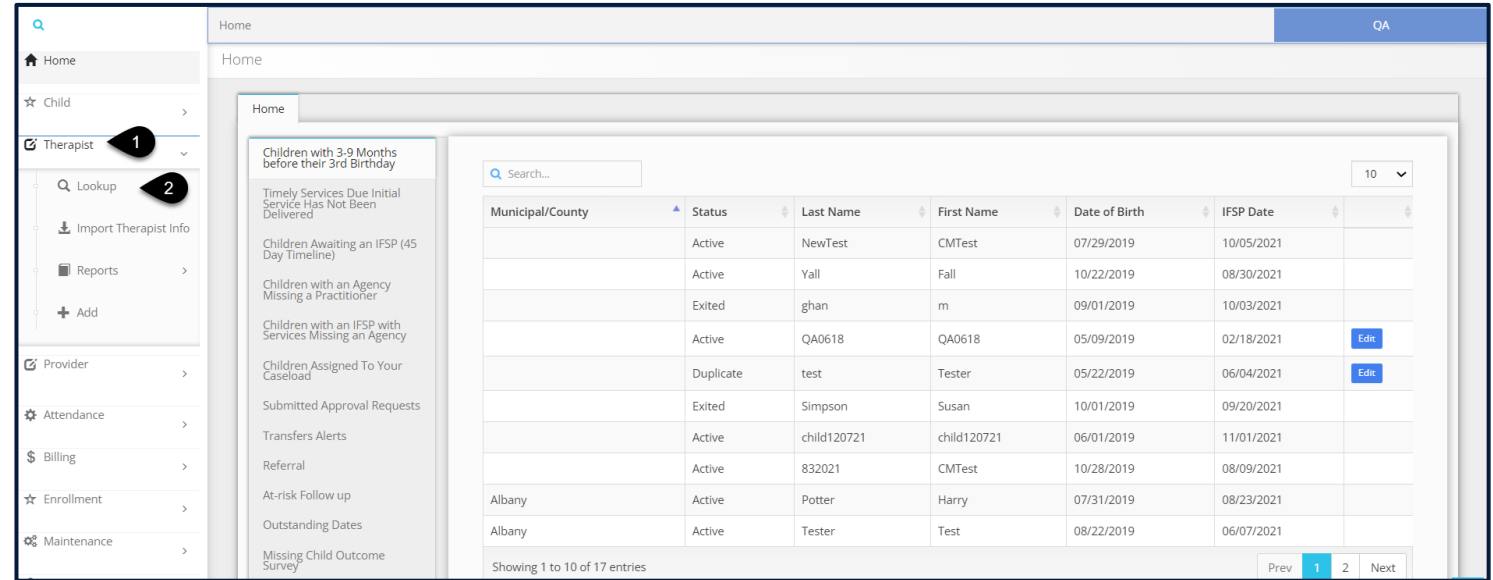
- The 'Therapist Lookup' functionality is determined by a user's role. Individuals with the appropriate access can search for/view Therapists using various data fields listed in the table. For example, Therapists will be taken directly to their profile page in the system and will not have the capability to perform searches or view other Therapists' records.
- If a Therapist is not located after an initial search, please consider modifying the search criteria (i.e., using the first four letters of a Therapist's last name as opposed to the entire last name).
- If no search criteria is entered, the system will return a list of **all** therapists in the system.

### Step/Action

- From the **EI-Hub Case Management** Home page, select/expand the **Therapist** menu listed on the left pane.
- Select the **Lookup** submenu located within the **Therapist** menu. The **Therapist Lookup** pane will populate.



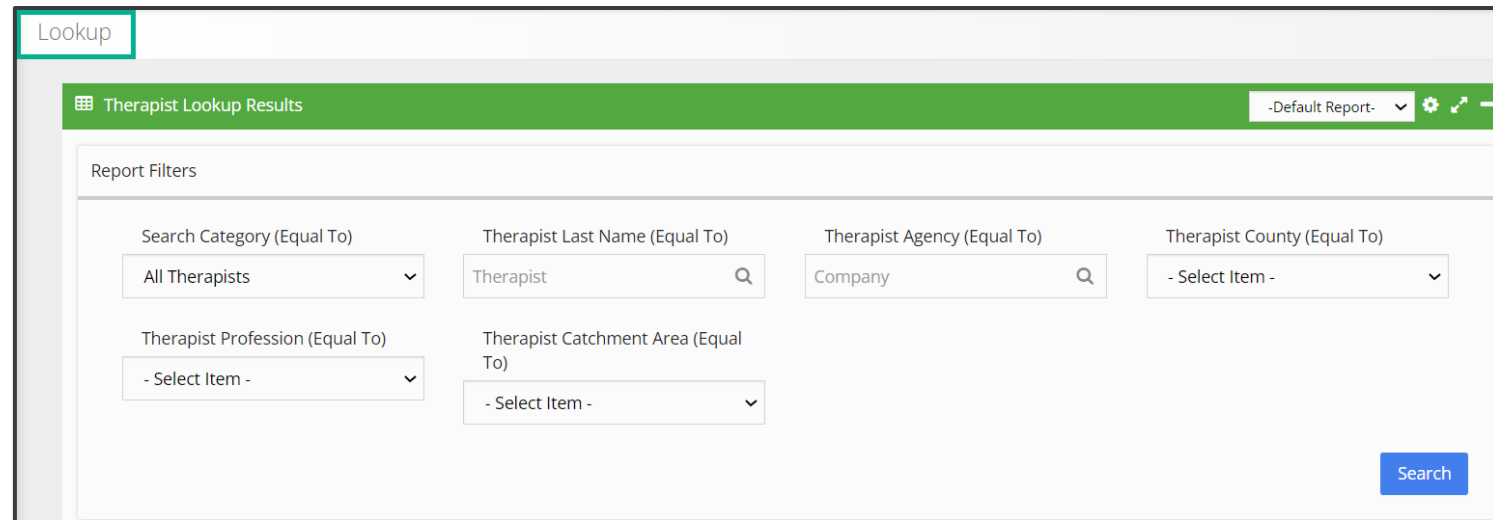
Please refer to the EI-Hub Case Management User Guide Unit 9. Therapists for more information.



The screenshot shows the 'Home' page of the EI-Hub system. On the left, a sidebar menu has 'Therapist' selected, with a sub-menu 'Lookup' highlighted. The main content area displays a table of therapists with the following columns: Municipal/County, Status, Last Name, First Name, Date of Birth, IFSP Date, and an 'Edit' button. The table contains 10 entries, showing therapists like 'NewTest', 'Yall', 'ghan', 'QA0618', 'test', 'Tester', 'Simpson', 'Susan', 'child120721', and 'Potter'.

Municipal/County	Status	Last Name	First Name	Date of Birth	IFSP Date	Edit
	Active	NewTest	CMTest	07/29/2019	10/05/2021	
	Active	Yall	Fall	10/22/2019	08/30/2021	
	Exited	ghan	m	09/01/2019	10/03/2021	
	Active	QA0618	QA0618	05/09/2019	02/18/2021	Edit
	Duplicate	test	Tester	05/22/2019	06/04/2021	Edit
	Exited	Simpson	Susan	10/01/2019	09/20/2021	
	Active	child120721	child120721	06/01/2019	11/01/2021	
	Active	832021	CMTest	10/28/2019	08/09/2021	
Albany	Active	Potter	Harry	07/31/2019	08/23/2021	
Albany	Active	Tester	Test	08/22/2019	06/07/2021	

Showing 1 to 10 of 17 entries



The screenshot shows the 'Therapist Lookup Results' page. It features a green header bar with the title and a '-Default Report-' dropdown. Below the header, there are 'Report Filters' for various search criteria: Search Category (All Therapists), Therapist Last Name (Therapist), Therapist Agency (Company), Therapist County (- Select Item -), Therapist Profession (- Select Item -), and Therapist Catchment Area (- Select Item -). A 'Search' button is located at the bottom right.

\*All screen captures may not reflect the system's current state and will be updated accordingly.

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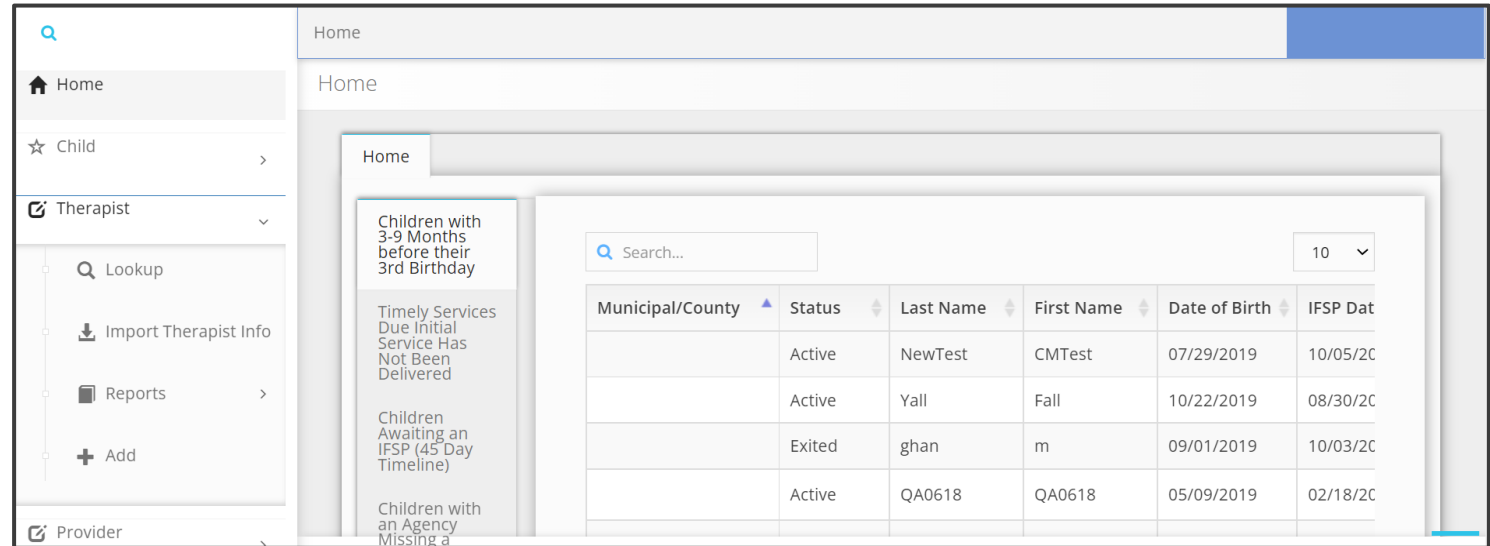
- Search for a Therapist using the 'Therapist Lookup' functionality.

### NOTE

- Users seeking to filter, customize and/or print Therapist information should consider creating a report from the **Therapist Report** menu.
- Please Note: Public Consulting Group, Inc. will offer post go-live support via the PCG Help Desk.

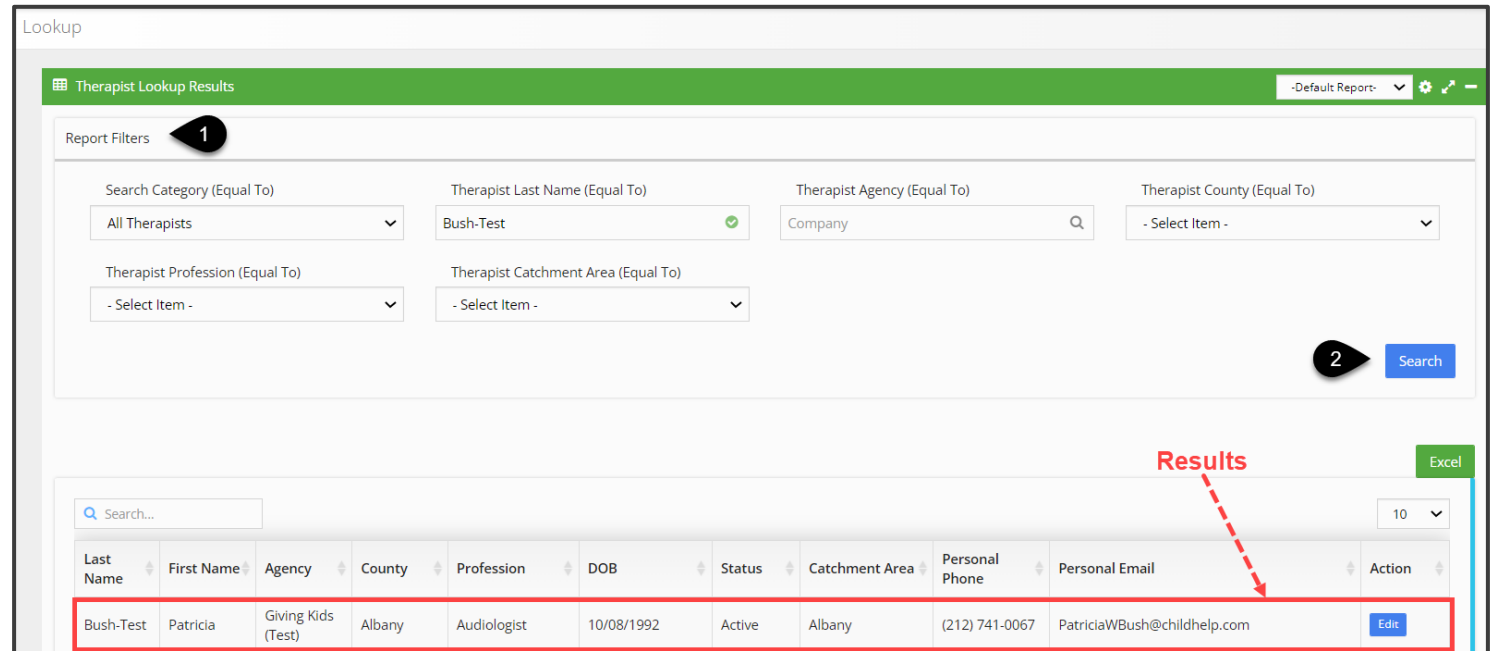
### Step/Action

- From the **Therapist Lookup** pane, use the **Report Filters** to create a search criteria (i.e., filter by Therapist Name, Therapist Agency etc.)
- Select the **Search** button, the system searches the EI-Hub database and returns a list of Therapists based on the search criteria entered.



The screenshot shows the 'Home' page of the EI-Hub system. On the left is a sidebar with navigation options: Home, Child, Therapist, and Provider. The 'Therapist' option is selected, and the 'Lookup' sub-option is active. The main content area displays a table of therapists with columns: Municipal/County, Status, Last Name, First Name, Date of Birth, and IFSP Dat. The table contains four rows of data. A search bar is located at the top right of the table area.

Municipal/County	Status	Last Name	First Name	Date of Birth	IFSP Dat
	Active	NewTest	CMTest	07/29/2019	10/05/20
	Active	Yall	Fall	10/22/2019	08/30/20
	Exited	ghan	m	09/01/2019	10/03/20
	Active	QA0618	QA0618	05/09/2019	02/18/20



The screenshot shows the 'Therapist Lookup Results' page. It features a 'Report Filters' section with dropdown menus for Search Category, Therapist Last Name, Therapist Agency, Therapist County, Therapist Profession, and Therapist Catchment Area. A 'Search' button is located at the bottom right of the filters. Below the filters is a table of results with columns: Last Name, First Name, Agency, County, Profession, DOB, Status, Catchment Area, Personal Phone, Personal Email, and Action. The first row of results is highlighted with a red border. A red arrow points from the word 'Results' to the table.

Last Name	First Name	Agency	County	Profession	DOB	Status	Catchment Area	Personal Phone	Personal Email	Action
Bush-Test	Patricia	Giving Kids (Test)	Albany	Audiologist	10/08/1992	Active	Albany	(212) 741-0067	PatriciaWBush@childhelp.com	Edit