EI-Hub Case Management User Guide – Unit 9

early intervention shaping futures

EI-Hub EARLY INTERVENTION SOLUTION

PUBLIC CONSULTING GROUP

Table of Contents

Revision History

Version Number	Release Date	Author	Revision Summary
v.0.1.0		Paul Michael Ross	First Draft
v.0.2.0		Paul Michael Ross	Edits and additions to the user guide
v.0.3.0		Paul Michael Ross	Edits and additions to the user guide
v.0.4.0	8.5.2021	Paul Michael Ross	Sent to BEI for review
v.0.5.0	8.20.2021	Paul Michael Ross	Updated the following: 1. Teams tab > renamed panel to "EIO/D / Service Coordinator." 2. From 'Initial/On-going Service Coordinator' 3. The 'Service' panel removed from the Teams tab 4. The 'Add Service Coordinator' button was renamed "EIO/D Add Service Coordinator." 5. I edited the labels and descriptions for the EIO/D Add Service Coordinator panel. 6. Removed the 'Service' panel (screenshot & descriptions) 7. Evaluation Tabs and Panels sections.
v.0.6.0	8.24.2021	Paul Michael Ross	Updated the following: 1. Eval Tab > Birth/Medical Panel screenshot updated 2. Updated the Therapist sections based on the EI-Hub Therapist Navigation Guide for C1 Testing Word document comments. 3. Added 837P Loader section.
v.0.7.0	9.10.2021	Paul Michael Ross	Updated the following: 1. IFSP Screen captures 2. IFSP panels/sub-panels order
v.0.8.0	9.22.2021	Paul Michael Ross	Updated the following: • Added Breadcrumb navigation to section 5 • Evaluation panels (screenshots) • Eligibility panels (screenshots) • Added/updated Provider sections

<table>
<tr><th>Version Number</th><th>Release Date</th><th>Author</th><th>Revision Summary</th></tr>
<tr><td>v.0.9.0</td><td>9.27.2021</td><td>Paul Michael Ross</td><td>Updated the following:
Change "Address Validation panel to "Address message pad."
Added the term "Therapist" within the Therapist sections</td></tr>
<tr><td>v.0.10.0</td><td>9.28.2021</td><td>Paul Michael Ross</td><td>Updated the following in section 5.1 Web Page Banner Buttons and Hyperlinks:
Added NYEI logo/description
Added User Profile Files drop-down field
Added NY EI-Hub logo/description</td></tr>
<tr><td>v.0.11.0</td><td>10.1.2021</td><td>Paul Michael Ross</td><td>Reworded the correlation between Therapist and Therapist</td></tr>
<tr><td>v.0.12.0</td><td>10.6.2021</td><td>Paul Michael Ross</td><td>Updated IFSP panel/pane orders and screenshots</td></tr>
<tr><td>v.0.13.0</td><td>10.12.2021</td><td>Paul Michael Ross</td><td>Updated the following:
For consistency, I made a global change for the 'Search text box as follows:<table><tr><td>Search</td><td>To search the results grid/table for a specific record, enter a keyword into this field.</td></tr></table>
Updated Transition panels, pane order, and screenshots
Removed the following buttons in section 5:
Message
Tasks
Removed Task board section
Updated system user sign-in
Updated the Evaluation > Screening Tab > Screening Information panel (Screenshot + fields)
Added a 'Checkboxes' description (section 5.7)
Updated Eligibility sections</td></tr>
</table>

Version Number	Release Date	Author	Revision Summary
v.0.14.0	11.3.2021	Paul Michael Ross	• Updated Screenshots for the Evaluation Tab > Waiver panel added and updated field descriptions.
v.0.15.0	11.29.2021	Paul Michael Ross	• Updated the Document Management Panel. • Add a definition for the "Submit" button (listed in the Navigation section). • I updated the 'Home' tab dashboard section. • I removed screenshots, fields, descriptions, and buttons for all tabs and panels and added a New Therapist (Therapist). The purpose is to reduce repetition, hence, decreasing the size of the overall CM User Guide. However, the user is referred to sections 8.3.1.3.1 – 8.3.1.5.1.1. • I removed the Entering a Coordinator Menu selection and subsections (panels) from the user guide. • Updated Attendance > "Billing to State" - Filter Options section • Updated the Transition sections.
v.0.16.0	12.20.2021	Paul Michael Ross	• Updated Transfer, Exit Close panels • Updated Provider sections (panels/sub-panels) • I have reviewed/edited grammar through the user guide. Please note editing review is not final at this point.
v.0.17.0	1.6.2022	Paul Michael Ross	• Removed the sentence from the Excel button table, "An example of MS Edge browser downloading the excel file and options," which did not have an image. • Updated the IFSP Outcome panel. • Updated the Therapist Assignment panel. • I removed sources referenced in the user guide that provides definitions or links that should be NYS Specific. In addition, reference sites need to be NYS EI approved, not general sites found from searching the internet, i.e., parenting articles. • Section 8.1.4.2.1 Child Outcomes Summary Form (COSF) Tab/Panel,

Version Number	Release Date	Author	Revision Summary
			corrected terms with This is NYS narrative taken directly from the COSF Entry and Exit forms explaining these terms (feedback provided by Mike I.) • Updated IFSP Information panel • Updated IFSP Outcome panel • Updated Therapist Assignment panel • Updated Respite Services panel • Updated Transportation panel • Updated Waiver panel • Updated IFSP Service/Link IFSP Service panel • Natural Environments panel • Removed IFSP Meeting panel • Removed Service Information Tab/Panel, which references 'Please refer to section 8.1.2.7.9 IFSP Services Panel above for sub-panels and fields/descriptions. • Added the Caseworker panel
v.0.18.0	1.28.2022	Paul Michael Ross	• Updated Section 6 (User Login) I include HCS > EI-Hub landing page > CM • Added HCS Sign Up instructions in Appendix 1. • Added the 'Path to Early Intervention Services' (**Note:** this will eventually have individual links to guide users to their specific roles). • I re-adjusted the Transition panels order. • **NOTE:** Next revision will have more narratives (e.g., the purpose of panels).
v.0.19.0	2.18.2022	Paul Michael Ross	• I removed Reopen/Reactivate Child Record panel. • I added narratives on the Child and Provider Management panels. • I added back the 'Task Board' section 6.2. • Removed sections 5.3 – 5.4 and added sections 6.5 – 6.7. • Removed IFSP Service Link Tab/IFSP Service Report Panel. • Updated the COSF Panel • Updated the Dashboards section. • I moved the "customized" EI-Hub UI sections to the Appendix section. • Update Attendance and Billing Reports.

Version Number	Release Date	Author	Revision Summary
v.0.20.0	2.25.2022	Paul Michael Ross	• I renamed the Heading 1 Styles to "Unit" <chapter/section number (e.g., Unit 9. Child). • I removed the Availability, Service Area, and Compliance Type grids/tables and panels from the Therapist module. • I added a Catchment Area Grid/Table and panel.
v.0.21.0	1.5.2023	Paul Michael Ross	• Modify the document styles and footers for a sleeker presentation. • Made edits/added BEI's comments from Unit 1 – Unit 8. • Added Child Transfer popup panel. • Removed 'Program Details Grid/Table section. • Updated screenshots and fields (grids/tables & panels) for the IFSP and Transition sections • Edits made to Unit 9 per BEI comments.

EI-Hub Version	Release Date
3.14.0.0	1.25.2023

Unit 9. Therapist

This unit offers an overview of the Therapist section within the Case Management component of the EI-Hub. In addition, it includes a description of the elements included as part of a Therapist's record.

The following section outlines the processes for establishing and managing therapist accounts in the case management system and reporting features. Within EI-Hub Case Management, Therapists or Rendering Providers are the qualified personnel approved to provide EI services; this may include licensed, certified, or registered therapists and educators or other professionals delivering services. **The ISCs, OSCs, and Health Home coordinators do not meet the definition of a Therapist or Rendering Provider; however, in the EI-Hub, they are included in the Therapist section.**

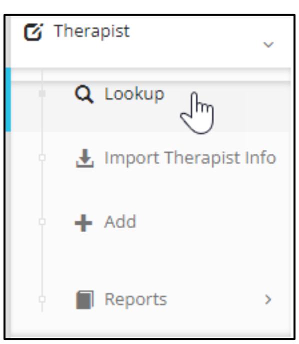
Once an applicant is approved by DOH as an approved individual provider utilizing the Provider Enrollment Tool, the individual's information will be imported into the Provider Management section of EI Hub and the Therapist section of EI Hub.

9.1 Lookup

The **user's role** determines therapist lookup functionality. In this section, individuals with the appropriate access can search for therapists using various data fields listed in the table. Individual therapists will be taken directly to their profile page by accessing the lookup functionality but cannot perform searches or view other therapists' records.

- If a therapist is not found after an initial search, consider modifying the search criteria (e.g., using the first four letters of a therapist's last name instead of the full last name).
- The system will return a list of all therapists if no search criteria are entered.
- Users seeking to filter, customize, and/or print Therapist information should consider creating a report from the Therapist Report menu.
- Names do not have restrictions on the case sensitive (Upper and Lower), and searches include matches on characters regardless of the case.

A provider can be an agency, municipality, or DOH-approved individual provider.

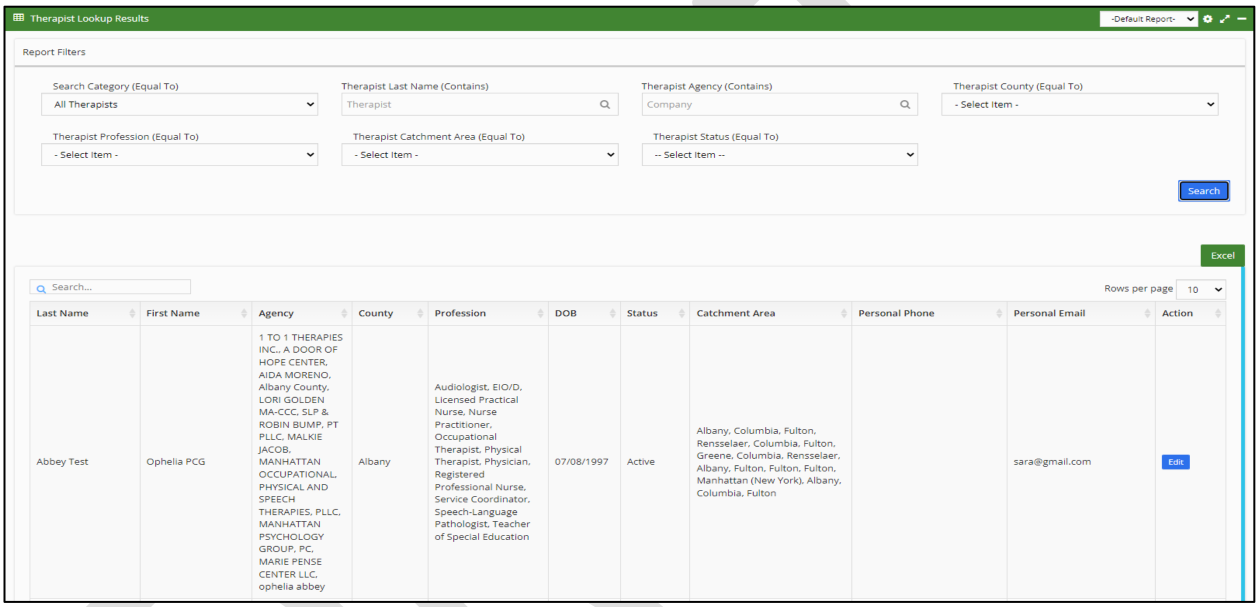


9.1.1 Therapist Lookup Filter Panel and Results Grid/Table

The Therapist search filters allow the user to search by catchment area or address county. For example, the search is impacted if the therapist county field is blank. Nevertheless, the catchment area requires the county, and the system will locate a therapist with a blank county address.

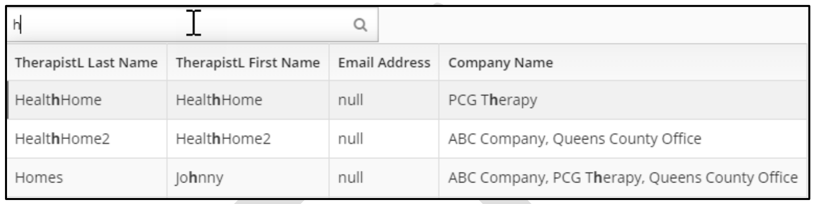
Therapist Lookup fields with magnifying lenses indicate 'smart search' fields.

- **The system presents existing records to select from as the user begins typing.**
- **The user selects a record to populate the field and search as normal.**



FIELD	DESCRIPTION
-Default Report	The "Default Report" is the system's canned report. If your agency created a custom report for you to use, select/click the drop-down and select the appropriate report item from the list. **Depending on the chosen custom report, the presentation will look different based on the design; hence, different results will transpire.**

Report Filters

<table>
<tr><th>FIELD</th><th>DESCRIPTION</th></tr>
<tr><td>Search Category (Equal To)</td><td>Select the appropriate category from the list using this drop-down to narrow your search.</td></tr>
<tr><td>Therapist Last Name (Equal To)</td><td>To narrow your search, begin typing and select the appropriate therapist's last name from the drop-down grid (example below).

h
<table>
<tr><th>TherapistL Last Name</th><th>TherapistL First Name</th><th>Email Address</th><th>Company Name</th></tr>
<tr><td>HealthHome</td><td>HealthHome</td><td>null</td><td>PCG Therapy</td></tr>
<tr><td>HealthHome2</td><td>HealthHome2</td><td>null</td><td>ABC Company, Queens County Office</td></tr>
<tr><td>Homes</td><td>Johnny</td><td>null</td><td>ABC Company, PCG Therapy, Queens County Office</td></tr>
</table></td></tr>
<tr><td>Therapist Agency (Equal To)</td><td>To narrow your search, begin typing and select the therapist agency name from the drop-down grid.</td></tr>
<tr><td>Therapist County (Equal To)</td><td>Select the therapist county from the list to narrow your search using this drop-down.</td></tr>
<tr><td>Therapist Profession (Equal To)</td><td>To narrow your search, select the therapist profession from the drop-down list.</td></tr>
<tr><td>Therapist Catchment Area (Equal To)</td><td>To narrow your search, use this drop-down and select the appropriate therapist catchment area from the list.</td></tr>
<tr><td>Therapist Status (Equal To)</td><td>To narrow your search, use this drop-down and select 'Active' or 'Inactive.'

Select 'Active' to search for a therapist currently active in the EI Program and 'Inactive' for therapists who are no longer active in the program.

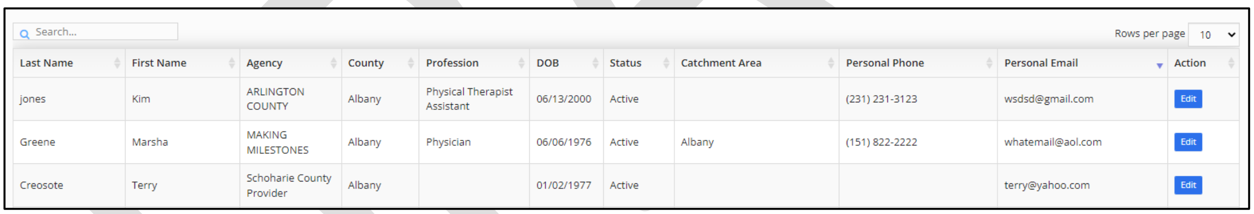
Therapists who are active or inactive in the agency could be active and work for another agency.

Who sees what?
As an Individual Provider, you will only see your information.
You will see information for the entire NY State as an Agency Provider.</td></tr>
</table>

BUTTON	DESCRIPTION
Excel Excel	Click this button to export your results (based on your criteria entered) in an MS Excel spreadsheet. To see your results in excel, click **Open file**. ⓘ**Leaving all the Report Filters fields blank will show "all" results.** ⓘ**The Excel export option is helpful if you have a lot of data to examine; this function helps perform data analysis tasks outside the EI-Hub system.**

BUTTON	DESCRIPTION
Search Search	When clicked, based on your criteria (fields populated above), the system searches the EI-Hub database and returns the results (example shown below).

9.1.2 Therapist Results Grid/Table


Search...

Rows per page 10

Last Name	First Name	Agency	County	Profession	DOB	Status	Catchment Area	Personal Phone	Personal Email	Action
jones	Kim	ARLINGTON COUNTY	Albany	Physical Therapist Assistant	06/13/2000	Active		(231) 231-3123	wsdsd@gmail.com	Edit
Greene	Marsha	MAKING MILESTONES	Albany	Physician	06/06/1976	Active	Albany	(151) 822-2222	whatemail@aol.com	Edit
Creosote	Terry	Schoharie County Provider	Albany		01/02/1977	Active			terry@yahoo.com	Edit

FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

COLUMN	DESCRIPTION
Last Name	This column displays the last name of the therapist.
First Name	This column displays the first name of the therapist.
Agency	This column displays the therapist's Agency.
County	This column displays the therapist's county name.

COLUMN	DESCRIPTION
Profession	This column displays the therapist's profession.
DOB	This column displays the therapist's date of birth (DOB).
Status	This column displays the therapist's status ('**Active**' or '**Inactive**').
Catchment Area	This column displays the therapist's catchment area.
Personal Phone	This column displays the phone number of the therapist.
Personal Email	This column displays the email address of the therapist.
Action	This column displays (if applicable) corresponding action buttons (e.g., Add, Edit, Delete, etc.).

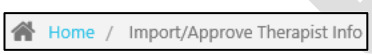
BUTTON	DESCRIPTION
Edit Edit	Click this button adjacent to a therapist record/row to view or edit an existing therapist record. When clicked, the system advances you to the multi-tabbed/panel sections (example shown below).

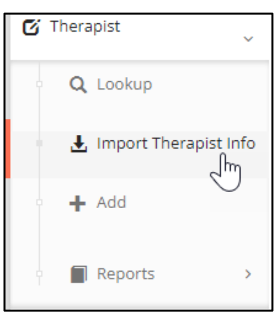
9.2 Import Therapist Info

Please note that the import functionality is inactive and will be available sometime post-go-live.

This function is only available for Superuser and BEI Superuser roles.

The Import Therapist functionality enables agencies to import an excel list of their therapists (rendering providers). The system would then translate the spreadsheet and load the therapists into Case Management (CM).





9.2.1 Import Therapist Info Grid/Table

See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section Home Tab Controllers; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

BUTTON	DESCRIPTION
Import Therapist Info Import Therapist Info	To import therapist(s) data, click this button. **Please note that the import functionality is inactive and will be available sometime post-go-live.**

FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

COLUMN	DESCRIPTION
Therapist First Name	This column displays the first name of the therapist.
Therapist last Name	This column displays the last name of the therapist.
Field	This column displays a therapist's added or changed attributes (county, profession, etc.).
New Value	This column displays a new or changed attribute value for the selected field.
Current Value	This column displays the attribute value on the record for the selected field.

These values mentioned above will be inactive until after go-live. In addition, some of these values may change after EI-Hub go-live.

9.3 Add (Therapist)

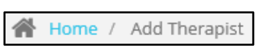
1. **New therapists will only need to be added to the system once. However, to avoid duplication and possible billing issues, you must search the system before entering an individual to ensure no existing record exists.**
    a. **Then, if other agencies want to add the therapist to their rosters, they will select the therapist from the search.**
    b. **Other agencies must add the association between the agency and therapist in the Professions tab, Companies panel.**

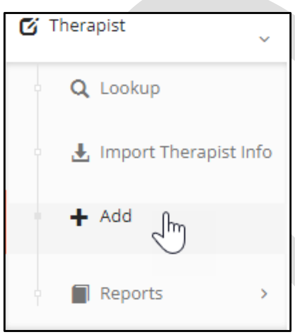
2. **You cannot delete therapists from the system. Instead, companies would end their association with the therapist in the Therapist - Professional tab - Companies panel by adding an end date and making the employee status inactive.**

3. **Therapist NPI values are validated in the proper format, not matched to an individual entity. You must verify the individual's NPI in the NPI Registry and confirm accuracy before entry.**

4. **No reset button: Entries can be de-selected or replaced with new entries.**

5. **The therapist's name must exactly match the name on all licenses and certifications.**





9.3.1 Demographics Tab

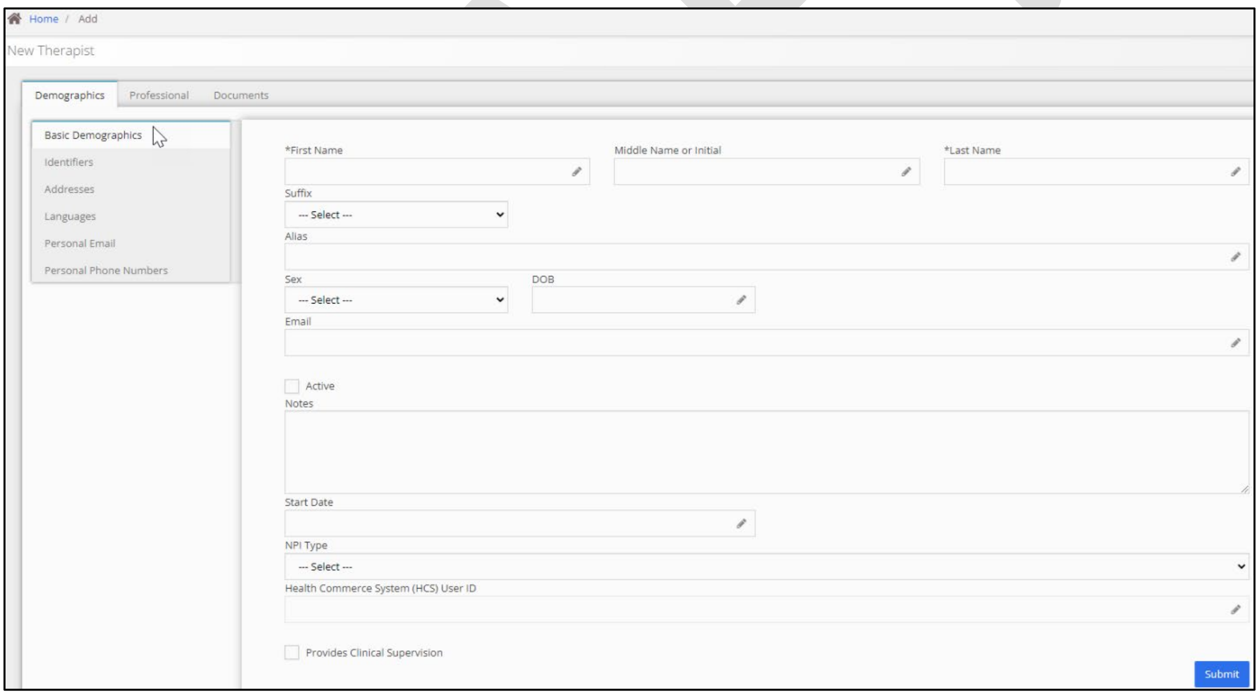
All information provided during the enrollment and/or registration process will autofill the information in the Therapist's profile. The data will not need to be entered again but can be edited if required. Editability and access rights are determined by an individual's role in the system.

Not all therapists are entered during approval, but their info will transfer to Case Management if they are.

9.3.1.1 Basic Demographics Panel

Use this panel to enter a new therapist's or edit an existing therapist's demographic information.

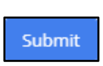
When deactivating a therapist, the user must uncheck/de-select the 'Active' checkbox.



An asterisk (*) adjacent to a field name/label means it is a required field for you to populate.

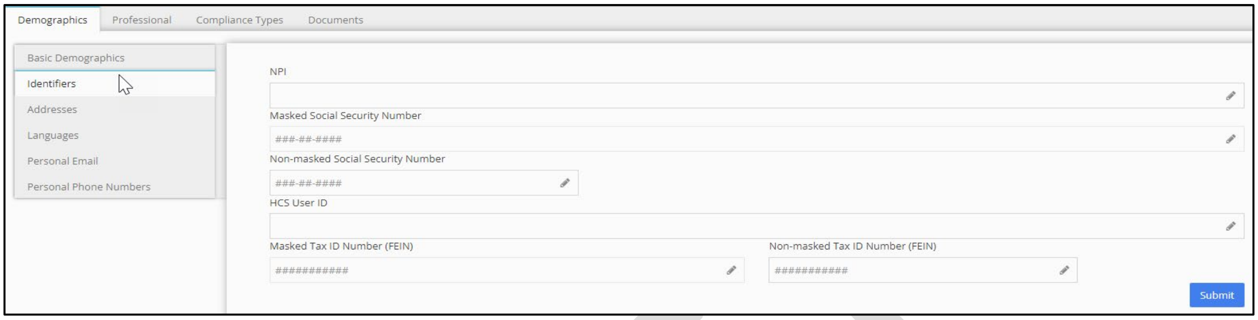
FIELD	DESCRIPTION
***First Name**	Enter/edit the professional individual's first name.

FIELD	DESCRIPTION
Middle Name or Initial	Enter/edit the professional individual's middle name or middle initial (optional).
***Last Name**	Enter/edit the professional individual's last name.
Suffix	Use this drop-down and select the professional individual's suffix.
Alias	Enter/edit the professional individual's, also known as (AKA) first name (optional).
Sex	Use this drop-down and select the professional individual's gender.
DOB	Manually enter (or use the calendar picker) the professional individual's birth date (DOB).
Email	Enter/edit the professional individual's email address.
☐ **Active**	If '**Yes**,' select/tick the checkbox. If '**No**,' leave blank. Selecting/ticking the 'Active' checkbox indicates the agency actively employs the therapist. • If you are an agency adding a new therapist to your roster, you will check "**Yes**" because the new therapist is actively working for the agency. • When you add an employee (e.g., a therapist), they will be active at your agency. **There is a "Withdrawn" status (reference CM Unit 10 User Guide) that PAU can select if the individual has no agreement with the state. The status of Withdrawn, however, does not prevent a therapist from being employed by an agency.**
Notes	Enter/edit any additional notes about the professional individual.
Start Date	Enter the professional individual's start date manually or use the calendar picker (invoked by clicking this field) if applicable.
NPI Type	Use this drop-down and select the NPI Type ('Individual') from the list.
Health Commerce System (HCS) User ID	Enter/edit the professional individual's HCS User ID.

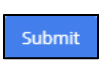
BUTTON	DESCRIPTION
Submit  	To save your entry, click this button. When clicked, the system keeps the information in the EI-Hub database, and the record updates the Basic Demographics panel.

9.3.1.2 Identifiers Panel

Use this panel for the therapist's relevant ID numbers (NPI and SSN). The masked option (SSN and FEIN) will have the most numbers hidden. However, if your user role has access, you will see all.

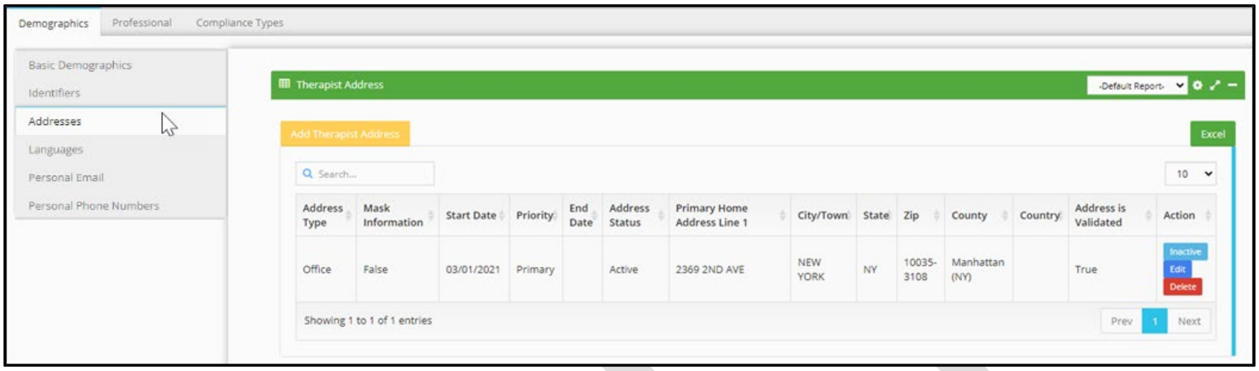


FIELD	DESCRIPTION
NPI	Enter/edit the 10-position all-numeric National Provider Identifier for the professional individual.
Masked Social Security Number	This read-only field displays the last four digits of the social security number.
Non-masked Social Security Number	Enter/enter the whole social security number; revealed for users with the highest level of access.
HCS User ID	Enter/edit the professional individual's Health Commerce System (HCS) user identification.
Masked Tax ID Number (FEIN)	This read-only field displays the last four digits of the tax identification number.
Non-masked Tax ID Number (FEIN)	Enter/edit the professional individual's tax identification number, revealed for users with the highest level of access.

BUTTON	DESCRIPTION
Submit 	To save your entry, click this button. When clicked, the system keeps the information in the EI-Hub database, and the record updates the Identifiers panel.

9.3.1.3 Addresses Grid/Table

Use this grid/table and panel to enter the therapist's address information (e.g., home, billing, and office). In addition, use this grid/table to manage therapists' addresses. For example, if the therapist moves or a PO Box is discontinued, input the end date and/or add a new address—edit/end addresses as needed.



FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

COLUMN	DESCRIPTION
Address Type	This column displays the address type (e.g., Hospital, Residential Facility, etc.).
Mask Information	This column displays' **True**' or '**False**' (ref. mask/hide the therapist information).
Start Date	This column displays the start date of the therapist's address entered into the system.
Priority	This column displays the therapist's address priority (e.g., Primary, Secondary, or Tertiary).
End Date	This column displays the end date of the therapist's address entered into the system.
Address Status	This column displays the address status ('**Active**' or '**Inactive**').
Primary Home Address Line 1	This column displays the primary home address where the therapist resides.
City/Town	This column displays the city/town where the therapist resides.
State	This column displays the state where the therapist resides.
Zip	This column displays the zip code where the therapist resides.

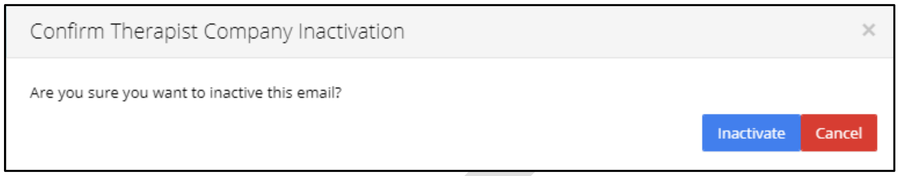
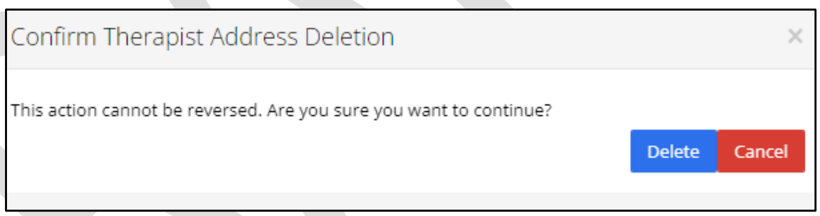
COLUMN	DESCRIPTION
County	This column displays the county where the therapist resides.
Country	If applicable, this column displays the country.
Address is Validate	This column displays the system's address validation where the therapist resides.
Action	This column displays (if applicable) corresponding action buttons (e.g., Inactive, Edit, Delete, etc.).

BUTTON	DESCRIPTION
Add Therapist Address Add Therapist Address	Click this button to add a therapist's 'Address' record in the EI-Hub database. When clicked, the system prompts an "Add Therapist Address" popup panel (shown below).

Add/Edit Therapist Address Popup Panel: Note there are two (2) buttons:

- The '**Address Validate**' button can be used as an override to save an address it can't verify by the '**USPS, City/State/Zip Lookup**' button.
- The '**USPS, City/State/Zip Lookup**' button uses the USPS database to complete missing info and complete the city/state with a valid Zip.

BUTTON	DESCRIPTION
Excel Excel	Click this button to export your results (based on your criteria entered) in an MS Excel spreadsheet. **Leaving all the Report Filters fields blank will show "all" results.** **The Excel export option is helpful if you have a lot of data to examine; this function helps perform data analysis tasks outside the EI-Hub system.**

BUTTON	DESCRIPTION
Inactive Inactive	To inactivate a therapist's address, click this button. When clicked, the system prompts a message pad popup (shown below); click the **Inactive** button to proceed or the **Cancel** button to retract. 
Edit Edit	Click this button to view or edit an existing therapist in the EI-Hub database. When clicked, the 'Edit Therapist Address' popup panel appears (shown below). **TIP:** Users must maintain a history of addresses in the EI-Hub for a therapist. Use the 'Edit' button to modify an inaccurate address. For example, a therapist's old address can be end-dated ('End Date' field) and then add a new address with an applicable 'Start Date.'
Delete Delete	To delete an existing document for a therapist's address, click this button adjacent to the appropriate record/row. When clicked, the system prompts a confirmation message pad popup (shown below); click the **Delete** button to proceed or click the **Cancel** button to retract. 

9.3.1.3.1 Add Therapist Address Popup Panel

An asterisk (*) adjacent to a field name/label means it is a required field for you to populate.

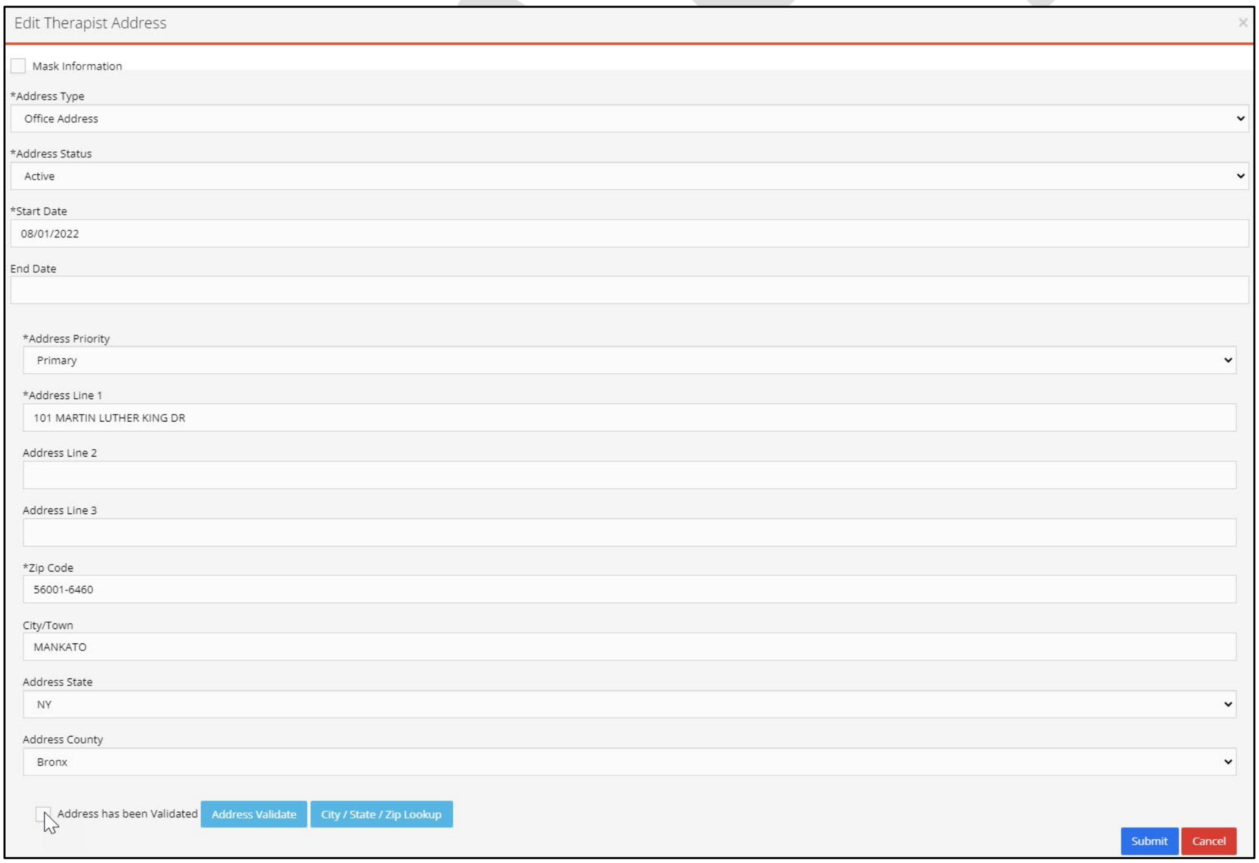
FIELD	DESCRIPTION
☐ **Mask Information**	**The mask information checkbox is for printed documents (such as IFSP), not for masking information on the panel/screen.** If '**Yes**,' select/tick the checkbox. If '**No**,' leave blank.
***Address Type**	Use this drop-down and select the appropriate address type (e.g., Home, Billing, Office, and Mailing) from the list.
***Address Status**	Use this drop-down and select the appropriate address status ('Active' or 'Inactive').
***Start Date**	Manually enter the start date or use the calendar picker (invoked by clicking this field) for the therapist's address.

FIELD	DESCRIPTION
End Date	Manually enter the end date or use the calendar picker (invoked by clicking this field) for the therapist's address.
***Address Priority**	Use this drop-down and select the appropriate Priority (e.g., Primary, Secondary) from the list.
Address Line 1	Enter the primary home address where the therapist resides.
Address Line 2	Enter the primary home address line 2 (e.g., APT#) where the therapist resides.
Address Line 3	If applicable, enter the primary home address line 3, where the therapist resides.
***Zip Code**	Enter the zip code where the therapist resides.
City/Town	Enter the city/town where the therapist resides.
Address State	Use this drop-down and select the state where the therapist resides.
Address County	Use this drop-down and select the county where the therapist resides.
☐ **Address is Validated**	Select/tick this checkbox if you're confident in the correct address (shown below). ⓘThis checkbox appears greyed out after entering all required fields (*) and selecting/clicking the' Address Validate' button. However, if you select/click the' City/State/Zip Lookup' button, the checkbox will appear and can be selected/clicked.

BUTTON	DESCRIPTION
Address Validate Address Validate	**Address Validate**: To validate the address entered, click this button. When clicked, the system prompts an "Address Validation" message pad (example below).  • Change **- Change:** To accept/change the USPS address validation suggestion, click this button. • Cancel **- Cancel:** To cancel the USPS address validation suggestion, click this button.

BUTTON	DESCRIPTION
City/State/Zip Lookup City / State / Zip Lookup	If you do not know the zip code for the therapist's location, leave the "Zip Code" field blank and click this button. The system then populates the Zip Code field with the correct zip code. **If you enter the address, city, and state and leave the zip code blank, click the Zip Code Lookup button; the process will look up the zip code.**
Submit Submit	To save your entry, click this button. When clicked, the system keeps the information in the EI-Hub database, and the record updates in the Therapist Address panel (grid/table).
Cancel Cancel	To cancel your entry, click this button. The system does not save the information entered in the Add Child Address panel; it closes and returns you to the Therapist Address (grid/table).

9.3.1.3.2 Edit Therapist Address Popup Panel



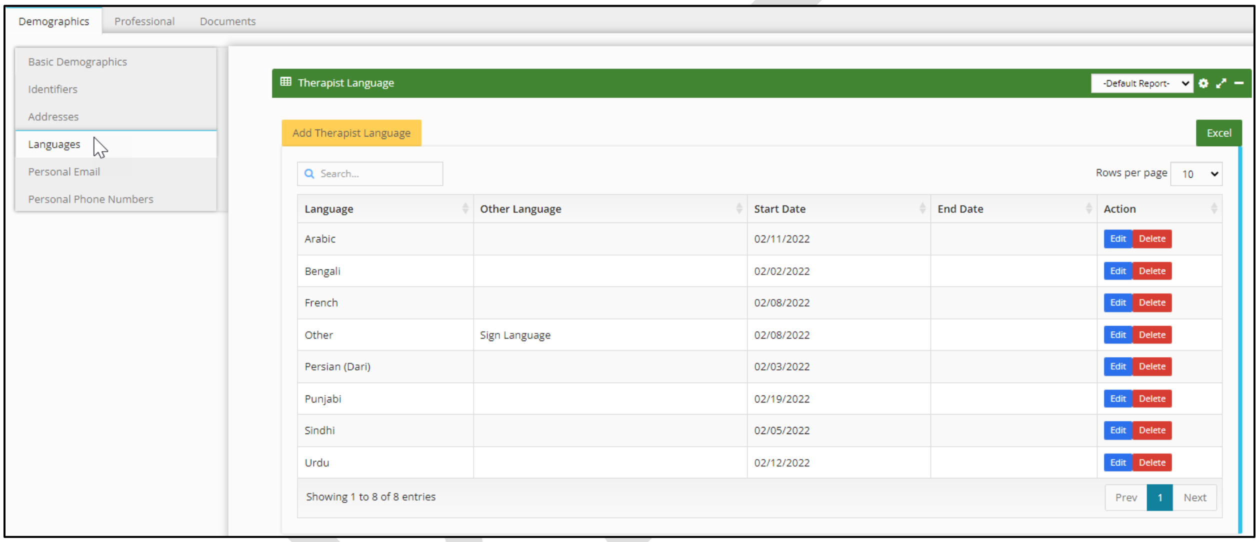
An asterisk (*) adjacent to a field name/label means it is a required field for you to populate.

The fields and descriptions for editing the Therapist Address popup panel are the same as for <u>Add Therapist Address popup panel</u>.

When editing a therapist's address (e.g., changing the 'Address State'), the 'Address has been Validated' check box appears.

9.3.1.4 Languages Grid/Table

Use this grid/table and panel to select various languages the therapist can speak

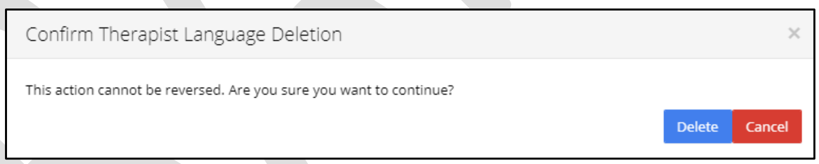


See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section <u>Home Tab Controllers</u>; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

COLUMN	DESCRIPTION
Language	This column displays the language spoken by the therapist.
Other Language	This column displays another language the therapist speaks.
Start Date	This column displays the therapist's language start date (add/edit record).
End Date	This column displays the therapist's language end date (add/edit record).

COLUMN	DESCRIPTION
Action	This column displays (if applicable) corresponding action buttons (e.g., Add, Edit, Delete, etc.).

BUTTON	DESCRIPTION
Add Therapist Language Add Therapist Language	Click this button to add a therapist's 'Language' record in the EI-Hub database. The Therapist Language tab/panel appears (shown below).
Edit Edit	Click this button to view or edit an existing therapist language in the EI-Hub database. When clicked, the Therapist Language tab/panel appears **See the Therapist Language tab/panels below for fields/descriptions.**
Delete Delete	To delete an existing 'Therapist's Language,' click this button adjacent to the appropriate record/row. When clicked, the system prompts a confirmation message pad popup (shown below); click the **Delete** button to proceed or click the **Cancel** button to retract. 
Excel Excel	Click this button to export your results (based on your criteria entered) in an MS Excel spreadsheet. **Leaving all the Report Filters fields blank will show "all" results.** **The Excel export option is helpful if you have a lot of data to examine; this function helps perform data analysis tasks outside the EI-Hub system.**

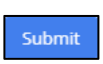
9.3.1.4.1 Therapist Language Tab/Panel

Providers are required to include at least one language during the enrollment process. You can add Therapist languages after approval. Languages are removed from the drop-down when previously selected.

An asterisk (*) adjacent to a field name/label means it is a required field for you to populate.

FIELD	DESCRIPTION
Language	Enter the appropriate language or begin typing (type-ahead) the therapist's language (type-ahead) and select it from the drop-down list (example below). 
***Start Date**	Manually enter the start date or use the calendar picker (invoked by clicking this field) for the therapist's language.
End Date	Manually enter the end date or use the calendar picker (invoked by clicking this field) for the therapist's language.

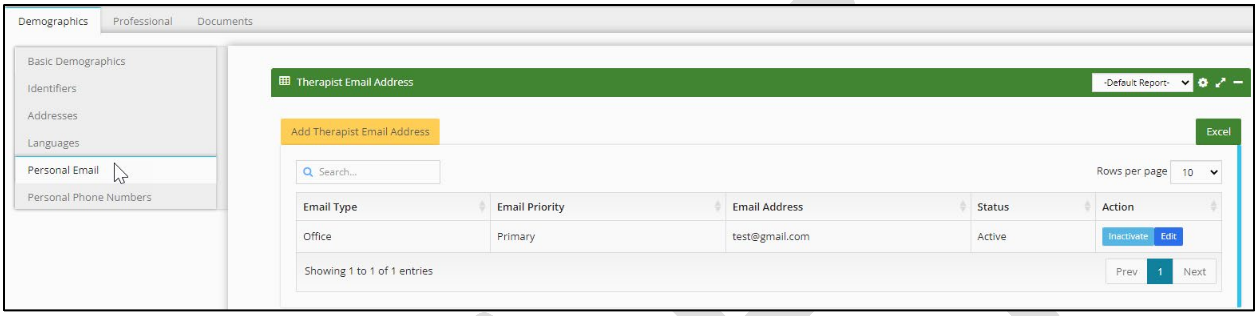
The start and end date (if applicable) indicate the date the provider offers or no longer offers the language.

BUTTON	DESCRIPTION
Submit  	To save your entry, click this button. When clicked, the system keeps the information in the EI-Hub database, and the record updates the Therapist Language panel (grid/table).

9.3.1.5 Personal Email Grid/Table

Use this grid/table and panel to enter the therapist's email address. For example, it can be the therapist's home, billing, and office. If the therapist's email address information changes, you can edit the email address using the **Edit** button in the action column (example shown below).

The system allows users to add or edit entries. The edit function allows the user to inactivate all entries. The therapist record should always contain at least one active primary email.



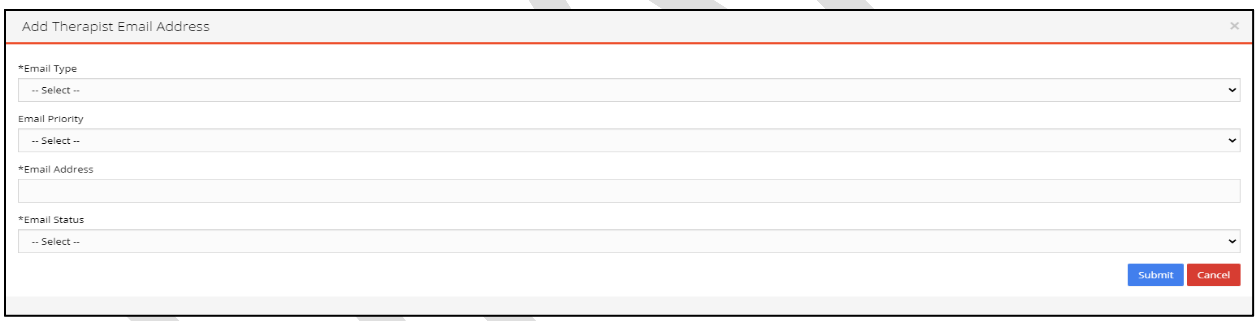
See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section Home Tab Controllers; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

COLUMN	DESCRIPTION
Email Type	This column displays the therapist's email type (e.g., Home, Office, etc.).
Email Priority	This column displays the email priority for the therapist.
Email Address	This column displays the therapist's email address.
Status	This column displays the therapist's email status (**'Active'** or **'Inactive'**).
Action	This column displays (if applicable) corresponding action buttons (e.g., Add, Edit, Delete, etc.).

BUTTON	DESCRIPTION
Add Therapist's Email Address 	Click this button to add a therapist's 'Email Address' record. When clicked, the system prompts the "Add Therapist Email Address" popup panel (shown below). ⓘ**You can add multiple email addresses (Primary, Secondary, and Tertiary) for a therapist. For example, if you needed to add Primary, Secondary, and Tertiary, you would add each record. Three (3) records appear in the Personal Email grid/table when finished.**
Excel 	Click this button to export your results (based on your criteria entered) in an MS Excel spreadsheet. ⓘ**Leaving all the Report Filters fields blank will show "all" results.** ⓘ**The Excel export option is helpful if you have a lot of data to examine; this function helps perform data analysis tasks outside the EI-Hub system.**

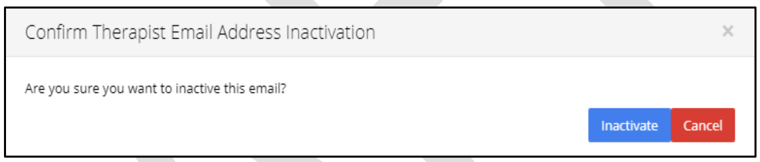
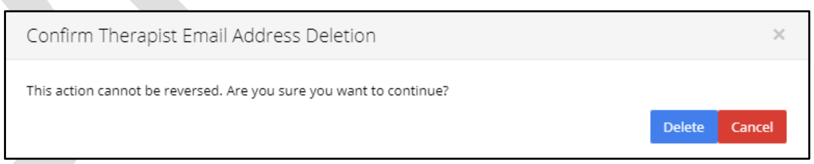
9.3.1.5.1 Add Therapist Email Address Popup Panel



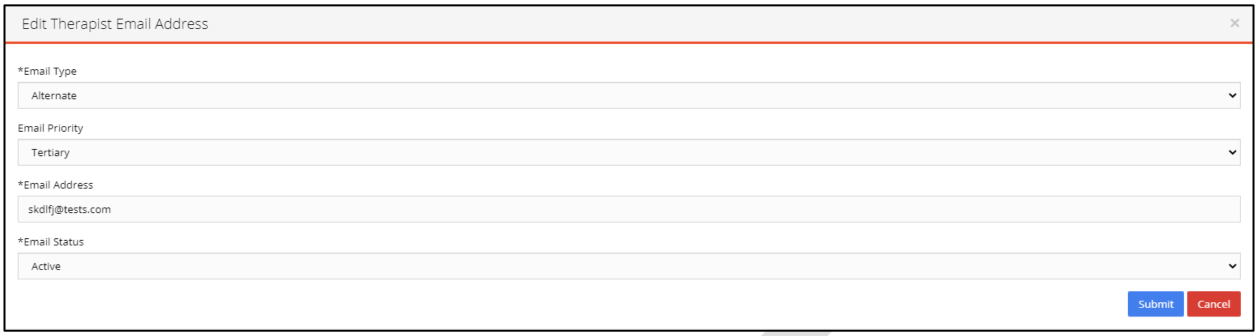
ⓘ**An asterisk (*) adjacent to a field name/label means it is a required field for you to populate.**

FIELD	DESCRIPTION
***Email Type**	Use this drop-down and select the appropriate Email Type from the list.
Email Priority	Use this drop-down and select the appropriate Email Priority (Primary, Secondary, and Tertiary) from the list:
***Email Address**	Enter the therapist's email address.
***Email Status**	Use this drop-down and select the appropriate status (**'Active'** or **'Inactive'**) from the list.

BUTTON	DESCRIPTION
Submit Submit	To save your entry, click this button. When clicked, the system keeps the information in the EI-Hub database, and the record updates in the Therapist Email Address panel (grid/table).
Cancel Cancel	To cancel your entry, click this button. The system does not save the information entered in the Add Therapist Email Address panel; it closes and returns you to the Therapist Email Address (grid/table).

BUTTON	DESCRIPTION
Inactive Inactive	To inactivate a therapist's address, click this button. When clicked, the system prompts a message pad popup (shown below); click the **Inactive** button to proceed or the **Cancel** button to retract. 
Edit Edit	Click this button to view or edit an existing therapist email address in the EI-Hub database. When clicked, the system prompts the "Edit Therapist Email Address" popup panel (shown below).
Delete Delete	To delete an existing therapist email address, click this button adjacent to the appropriate record/row. When clicked, the system prompts a confirmation message pad popup (shown below); click the **Delete** button to proceed or click the **Cancel** button to retract. 

9.3.1.5.2 Edit Therapist Email Address Popup Panel



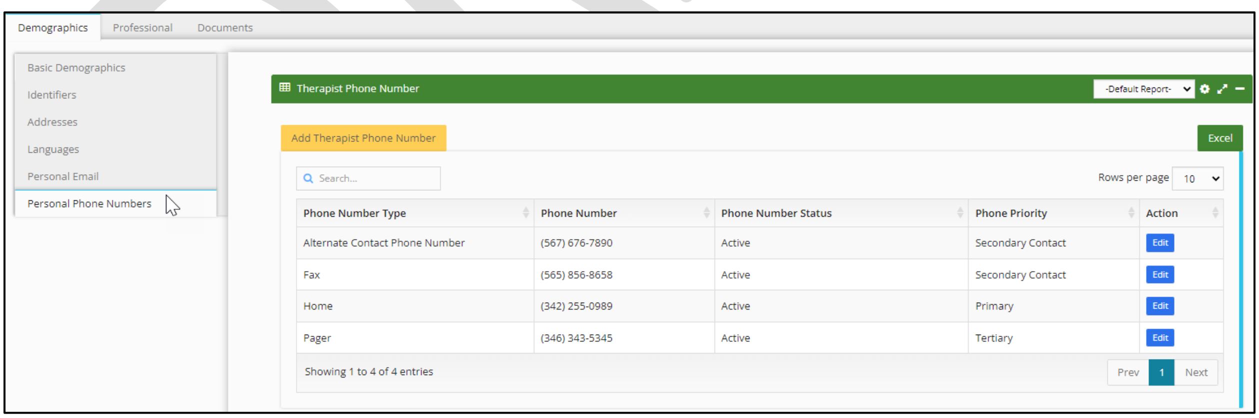
An asterisk (*) adjacent to a field name/label means it is a required field for you to populate.

The fields and descriptions for editing the Therapist's Email Address are the same as for adding a Therapist's Email Address.

9.3.1.6 Personal Phone Numbers Grid/Table

Use this grid/table and panel to enter the therapist's phone number. For example, it can be the therapist's home, billing, and office phone number. If the therapist's phone number information changes, you can edit the number, or add a new phone number can be added.

The system allows users to add or edit entries. The edit function allows the user to inactivate all entries. The therapist's record should always contain at least one active primary phone number.



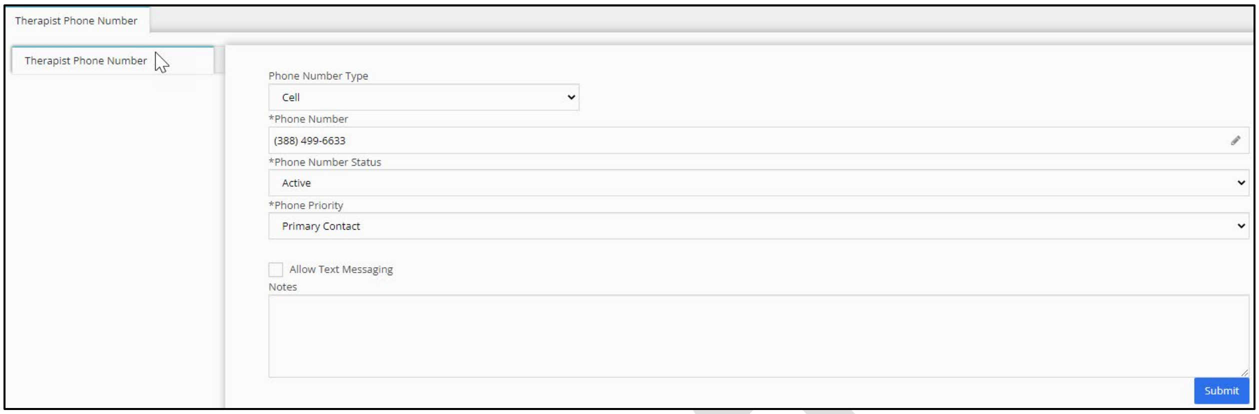
See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section <u>Home Tab Controllers</u>; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

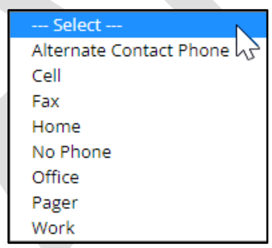
COLUMN	DESCRIPTION
Phone Number Type	This column displays the therapist's phone number type (e.g., office, home, mobile).
Phone Number	This column displays the therapist's phone number.
Phone Number Status	This column displays the therapist's phone number status ('**Active**' or '**Inactive**').
Phone Priority	This column displays the therapist's phone priority (e.g., Primary Contact).
Action	This column displays (if applicable) the corresponding action button (Edit).

BUTTON	DESCRIPTION
Edit Edit	Click this button to view or edit an existing therapist's phone number in the EI-Hub database. When clicked, the 'Edit Therapist Phone Number' popup panel appears **Please note that the fields/descriptions are the same as the "Add Therapist Phone Number" popup panel.**
Add Therapist Phone Number Add Therapist Phone Number	Click this button to add a therapist's 'Phone Number' record in the EI-Hub database. When clicked, the system prompts an "Add Therapist Phone Number" popup panel (shown below).
Excel Excel	Click this button to export your results (based on your criteria entered) in an MS Excel spreadsheet. **Leaving all the Report Filters fields blank will show "all" results.** **The Excel export option is helpful if you have a lot of data to examine; this function helps perform data analysis tasks outside the EI-Hub system.**

9.3.1.6.1 Add Therapist Phone Number Tab/Panel



An asterisk (*) adjacent to a field name/label means it is a required field for you to populate.

COLUMN	DESCRIPTION
Phone Number Type	Use this drop-down and select the appropriate phone number type for the therapist (example below). 
Phone Number	Enter the therapist's phone number.
***Phone Number Status**	Use this drop-down and select the status for the therapist's phone number ('**Active**' or '**Inactive**').
Phone Priority	Use this drop-down and select the phone priority (e.g., Primary Contact) from the list.
Allow Text Messaging	Select/tick this checkbox if the therapist allows/accepts text messaging on their cell/smartphone.
Notes	Enter any relevant notes about contacting the therapist.

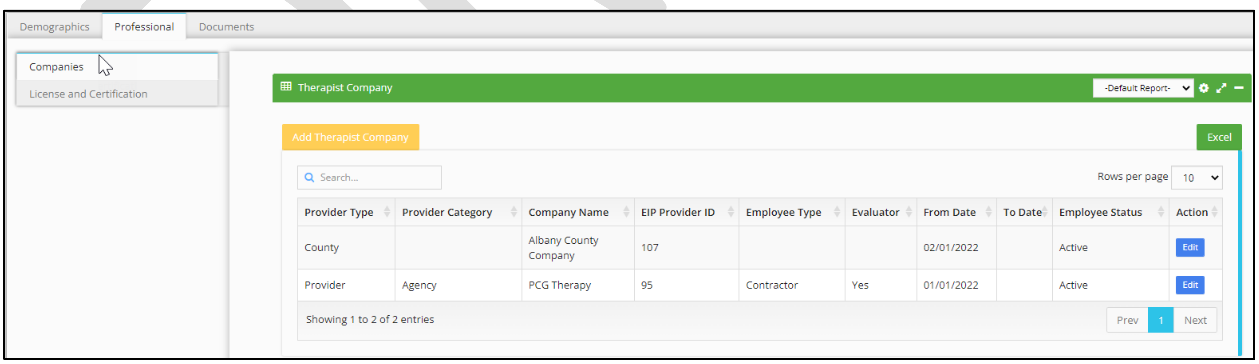
BUTTON	DESCRIPTION
Submit Submit	To save your entry, click this button. When clicked, the system keeps the information in the EI-Hub database, and the record updates in the Therapist Phone Number panel (grid/table).

BUTTON	DESCRIPTION
Excel Excel	Click this button to export your results (based on your criteria entered) in an MS Excel spreadsheet. **Leaving all the Report Filters fields blank will show "all" results.** **The Excel export option is helpful if you have a lot of data to examine; this function helps perform data analysis tasks outside the EI-Hub system.**

9.3.1.7 Professional Tab

9.3.1.7.1.1 Companies Grid/Table

This grid/table's function is for record-keeping and documentation purposes for agencies and to trigger an alert for notification when a therapist has been deemed inactive and the date that status went into effect. Access to the information included in the status panel is role-based.



See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section <u>Home Tab Controllers</u>; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

COLUMN	DESCRIPTION
Provider Type	This column displays the county or provider type.
Provider Category	This column displays the agency or individual category.
Company Name	This column displays the agency, independent provider, or municipality names.
EIP Provider ID	This column displays the agency's Early Intervention Program (EIP) Provider ID.
Employee Type	This column displays the company employee type.
Evaluator	This column displays the company evaluator.
From Date	This column displays the therapist's company 'from' date.
To Date	This column displays the therapist's company 'to' date.
Employee Status	This column displays the therapist's company status.
Action	This column displays (if applicable) the corresponding action button (Edit).

BUTTON	DESCRIPTION
Add Therapist Company Add Therapist Company	Click this button to add a 'Therapist's Company' record in the EI-Hub database. When clicked, the Employment tab/panels appear (shown below).
Excel Excel	Click this button to export your results (based on your criteria entered) in an MS Excel spreadsheet. **Leaving all the Report Filters fields blank will show "all" results.** **The Excel export option is helpful if you have a lot of data to examine; this function helps perform data analysis tasks outside the EI-Hub system.**

BUTTON	DESCRIPTION
Edit Edit	Click this button to view or edit an existing 'Therapist Company' record in the EI-Hub database. The 'License And Certification' tab/panel appears **Please see the Employment tab/panels below for fields/descriptions.**

9.3.1.7.1.1.1 Employment Tab/Panels

Use the panels under this tab to input information on where the therapist works. A therapist can work for multiple companies. Many work for various agencies at a time. If the therapist is no longer working for that company, enter an end date.

9.3.1.7.1.1.1.1 Employment Details Entry Panel

Use this panel to enter information about a therapist's employment details, such as what type of provider they are, whether they are active employees, and what role this individual will provide in early intervention for your agency. There you indicate if they are a contractor, self-employed, or employee. Start and end dates are entered here as well.

Reminder, agencies can only contract with individual providers with DOH approval and an active Agreement (the agreement end date has not been reached). If these conditions are not met, the individual must be an employee of your agency.

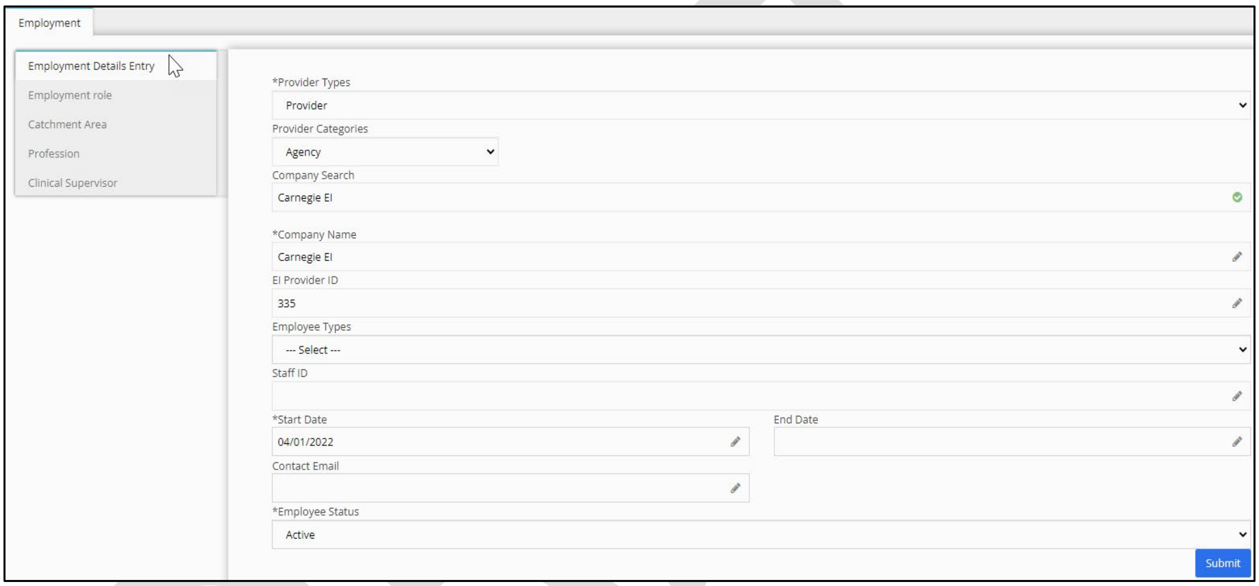
- **If this is an agency adding a new employee, the user must fill in all the fields and all the panels.**
- **Some of this information is pre-populated for a newly approved agency's EIP director and two qualified professionals listed in the agency's application. The user should review and complete the panels. Employment role and profession panels must contain the correct information, or the new employee will not be selectable on Service Authorization (SA) or as EIOD or Service Coordinator (SC) within the Teams panel.**
- **Individuals who have DOH approval with or without an appendix agreement must review and complete the information. The 'Employment role' and 'Profession' panels must contain the correct information, or the New Employee will not be selectable on an SA or as EIOD or SC within the Teams panel.**

When entering a company for a therapist, the "EI Provider" field is marked as required, yet it is a read-only field; when attempting to submit/save, you may receive the error message "Save failed."

Solution: Employment tab > Employment Details Entry panel

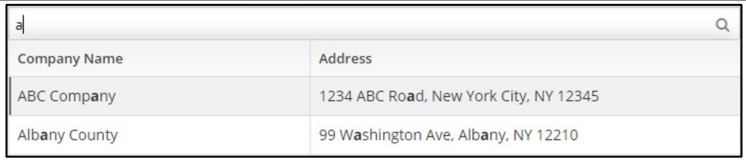
Step/Action:

1. Select Provider Type - Provider,
2. Select Provider Category - Agency
3. Begin typing letters to the provider search field and the 'Type-Ahead.' functionality-appears with a drop-down menu
4. Select a result from the drop-down; Company Name and EI Provider ID will auto-populate.



An asterisk (*) adjacent to a field name/label means it is a required field for you to populate.

FIELD	DESCRIPTION
***Provider Types**	Use this drop-down and select the appropriate therapist type (e.g., County, etc.) from the list.
Provider Categories	Use this drop-down and select the appropriate therapist category (e.g., Agency, etc.) from the list. **The Provider Category drop-down list repopulates from the Provider Types field.**
Company Search	Enter the company name or begin typing (type-ahead) the company name and select it from the drop-down list (example below).

FIELD	DESCRIPTION
	
***Company Name**	A read-only field auto-fills the company's name when selecting from the Company Search drop-down list.
EI Provider ID	This field appears when selecting "Provider" from the *Provider Types drop-down menu, which populates with the EI Provider ID number.
Employee Types	Use this drop-down and select the company's appropriate employee type (e.g., Contractor, etc.).
Staff ID	This read-only field auto-populates if the agency uses a staff identification number.
***Start Date**	Manually enter the start date or use the company's calendar picker (invoked by clicking this field).
End Date	Manually enter the end date or use the company's calendar picker (invoked by clicking this field).
Contact Email	Enter/edit the therapist's email address.
***Employee Status**	Use this drop-down and select the company's appropriate status ('Active' or 'Inactive').

<table>
<tr><th>BUTTON</th><th>DESCRIPTION</th></tr>
<tr><td>

Submit

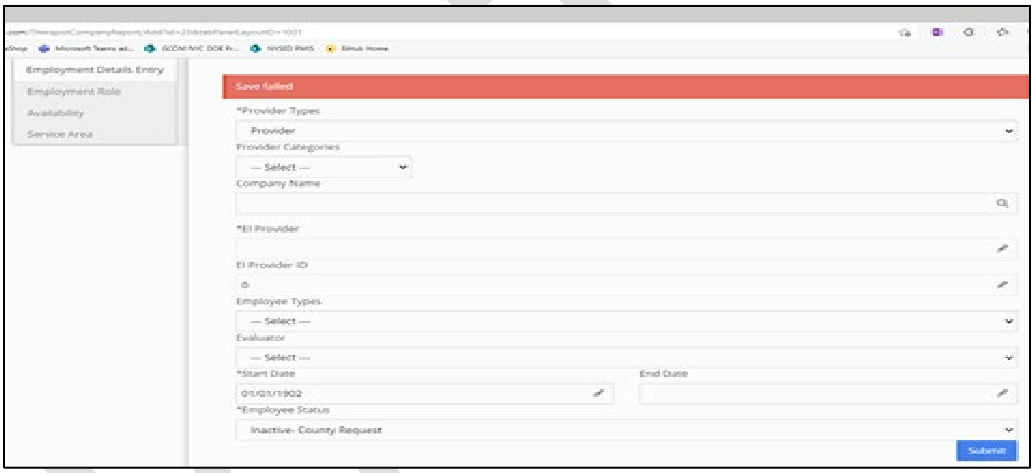
</td><td>

After making the appropriate entries, click this button to save your changes listed in the Employment Details Entry panel.

If the save failed error occurs, please read below.

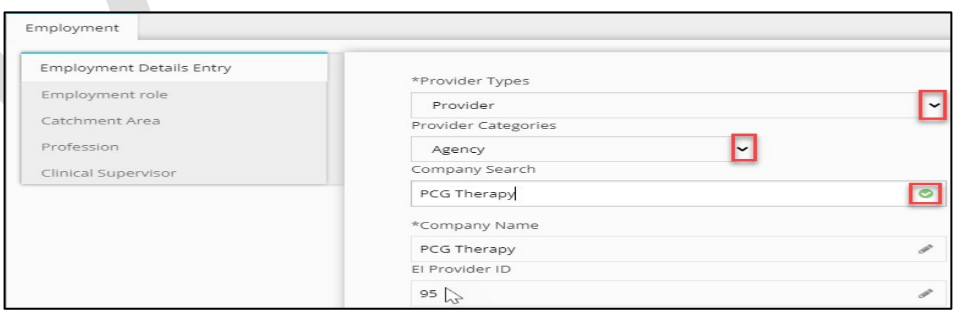
Why can I not save a company for a therapist?

When entering a company for a therapist, the "EI Provider" field is marked as required, yet it is a read-only field. Therefore, if you attempt to save the record, you receive a "Save failed" error message (shown below) with no other info.



If the save failed error populates, as shown above, you must ensure all required fields are populated as shown below.

The EI Provider ID field will not auto-populate unless there are entries in the 'Provider Type,' 'Provider Categories,' and 'Company Search fields

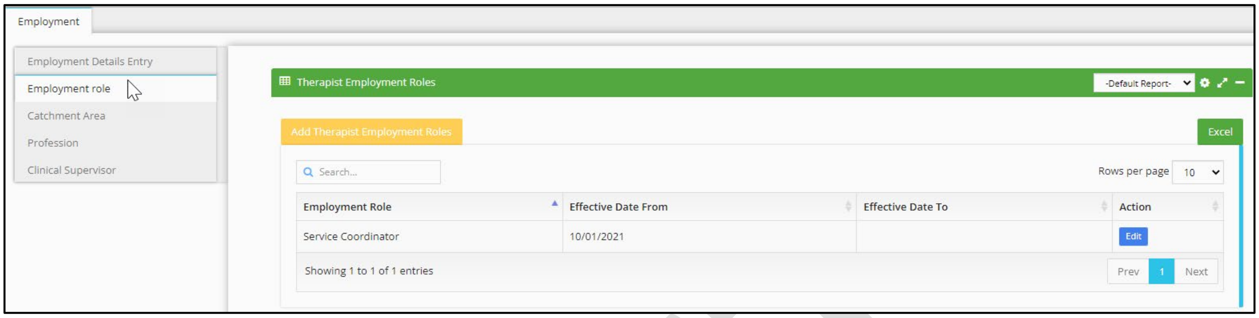


.

</td></tr>
</table>

9.3.1.7.1.1.1.2 Employment Role Grid/Table

Use this grid/table and popup panel to designate the therapist's employment role in the EI-Hub system to load them into the system properly.



See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section <u>Home Tab Controllers</u>; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

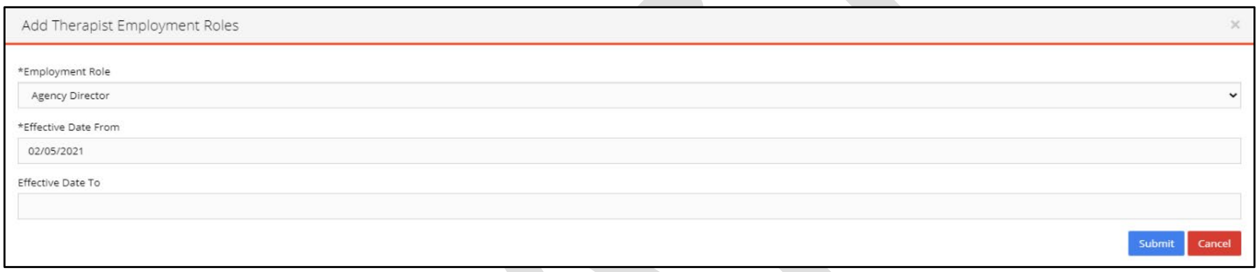
FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

COLUMN	DESCRIPTION
Employment Role	This column displays the therapist's employment role.
Effective Date From	This column displays the therapist's company's effective start date.
Effective Date To	This column displays the therapist's company's effective end date.
Action	This column displays (if applicable) corresponding action buttons (e.g., Add, Edit, Delete, etc.).

BUTTON	DESCRIPTION
Add Therapist Employment Roles 	Click this button to add the therapist's Employment role record to the EI-Hub database. When clicked, the Add Therapist Employment Roles popup panel appears (shown below).

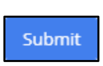
BUTTON	DESCRIPTION
Excel  	Click this button to export your results (based on your criteria entered) in an MS Excel spreadsheet. **Leaving all the Report Filters fields blank will show "all" results.** **The Excel export option is helpful if you have a lot of data to examine; this function helps perform data analysis tasks outside the EI-Hub system.**

9.3.1.7.1.1.1.2.1 Add Therapist Employment Roles Popup Panel



An asterisk (*) adjacent to a field name/label means it is a required field for you to populate.

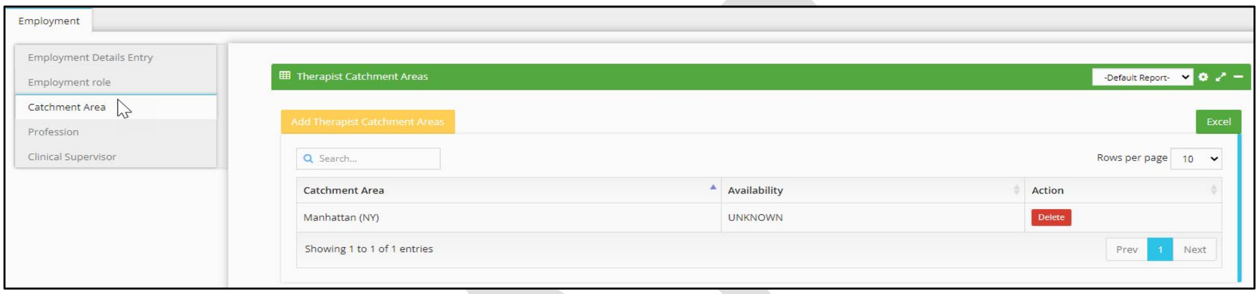
FIELD	DESCRIPTION
***Employment Role**	Use this drop-down and select the appropriate therapist employment role (e.g., Agency Director, etc.).
***Effective Date From**	Enter the from ('Start') date manually or use the calendar picker (invoked by clicking this field) for the therapist employment role.
Effective Date To	Enter the to ('End') date manually or use the calendar picker (invoked by clicking this field) for the therapist employment role.

BUTTON	DESCRIPTION
Submit  	To save your entry, click this button. When clicked, the system keeps the information in the EI-Hub database, and the record updates the Therapist Employment Roles panel (grid/table).

BUTTON	DESCRIPTION
Cancel Cancel	To cancel your entry, click this button. When clicked, the system does not save the information entered in the 'Add Therapist Employment Roles' popup panel and closes.

9.3.1.7.1.1.1.3 Catchment Area Grid/Table

This grid/table can show multiple entries based on where the therapist has the availability to work.



See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section Home Tab Controllers; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

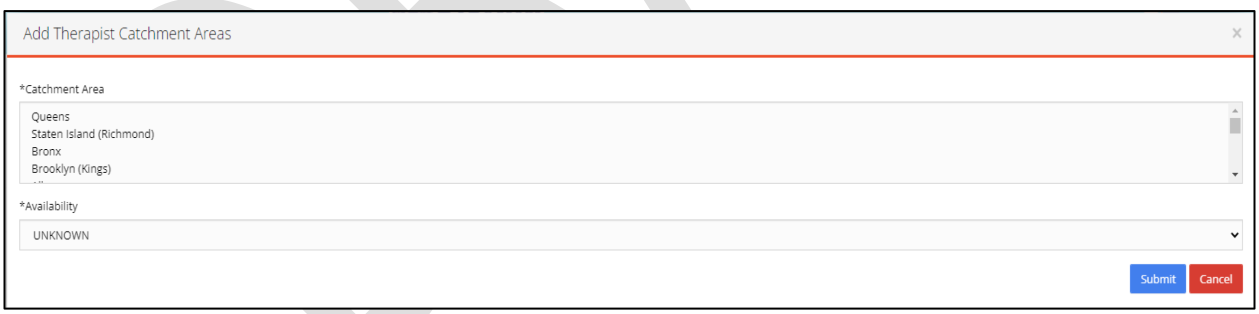
COLUMN	DESCRIPTION
Catchment Area	This column displays therapists' catchment area (service area) (Rendering Providers).
Availability	This column displays the availability of therapists (Rendering Providers).
Action	This column displays (if applicable) corresponding action buttons (e.g., Add, Edit, Delete, etc.).

BUTTON	DESCRIPTION
Excel Excel	Click this button to export your results (based on your criteria entered) in an MS Excel spreadsheet. **Leaving all the Report Filters fields blank will show "all" results.** **The Excel export option is helpful if you have a lot of data to examine; this function helps perform data analysis tasks outside the EI-Hub system.**
Add Therapist Catchment Areas Add Therapist Catchment Areas	Click this button to add a 'Therapist Catchment Area' record in the EI-Hub database. Next, the system prompts the Add Therapist Catchment Areas popup panel (shown below).

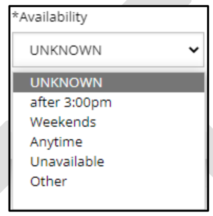
9.3.1.7.1.1.1.3.1 Add Therapist Catchment Areas Popup Panel

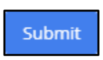
Use this panel to input information on when a therapist is available for service and where they work (select multiple counties). Also, indicate their availability. For example, a therapist can only work from 8 AM-3 PM for a particular time slot during the school year. Also, if a therapist is going out on leave, you can mark them as unavailable. This information helps the agency manage its staff.

There is no option for editing an entry in this popup panel, and any changes to the provider's availability would require a new entry.



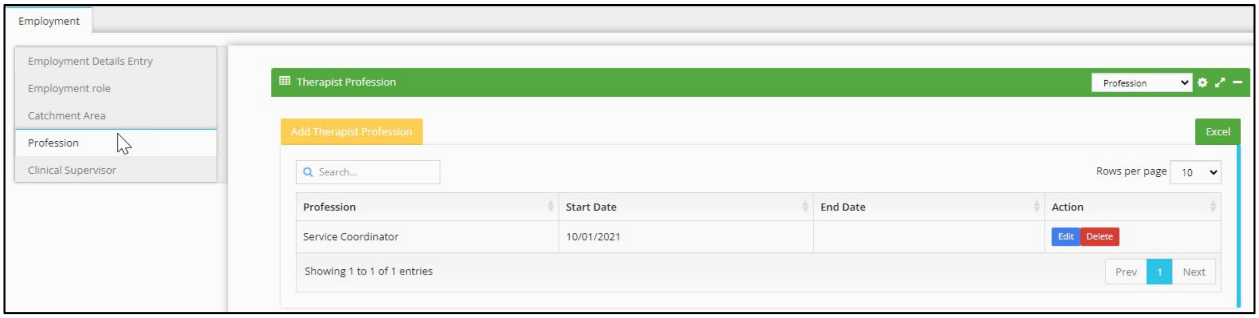
An asterisk (*) adjacent to a field name/label means it is a required field for you to populate.

FIELD	DESCRIPTION
***Catchment Area**	• To add a catchment area, use the vertical scroll bar on the panel's right side, select/scroll, and click the appropriate item (catchment area) in the list box. • To select multiple items, hold down the 'ctrl' key on your keyboard, select (e.g., using a mouse pointer), and select all required. • Each Catchment area will load independently into the grid/table with the same availability.
***Availability**	Use this drop-down and select the therapist's (Rendering Provider) availability from the list (example below). 

BUTTON	DESCRIPTION
Submit  	To save your entry, click this button. When clicked, the system keeps the information in the EI-Hub database, and the record updates the Catchment Area panel (grid/table).
Cancel  	To cancel your entry, click this button. When clicked, the system does not save the information entered in the Add Therapist Catchment Areas popup panel, which closes.

9.3.1.7.1.1.1.4 Profession Grid/Table

Use this grid/table and the **Therapist ProfessionTab/Panel** panel (below) to add a profession. For example, select the person as a physical therapist, teacher, etc., with their professional designation. There's an option to upload supporting documentation from the Therapist Profession Panel. An individual rendering therapist must hold a valid NYS license or certification matching the selected profession. Agencies must verify that their license or certification is current and a license or certification that the NYS EIP recognizes prior to data entry. Service coordinators and Early Intervention Officials/Designees may not hold an NYS license or certification.



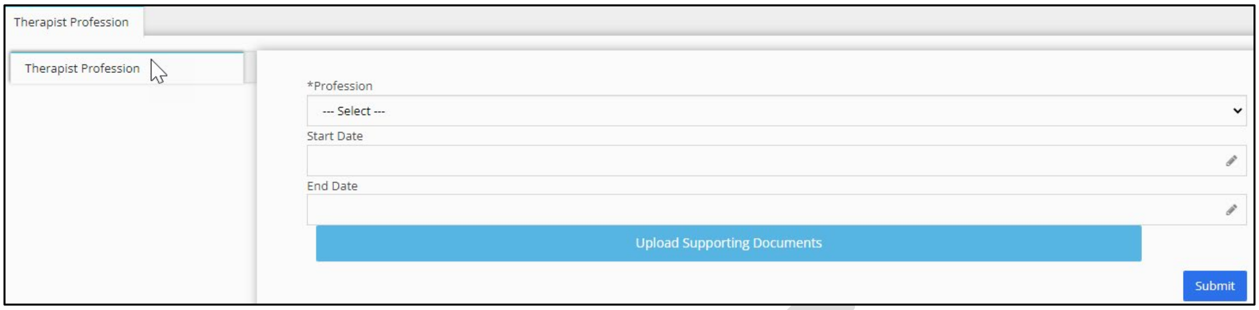
See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section <u>Home Tab Controllers</u>; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

COLUMN	DESCRIPTION
Profession	This column displays the therapist's profession.
Start Date	This column displays the therapist's start date.
End Date	This column displays the therapist's end date.
Action	This column displays (if applicable) corresponding action buttons (e.g., Add, Edit, Delete, etc.).

BUTTON	DESCRIPTION
Excel 	Click this button to export your results (based on your criteria entered) in an MS Excel spreadsheet. **Leaving all the Report Filters fields blank will show "all" results.** **The Excel export option is helpful if you have a lot of data to examine; this function helps perform data analysis tasks outside the EI-Hub system.**
Add Therapist Profession 	Click this button to add a 'Therapist Profession' record in the EI-Hub database. The system prompts the Profession tab/panel to appear (shown below).

9.3.1.7.1.1.1.4.1 Therapist Profession Report Panel



An asterisk (*) adjacent to a field name/label means it is a required field for you to populate.

FIELD	DESCRIPTION
***Profession**	Use this drop-down and select the appropriate therapist's profession from the list.
Start Date	Enter the therapist's start date manually or use the calendar picker (invoked by clicking this field).
End Date	Enter the therapist's end date manually or use the calendar picker (invoked by clicking this field).

BUTTON	DESCRIPTION
Upload Supporting Documents Upload Supporting Documents	To upload the accommodating file, click this button bar. Then, the "Upload Supporting Documents " popup panel appears (see below).
Submit Submit	To save your entry, click this button. When clicked, the system keeps the information in the EI-Hub database, and the record updates the Therapist Profession Report panel (grid/table).

9.3.1.7.1.1.1.4.2 Upload Supporting Documents Popup Panel

An asterisk (*) adjacent to a field name/label means it is a required field for you to populate.

FIELD	DESCRIPTION
***Document Type**	Use this drop-down and select the appropriate document type (e.g., IFSP Template, etc.) from the list.
***Document Name**	Enter the name of the uploaded document.
Choose File 	To upload your file into the EI-Hub database, click this button. When clicked, your PC's web browser (e.g., MS Edge) prompts an "Open" window; navigate to where your document/file resides, click on the file (highlighted), and click the **Open** button on the window. The name of your file name should read adjacent to the 'Choose File' button.
Notes	Use this textbox to enter relevant notes about your document file uploaded into the system.

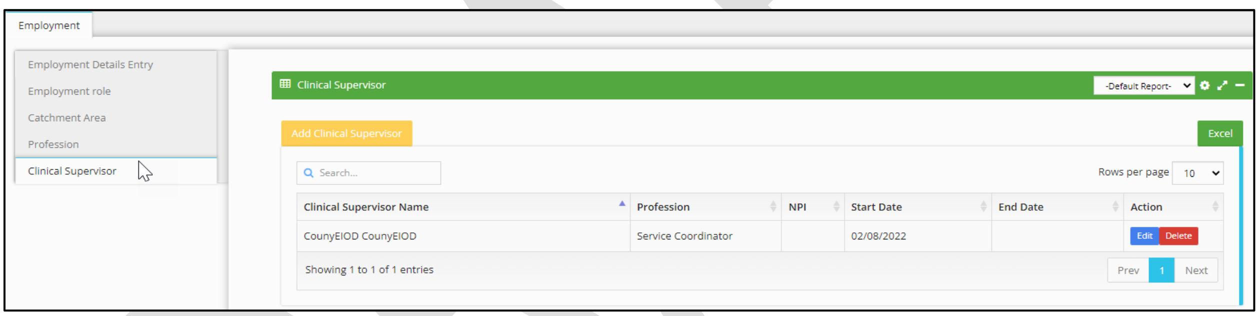
BUTTON	DESCRIPTION
Upload 	After populating fields in the Upload File panel (mentioned above), your file uploads into the EI-Hub database when clicked.

BUTTON	DESCRIPTION
Cancel Cancel	To cancel the action for uploading a file, click this button. When clicked, the Upload File panel closes.

9.3.1.7.1.1.1.5 Clinical Supervisor Grid/Table

After selecting the Clinical Supervisor panel, a grid displays the supervisor's information. The system will populate this information if the therapist worked under the direction of a supervisor (CFY Candidates must work under the direction of an NYS Licensed Speech Language Pathologist supervised.

Not everyone will have a clinical supervisor. Depending on their licensure status, some therapists will need a clinical supervisor to be assigned. For example, an occupational therapist assistant (COTA) operates under the clinical supervision of an occupational therapist. The clinical supervisor reviews and approves the COTA's service logs, treatment plans, etc.



See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section <u>Home Tab Controllers</u>; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

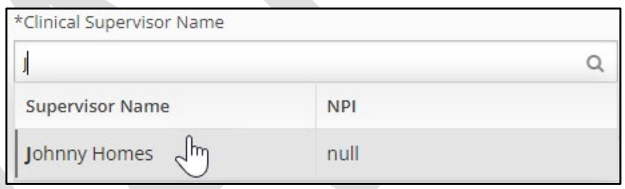
COLUMN	DESCRIPTION
Clinical Supervisor Name	This column displays the clinical supervisor's name.
Profession	This column displays the clinical supervisor's profession.

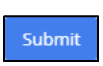
COLUMN	DESCRIPTION
NPI	This column displays the clinical supervisor's 10-position all-numeric National Provider Identifier number.
Start Date	This column displays the clinical supervisor's start date.
End Date	This column displays the clinical supervisor's end date.
Action	This column displays (if applicable) corresponding action buttons (e.g., Add, Edit, Delete, etc.).

BUTTON	DESCRIPTION
Excel 	Click this button to export your results (based on your criteria entered) in an MS Excel spreadsheet. **Leaving all the Report Filters fields blank will show "all" results.** **The Excel export option is helpful if you have a lot of data to examine; this function helps perform data analysis tasks outside the EI-Hub system.**
Add Clinical Supervisor 	Click this button to add a 'Therapist Profession' record in the EI-Hub database. The system prompts the Profession tab/panel to appear (shown below).

9.3.1.7.1.1.1.5.1 Clinical Supervisor Tab/Therapist Clinical Supervisor Panel

An asterisk (*) adjacent to a field name/label means it is a required field for you to populate.

FIELD	DESCRIPTION
***Clinical Supervisor Name**	Enter (type ahead) the therapist's clinical supervisor's name in this field and select the appropriate company name from the drop-down list (example below). 
Profession	Use this drop-down and select the appropriate clinical supervisor's profession from the list. The supervisor's profession must be appropriate to the individual profession that they are supervising.
NPI	Enter the clinical supervisor's 10-position all-numeric National Provider Identifier number.
Start Date	Enter the clinical supervisor's start date manually or use the calendar picker (invoked by clicking this field).
End Date	Enter the clinical supervisor's end date manually or use the calendar picker (invoked by clicking this field).

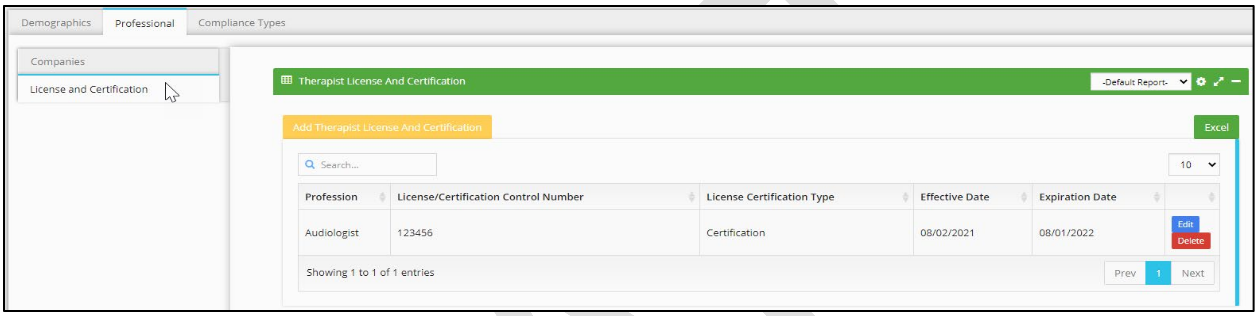
BUTTON	DESCRIPTION
Submit 	To save your entry, click this button. When clicked, the system keeps the information in the EI-Hub database, and the record updates the Therapist Clinical Supervisor panel (grid/table).

9.3.1.7.1.1.1.6 License and Certification Grid/Table

License and Certification: Use this grid/table and the License and Certification panel to enter the therapist's licenses and certifications.

Service coordinators, Early Intervention Official Designees, and Health Homes Case Managers who do not need a license or certification to provide their services should skip this panel.

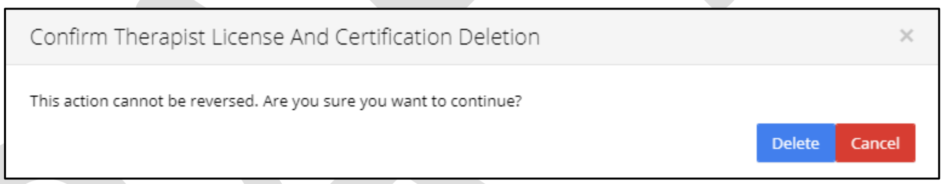
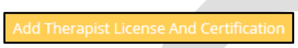
Not all therapists require a license; please refer to '<u>The Licensed Professions in New York State</u>.'



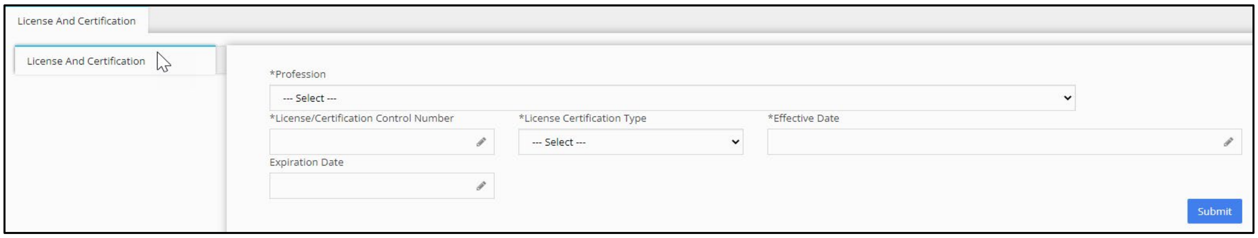
See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section <u>Home Tab Controllers</u>; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

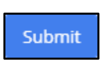
COLUMN	DESCRIPTION
Profession	This column displays the therapist's profession.
License/Certification Control Number	This column displays the therapist's license/certification control number.
License Certification Type	This column displays the license certification type of the therapist.
Effective Date	This column displays the therapist's license/certification effective date.
Expiration Date	This column displays the therapist's license/certification expiration date.

BUTTON	DESCRIPTION
Excel 	Click this button to export your results (based on your criteria entered) in an MS Excel spreadsheet. **Leaving all the Report Filters fields blank will show "all" results.** **The Excel export option is helpful if you have a lot of data to examine; this function helps perform data analysis tasks outside the EI-Hub system.**
Edit 	Click this button to view or edit an existing Therapist License and Certification in the EI-Hub database. The License and Certification tab/panel appears (see "License And Certification Tab/Panel" below for fields/descriptions).
Delete 	To delete an existing therapist license/certification, click this button adjacent to the appropriate record/row. When clicked, the system prompts a confirmation message pad popup (shown below); click the **Delete** button to proceed or click the **Cancel** button to retract. 
Add Therapist License And Certification 	Click this button to add a 'Therapist License and Certification' record in the EI-Hub database. The License And Certification tab/panel appears (shown below) when clicked.

9.3.1.7.1.1.1.6.1 License And Certification Tab/Panel



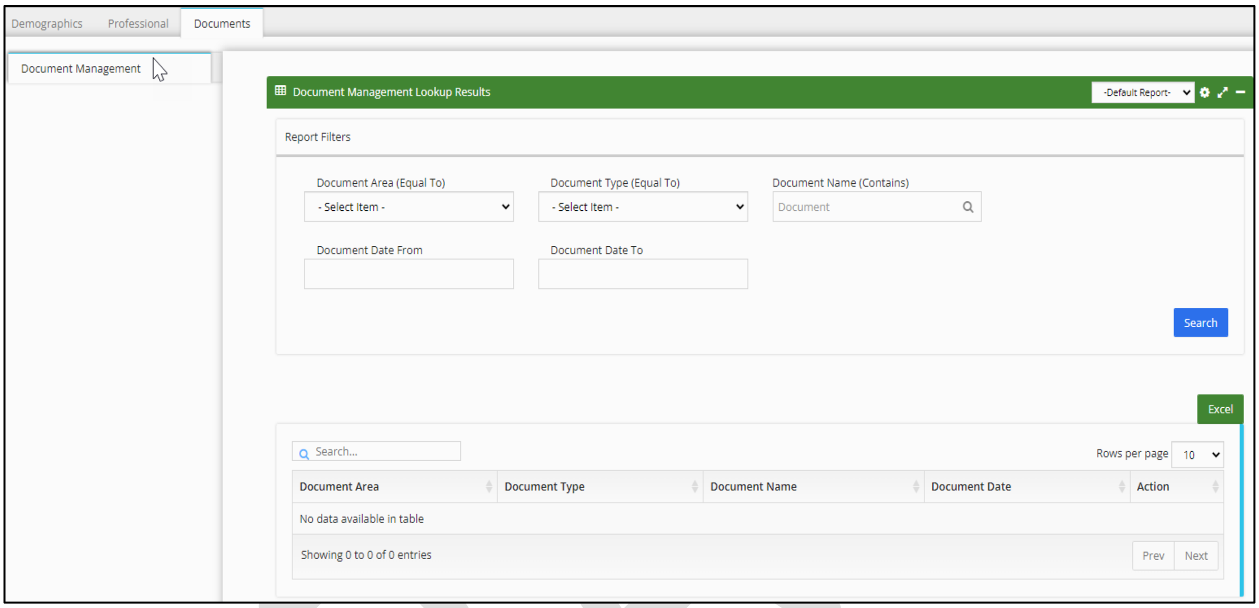
COLUMN	DESCRIPTION
***Profession**	Use this drop-down and select the therapist profession from the list.
***License/Certification Number**	Enter the therapist's license/certification number. This license/certification number must match the valid NYS license or certification that the individual has that is displayed in the NY SED Office of Professions' license verification online search or the NYSED TEACH online verification search.
***License Certification Type**	Use this drop-down and select the license/certification type from the list.
***Effective Date**	Enter the therapist's license/certification effective date manually or use the calendar picker (invoked by clicking this field).
End Date	Enter the therapist's license/certification end date manually or use the calendar picker (invoked by clicking this field). The end date must match the NY SED Online verification search exactly.

BUTTON	DESCRIPTION
Submit 	To save your entry, click this button. When clicked, the system keeps the information in the EI-Hub database, and the record updates the License And Certification panel (grid/table).

9.3.1.7.2 Documents Tab

9.3.1.7.3 Document Management Report Filters Panel and Results Grid/Table

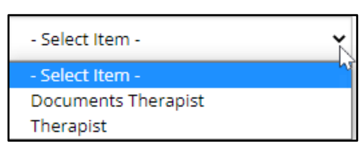
Use the report filters panel to search/review and upload copies of professional licenses or certifications relevant to the employee.

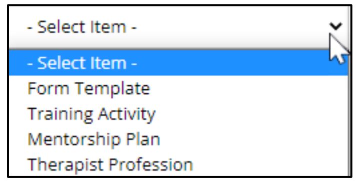


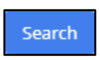
See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section <u>Home Tab Controllers</u>; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

Document Management Lookup Report Filters Panel

Use the Report Filters section to narrow your search.

FIELD	DESCRIPTION
Document Area (Equal To)	Use this drop-down and select the appropriate document area from the list. 

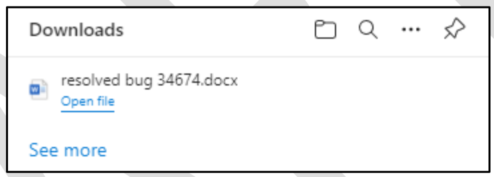
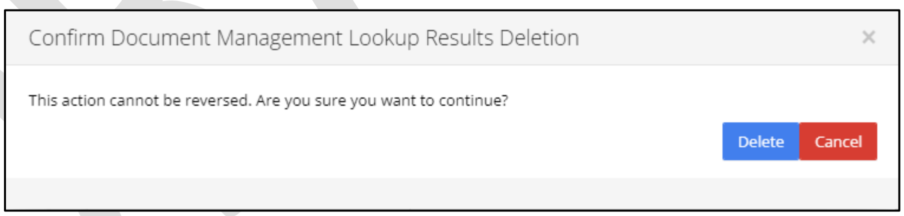
FIELD	DESCRIPTION
Document Type (Equal To)	Use this drop-down and select the appropriate document type from the list. 
Document Name (Equal To)	Use this drop-down and select the appropriate document name (e.g., Medical Records) or the child from the list.
Document Date From	Manually enter or click in this field (invoke the calendar picker) and select the 'from' date.
Document Date To	Manually enter or click in this field (invoke the calendar picker) and select the 'To' date.

BUTTON	DESCRIPTION
Search 	To search on your report filter's selection, click this button.

Document Management Lookup Results

FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

COLUMN	DESCRIPTION
Document Area	This column displays the document area.
Document Type	This column displays the document type.
Document Name	This column displays the document name.
Document Date	This column displays the document date.
Action	This column displays (if applicable) corresponding action buttons (e.g., View, Add, Edit, Delete, etc.).

BUTTON	DESCRIPTION
Excel Excel	Click this button to export your results (based on your criteria entered) in an MS Excel spreadsheet. **Leaving all the Report Filters fields blank will show "all" results.** **The Excel export option is helpful if you have a lot of data to examine; this function helps perform data analysis tasks outside the EI-Hub system.**
View View	To view an existing document for a child, click this button adjacent to the appropriate record/row. When clicked, the system downloads the document file and prompts you with a 'Downloads' message box (MS Edge browser example below). You can click the Open file hyperlink or access this file in your 'Downloads' folder on your Windows OS. 
Delete Delete	To delete an existing document for a child, click this button adjacent to the appropriate record/row. When clicked, the system prompts a confirmation message pad popup (shown below); click the **Delete** button to proceed or click the **Cancel** button to retract. 

9.4 Reports

The Reports section allows for the creation of different individual reports. To customize the report, the user will need to export the individual report to Excel.

What report can I run, including the therapist's profession and license information?

Agencies and NY State can use the two Therapist reports—the 'Therapist Detail' and 'Therapist Company Detail' as a resource to ensure that information was data entered accurately. You get similar information with both.

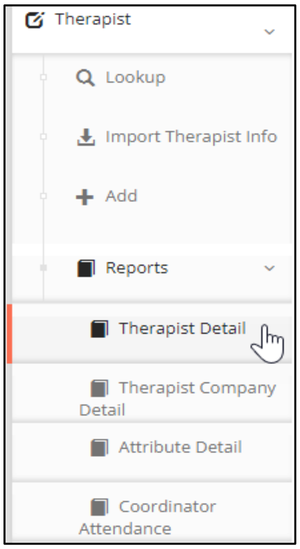
With the **Therapist Detail** report, you filter on the therapist's name, service type, or profession. You will either get the results for a single therapist. These multiple therapists can provide a service or multiple therapists of a given profession.

The **Therapist Company Detail** report has many more filters.

- **Profession:** Returns all the companies, along with their therapists, with a staff of that particular profession.
- **Service Type:** Returns all companies, along with their therapists, which have been authorized to provide that particular service type. Therapist Agency: returns all the employees employed by that agency across all professions/service types.
- **Provider Type:** returns all companies, along with their employees, meeting the selected provider type.
- **Employment Role:** returns all companies, along with their employees, which employ particular employment roles; Therapist.
- **Catchment:** Returns all companies, along with their employees, which serve the selected catchment area; and
- **Therapist Status:** returns all companies, along with their employees, with employees in the selected Therapist Status.

Depending on your user role, you may only see some of the reports or none, as shown below.

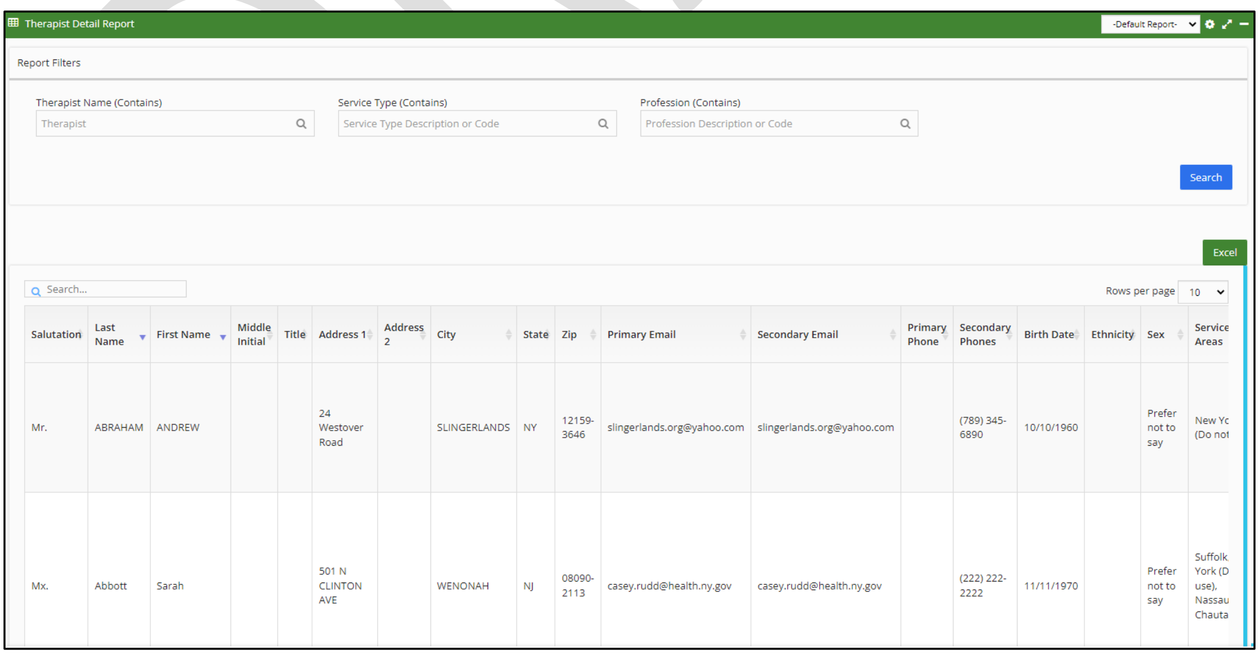
9.4.1 Therapist Detail Report Grid/Table



Therapist Detail Report Filters Panel and Results Grid/Table

Depending on your user role, you may only see some of the reports or none, as shown below.

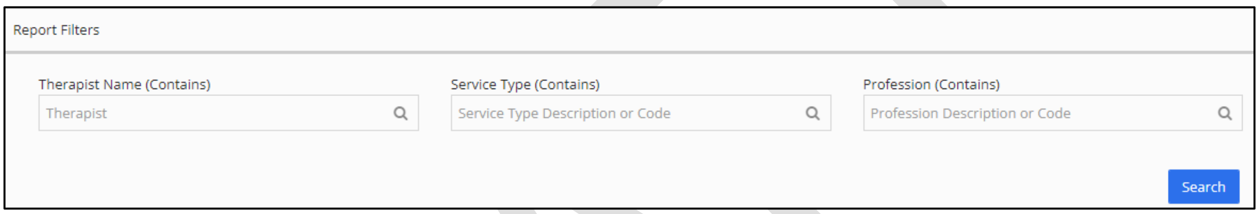
The Therapist Detail report contains multiple columns (Includes Therapist NPI but not EI Provider ID). Scrolling to the right will allow the user to view them.



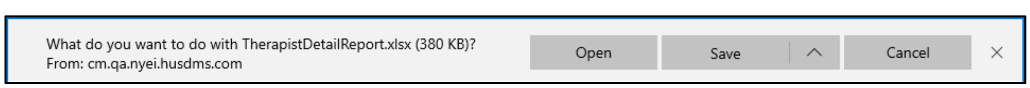
See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section Home Tab Controllers; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

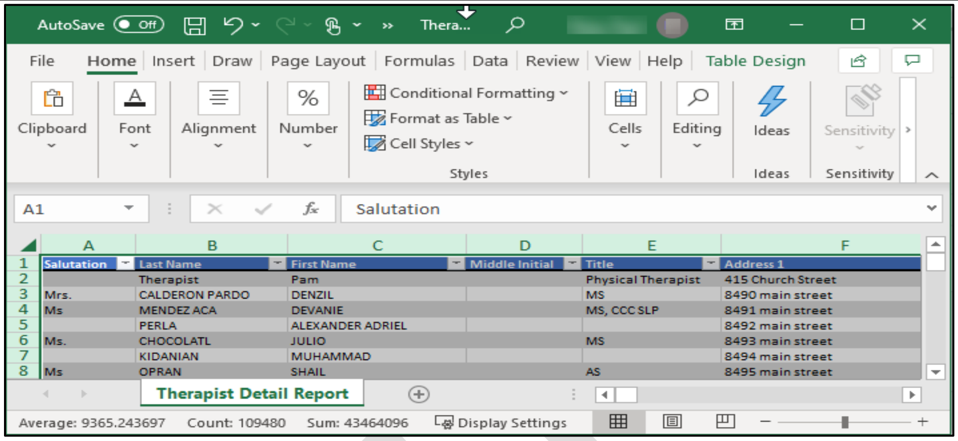
FIELD	DESCRIPTION
-Default Report-	The "Default Report" is the system's canned report. If your agency created a custom report for you to use, select/click the drop-down and select the appropriate report item from the list. **Depending on the chosen custom report, the presentation will look different based on the design; hence, different results will transpire.**

Report Filters



FIELD	DESCRIPTION
Therapist Name (Contains)	Enter the last name of the therapist for your keyword search.
Service Type Codes (Contains)	Enter the appropriate service type code for your keyword search.
Profession Codes (Contains)	Enter the appropriate 'profession' code for your keyword search.

BUTTON	DESCRIPTION
Excel  	Click this button to export your results (based on your criteria entered) in an MS Excel spreadsheet. An example of the Message popup from the MS Edge browser (shown below):  To see your results in excel, click **Open** (example below).

<table>
<tr><th>BUTTON</th><th>DESCRIPTION</th></tr>
<tr><td></td><td>


Leaving all the Report Filters fields blank will show "all" results.

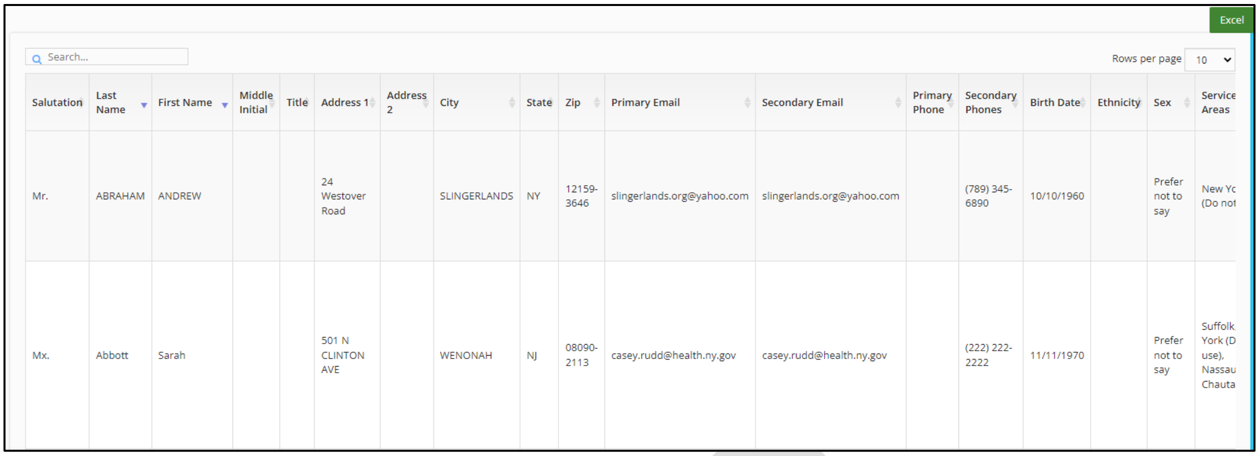
The Excel export option is helpful if you have a lot of data to examine; this function helps perform data analysis tasks outside the EI-Hub system.
</td></tr>
<tr><td>

Filter

</td><td>

Based on your criteria entered in the Report Filters fields above, click this button for the system to generate your results (example below).

Leaving all the Report Filters fields blank will show "all" results.
</td></tr>
</table>



Excel

Search...

Rows per page 10

Salutation	Last Name	First Name	Middle Initial	Title	Address 1	Address 2	City	State	Zip	Primary Email	Secondary Email	Primary Phone	Secondary Phones	Birth Date	Ethnicity	Sex	Service Areas
Mr.	ABRAHAM	ANDREW			24 Westover Road		SLINGERLANDS	NY	12159-3646	slingerlands.org@yahoo.com	slingerlands.org@yahoo.com		(789) 345-6890	10/10/1960		Prefer not to say	New Yc (Do not
Mx.	Abbott	Sarah			501 N CLINTON AVE		WENONAH	NJ	08090-2113	casey.rudd@health.ny.gov	casey.rudd@health.ny.gov		(222) 222-2222	11/11/1970		Prefer not to say	Suffolk, York (D use), Nassau Chauta

See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section <u>Home Tab Controllers</u>; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

COLUMN	DESCRIPTION
Salutation	This column displays the salutations ("Dr.," "Mr.," "Ms.," "Mrs.," and "Miss") for the therapist.
Last Name	This column displays the last name of the therapist.
First Name	This column displays the first name of the therapist.
Middle Initial	This column displays the middle initial of the therapist.
Title	This column displays the title of the therapist.
Address 1	This column displays the address where the therapist's office/practice resides.
Address 2	This column displays the second address (if applicable) where the therapist's office/practice resides.
City	This column displays the city's name where the therapist's office/practice resides.
Zip	This column displays the zip code where the therapist's office/practice resides.
Primary Email	This column displays the email address of the therapist.

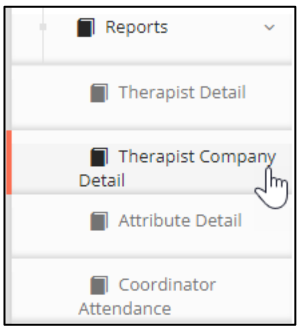
COLUMN	DESCRIPTION
Secondary Email	This column displays the alternative email address for the therapist.
Primary Phone	This column displays the primary phone number to contact the therapist.
Secondary Phones	This column displays the secondary (alternative) phone number to contact the therapist.
Birth Date	This column displays the therapist's birth date.
Ethnicity	This column displays the therapist's ethnicity.
Sex	This column displays the appropriate sex/gender for the therapist.
Service Areas	This column displays the service areas for the therapist.
Therapist NPI	This column displays the 10-position all-numeric National Provider Identifier for the therapist.
License Number	This column displays the license number for the therapist.
Certification Type	This column displays the certification type for the therapist.
Certification Number	This column displays the certification number for the therapist.
Enrolled In OPRA	This column displays a '**Y**' (Yes) or '**N**' (No) if the therapist is a member of the Order, Prescribe, Refer or Attend (OPRA) enrollment.
Medicaid Number	This column displays the Medicaid number assigned to the therapist.
Active	This column displays whether the therapist is still actively ('**Y**' or '**N**').
Therapist Status	This column displays the therapist's status ('**Active**' or '**Inactive**').
Company Name	This column displays the company name of the therapist employed.
Staff ID	This column displays the staff identification (ID) for the employed therapist.
Clinical Supervisor	This column displays the name of the therapist's clinical supervisor.
Employee Type	This column displays the employee type for the therapist. **Employee Type is a group defined by how employees are paid. Employee types are used for payroll, time tracking, and reporting purposes. Examples of predefined employee types include Full-time Hourly, Part-time Salaried, and Contractor employee types.**

COLUMN	DESCRIPTION
Therapist Start Date	This column displays the therapist's employment start date with the agency.
Therapist Termination Date	This column displays the therapist's end date with the agency.
Suffix	This column displays the suffix for the therapist.
Profession	This column displays the therapist's profession.
License/Certification Effective Date	This column displays the therapist's license/certification effective date.
License/Certification Expiration Date	This column displays the therapist's license/certification expiration date.

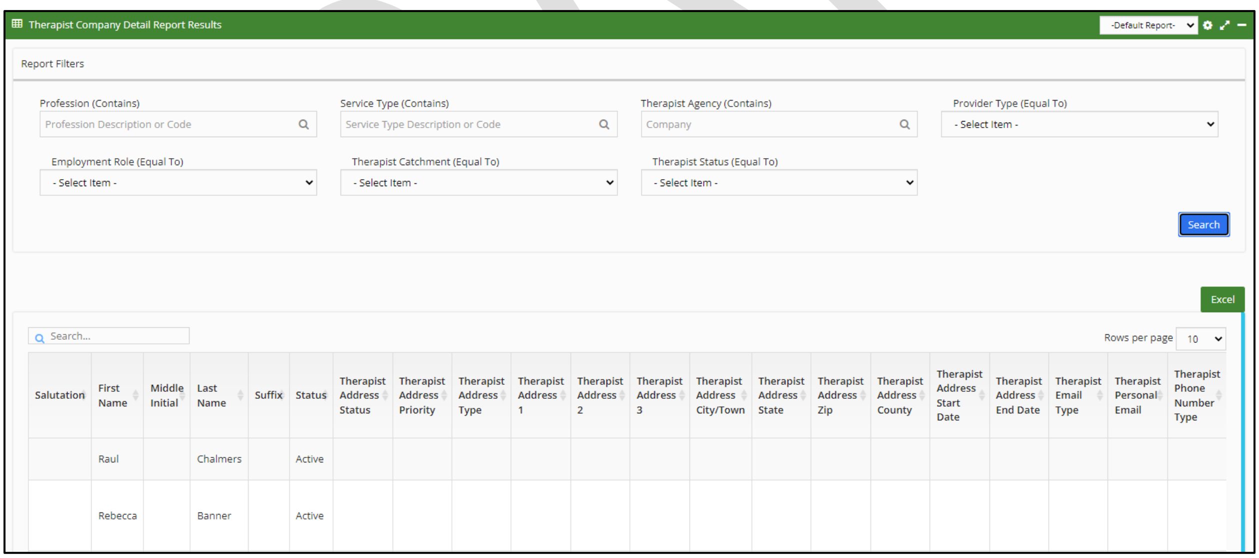
9.4.2 Therapist Company Detail

Depending on your user role, you may only see some of the reports or none, as shown below.

The Therapist Company Detail report contains multiple columns (including NPI and EI Provider ID). Scrolling to the right will allow the user to view them.



Therapist Company Detail Report Filters Panel and Results Grid/Table

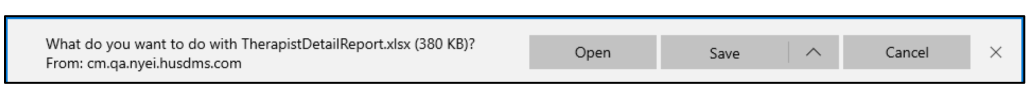


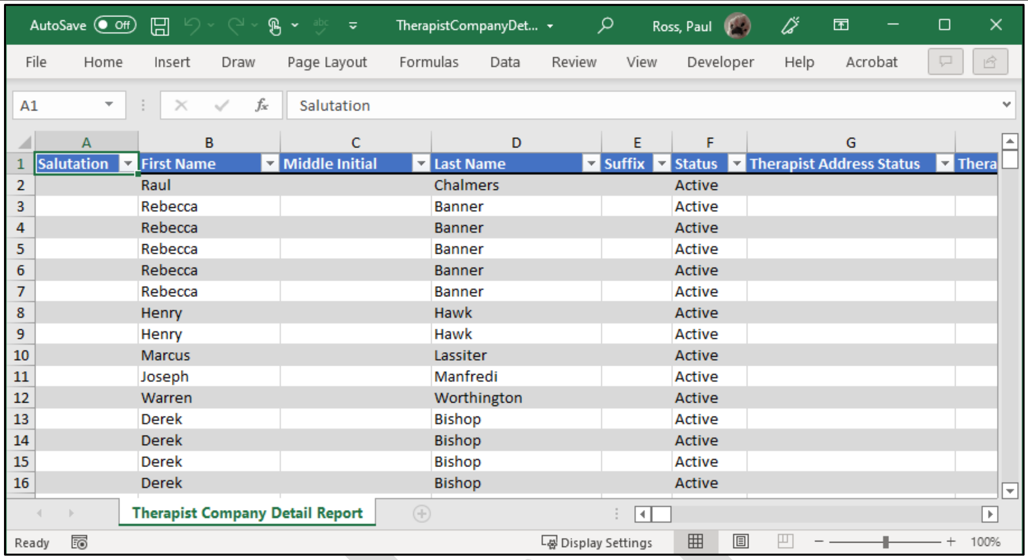
See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section <u>Home Tab Controllers</u>; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

FIELD	DESCRIPTION
-Default Report-	The "Default Report" is the system's canned report. If your agency created a custom report for you to use, select/click the drop-down and select the appropriate report item from the list. **Depending on the chosen custom report, the presentation will look different based on the design; hence, different results will transpire.**

Report Filters

FIELD	DESCRIPTION
Profession (Contains)	Enter the profession of the therapist for your keyword search.
Service Type (Contains)	Enter the appropriate service type for your keyword search.
Therapist Agency (Contains)	Enter the therapist's agency for your keyword search.
Provider Type (Equal To)	Use the drop-down and select the provider's type from the list.
Employment Role (Equal To)	Use the drop-down and select the therapist's employment role from the list.
Therapist Catchment (Equal To)	Use the drop-down and select the therapist's catchment area from the list.
Therapist Status (Equal To)	Use the drop-down list and select 'Active' or 'Inactive' for the therapist.

BUTTON	DESCRIPTION
Excel  	Click this button to export your results (based on your criteria entered) in an MS Excel spreadsheet. An example of the Message popup from the MS Edge browser (shown below):  To see your results in excel, click **Open** (example below).

BUTTON	DESCRIPTION
	 **Leaving all the Report Filters fields blank will show "all" results.** **The Excel export option is helpful if you have a lot of data to examine; this function helps perform data analysis tasks outside the EI-Hub system.**
Filter Filter	Based on your criteria entered in the Report Filters fields above, click this button for the system to generate your results (example below). **Leaving all the Report Filters fields blank will show "all" results.**

FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

COLUMN	DESCRIPTION
Salutation	This column displays the salutations ("Dr.," "Mr.," "Ms.," "Mrs.," and "Miss") for the therapist.
First Name	This column displays the first name of the therapist.
Middle Initial	This column displays the middle initial of the therapist.

COLUMN	DESCRIPTION
Last Name	This column displays the last name of the therapist.
Suffix	This column displays the suffix of the therapist.
Status	This column displays the therapist's status ('**Active**' or '**Inactive**').
Therapist Address Status	This column displays the therapist's address status ('**Active**' or '**Inactive**').
Therapist Address Priority	This column displays the therapist's address status ('**Primary'** or '**Secondary**').
Therapist Address Type	This column displays the therapist's address type (e.g., Office Address).
Therapist Address 1	This column displays the address where the therapist's office/practice resides.
Therapist Address 2	This column displays the second address (if applicable) where the therapist's office/practice resides.
Therapist Address 3	This column displays the third address (if applicable) where the therapist's office/practice resides.
Therapist City/Town	This column displays the city/town where the therapist's office/practice resides.
Therapist State	This column displays the state where the therapist's office/practice resides.
Therapist Address Zip	This column displays the zip code where the therapist's office/practice resides.
Therapist Address County	This column displays the county where the therapist's office/practice resides.
Therapist Address Start Date	This column displays the therapist's start date.
Therapist Address End Date	This column displays the therapist's end date.
Therapist Email Type	This column displays the email type of the therapist.
Therapist Personal Email	This column displays the therapist's personal email address.
Therapist Phone Number Type	This column displays the phone number type to contact the therapist.

COLUMN	DESCRIPTION
Therapist Primary Phone	This column displays the primary phone number to contact the therapist.
Therapist Language	This column displays the language(s) the therapist is fluent.
Birth Date	This column displays the therapist's birth date.
Sex	This column displays the appropriate sex/gender for the therapist.
NPI Type	This column displays the NPI type for the therapist.
NPI	This column displays the 10-position all-numeric National Provider Identifier for the therapist.
SSN	This column displays the last 4-digits social security number for the therapist.
HCS User ID	This column displays the therapist's New York Health Commerce System (HCS) user identification.
Tax ID (FEIN)	This column displays the therapist's tax identification number.
License/Certification Number	This column displays the license/certification number for the therapist.
Certification Type	This column displays the certification type for the therapist.
License/Certification Effective Date	This column displays the license/certification effective date for the therapist.
License/Certification Expiration Date	This column displays the license/certification expiration date for the therapist.
EIP Provider ID	This column displays the therapist's Early Intervention Program (EIP) provider identification number.
Company Name	This column displays the therapist's company name.
Staff ID	This column displays the therapist's staff identification number.
Employee Type	This column displays the employee type for the therapist. **Employee Type is a group defined by how employees are paid. Employee types are used for payroll, time tracking, and reporting purposes. Examples of predefined employee types include Full-time Hourly, Part-time Salaried, and Contractor employee types.**
Employee Status	This column displays the therapist's employment status ('Active' or 'Inactive').

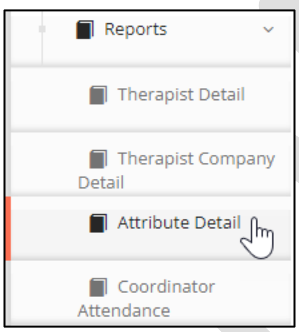
COLUMN	DESCRIPTION
Employment Start Date	This column displays the therapist's employment start date.
Employment End Date	This column displays the therapist's employment end date.
Company Address 1	This column displays the therapist's company address 1.
Company Address 2	This column displays the company address 2 (if applicable).
Company City	This column displays the city where the company resides.
Company State	This column displays the state where the company resides.
Company Zip	This column displays the zip code where the company resides.
Company County	This column displays the county where the company resides.
Evaluator	This column displays the therapist's evaluator role.
Employee Contact Phone	This column displays the therapist's employer's phone number.
Employee Contact Email	This column displays the therapist's employer's email address.
Provider Types	This column displays the provider's type (e.g., Provider, County, etc.).
Provider Categories	This column displays the provider's category (e.g., Agency).
Employment Role	This column displays the therapist's employment role.
Empl Role Effective Date From	This column displays the therapist's employment role 'from' the effective date.
Empl Role Effective Date To	This column displays the therapist's employment role 'to' effective date.
Catchment Area	This column displays the therapist's catchment area (e.g., Albany, etc.).
Availability	This column displays the therapist's availability (e.g., After 2:00 PM, etc.).
Profession	This column displays the therapist's profession (e.g., LCSW, OT, etc.).
Profession Start Date	This column displays the therapist's professional start date.
Profession End Date	This column displays the therapist's professional end date.

COLUMN	DESCRIPTION
Clinical Supervisor	This column displays the name of the therapist's supervisor.
Supervisor Profession	This column displays the name of the therapist's supervisor's profession.
Supvr NPI Number	This column displays the 10-position all-numeric National Provider Identifier for the supervisor.
Supvr Start Date	This column displays the supervisor's start date.
Supvr End Date	This column displays the supervisor's end date.

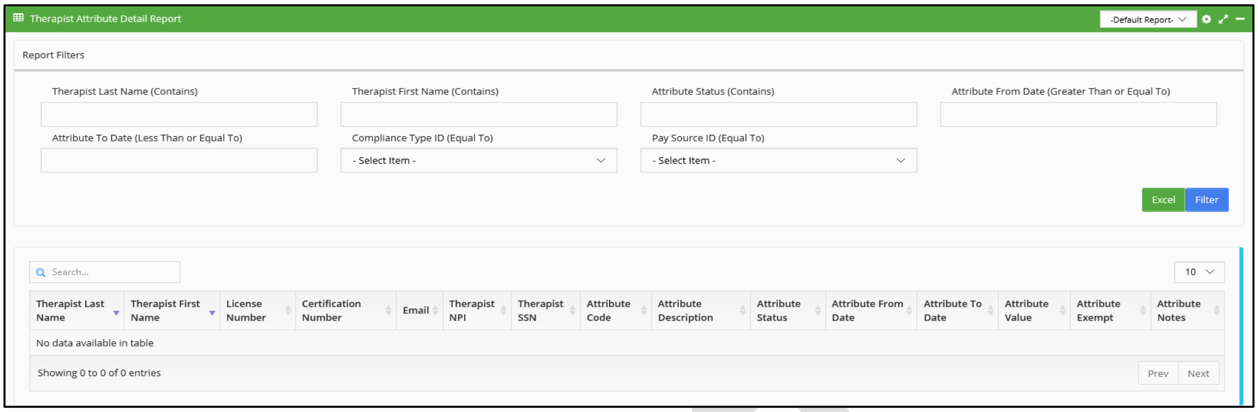
9.4.3 Therapist Attribute Detail Grid/Table

Depending on your user role, you may only see some of the reports or none, as shown below.

There are more columns in the screenshot below than shown; however, you can see more columns by scrolling to the right.



Therapist Attribute Detail Report Filters Panel and Results Grid/Table



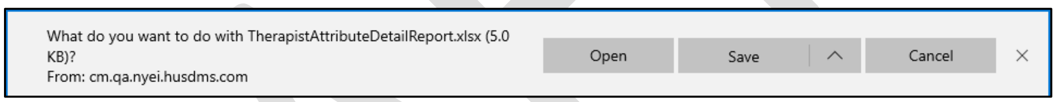
See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section <u>Home Tab Controllers</u>; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

FIELD	DESCRIPTION
-Default Report-	The "Default Report" is the system's canned report. If your agency created a custom report for you to use, select/click the drop-down and select the appropriate report item from the list. **Depending on the chosen custom report, the presentation will look different based on the design; hence, different results will transpire.**

Report Filters

FIELD	DESCRIPTION
Therapist Last Name (Contains)	Enter the last name of the therapist for your keyword search.
Therapist First Name (Contains)	Enter the first name of the therapist for your keyword search.
Attribute Status (Contains)	Enter the appropriate attribute status for your keyword search.
Attribute From Date (Greater Than or Equal To)	To narrow your search, enter the appropriate attribute 'from' date.

FIELD	DESCRIPTION
Attribute To Date (Less Than or Equal To)	To narrow your search, enter the appropriate attribute 'to' date.
Compliance Type ID (Equal To)	Use this drop-down and select the appropriate item from the list.
Pay Source ID (Equal To)	Use this drop-down and select the appropriate item from the list.

BUTTON	DESCRIPTION
Excel  	Click this button to export your results (based on your criteria entered) in an MS Excel spreadsheet. An example of the Message popup from the MS Edge browser (shown below):  To see your results in excel, click **Open**. **Leaving all the Report Filters fields blank will show "all" results.** **The Excel export option is helpful if you have a lot of data to examine; this function helps perform data analysis tasks outside the EI-Hub system.**
Filter  	Based on your criteria entered in the Report Filters fields above, click this button for the system to generate your results (example below). **Leaving all the Report Filters fields blank will show "all" results.**

Results Grid/Table

Search...

10

Therapist Last Name	Therapist First Name	License Number	Certification Number	Email	Therapist NPI	Therapist SSN	Attribute Code	Attribute Description	Attribute Status	Attribute From Date	Attribute To Date	Attribute Value	Attribute Exempt	Attribute Notes
LMS_URL	Individual	12589-QXZ-582123	12589-QXZ-582123	hhelms@pcgus.com	1497905038		tate Child Abuse Registry	State Child Abuse Registry	VALID	03/04/2021	03/04/2022		False	
EA_Approval_Email	Hope_Test	12589-QXZ-582123	12589-QXZ-582123	hhelms@pcgus.com	1234567890		tate Child Abuse Registry	State Child Abuse Registry	VALID	03/04/2021	03/04/2022		False	
URLtest2	LMStest2	123adb456p	123adb456p	hhelms@pcgus.com	1740680511		tate Child Abuse Registry	State Child Abuse Registry	VALID	03/04/2021	03/04/2022		False	
Provider	Hope	12589-QXZ-582123	12589-QXZ-582123	inei.provider@gmail.com			tate Child Abuse Registry	State Child Abuse Registry	VALID	03/04/2021	03/04/2022		False	

Showing 1 to 10 of 274 entries

Prev 1 2 3 4 5 ... 28 Next

See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section <u>Home Tab Controllers</u>; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

COLUMN	DESCRIPTION
Therapist Last Name	This column displays the last name of the therapist.
Therapist First Name	This column displays the first name of the therapist.
License Number	This column displays the license number for the therapist.
Certification Number	This column displays the certification number for the therapist.
Email	This column displays the email address of the therapist.
Therapist NPI	This column displays the 10-position all-numeric National Provider Identifier for the therapist.
Therapist SSN	This column displays the last 4-digits of the therapist's social security number.
Attribute Code	This column displays the attribute code for the therapist. **A Therapist Compliance Attribute defines a single item a therapist must complete to establish or maintain compliance.**

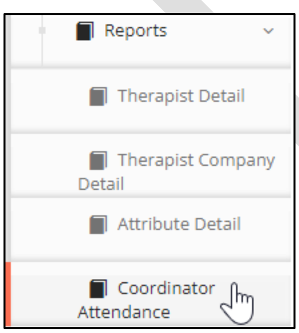
COLUMN	DESCRIPTION
Attribute Description	This column displays the attribute description for the therapist.
Attribute Status	This column displays the therapist's attribute code status ('Valid' or 'Invalid').
Attribute From Date	This column displays the attribute 'from' date for the therapist.
Attribute To Date	This column displays the attribute 'to' for the therapist.
Attribute Value	This column displays the attribute value for the therapist.
Attribute Exempt	This column displays the therapist's attribute exempt ('True' or 'False').
Attribute Notes	This column displays any relevant attribute notes for the therapist (if applicable).

9.4.4 Coordinator Attendance

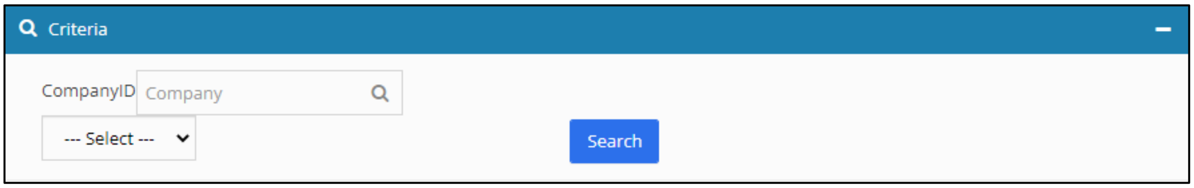
Attention EI-Hub users, this reporting section may be used during billing and claiming if applicable.

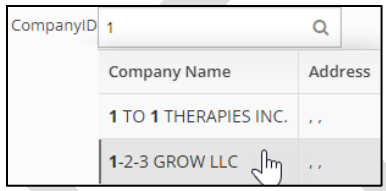
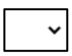
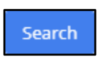
Depending on your user role, you may only see some of the reports or none, as shown below.

There are more columns in the screenshot below than shown; however, you can see more columns by scrolling to the right.

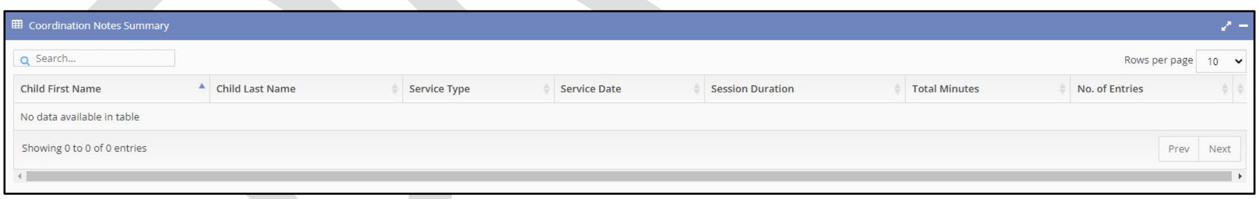


9.4.4.1 Criteria Panel



FIELD	DESCRIPTION
Company ID	To search for a company, begin typing (type ahead – example below) into this field. 
	[Panel still in development] 
Search 	When clicked based on your criteria (fields populated above), the system searches the EI-Hub database and returns the results.

9.4.4.2 Coordination Notes Summary Grid/Table



See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section Home Tab Controllers; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

COLUMN	DESCRIPTION
Child First Name	This column displays the first name of the child.
Child Last Name	This column displays the last name of the child.
Service Type	This column displaces the service type provided for the child.
Service Date	This column displays the service date for the child.
Session Duration	This column displays the child's session duration in minutes.
Total Minutes	This column displays the total minutes for the service provided for the child.
No. of Entries	This column displays the number of service entries for the child.

9.4.4.3 Coordination Notes to Apply Grid/Table

See "ASCENDING / DESCENDING CONTROLLER" for column sorting listed in the CM Unit 5 User Guide section Home Tab Controllers; selecting/clicking the 'Home Tab Controllers' hyperlink downloads the Unit 5 User Guide.

FIELD	DESCRIPTION
Search	To search the results grid/table for a specific record, enter a keyword into this field.

COLUMN	DESCRIPTION
Service Date	This column displays the service date for the child.
Child	This column displays the child's name.
Start Time	This column displays the start time for the service provided for the child.
End Time	This column displays the end time for the service provided for the child.
Minutes	This column displays the child's session duration minutes.
Service Type	This column displays the service type provided for the child.
Activity Code	This column displays the activity code for the service provided.
Notes	This column displays any relevant coordinator's notes.
Follow Up Date	This column displays any follow-up dates for the child.
Authorization	This column displays the service authorization (SA) number for the child.
Date Posted	This column displays the SA posted date.
Therapist	This column displays the therapist's name who provided the service.

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