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

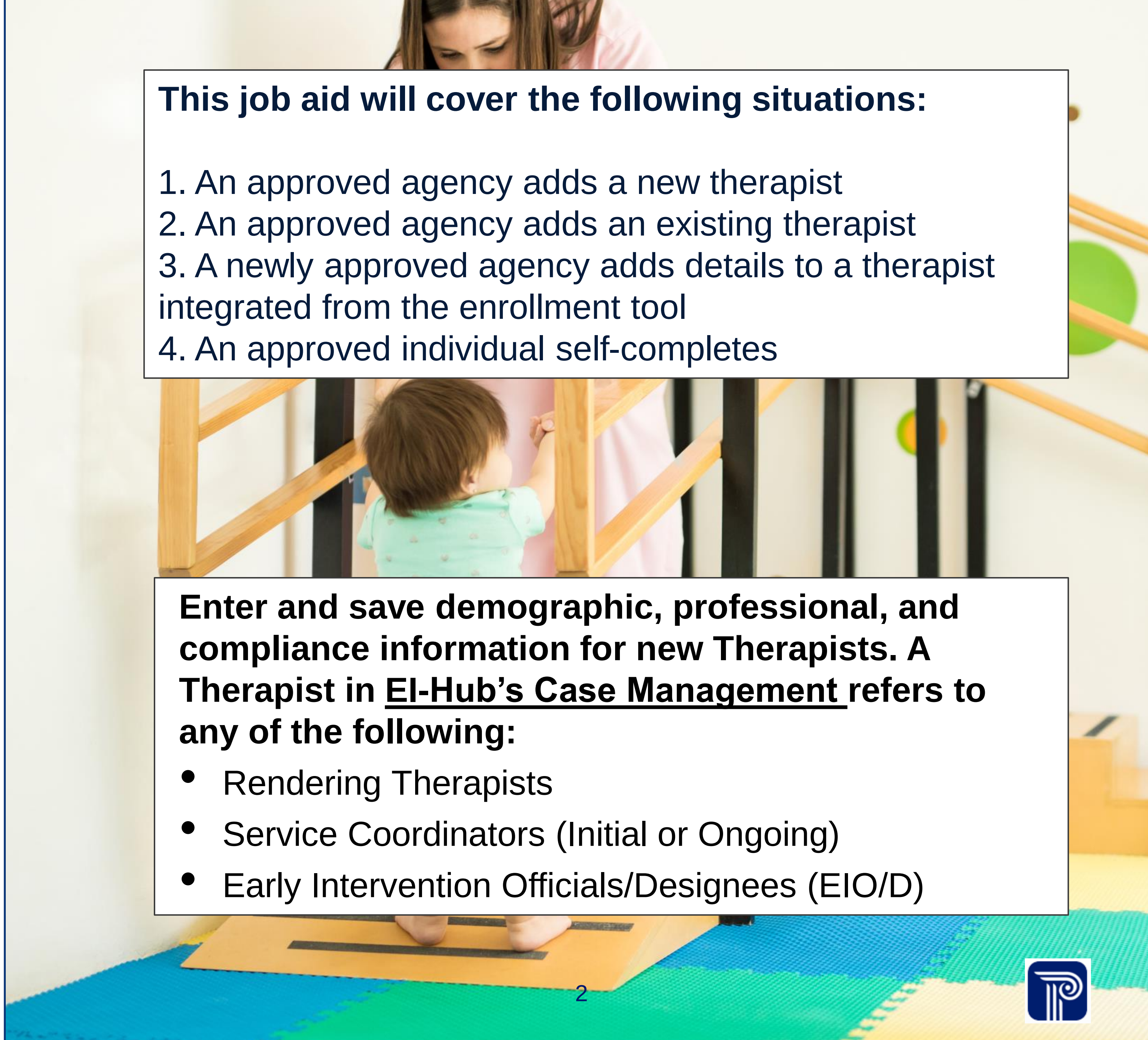
HOW TO

- 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 <u>EI-Hub's Case Management</u> 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

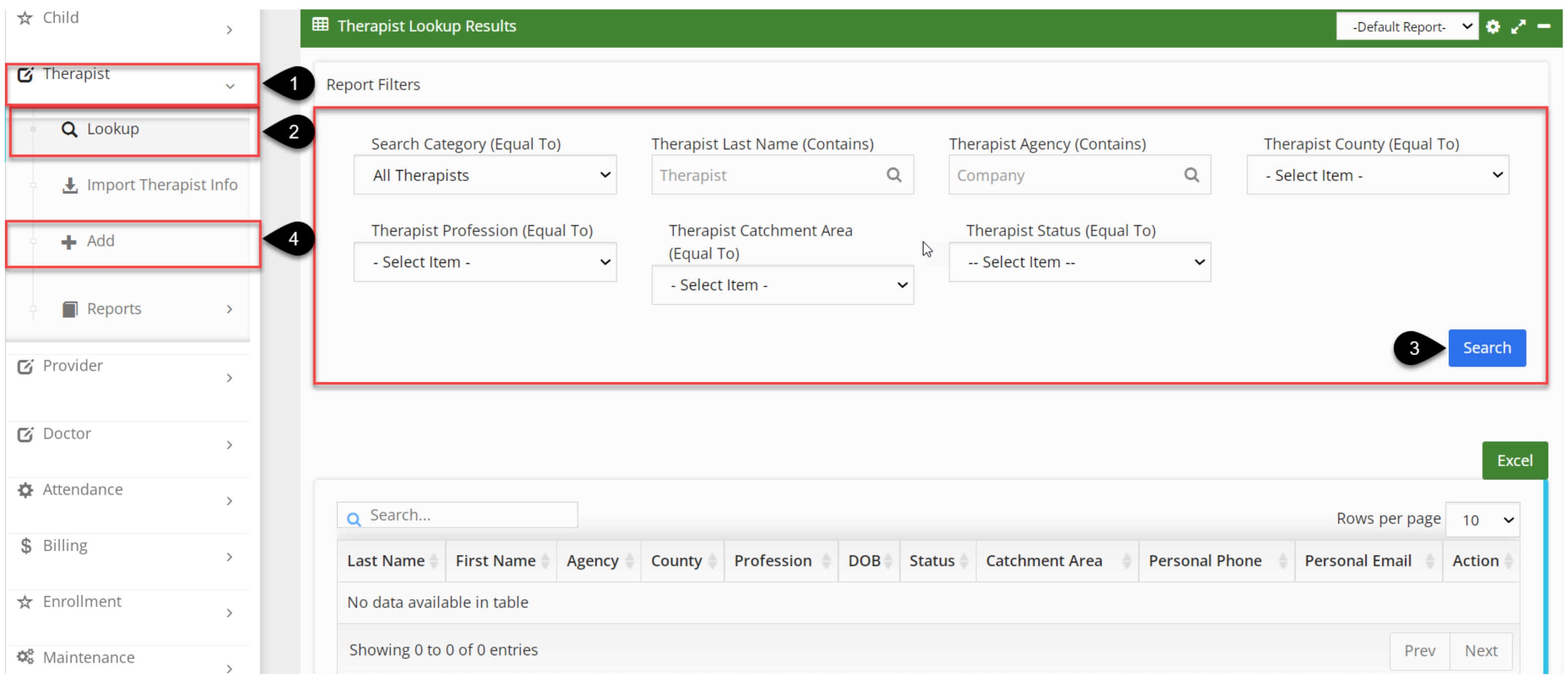
- Add a new therapist as an **approved agency**

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**.



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

1. An Approved Agency Adds a New Therapist

HOW TO

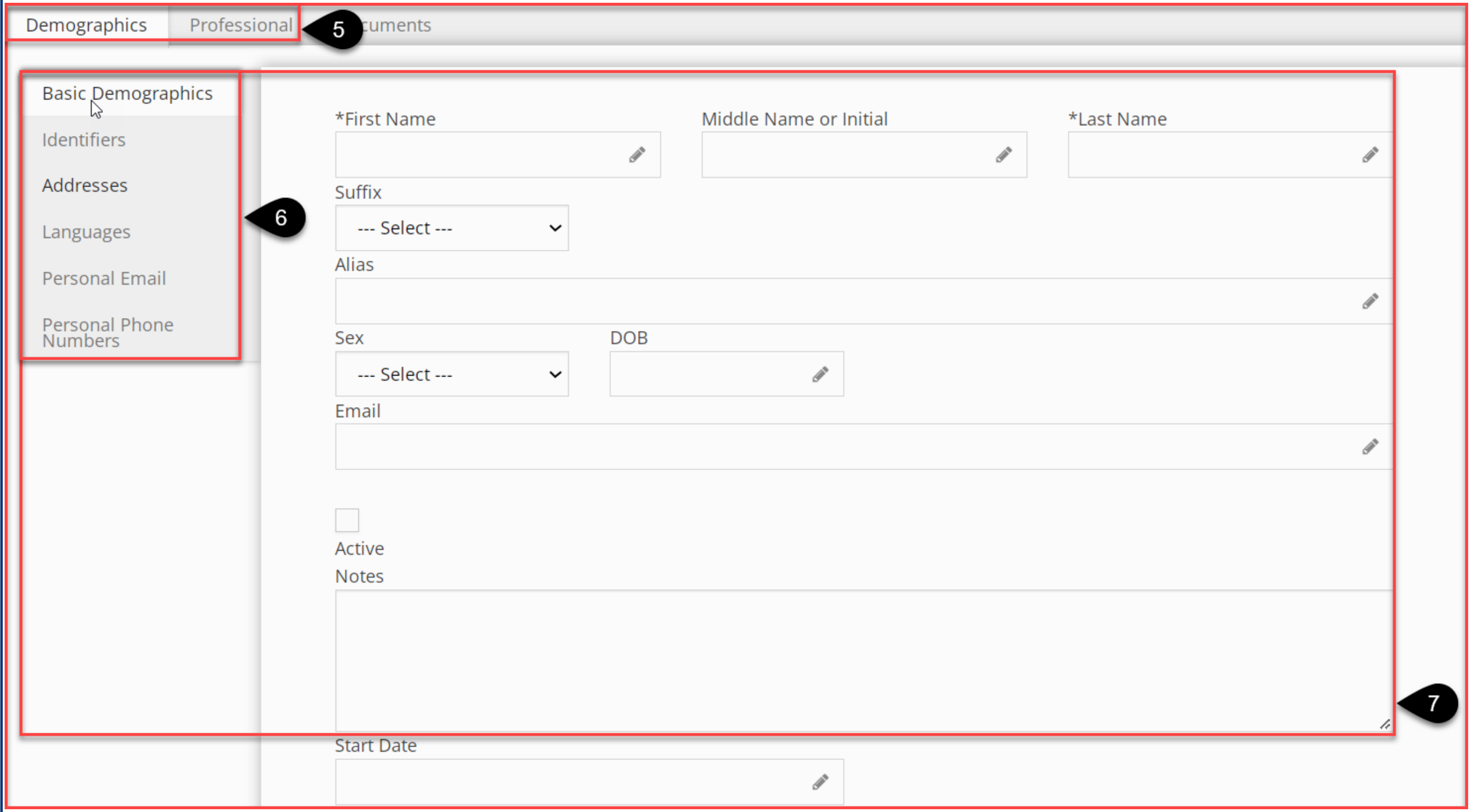
- Add a new therapist as an **approved agency**

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



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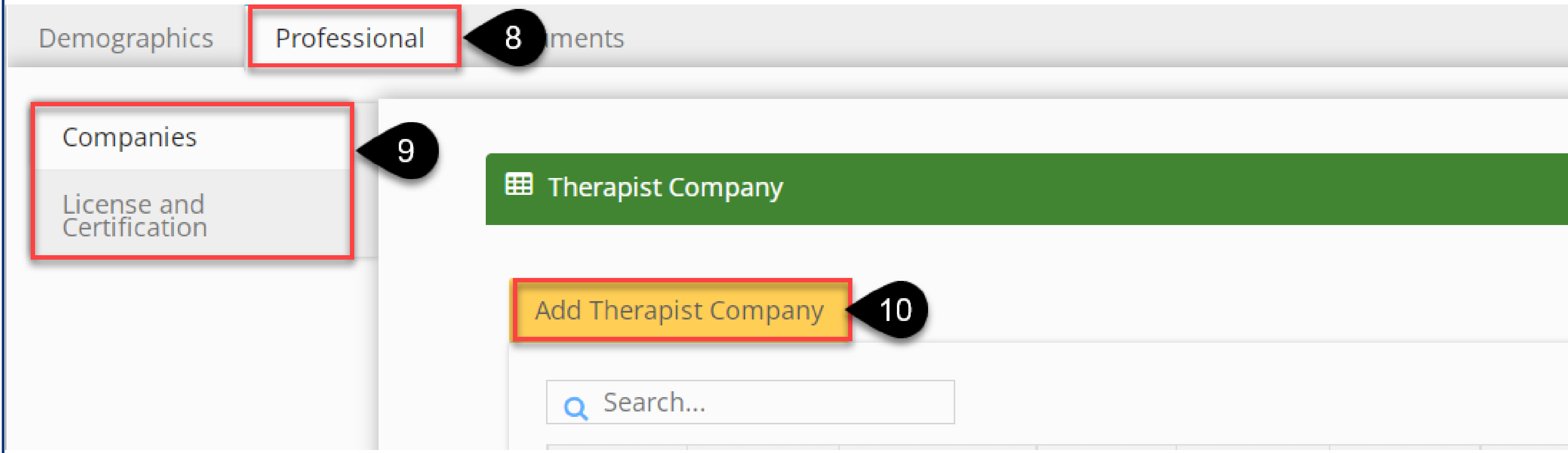
1. An Approved Agency Adds a New Therapist

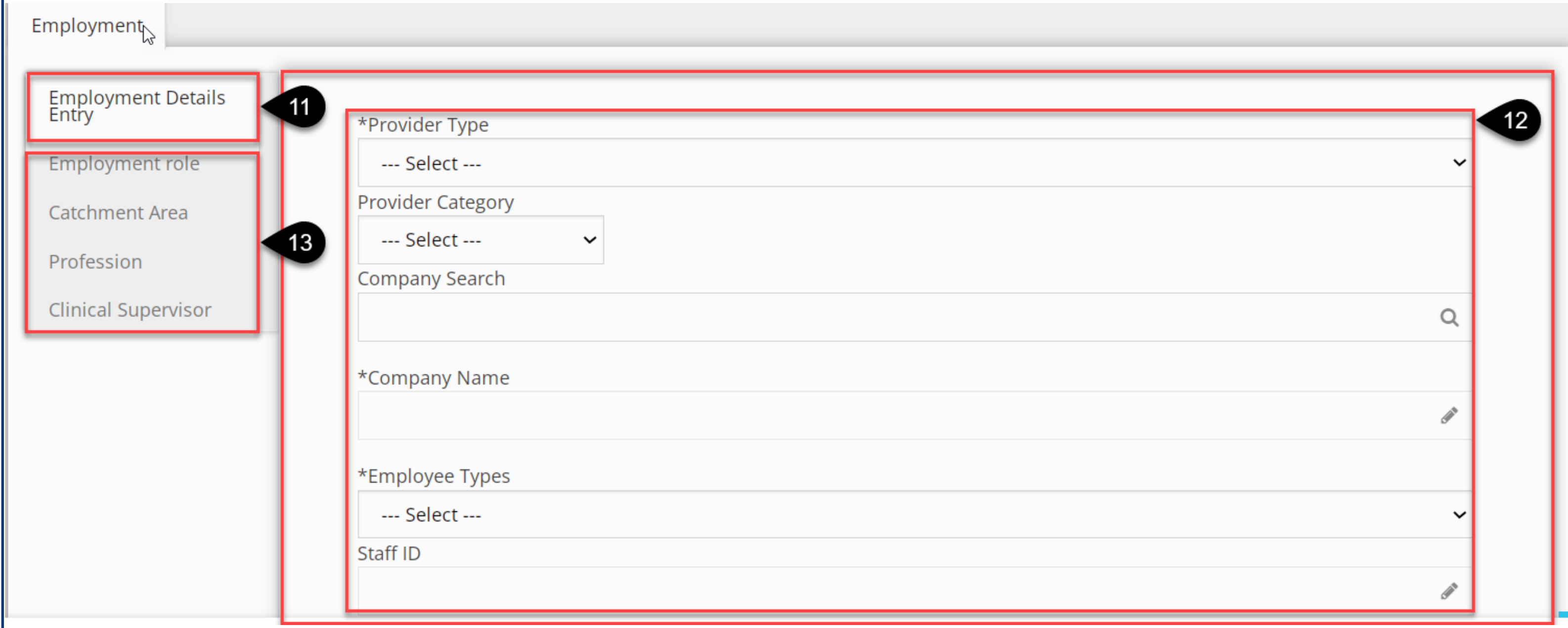
HOW TO

- 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.





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

2. An Approved Agency Adds an Existing Therapist

HOW TO

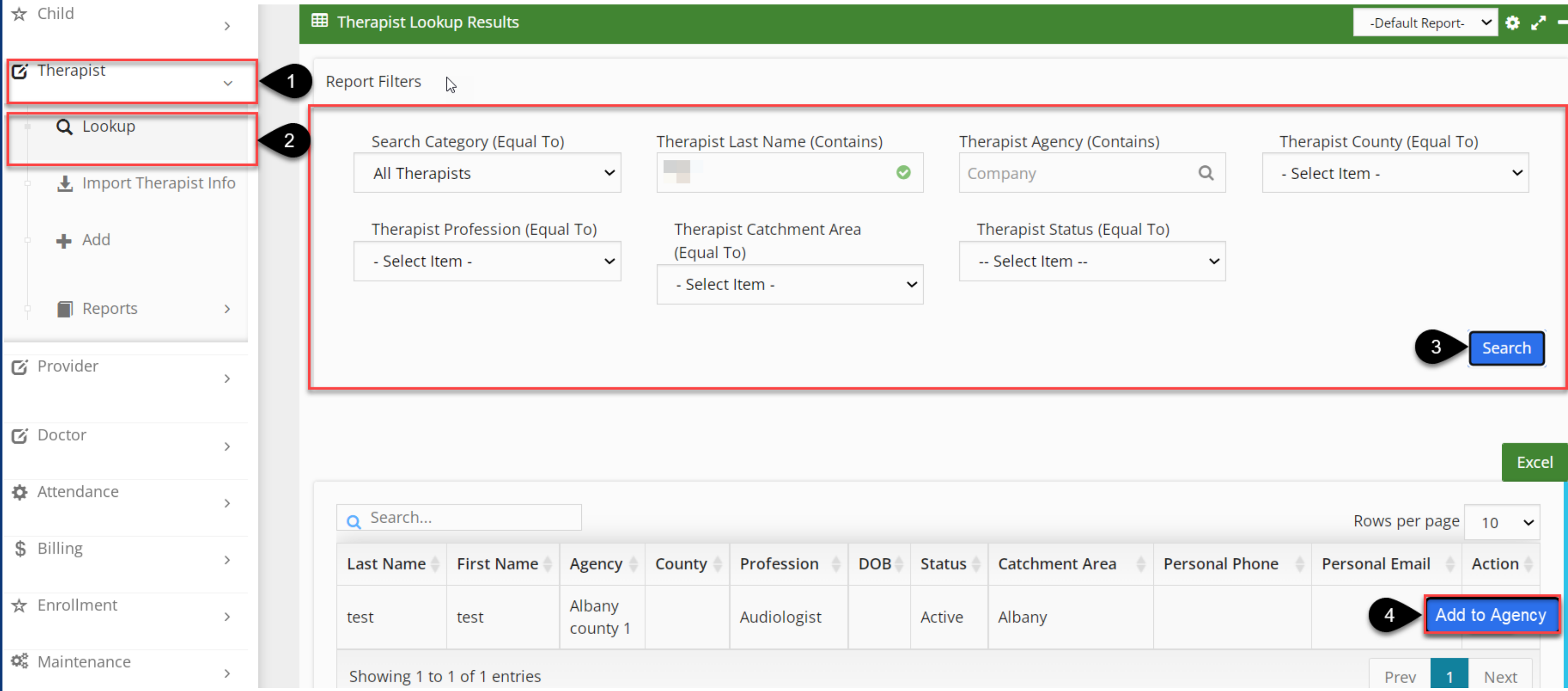
- Add an existing therapist as an **approved agency**

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.



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

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

HOW TO

- Add details to an **integrated therapist**

NOTE

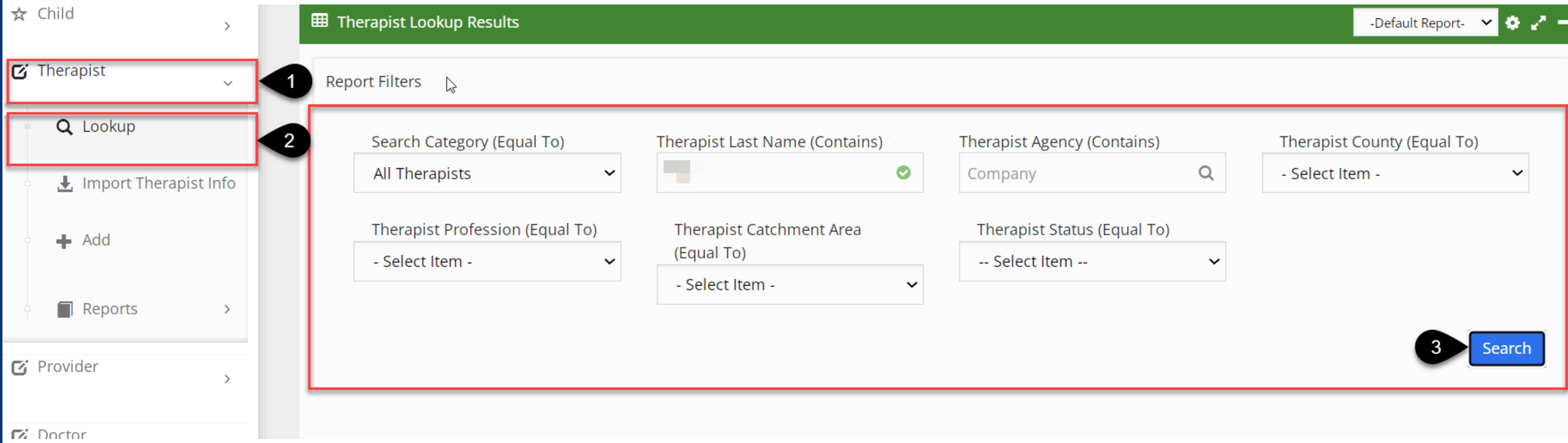
- In this section, an agency has just been approved in the new enrollment tool, and they need to complete their roster in Case Management.

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

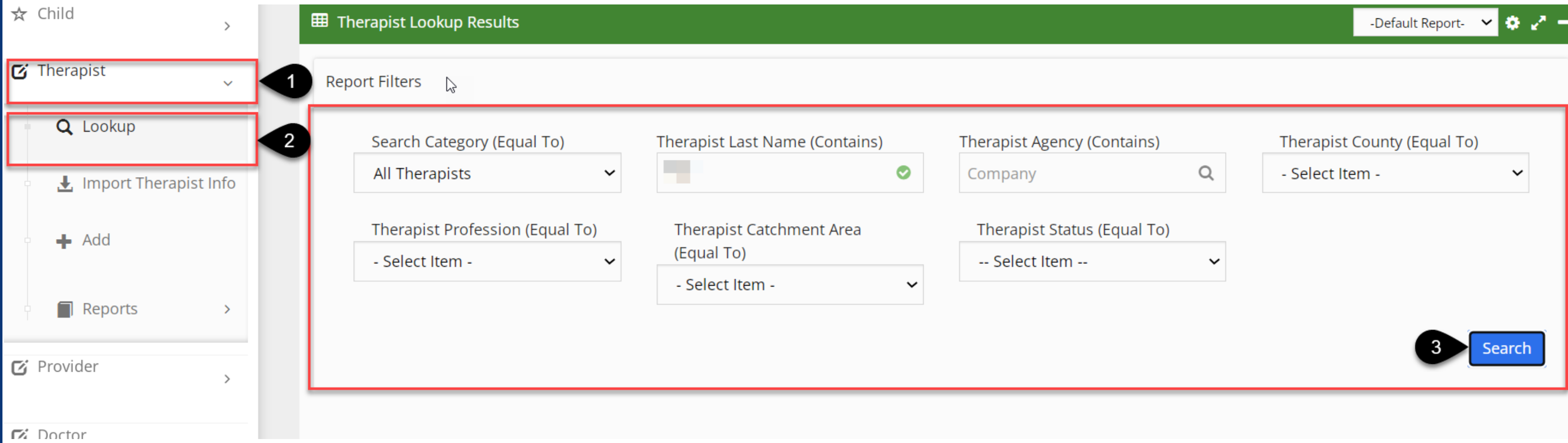
- Sell-Complete as an **approved individual**

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 accesses 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.



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