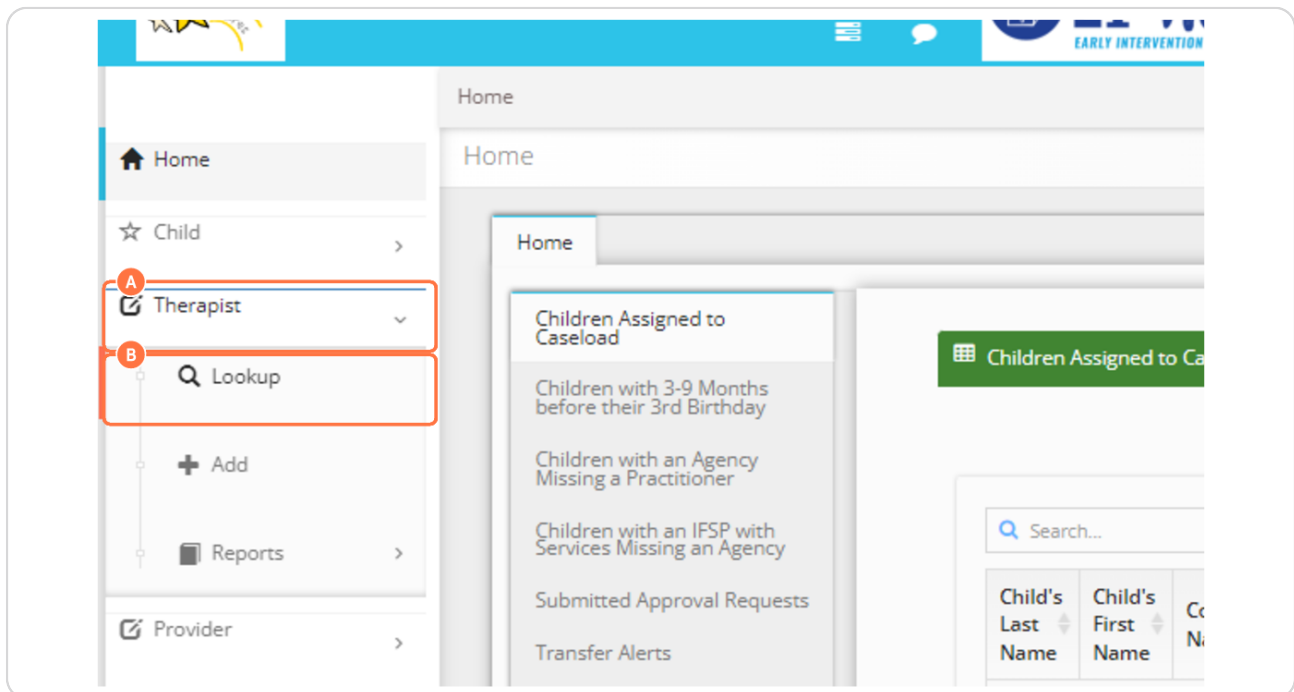


# Adding Therapist Employment Roles and Professions in the EI-Hub

## STEP 1

**A. Navigate to the Therapist menu**

**B. Click on Lookup**



## STEP 2

Enter the name of the therapist profile you want to review.

The screenshot shows the 'Therapist Lookup Results' page in the EI-Hub system. The page has a blue header with the EI-Hub logo and a navigation menu on the left. The main content area is titled 'Therapist Lookup Results' and contains a 'Report Filters' section. In this section, the 'Last Name (Equal To)' field is highlighted with a red rectangle. Below the filters is a 'Search' button. At the bottom, there is a table with columns for Last Name, First Name, Agency, County, Profession, DOB, Status, Catchment Area, Personal Phone, Personal Email, and Action. The table currently shows 'No data available in table' and 'Showing 0 to 0 of 0 entries'.

## STEP 3

Click on Search

This is a close-up view of the 'Search' button in the 'Therapist Lookup Results' page. The button is blue with the word 'Search' in white text. It is located below the filter fields and above the table. The table below the button shows columns for 'us', 'Catchment Area', 'Personal Phone', 'Personal Email', and 'Action'. The table is currently empty, displaying 'No data available in table' and 'Showing 0 to 0 of 0 entries'.

## STEP 4

Once you've found the individual in the list of options, click 'Edit' to open their profile.

The screenshot shows the 'Therapist Lookup Results' page. On the left is a sidebar with navigation links: Home, Child, Therapist, Provider, Attendance, Billing, Enrollment, and Help (option 1). The 'Therapist' link is selected. The main area has a 'Lookup' header and a 'Therapist Lookup Results' section with a 'Default Report' dropdown. Below this are 'Report Filters' with dropdowns for Search Category (All Therapists), Last Name (Equal To), First Name (Equal To), Therapist Agency (Contains), Therapist County (Equal To), Therapist Profession (Equal To), Therapist Catchment Area (Equal To), and Therapist Status (Equal To). A 'Search' button is at the bottom right of the filters. Below the filters is a table with columns: Last Name, First Name, Agency, County, Profession, DOB, Status, Catchment Area, Personal Phone, Personal Email, and Action. The table contains four entries. The first entry is for a 'EVID Service Coordinator' from 'Westchester County Department of Health' in 'Putnam' county, with an 'Active' status and 'Westchester' catchment area. An 'Edit' button is highlighted in the Action column for this entry. The other three entries are for 'Physical Therapist', 'Speech-Language Pathologist', and 'Other' professions, all with 'Add To Agency' buttons. At the bottom of the table, it says 'Showing 1 to 4 of 4 entries' and has 'Prev', '1', and 'Next' pagination controls. An 'Excel' button is in the top right corner of the table area. The footer shows '© 2024 PCG Human Services | 3.85.1.0'.

## STEP 5

Navigate to the Professional tab

The screenshot shows the 'Therapist Edit' profile page. The breadcrumb trail at the top reads 'Home / Therapist / Edit'. Below this is a tabbed interface with three tabs: 'Demographics', 'Professional' (which is highlighted with an orange border), and 'Documents'. The 'Professional' tab is active, showing a list of sub-tabs: 'Basic Demographics', 'Identifiers', 'Addresses', 'Languages', and 'Personal Email'. The 'Basic Demographics' sub-tab is selected, displaying fields for 'Salutation' (a dropdown menu with '--- Select ---'), '\*Last Name' (a text input field), and 'Alias' (a text input field). The left sidebar is partially visible, showing navigation links with right-pointing chevrons.

## STEP 6

**After locating the line with your entity name in the list of options, click 'Edit' to open that section of the individual's profile.**

*Please note, there may be multiple line items for each therapist. Each line represents a relationship this individual has with an entity. If your entity is listed twice, please set an end date for one of the records by following the remaining steps below.*

The screenshot displays the 'EI-Hub' web application interface. The top navigation bar includes the 'EI-Hub' logo and a user profile dropdown for 'Westchester I'. The left sidebar contains a menu with options: Home, Child, Therapist, Provider, Attendance, Billing, Enrollment, and Help (option 1). The main content area is titled 'Home / Therapist / Edit' and features three tabs: 'Demographics', 'Professional', and 'Documents'. The 'Professional' tab is selected, showing a 'Therapist Company' section. This section includes a search bar and a table with the following data:

Provider Type	Provider Category	Company Name	EIP Provider ID	Employee Type	Evaluator	From Date	To Date	Employee Status	Action
County	Agency	Westchester County Department of Health		Employee		01/01/2022		Active	<a href="#">Edit</a>

Below the table, it indicates 'Showing 1 to 1 of 1 entries' with 'Prev' and 'Next' navigation buttons. An 'Excel' button is located in the top right corner of the table area. The footer of the page shows the copyright notice '© 2024 PCG Human Services | 3.85.1.0'.

## STEP 7

**A. Navigate to the Employment role panel**

**B. If an employee role is missing, click the 'Add Therapist Employment Roles' option to add the role type.**

**C. If an employee role is listed twice in the grid, set an end date for one of the entries. To do this, click 'Edit' and enter an end date.**

The screenshot shows the 'Therapist Employment Roles' interface within the EI-Hub system. The left sidebar contains a menu with 'Employment role' highlighted. The main content area features a table with three columns: 'Employment Role', 'Effective Date From', and 'Effective Date To'. The table lists three roles: 'EIO/D', 'Service Coordinator', and 'Service Coordinator'. The 'Service Coordinator' role is listed twice, with the first entry having an 'Effective Date To' of '07/01/2024'. The 'EIO/D' role has an 'Effective Date From' of '05/09/2011'. The 'Action' column contains 'Edit' buttons for each row. A red box highlights the 'Add Therapist Employment Roles' button and the table. A blue box highlights the 'Edit' button for the first 'Service Coordinator' entry. The interface also includes a search bar, a pagination control showing '1' of 3 entries, and a 'Prev' button.

Employment Role	Effective Date From	Effective Date To	Providing Direct Services	Action
EIO/D	05/09/2011			Edit
Service Coordinator	07/01/2024	07/01/2024		Edit
Service Coordinator	07/01/2024			Edit

## STEP 8

**A. Navigate to the Profession panel**

**B. If profession is missing, click the 'Add Therapist profession' option to add the profession type.**

**C. If profession is listed twice in the grid, set an end date for one of the entries. To do this, click 'Edit' and enter an end date.**

The screenshot shows the 'Therapist Company Edit' page in the EI-Hub system. The left sidebar has a menu with 'Profession' highlighted. The main content area is titled 'Therapist Profession' and contains a table with the following data:

Profession	Start Date	End Date	Action
EIO/D	05/09/2011		<a href="#">Edit</a>
Service Coordinator	07/01/2024		<a href="#">Edit</a>

Below the table, it says 'Showing 1 to 2 of 2 entries'. There are 'Prev', '1', and 'Next' navigation buttons. An 'Add Therapist Profession' button is located above the table. The top of the page shows the 'EI-Hub' logo and user information for 'Westchester'.