

Adding a Therapist Job Aid

How To

1. Add a new therapist as an approved agency
2. Add an existing therapist as an approved agency
3. Add details to a therapist integrated from the enrollment tool as a newly approved agency
4. Self-complete as an approved individual



9/20/2022

Adding a Therapist

Job Aid

HOW TO

- Enter and save demographic, professional, and compliance information for a new Therapist.

NOTE

- Prior to adding a Therapist, perform a Therapist Lookup. Performing a 'Therapist Lookup' verifies the Therapist does not have a pre-existing record, prevents record duplication and reinforces EI-Hub's data/reporting quality. A 'Duplicates Found' alert will populate if a Therapist is found to have an existing record.
- Each tab may house multiple panels, subpanels, and panes (i.e., the Compliance tab).
- Fields and dropdowns with an asterisk (*) are required for the system to save/submit information entered.
- The ability to add, edit and access Therapists' records are determined by an individual's role in the system.
- *All screen captures may not reflect the system's current state (i.e. labels may differ) and will be updated accordingly.
- Therapists do not log into the Therapist record unless they are individually approved billing providers. If the therapist has only a Basic agreement or no agreement with BEI, the Agency will load/update the therapist's information on their behalf. Individually approved providers are responsible for maintaining their/own records, although the agency representative may associate the provider with the Agency on the Therapist screens.



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

This job aid will cover the following situations:

1. An approved agency adds a new therapist
2. An approved agency adds an existing therapist
3. A newly approved agency adds details to a therapist integrated from the enrollment tool
4. An approved individual self-completes

Enter and save demographic, professional, and compliance information for new Therapists. A Therapist in EI-Hub's Case Management refers to any of the following:

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

1. An Approved Agency Adds a New Therapist

HOW TO

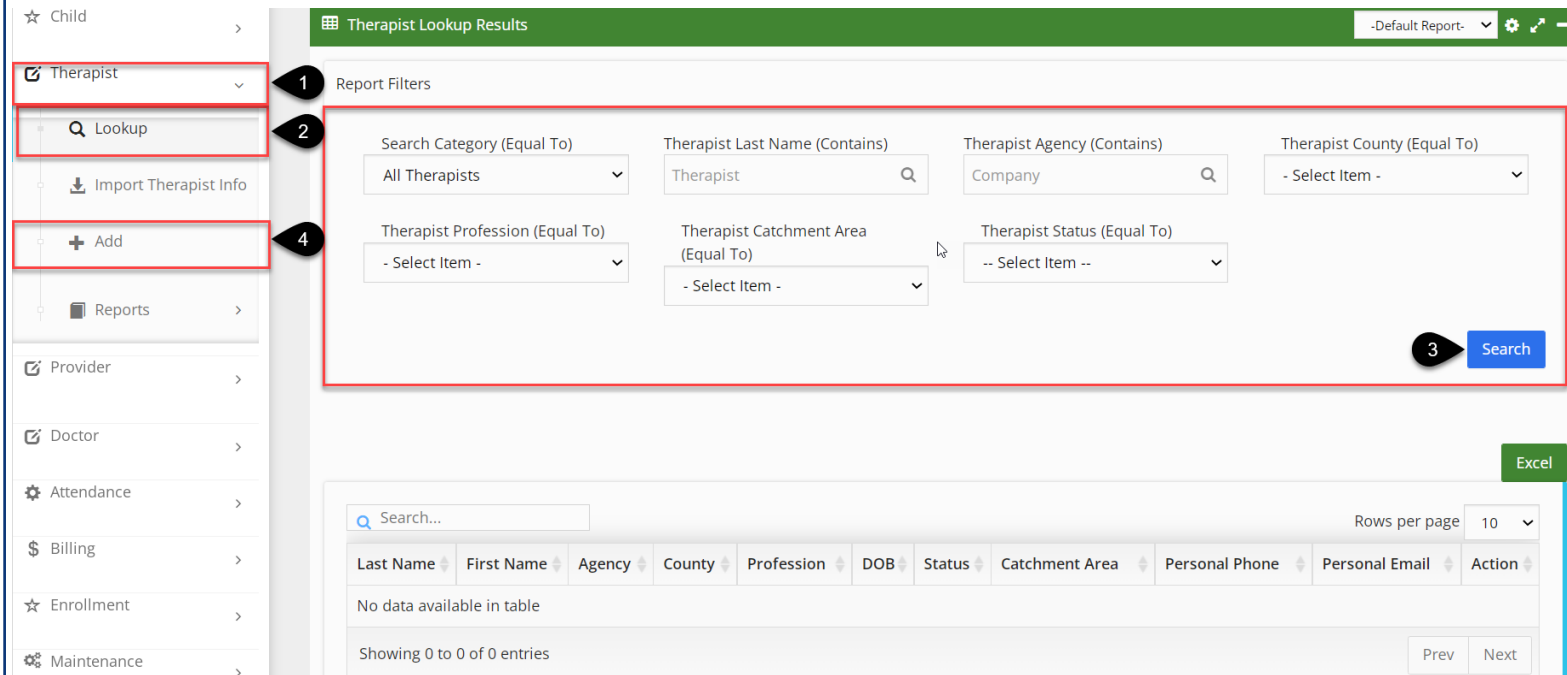
- Add a new therapist as an **approved agency**

NOTE

- In this section, either an existing provider migrated into Case Management from NYEIS or a provider newly approved in the enrollment tool and integrated into Case Management needs to complete their roster by adding a new therapist who has not previously been loaded to Case Management.

Step/Action

1. Users are required to be in the proper agency role in the EI-Hub and must log into Case Management as the agency provider. Once logged in, **Select the Therapist Dropdown Menu.**
2. Select **Lookup**
3. Enter the known therapist details into the **Report Filters** and **Select Search.**
4. See **Section 2, Adding an Existing Therapist** if a match is found. If no match is found try simplifying the search. Once verified that the therapist is not found in Case Management, **Select Add** under the **Therapist Drop Down Menu.**



The screenshot displays the 'Therapist Lookup Results' interface. On the left sidebar, the 'Therapist' menu item is highlighted, and the 'Lookup' option is selected. The main area shows 'Report Filters' with the following fields:

- Search Category (Equal To):** All Therapists
- Therapist Last Name (Contains):** Therapist
- Therapist Agency (Contains):** Company
- Therapist County (Equal To):** - Select Item -
- Therapist Profession (Equal To):** - Select Item -
- Therapist Catchment Area (Equal To):** - Select Item -
- Therapist Status (Equal To):** -- Select Item --

A 'Search' button is located at the bottom right of the filter section. Below the filters, there is a table with columns: Last Name, First Name, Agency, County, Profession, DOB, Status, Catchment Area, Personal Phone, Personal Email, and Action. The table currently displays 'No data available in table' and 'Showing 0 to 0 of 0 entries'.



1. An Approved Agency Adds a New Therapist

HOW TO

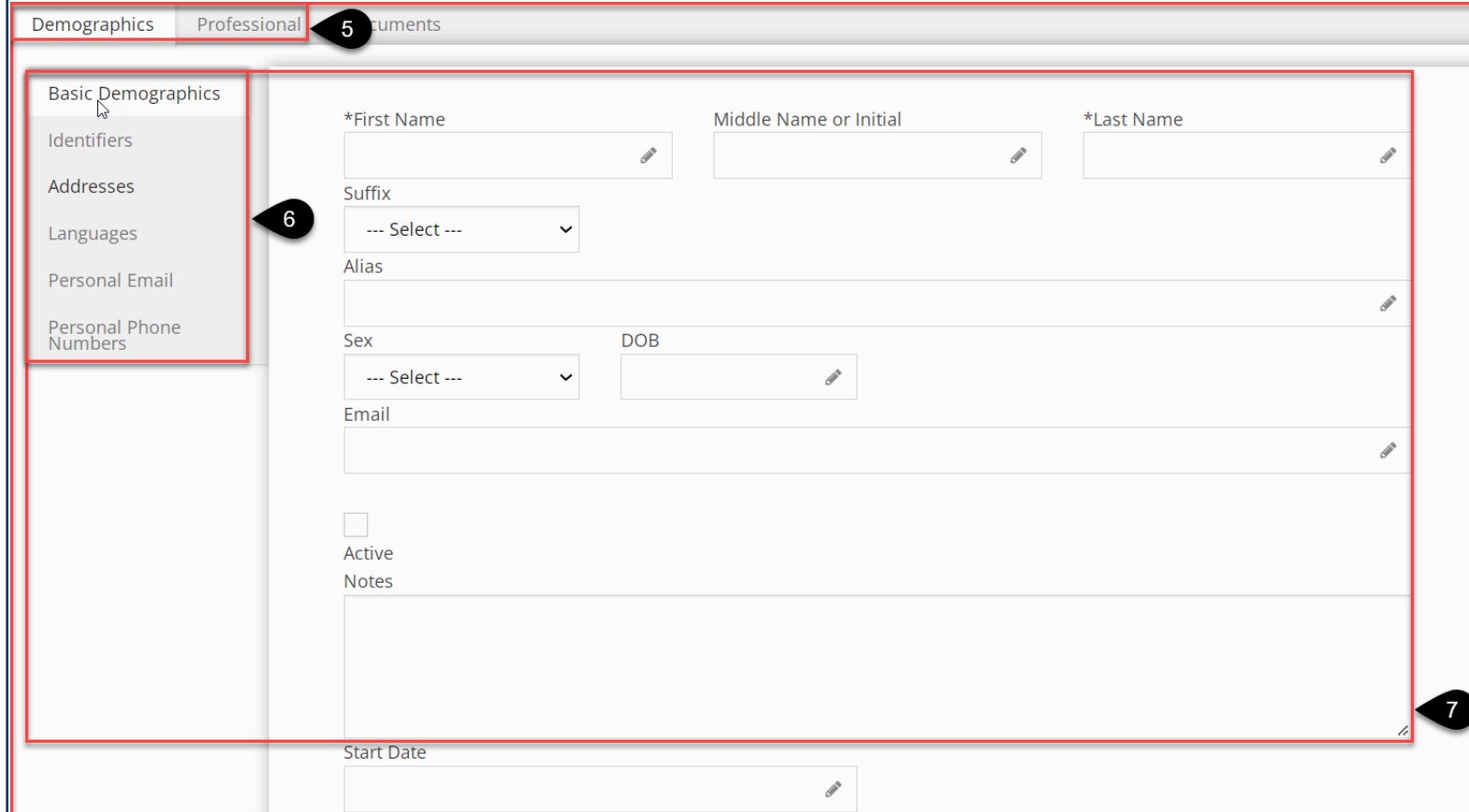
- Add a new therapist as an **approved agency**

NOTE

- Required fields are marked with an asterisk (*)
- An error message will display if a required field is empty after submit is selected
- You must complete the panels to avoid errors; the action buttons on the grid/table will not display until the initial panel is saved successfully.
- The Document tab is not used at this time.

Step/Action

5. Select the **Demographic Tab**
6. Complete **All Demographic Panels**
7. Review all required fields have been entered and **Select Submit** to save



The screenshot shows the 'Demographics' tab selected in the top navigation bar. A sidebar on the left lists the form sections: Basic Demographics, Identifiers, Addresses, Languages, Personal Email, and Personal Phone Numbers. The main form area contains the following fields:

- *First Name**, **Middle Name or Initial**, ***Last Name**: Text input fields with edit icons.
- Suffix**: A dropdown menu with '--- Select ---'.
- Alias**: Text input field with an edit icon.
- Sex**: A dropdown menu with '--- Select ---'.
- DOB**: Text input field with an edit icon.
- Email**: Text input field with an edit icon.
- Active**: A checkbox.
- Notes**: A large text area.
- Start Date**: Text input field with an edit icon.

Numbered callouts indicate the following steps:

5. Select the **Demographic Tab**
6. Complete **All Demographic Panels**
7. Review all required fields have been entered and **Select Submit** to save



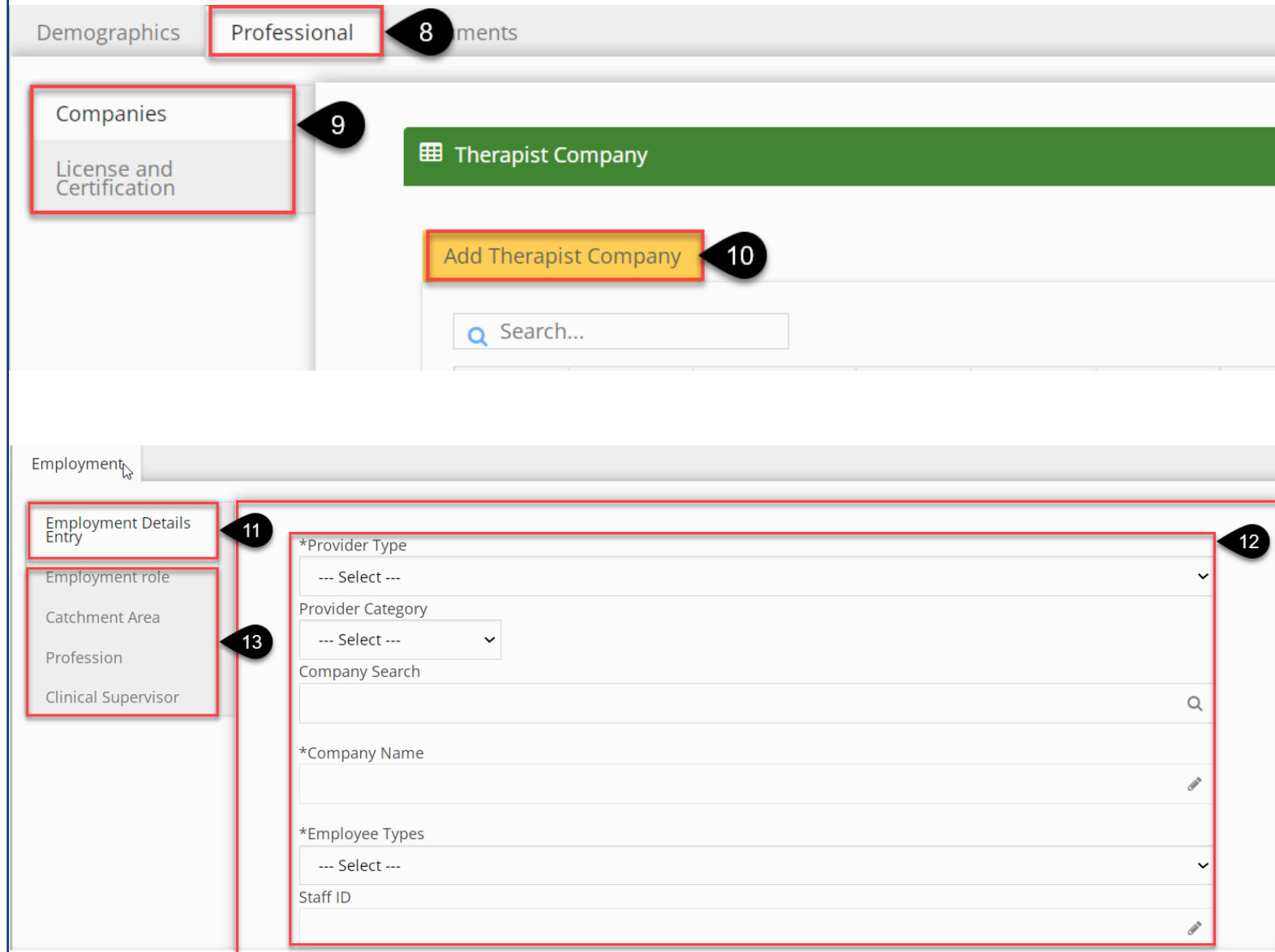
1. An Approved Agency Adds a New Therapist

HOW TO

- Add a new therapist as an **approved agency**

Step/Action

8. Select the **Professional** Tab
9. Select **Companies**
10. Select **Add Therapist Company**
11. The Employment Details Entry Panel must be successfully completed for the action buttons to appear on the other panels.
12. Complete required fields and **Select Submit**
13. Complete remaining Panels.



The screenshot displays the 'Professional' tab in the EI-Hub system. On the left sidebar, the 'Companies' option is highlighted. The main content area shows a green bar for 'Therapist Company' and a yellow button labeled 'Add Therapist Company'. Below this is a search bar. The 'Employment Details Entry' panel is open, showing fields for 'Provider Type', 'Provider Category', 'Company Search', '*Company Name', '*Employee Types', and 'Staff ID'. The 'Add Therapist Company' button is highlighted with a red box and a callout number 10. The 'Employment Details Entry' panel is also highlighted with a red box and a callout number 11. The 'Add Therapist Company' button is highlighted with a red box and a callout number 10. The 'Employment Details Entry' panel is highlighted with a red box and a callout number 11. The 'Add Therapist Company' button is highlighted with a red box and a callout number 10. The 'Employment Details Entry' panel is highlighted with a red box and a callout number 11.



2. An Approved Agency Adds an Existing Therapist

HOW TO

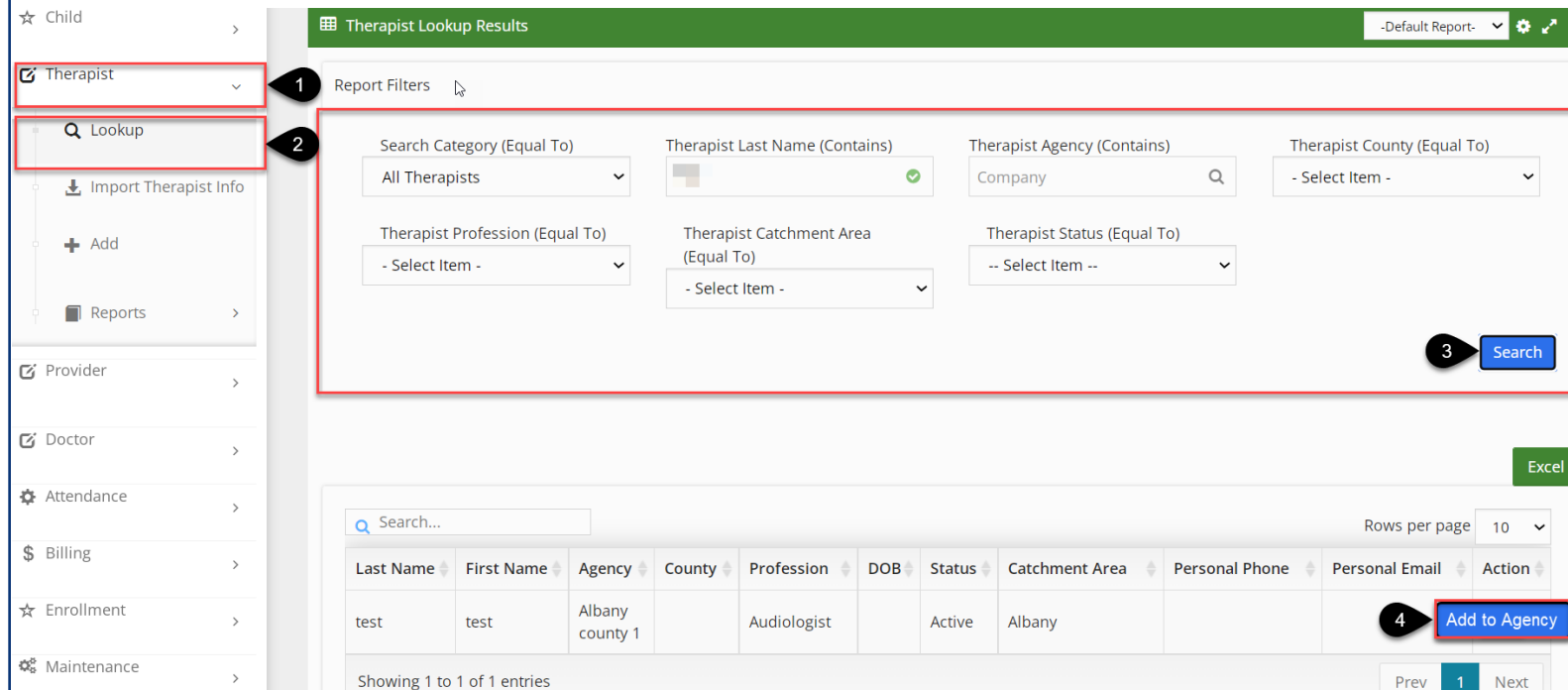
- Add an existing therapist as an **approved agency**

NOTE

- In this section, either an existing provider migrated into Case Management from NYEIS or a provider newly approved in the enrollment tool and integrated into Case Management must complete a roster by adding a therapist who has previously been loaded to Case Management.

Step/Action

1. Users are required to be in the proper agency role in the EI-Hub and must log into Case Management as the agency provider. Once logged in, **Select the Therapist Dropdown Menu.**
2. Select **Lookup**
3. Enter the known therapist details into the **Report Filters** and **Select Search.**
4. See **Section 1, Adding a New Therapist** if a match is not found. If match is found **Select Add to Agency and Select Edit; Follow Steps in Slides 4-5** to edit demographic info.



Child >

Therapist >

Lookup

Import Therapist Info

+ Add

Reports >

Provider >

Doctor >

Attendance >

Billing >

Enrollment >

Maintenance >

Therapist Lookup Results

-Default Report-

Report Filters

Search Category (Equal To)
All Therapists

Therapist Last Name (Contains)
[Input Field]

Therapist Agency (Contains)
Company

Therapist County (Equal To)
- Select Item -

Therapist Profession (Equal To)
- Select Item -

Therapist Catchment Area (Equal To)
- Select Item -

Therapist Status (Equal To)
-- Select Item --

Search

Search...

Rows per page 10

Last Name	First Name	Agency	County	Profession	DOB	Status	Catchment Area	Personal Phone	Personal Email	Action
test	test	Albany county 1		Audiologist		Active	Albany			Add to Agency

Showing 1 to 1 of 1 entries

Prev 1 Next



3. A Newly Approved Agency Adds Details to a therapist Integrated From The Enrollment Tool

HOW TO

- Add details to an **integrated therapist**

NOTE

- In this section, an agency has just been approved in the new enrollment tool, and they need to complete their roster in Case Management.

Step/Action

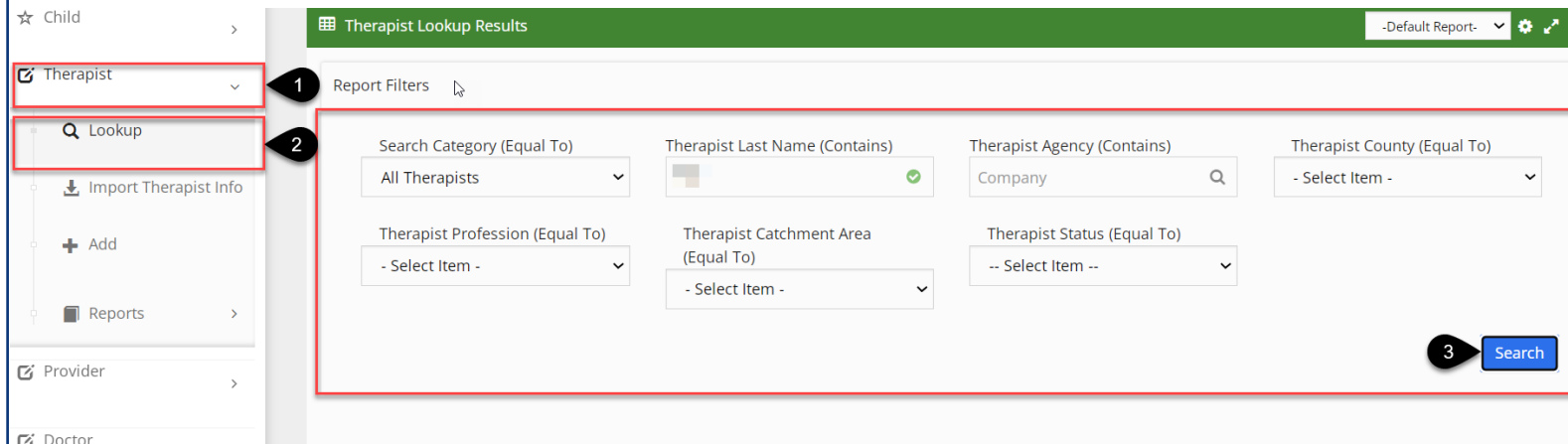
1. Users are required to be in the proper agency role in the EI-Hub and must log into Case Management as the agency provider. Once logged in, **Select the Therapist Dropdown Menu.**
2. Select the Lookup button.
3. Enter the known therapist details into the **Report Filters** and **Select Search.**

As a newly approved provider, the 2 Qualified Professionals entered in the **Agency PAT** will integrate into Case Management as will the Agency Director; if indicated that the director provides direct EI services.

Search for each professional and access their **Therapist Record** following **Slides 4-5** . **All other providers must be associated with the Agency as in sections 1 & 2 above.**



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



4. An Approved Individual Self-Completes

HOW TO

- Sell-Complete as an **approved individual**

NOTE

- In this section, an individual provider has been approved in the new enrollment tool and they must complete their Therapist record in Case Management.

Step/Action

1. The “Individual Provider” logs into the EI-Hub with the proper individual provider role. Once logged in, the provider should access Case Management as the individual provider and **Select the Therapist Dropdown Menu.**
2. Select **Lookup**
3. Self-search entering information and **Select Search.** Once located **Select Edit.** Follow **Slides 4-5** to edit demographic information and record.

