

# Child Lookup



## How To

Search for a child's record within EI-Hub.

**This job aid is recommended for all roles.**

# Child Lookup

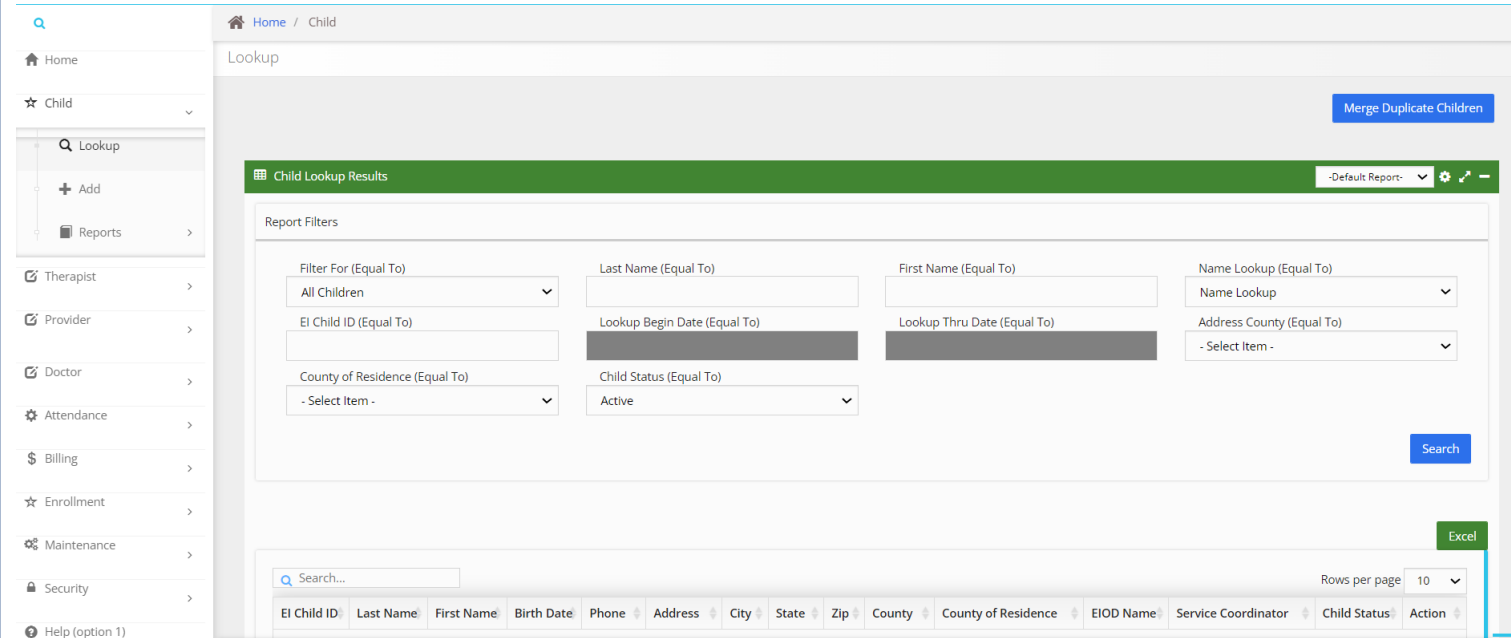
## Child Record Search

### How To

Perform a Child Lookup

### Note

- The Child Lookup feature can be used to:
  - Verify a child's previous enrollment in your municipality to prevent creating duplicate child records upon referral.
  - Pull up a child's record that is not readily available in your dashboard.
- It is important to ALWAYS perform a child lookup before entering a new child into the EI-Hub.
- The Child Lookup is role dependent. The search will be across the state, county, or individual provider's caseload, depending on the role used to perform the child lookup.



The screenshot shows the EI-Hub web application interface. On the left is a sidebar menu with options: Home, Child (selected), Lookup, Add, Reports, Therapist, Provider, Doctor, Attendance, Billing, Enrollment, Maintenance, Security, and Help (option 1). The main content area is titled 'Lookup' and contains a 'Child Lookup Results' section with a '-Default Report-' dropdown and a 'Merge Duplicate Children' button. Below this is a 'Report Filters' section with various search criteria: Filter For (All Children), Last Name, First Name, Name Lookup, EI Child ID, Lookup Begin Date, Lookup Thru Date, Address County, County of Residence, and Child Status (Active). A 'Search' button is at the bottom right of the filters. At the bottom of the page is a table header with columns: EI Child ID, Last Name, First Name, Birth Date, Phone, Address, City, State, Zip, County, County of Residence, EIOD Name, Service Coordinator, Child Status, and Action. A search bar and 'Rows per page' dropdown (set to 10) are also visible.

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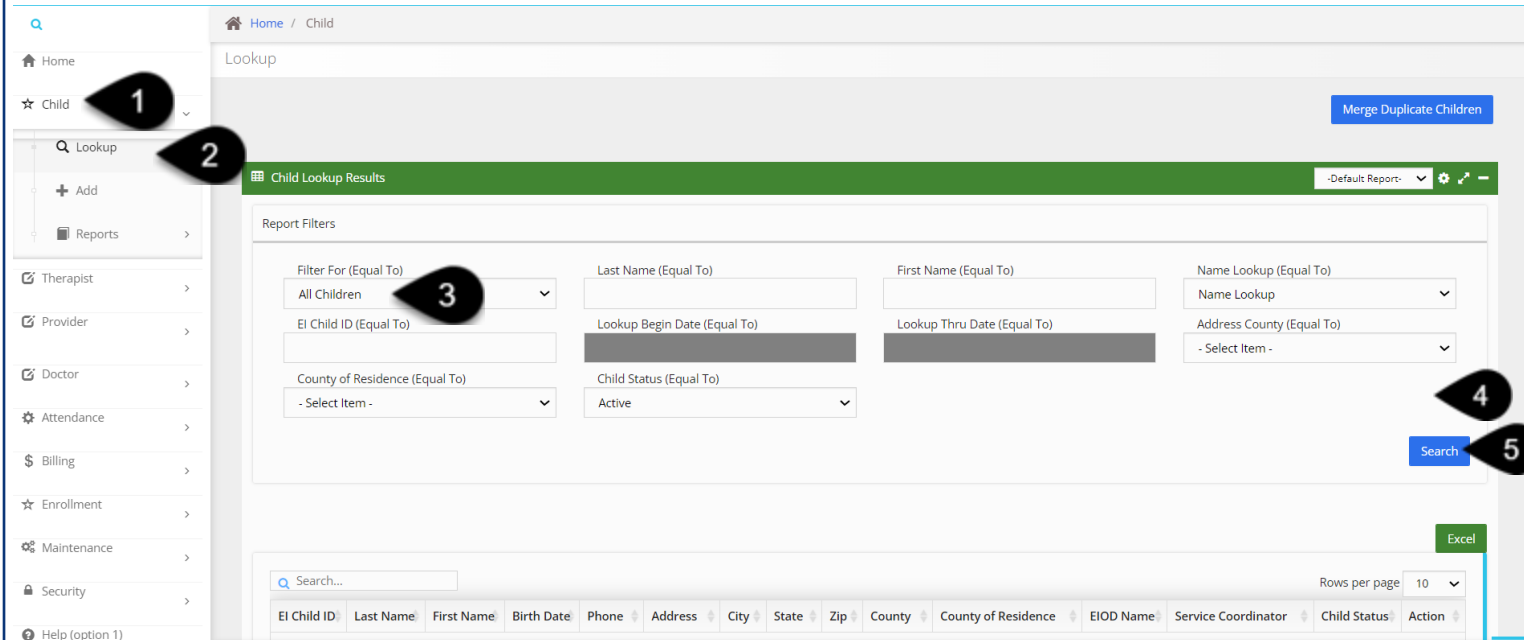
#### Perform a Child Lookup

#### Step / Action

1. In the Case Management module, click **Child**.
2. From the dropdown menu, click **Lookup**.
3. Choose a filter to search child information. Filters include:
  - All Children
  - Children with a Date of Birth within the selected period
  - Children with no enrollments yet
  - Children with active services within the selected period
  - Children 'At-Risk' within the selected period
4. Within "Criteria," enter any relevant information for the child.
5. Click **Search**
6. To confirm child information, click **Edit** to view the child record.

### Note

- The search criteria can include, but does not require:
  - First Name and/or Last Name (of a child, guardian, SC, or EIO/D) When searching by EIO/D or SC name, results include children with the individual listed as **either** the EIO/D or SC.
  - EI Child ID
  - Company (provider or agency name)
  - County
  - State
  - Child Status



The screenshot shows the 'Child Lookup' page. Callout 1 points to the 'Child' dropdown in the left sidebar. Callout 2 points to the 'Lookup' option in the dropdown menu. Callout 3 points to the 'Filter For (Equal To)' dropdown, which is set to 'All Children'. Callout 4 points to the 'Search' button. Callout 5 points to the 'Excel' button.



The screenshot shows the search results table. Callout 6 points to the 'Child Status' column, which has a dropdown menu with options 'Request Transfer' and 'Edit'.

EI Child ID	Last Name	First Name	Birth Date	Phone	Address	City	State	Zip	County	County of Residence	EIOD Name	Service Coordinator	Child Status	Action
171	rraaAjefb	zaadzWvdbzez	05/01/2021		151 W 34TH ST	NEW YORK	NY	10001-2101	Albany	Albany	Karev Alex		Active	Request Transfer Edit
227	xfddbXQxaaAe	dcXTXaTraed	05/01/2021							Yates			Active	Request Transfer Edit

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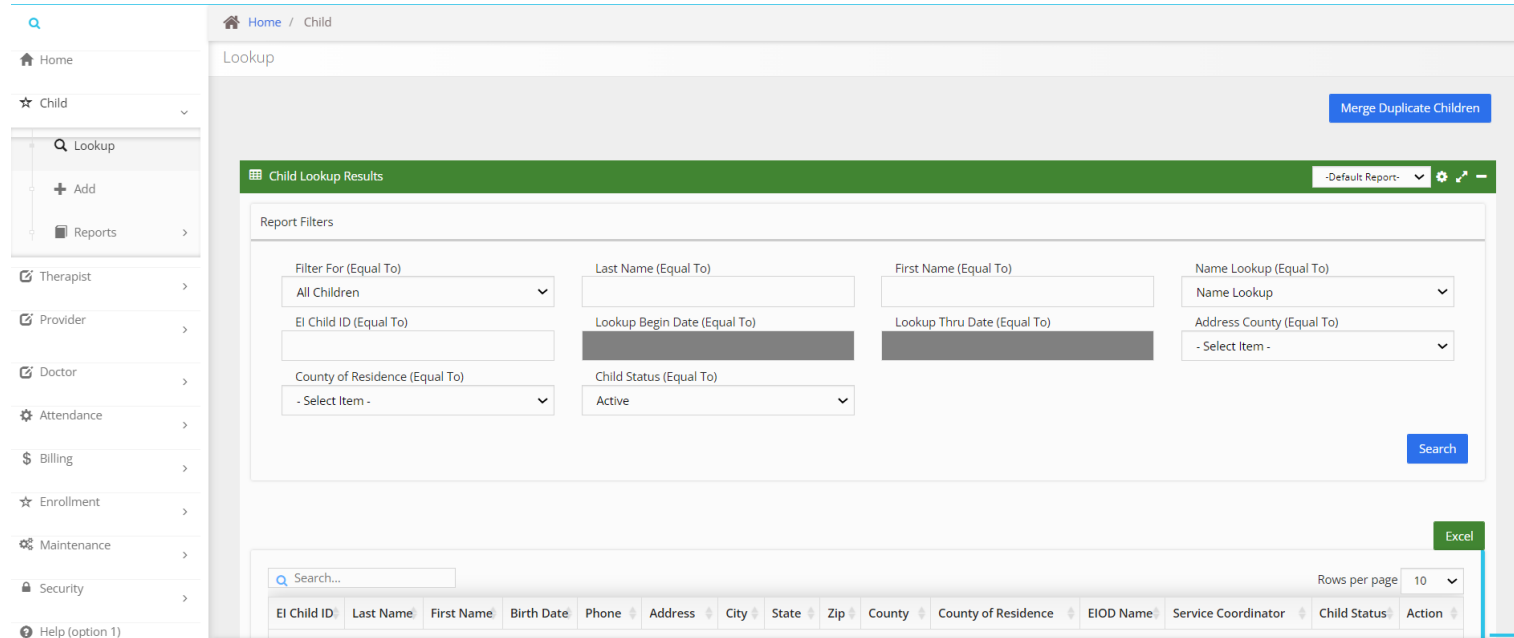
Perform a Child Lookup

### Note

- To search for a child by Date of Birth, select the Filter option of Children with a Date of Birth within the selected period. Then input the child's birthday in both fields: Lookup Begin Date (Equal To) and Lookup Thru Date (Equal To)
- When performing a search **by either** the Service Coordinator's name or the EIO/D's name, results will include children who have the person as either the service coordinator or the EIO/D. The system will check both columns and return the same results when using either the Service Coordinator's name or the EIO/D's name using the Name Lookup search.
- To further sort and filter by Service Coordinator or EIO/D columns, export the results to Excel using the **Excel** button.
- Prior to entering a new referral, it is crucial to perform a child look up. The child look up will return any possible duplicate child matches within your county. If no match is found within your county, you may begin to enter in the new child referral information. If another record with the same data exists within the State, the system will then report a potential duplicate match. More information on what to do if a potential duplicate match is found will be covered in the Child Information Job Aid.



Please refer to the EI-Hub Case Management User Guide Unit 8. Child for more information.



The screenshot shows the 'Child Lookup' interface. On the left is a sidebar with navigation links: Home, Child, Lookup, Add, Reports, Therapist, Provider, Doctor, Attendance, Billing, Enrollment, Maintenance, Security, and Help (option 1). The main area is titled 'Lookup' and contains a 'Child Lookup Results' section with a '-Default Report-' dropdown and a 'Merge Duplicate Children' button. Below this is a 'Report Filters' section with various input fields: 'Filter For (Equal To)' (dropdown with 'All Children'), 'EI Child ID (Equal To)' (text field), 'County of Residence (Equal To)' (dropdown with '- Select Item -'), 'Last Name (Equal To)' (text field), 'Lookup Begin Date (Equal To)' (text field), 'Child Status (Equal To)' (dropdown with 'Active'), 'First Name (Equal To)' (text field), 'Lookup Thru Date (Equal To)' (text field), 'Name Lookup (Equal To)' (dropdown with 'Name Lookup'), 'Address County (Equal To)' (dropdown with '- Select Item -'), and a 'Search' button. At the bottom, there is a table header with columns: EI Child ID, Last Name, First Name, Birth Date, Phone, Address, City, State, Zip, County, County of Residence, EIOD Name, Service Coordinator, Child Status, and Action. A search bar and a 'Rows per page' dropdown (set to 10) are also visible.

## Revision History

Version Number	Release Date	Author	Revision Summary
v0.1.0	1.19.2022	Evan Thibeau	First Draft Release
v0.1.1	1.19.2022	Evan Thibeau	First visual revisions
v0.1.1	1.20.2022	PMR	Second visual revision
v0.2.0	1.31.2022	Evan Thibeau	First Revisions w/ BEI comments
v0.3.0	2.8.2022	Evan Thibeau	Second Revisions
V0.4.0	3.15.2022	Evan Thibeau	Third Revisions
v.0.5.0	8.9.23	Matthew	Update
V 0.6.0	9.11.23	Matthew	Update Added info on Duplicate
V.0.7.0	1.26.24	Courtney	UAT Finding 2148
V.0.8.0	5.15.24	Courtney	Child Lookup Revamp

