

July 2020

EBP TRACKER USER MANUAL

Guide for EBP Tracker and Tracker Module in PIE

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OVERVIEW

EBP Tracker and PIE (Tracker Module) are online databases designed to collect process and outcome data for children's evidence-based behavioral health treatments. The Child Health and Development Institute (CHDI) contracted with Data Silo Solutions, LLC to develop EBP Tracker through funding from the Connecticut Department of Children and Families (DCF).

Currently, there four EBTs included in EBP Tracker: Attachment Regulation and Competency (ARC), Bounce Back, Child Parent Psychotherapy (CPP), and Cognitive Behavioral Intervention for Trauma in Schools (CBITS). **And there are two EBTs included in PIE (Tracker Module):** Modular Approach Therapy for Children with Anxiety, Depression, Trauma, or Conduct Problems (MATCH-ADTC) and Trauma-Focused Cognitive Behavioral Therapy (TF-CBT). Each model has its own components and protocols, and PIE and EBP Tracker has modules customized to each of them. The primary purpose of these data systems is to collect the model-required assessment information at specified intervals, calculate scores, and report out on the assessment information.

MANAGING YOUR CASES

After logging in to EBP Tracker, you will notice the purple and red “Actions” menu at the left of your screen. You will use the following actions when managing your cases:

The “[Attention Items](#)” action will take you to a screen that shows the status of case documentation that needs to be added or finished for clients. A Clinician will only see documentation that must be completed for his/her assigned clients. A Coordinator or Data Entry Specialist will see documentation that requires attention for ALL clinicians on their EBP Team. The “Search” button allows you to filter results by clinician or document type (face sheet, monthly session, assessment, etc.). Clicking on the specific attention item for a child will open the documentation form.

The “[My Open Cases](#)” action will show each Clinician all of their open cases. A Coordinator that is also a Clinician providing direct services to clients will see only their own caseload in “My Open Cases.” By clicking on “View” next to a child’s ID, a Clinician will be taken to the “Child Home Page.”

The “[Child Home Page](#)” shows the status of all required documentation for a specific child and allows the Clinician, Coordinator or Data Entry Specialist to add or finish documentation.

The “[Add/Reopen Child](#)” action checks if a client already exists in the system and then allows you to add or reopen a new episode of care for a client. If the client had a previous episode at your organization, you will see him/her in the search result for any EBP received, even if you did not provide that EBP service yourself. For example, you may be a TF-CBT Clinician and the client search shows a previous MATCH episode for the client at your agency. You will not be able to edit the MATCH documentation, but you will be able to add a new TF-CBT episode for the child. This is to ensure that the same client does not get assigned two different IDs within EBP Tracker; all his/her EBP services should be recorded under his/her own unique ID.

The “[Find/Edit Child](#)” (EBPTracker) or “[Search Client](#)” (PIE) action is used by Coordinators and Data Entry Specialists to look up an open or closed case. Although Clinicians generally look up their cases by clicking on “My Open Cases,” they will need to use Find/Edit Child/Search Client if they wish to view or edit documentation for a closed case. The “Find/Edit Child” / “Search Client” action allows you to filter search results by clinician, treatment model, or by case status (open or closed).

The “[Monthly Session](#)” action allows you to view due, incomplete and completed Monthly Session forms for a specific month, specific clinician, or for all clinicians and all months. Clicking on the action “add” or “Finish” next to the monthly session form selected will open and allow you to complete the form.

The “[My CBITS Groups](#)” or “[My Bounce Back Groups](#)” action lists CBITS or Bounce Back Groups in EBP Tracker. Clinicians will see only their own groups, while Coordinators and Data Entry Specialists will see all CBITS or Bounce Back Groups for their provider organization. You can filter results by clinician (if you are a Coordinator or Data Entry Specialist), or by Group Status (Open, Completed or Cancelled). By clicking on the “Add New Group” button, you can name a new CBITS or Bounce Back group and “Save” details, and then click on “Edit List” to add client group members. Clicking on “Manage Group” will allow you to view the client group membership and add or unenroll clients as necessary. Clicking on “View” brings you to the Group Session form which allows you to record group meeting dates and components used.

The “[CBITS Session](#)” or “[Bounce Back Session](#)” on the Child Actions Menu are the forms where clinicians record the date and activities used for a child or caregiver session, and complete the ratings for each session objective.

ACCESSING EBP TRACKER AND MANAGING YOUR ACCOUNT

User Enrollment in EBPTacker

Complete the User Enrollment form given to you by your EBP Coordinator or CHDI. Forward the completed form to CHDI (EBPTrackerHelpDesk@chdi.org).

Logging in to EBPTacker

For your first log in to EBP Tracker, you will receive an email from CHDI with your user name and temporary password. The temporary password will expire in 3 days, so please log in as soon as possible. If your temporary password has already expired, contact CHDI for assistance.

! TIP: Bookmark the page and name it “EBP Tracker.” You can then return to your Bookmarks to readily access the page whenever you need it.

The screenshot shows the login interface for EBP Tracker. At the top left is the CHDI logo with the text 'Child Health and Development Institute of Connecticut, Inc.'. To the right of the logo, the text 'EBP TRACKER' is displayed in large, bold, black letters. Below this, a purple horizontal bar contains the text 'Login Page'. The main content area is white and contains the following elements: 'User Name:' followed by a text input field; 'Password:' followed by a text input field; a purple 'Login' button; and a link at the bottom that reads 'I Forgot My Password (Click This Link to Reset and Login)'.

Go to <https://ebp.dcf.ct.gov/Login.aspx>

Enter your user name and password.

Creating a New Password, Security Question and Answer –EBPTracker Only

For a new User, the “Account Settings” box will pop up after entering your user name and temporary password.

The screenshot shows the EBP Tracker web interface. At the top left is the CHDI logo (Child Health and Development Institute of Connecticut, Inc.). To the right of the logo is the text 'EBP TRACKER'. In the top right corner, it says 'Welcome Training user'. Below this is a purple bar with the text 'Account Settings'. Underneath is another purple bar with 'User Password Change'. There are three input fields: 'Old Password:', 'New Password:', and 'Confirm New Password:'. Below that is a purple bar with 'Account Information'. There are two fields: 'Security Question:' with a dropdown menu showing 'Name of first pet?' and 'Security Answer:' with a text input field containing 'spot'. At the bottom are three buttons: 'Back to Home Page', 'Cancel', and 'Save'.

In the “Old Password” box, copy the temporary password from the CHDI email you received and paste it into the “Old Password” box.

In the “New Password” and “Confirm New Password” boxes, type a new password of your choosing. Passwords must be at least eight characters including one capital letter, one number and one symbol. Your new password must not be a password that you used within the last 365 days.

A Security Question and Security Answer are required for your EBP Tracker account as a means of verifying your identity in the event that you forget your password or get locked out of your account.

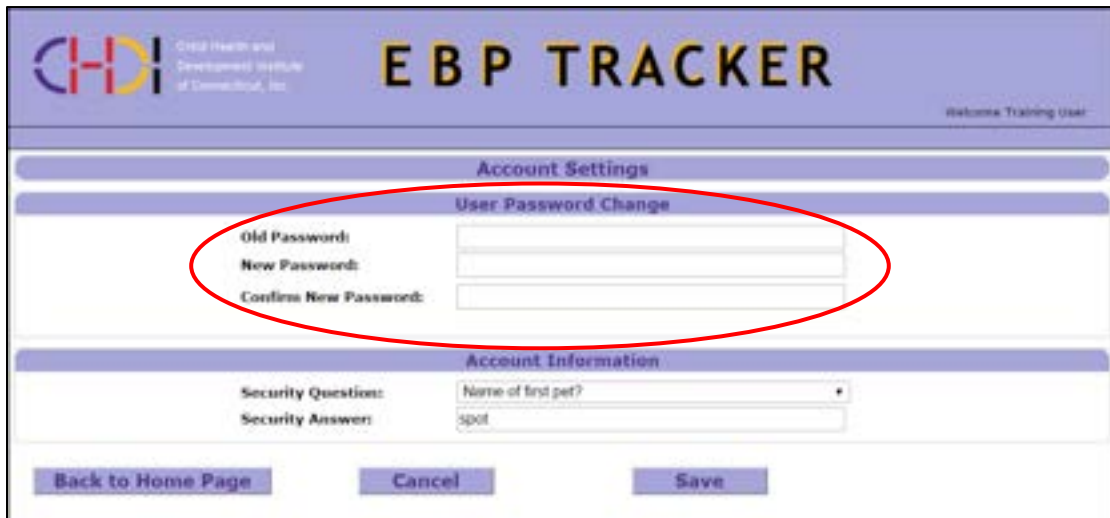
Select a Security Question from the dropdown menu.

Type in your security answer for the question you selected.

Updating Password or Security Question and Answer – EBPTracker Only

To change your password:

On the “Actions” menu located at the left of the screen, select “Account Settings.”



Type your current password in the “Old Password” box.

In the “New Password” and “Confirm New Password” boxes, type a new password of your choosing. Passwords must be at least eight characters including one capital letter, one number and one symbol. Your new password must not be a password that you used within the last 365 days.

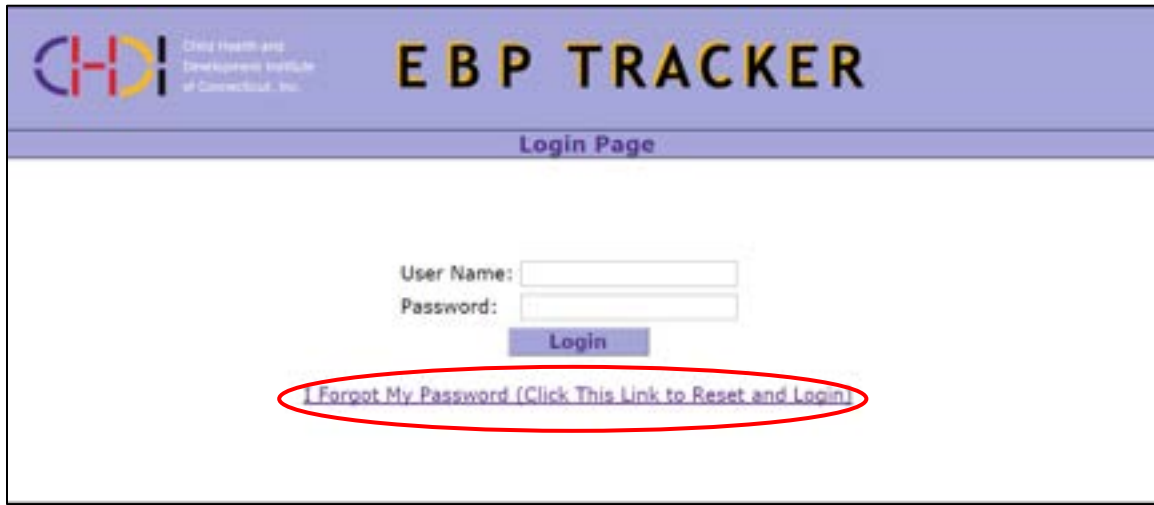
To change your Security Question or Security Answer:

On the “Actions” menu located at the left of the screen, select “Account Settings.”

Select a Security Question from the dropdown menu. Type in a new security answer for the question you selected.

Forgotten Password and Getting Locked Out – EBPTracker Only

If you enter the wrong user name or password, the message “Sorry, your login information was not correct” will appear in the Log In box. If you have forgotten your password or have gotten ‘locked out’ after three attempts to log in with a wrong password, follow these steps:



Click on the link “[I Forgot My Password \(Click This Link to Reset and Login\).](#)”

A “User Password Reset Request” box will pop up. Enter your user name and the email address associated with your EBP Tracker account.



User name is assigned by CHDI. If you have forgotten your user name, or if you have recently changed your name or prefer a different user name than the one assigned, contact CHDI for assistance.

! TIP: If you enter an email that is not registered in EBP Tracker, you will not receive the email password reset. Enter the email address associated with your EBP Tracker account (your work email that you provided on your User Enrollment form).

If the system finds your user name and email successfully, you will receive a reset email. The subject of the email will be “EBP Tracker Password Reset Request.” In the email, click on the “Password Reset” link as soon as possible, since it will expire.

Once you have completed the information, click on “Save.” This will return you to the log in page. Log in using your user name and newly created password.

! TIP: If you do not receive the reset email within a few minutes, look in your email Spam or Junk Email folder. Your email system may have forwarded the reset email there automatically. If you do not receive a reset email and the email is not in your ‘Junk Email’ or ‘Spam’ folder, contact CHDI for assistance.

Logging Out of EBPTracker

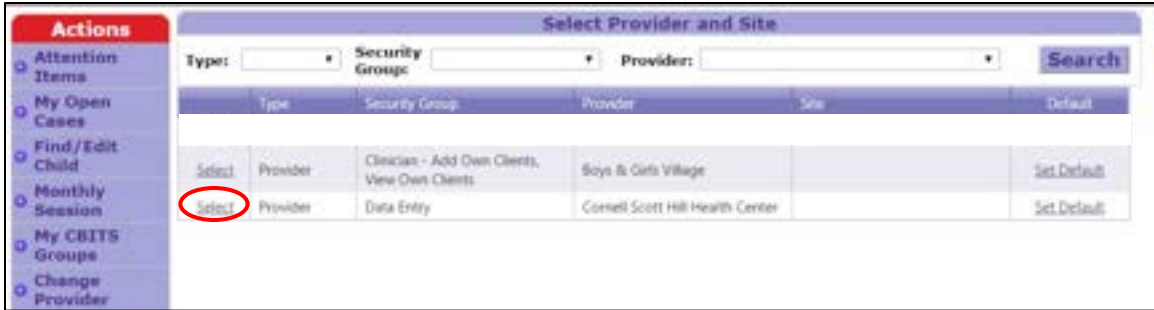
To log out of EBP Tracker, click on “Logout” on the “Actions” menu. When you are asked if you are sure, click on “OK.”

Selecting Your Provider at Log In – EBPTracker Only

For Users who provide EBPs at more than one provider organization, log in and click on the “Change Provider” tab on the “Actions” menu.

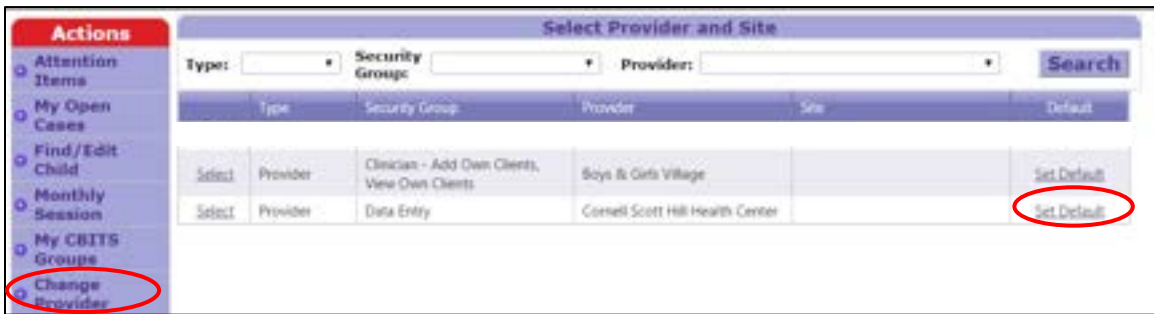


On the “Select Provider” form, click on the “Select” link to go to the Provider that you wish to access (your choices are limited to those security groups and EBP treatment models for which you have been granted access rights).



Setting Your Default Provider – EBPTTracker Only

When you log in to EBP Tracker, the first screen that you see will be the “Attention Items” page for your default provider. Users who work at multiple providers and have not chosen a default provider will be brought to the “Change Provider” page each time they login. If you only work at one provider, or if you frequent one provider the majority of the time, click on “Set Default” next to your preferred provider.



Security Groups

Based on your EBP Treatment Model (TF-CBT, MATCH-ADTC, CBITS or Bounce Back) and your EBP Team role(s), you will be assigned the highest user Security Group access rights to accomplish the tasks required of you in EBP Tracker. Security Group selections include:

EBP Team Member Role	Security Group
Clinician or Clinician Intern	Data entry privileges for his/her own clients at this provider
Clinician and Coordinator	Data entry for his/her own cases and for other clinicians' cases at this provider
Data Entry Specialist	Data entry for all clinicians at this provider
Senior Leader, Supervisor, or Executive	View all clients at this provider but no data entry privileges
Reports Only	Views provider-level, aggregate reports only; will not be allowed to view client information

! TIP: You must have an assigned role (Coordinator, Clinician, etc.) for a specific EBP Model (TF-CBT, MATCH-ADTC, CBITS or Bounce Back) to view or enter data for that model.

Team Members with Multiple Roles and Security Groups

Upon logging in you will be brought directly to your default profile (role such as clinician at your preferred provider), if you have chosen one. If you do not have a default profile, then you will be brought directly to “Change Provider” upon log in. Here, you must select which assigned role you wish to use (see the “Security Group” column). Your ability to view or edit client data depends on which role you choose, so make sure you have the correct role chosen for the task at hand.

! TIP: If you have selected a Senior Leader or Supervisor Security Group, you will not be allowed to add client data.

Getting a PIE Account

Using Internet Explorer navigate to the PIE website (<https://pie.dcf.ct.gov/Login.aspx>) and select “Request an Account”. Complete the Request Account fields and alert the Authorized Lead at your agency that you have applied for access. **Only the authorized lead at your agency may grant PIE access.** The Authorized Lead is the person at your agency responsible for managing your agency’s OPCC data and users in the PIE system.

Login

Welcome to PIE, Provider Information Exchange, a secure web application for collecting data.

User Name:

Password:

By checking this box, I confirm that I am an authorized and registered user of PIE and will not use this system, or the data contained in it, for any use other than its intended business purpose. Any use of this system for personal reasons are strictly prohibited by state and federal law.

Login

[Forgot Password](#)
[Forgot Username](#)
[Need Help Logging In](#)
[Request an Account](#)

Getting EBP Access in PIE

Once a user has been given access to the correct projects in PIE they may complete an EBP Training Attendance Form which should be submitted to EBPTrackerHelpdesk@chdi.org.

Managing Your PIE Account

PIE accounts are managed by the agency-designated Authorized Lead. PIE accounts are automatically suspended after six months of inactivity and require the authorized lead to re-activate.

If you forget your username or password select “Forgot Password” or “Forgot Username” on the PIE log in page - <https://pie.dcf.ct.gov/login.aspx>

Frequently Asked Questions can be addressed through the Training Info page - <https://pie.dcf.ct.gov/Training.aspx>

NAVIGATING EBP TRACKER

Back Arrow

After logging in to EBP Tracker, the first screen seen by most users will be the “Attention Items” screen. (Users who work at more than one provider or site may have to select a provider or site on their first screen).



The “Actions” menu located at the left of the screen contains a list of links. By clicking on a text link in the Actions menu, such as “My Open Cases,” the selected page will open.

If you click on your browser’s back arrow while in EBP Tracker, you may receive the following “Confirm Form Resubmission” message:



If this occurs, you will have to log in to EBP Tracker again. Instead of the back arrow, use the “Back to Home Page” on the “Child Actions” menu.

Back to Home Page

After completing data entry in an intake face sheet or other form, go to the “Actions” or “Child Actions” menu and click on “Back to Home Page.” Use of your browser’s Back Arrow causes an error that will require you to log back in to EBP Tracker. By clicking on “Child Home Page,” you will be returned to the page where all required forms and assessments are displayed for this child.

The screenshot shows the 'Child Case' interface for a child named 'C, D 08/09/2004'. The left sidebar contains a menu with 'Child Actions' highlighted in red, and 'Child Home Page' also highlighted with a red circle. The main content area is titled 'MATCH Primary Problem Area' and includes an 'Update' button. Below this is a table for 'Top Problems Assessment (TPA)' with columns for Rank, Child Top Problem, and Caregiver Top Problem. The table contains three rows of test data. Below the TPA table is a section for 'Intake, Periodic, Discharge Checks' with a table listing various checks, their status, and next scheduled dates. The table has columns for Overall Status, Status, Action, Type, Date, Shortcut, and Next Scheduled Date. The 'Child Home Page' option in the sidebar is circled in red.


Cancel


Click on the “Cancel” button to exit a form without saving the data you have entered. You may also click on any link on the Actions menu, or simply close the form without saving.

Required Fields

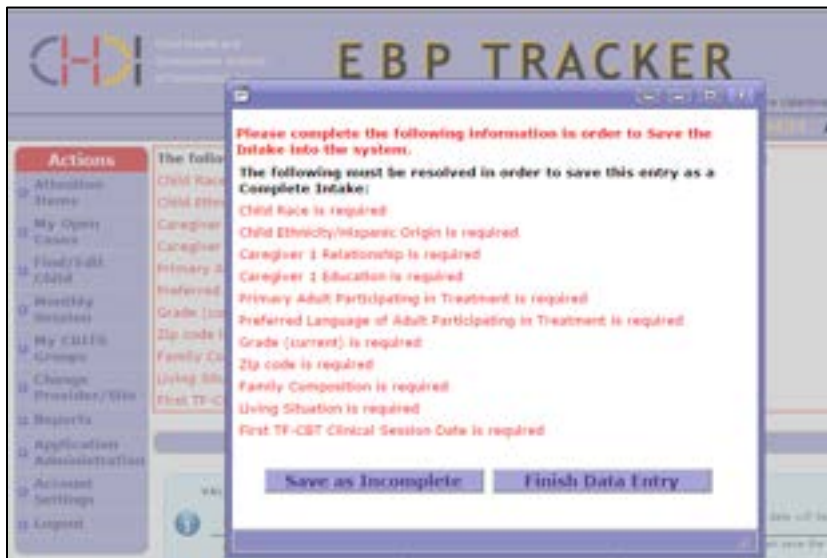
When entering data into forms, required data fields are indicated by an exclamation point or an asterisk.

The screenshot shows the 'Direct Service Provider User Information' form. The 'Child Information' section contains several fields with exclamation points and asterisks indicating required data. The fields are: First Initial of Child's First Name (A), Date of Birth (05/01/2010), Sex (Male), Race (American Indian or Alaska), City/Town (City Test), State (AZ), First Initial of Child's Last Name (B), Age (4 years), Grade (current) (Kindergarten), Hispanic Origin (Yes, of Hispanic/Latino Des), and Zip code (01234). The 'Child Actions' menu is visible on the left, with 'Child Home Page' highlighted.

! The exclamation point means that the item is one of the minimum fields that must be filled out to save the record. Data in the form CAN NOT BE SAVED unless these items are completed. All exclamation point items must be filled in for the form's Status to read as completed  in the "Child Home Page," and for the form to be removed from the "Attention Items" list. "Date of Birth" is an example of an exclamation point field in the screenshot above.

* The asterisk means that the item is required but the form CAN BE SAVED as incomplete. All asterisk items must be filled in for the form's "Status" to read as completed  in the "Child Home Page," and for the form to be removed from the "Attention Items" list. "Zip Code" is an example of an asterisk item in the screenshot above.

If you click on "Save" before filling in any of the required exclamation point or asterisk items, a message box will appear that lists all of the required items that have not been completed.



Save

Always click on the "Save" button after adding or editing data, since there is no auto-save function in EBP Tracker. If you close a form without clicking on the "Save" button, the data you entered will be lost. In order to be able to save data, all of the exclamation points (minimum required data) on the form must be completed. If you clicked on "Save" and have missed any required exclamation point items, they will be listed for you as in the message shown above.

In the example below, the user tried to save but was not allowed to do so since “Child DOB” is an exclamation point item, and all exclamation point items must be completed before saving.




In the next example, the user tried to save but was warned that there was an asterisk item that had not been filled in, since completion of asterisk items is required for a complete intake face sheet. Since all exclamation points have been completed, however, the User is provided with two options for saving data, “Save as Incomplete” or “Finish Data Entry.”



Save As Incomplete

Clicking on ‘Save as Incomplete’ allows the user to save a form and return later to finish it. This button may be used only when all exclamation point items have been completed. Some asterisk items may not be filled in, but the user intends on entering these items at a later time. The form will close and the focus will return to the “Child Home Page.” The form will be saved but its status will appear as Incomplete 🚩 on the “Child Home Page” and remain in “Attention Items.”

Finish Data Entry

If the user has entered all exclamation point items and as many asterisk items that will be obtained for a form, clicking on the “Finish Data Entry” button is a method of checking that all requirements (exclamation points and asterisk items) have been entered. If all exclamation points have been entered, the form will be saved but the focus will remain on the form screen. This allows the user to finish the missed items in the form. The user then clicks on “Save” again and if all items have been completed, the focus will return to the “Child Home Page.” The form’s status will appear as “Completed”  and the form will no longer appear on the “Attention Items” list. If the user is waiting on additional data to add to the form at a later date, they should click instead on “Save as Incomplete.”

Status And Action


On the screens used to enter and manage child data, there are “Status” and “Action” columns listing each form or assessment that is required for the child’s specific evidenced based practice.







Intake, Periodic, Discharge Checks							
Overall Status	Status	Action	Type	Date	Shortcut	Next Scheduled Date	
			Periodic			06/15/2015	
		Finish Periodic	Periodic	01/15/2015	Assessment		
		View Periodic	Periodic	10/15/2014	Assessment		
		View Intake	Intake	07/04/2014	Assessment		

Monthly Session							
Status	Action	Clinician	Period	Due Date	Complete Date	Number Of Visits	Number Of No Shows
	Edit	Monna Mouse	January 2015	02/09/2015	06/04/2015	3	0
	Edit	Monna Mouse	December 2014	01/05/2015	06/04/2015	4	0
	Edit	Monna Mouse	November 2014	12/09/2014	06/04/2015	4	0
	Edit	Monna Mouse	October 2014	11/09/2014	06/04/2015	3	1

Assessment Details						
Periodic on 01/15/2015						
Status	Action	Assessment	Assessment Date	Custom Assessment	By Assessment Reason	By Assessment Reason Date
	Add	Child PTSD Symptom Scale (PTSD SI) - CHILD				
	Edit	Short Mood And Feelings Questionnaire - CHILD				

The “Child Home Page” also shows an additional “Overall Status” column that determines the status for a set of required forms for each assessment period (e.g., intake, periodic, discharge). ALL forms and assessments must be complete for a “Completed”  to show in the Overall Status column.

The icons below are used to assist the clinician in monitoring status, and provide an “Action” link to take you to the form to “Add,” “Finish” or “View.”

Icon	“Status” on Face Sheets, Monthly Session forms and Monthly Assessments	“Overall Status” on “Child Home Page”
 Completed	The form has been completed.	ALL forms and assessments for this time period (e.g., at the intake assessment, periodic or discharge assessment period) have been completed.
 Due	The form is coming due within 30 days, or is already overdue. The Due Date will be provided.	At least one form or assessment for this snapshot time period has not been completed.
 Incomplete	The form is incomplete because all required fields (exclamation points and asterisks) have not been completed.	At least one form or assessment for the time period was started but remains incomplete.
 Notice	Calls your attention to important information.	Examples include: Data entry forms: “Hover your mouse over the question label for a more detailed definition of the question.” “Attention Items” page: “Case transfer from Clinician ‘Minnie Mouse’ to Clinician ‘Donald Duck’.” “Monthly Session” form: “Please note: if the number of Visits is Zero, then some questions are not applicable, such as the Percentage of Time Spent, the Components Used, and the Session Structure.”

MY OPEN CASES AND THE CHILD HOME PAGE

My Open Cases

After logging in to EBP Tracker, click on “My Open Cases” in the “Actions” menu at the left. When a clinician clicks on “My Open Cases,” s/he will view a list of his/her assigned child cases who are currently receiving services (open). Coordinators or Data Entry Specialists will view a list of all open cases for all clinicians at their provider.

Child Health and Development Institute of Connecticut, Inc. **EBP TRACKER** Welcome Laurie Valentine

My Open Cases ✖ 1 ⚠ 0 ✔ 0 Total: 1

Status	Action	Agency Client ID	PSDCRS Client ID	DOR	Sex	First Initial	Last Initial	Date of Intake	Treatment Model
✖	View	88888888		01/01/2015	Male	D	D	01/20/2015	TF-CBT

The Child Home Page

Clicking on “View” under “My Open Cases” will bring you to the “Child Home Page,” where you can add or finish any necessary forms or assessments by clicking on the hyperlink in the “Action” column.

Child Health and Development Institute of Connecticut, Inc. **EBP TRACKER** Welcome Laurie Valentine

Child Case 88888888 D, D 01/01/2015

Intake, Periodic, Discharge Checks

Overall Status	Status	Action	Type	Date	Shortcut	Next Scheduled Date
✖	✖		Periodic			10/17/2015
✖	✖		Periodic			07/19/2015
✖	✖	Add Periodic	Periodic			04/20/2015
✖	✔	View Intake	Intake	01/20/2015	Assessment	

! TIP: If you would like to view closed cases, go to “Find/Edit Child” (EBPTracker) or “Search Client” (PIE) on the “Actions” menu. Search results can be filtered by client, clinician, provider, site, treatment model or by case status (open or closed).

Return to Child Home Page

After you have completed entering data in a facesheet, click on the “Save” button at the bottom of your screen. Saving the form will return you to the Child’s Home Page.

Psychiatric Medication

1) Psychiatric Medication:	None	1) Dosage:	gm	daily
2) Psychiatric Medication:		2) Dosage:	gm	daily
3) Psychiatric Medication:		3) Dosage:	gm	daily

Save

If you were just viewing information and have not modified data that needs to be saved, you may click on “Child Home Page” located on the Child Actions menu at the left of your screen without saving.

Child: Periodic D, D 01/01/2015

Client Face Sheet: Periodic

VALIDATION REQUIREMENTS AND SYMBOLS EXPLAINED

- This symbol means the field is one of the minimum fields that must be filled out to save the record. No data will be saved unless these fields are completed.
- This symbol means the field is a required field in order to save the record as completed. Although you can save the record, the system does not consider the record to be completed unless ALL of these fields are completed.

Hover your mouse over the question label for a more detailed definition of the question.

Direct Service Provider User Information

Clinician: Laurie Valentine
Provider Name: Boys & Girls Village Site Name: Main Office-Hillford Residential

Child Information

First Initial of Child's First Name: D First Initial of Child's Last Name: D
Date of Birth: 01/01/2005 Age:
Sex: Male Grade (current):
Race: Other Hispanic Origin: No, Not of Hispanic, Latin
City/town: State: Zip code:

Child Identification Codes

Please enter client identifiers below. Only ONE of them is required.

Agency Assigned Client ID

SEARCHING FOR A CHILD

Find/Edit a Child - EBP Tracker Only

To search for a child, click on “Find/Edit Child” on the “Actions” menu at the left of your screen. This will search for all children entered into the system, whether their case is currently open or closed.

You may enter as much or as little information as you wish in order to limit the search results. For example, you may put in the client’s ID the child’s initials, child’s date of birth, etc.

You may also search for all cases by clinician, treatment model, or case status (open or closed).

If you do not enter *any* information and just click on the “Search” button, the search will produce a list of all clients at the site you are currently accessing.

The screenshot shows the 'Find Child' search interface. On the left is a vertical 'Actions' menu with options: Attention Items, My Open Cases, Find/Edit Child (highlighted), Monthly Session, My CBITS Groups, Change Provider/Site, Reports, Application Administration, Account Settings, and Logout. The main content area is titled 'Find Child' and contains the following text: 'To search for a child, please enter information into one or more of the fields, and click on the Search button. Children with information that matches ALL of the information entered will appear in the results table. Examples: A search on the last initial "J" will return all children with the last initial of "J". A search on the first initial "R" and the last initial "J" will return children whose first initial is "R" and whose last initial is "J".' Below this text are several input fields: 'First Initial of Child's First Name', 'Child DOB', 'Agency Assigned Client ID Number (not PHI)', 'Provider', 'Site', 'Clinician', and 'Case Status'. To the right are 'First Initial of Child's Last Name', 'Child Sex', and 'PSDCRS Client ID Number'. At the bottom, there are checkboxes for 'Treatment Model' with options: TF-CBT, MATCH-AOTC, and CBITS. A 'Search' button is located at the bottom center.

Search Clients – PIE Only



Complete either the Client Filters or Episode Filters to find your clients.

IMPORTANT: Only the filters in the red square apply to the EBT episode. All other filters apply to the outpatient episode only.

Possible Child Matches Found

If the Search returns one or more clients, confirm that “Agency Client ID,” “DOB” (date of birth), “Sex,” and “Treatment Model” are correct; this is the information that makes a child unique in EBP Tracker. If all the information is correct, click on “View” next to the child’s initials. This will open the existing child’s Home Page to allow you to edit his/her specific information.

If the Search result shows the client status as “closed,” this means that the child had a previous episode of care with your provider. If you wish to reopen a new episode for the child, go to “Add/Reopen a Case” on the “Actions” menu.

No Child Matches Found

If you know a child has received services at your provider but s/he is not showing up in your search result, it may be that you are not accessing the correct provider. If you are a Coordinator or Data Entry Specialist, or a Clinician who works at more than one provider, you will have to go to “Change Provider” on the “Actions” menu and select a different provider. Then return to “Find/Edit Child” (EBPTracker) or “Search Client” (PIE) on the “Actions” menu to search for the client at this provider.

What Information Makes a Child Unique

In EBP Tracker:

It is very important that providers are able to distinctly identify each individual child. Within one organization, it is possible that clients may have the same first and last names. How do providers distinguish between individuals who have the same names? Providers collect date of birth and assign a unique identification number to clients at intake.

Only a limited data set of information is collected in EBP Tracker. Only the first initial of the child's first and last names is collected (no full names). EBP Tracker uses the following to create a unique EBP Tracker Child ID number:

- The unique number assigned to the child that is entered by the provider (or PSDCRS ID number as an alternative if the provider chooses to use this);
- The first initial of the child's first and last names; and
- The child's date of birth.

EBP Tracker also tracks provider readmissions for the same child.

In PIE:

Potential Matches Identified

Client Information Entered

Name: ron weasley

DOB: 04/13/2004

Sex: Male

Click on "Select" next to a matching entry (rows with same Provider Client ID represent same client record in different projects; click Select of either one to match). If no match to your client, click on "The client is not listed above". Click Cancel Matching to return to the client info you entered and make changes.

Match %	PSDCRS ID	First Name	Middle Name	Last Name	DOB	Sex	# Episodes
100%	PSDCRS1PSQ5P	Ron		Weasley	04/13/2004	Male	1

After adding a referral and beginning the new intake, the system will check for matches with existing cases already entered into the system. This feature helps to prevent re-adding the same case more than once. Factors that make a child unique in PIE include: PSDRCRS ID, Name, DOB, and Sex.

! TIP: Because medical record numbers are not allowed as part of a Limited Data Set and are Protected Health Information under HIPAA law, providers should assign a unique number to each child that is NOT the medical record number used at the provider. Only the provider should be able to link the child's number in EBP Tracker to the provider's medical record number for the child at the organization. Please consult with your HIPAA Privacy/Security Officer.

ADDING A NEW CASE OR REOPENING A CASE

Adding a New Case – EBPTracker Only

On the left hand side in the “Actions” menu select “Add/Reopen Child.”

You must first search for the child to make sure they are not already in the system using their First and Last initial, date of birth, gender and one ID number.

The screenshot shows a web form titled "Add New Child". At the top, it says "To add a new child into the database, please enter the following information and click **Search**:" followed by a bulleted list: Child First Initial, Child Last Initial, Child Date of Birth, Child Sex, and Treatment Model. Below this is a paragraph explaining that the system will perform a search to see if the child exists. The form contains several input fields: "First Initial of Child's First Name:" (text box), "First Initial of Child's Last Name:" (text box), "Child DOB:" (date picker), "Child Sex:" (dropdown menu), "Agency Assigned Client ID Number (not PHI):" (text box), and "PSDCRS Client ID Number:" (text box). Under "Treatment Model:", there are three radio buttons: "TF-CBT", "MATCH-ADTC", and "CBITS". A blue "Search" button is centered at the bottom of the form.

If they **ARE NOT** found in the system you will see the following message:

“RESULT: The system found NO matches for the child you are trying to add.”

If you are sure that you entered their information correctly, and want to proceed with adding the child to the system, select:

- I want to add the child that I entered as a new child and create an intake

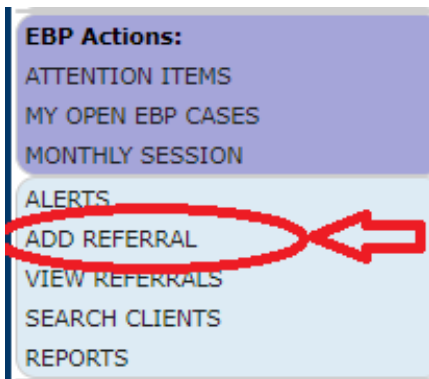
Click on the next button. This will take you to the intake face sheet to enter data for the new client. For more information on completing the intake face sheet, please go to the “Completing Snapshot Face Sheets” section of this manual.

Creating EBP Episodes in PIE Only

*** TIP** - Clinicians cannot create EBP episodes in PIE. In order for a clinician to see/edit data on a child receiving an EBP they need to be assigned the EBP episode by the coordinator, supervisor, or data entry staff person first. This quick guide provides a brief overview on how to create an outpatient episode (with minimum fields), create an EBP episode within that outpatient episode, and assign the EBP episode to a clinician. If the outpatient episode already exists, you can skip to “Creating the EBP Episode.”

Step 1: Creating the outpatient episode

After logging into PIE, select **Add Referral** in the left hand navigation. (Note: If the client already exists in PIE, you can skip the referral steps and select **Search Clients** instead.) You will now be directed to a page where you must enter the following fields before selecting **Save and Enter Client/Intake**.



- First & Last name
- Date of Birth
- Sex
- Zip Code
- Date of referral
- Referral source

(IMPORTANT: Make sure all the fields above are entered into the form before selecting the Save and Enter Client/Intake button. Otherwise, you will not be able to see that button and will instead be taken to the referrals page where you will need to select the referral you just entered).

After entering this information, the system will ask you to confirm your PIE project (select **OK**), and then you will be brought to the Add a Client Screen. Confirm the client identifying information, then select **Check for Match**. This will either generate:

- 1) A list of potential matching clients - If there are matches, check the list to make sure the client you are entering doesn't already exist in PIE under another program/agency. If you see the client in the list, select that client, select **Client Info** in the left hand navigation, and skip to the “Creating the EBP Episode” instructions in this packet. Otherwise, select **This client is not listed above**.
- 2) A pop-up that says there were no matches - Select **OK**. You will now be redirected to the Add a Client page. At the bottom of the page under ID Codes, the Provider's Unique Client ID is required.

ID Codes	
Provider's Case ID:	<input type="text"/>
Child Medicaid Number:	<input type="text"/>
Provider's Unique Client ID:	<input type="text"/>

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NOTE: The EBP intake form pulls Hispanic, Latino, or Spanish origin and Race from the Client Information section on this page. After entering the ID (and Hispanic, Latino, or Spanish origin and Race if you opt to do so), select **Save**.

You will be directed to a page with client/episode information and date information. Under Select date, the Episode Start Date and Is this case evaluation only fields are required. Evaluation only outpatient episodes cannot have EBP episodes, so select “no” for the Is this case evaluation only field.

Select Date

What is the date of referral 09/11/2019 12 :00 AM ET

Referral Source Self/Family

Episode Start Date (first face-to-face contact) MM/DD/YYYY 12 :00 AM ET

Is this case evaluation only Yes No

Save

Save Cancel

This will start the process for entering the outpatient episode intake information and Ohios. These fields are not required to save the outpatient episode. If opting to skip all outpatient fields, select **Save/Summary** at the bottom of the screen.

Previous/Next/Save

Next

Episode Start Date --> Basic Referral --> Address --> Episode of Care --> Client Status --> Client History: School --> Client History: Legal --> Client History: Medical --> Client Presentation --> Assessments --> Ohio Scales Problem Severity :: Parent --> Ohio Scales Functioning :: Parent --> Ohio Scales :: Parent --> Ohio Scales Problem Severity :: Worker --> Ohio Scales Functioning :: Worker --> Ohio Scales Problem Severity :: Youth --> Ohio Scales Functioning :: Youth --> Ohio Scales :: Youth --> **Save/Summary**

Note: using links does not save the data on the page, you must click Save, Previous or Next to save the data.

If opting to skip outpatient episode intake information and Ohios, the system will generate a long list of warnings. You can skip any warnings in black text by selecting **Save**. If you have a warning in red text, it means that one of the required fields mentioned in the previous sections were not entered and you must enter those fields first before saving the episode.

(Note: To see full instructions on creating an outpatient episode, go to the **Training Info** page in PIE and select the **Add a Client & Matching** and **Intake- Entering and Editing** documentation under **Basic Data Entry Screens**.)

Step 2: Creating the EBP Episode

After the outpatient episode is created (from the steps above), you will be directed to a page with the client/episode Information. (Or, if the outpatient episode already exists, you can find this page by selecting **Search Clients** in the left-hand navigation and searching for the client).

When you scroll to the bottom of the page, you will see the EBP Treatment Model Cases section. This is where you will enter the minimum EBP episode fields: treatment model, clinician (generates from project staff list), and treatment model intake date. After entering this information, click on the **Add Treatment Model Case to Episode** button to save the episode. If the client has more than one outpatient episode, you can select the outpatient episode to add the EBP episode to in the Episode to Add to dropdown.

The screenshot displays two main sections: 'Episodes of Care' and 'EBP Treatment Model Cases'. The 'Episodes of Care' table has columns for Referral Date, Episode ID, Episode Start Date, Episode End Date, Intake Date Saved, Discharge Date Saved, Last Saved, and View/Edit/Add. The 'EBP Treatment Model Cases' table has columns for Case ID, Episode ID, Episode Start Date, Episode End Date, Tx Model Start Date, Tx Model End Date, Tx Model, Date Entered, and View/Edit. Below the table is a form titled 'Add New Treatment Model Case' with fields for Treatment Model (radio buttons for TF-CBT and MATCH-ADTC), Clinician (dropdown menu showing 'EBPT, Sarah'), Episode to Add to (dropdown menu showing '09/12/2019 12:00 AM to'), and Treatment Model Intake Date (text input). A red box surrounds the form, and a red arrow points to the 'Episode to Add to' dropdown.

Now that the outpatient and EBP episodes have been created, the clinician assigned to the EBP episode will now be able to see/edit information about the EBP episode including the EBP intake, assessments, monthly session, and discharge forms.

Current Client:
X, Andrew
Current Episode:
10/15/2019 -

- CLIENT INFO
- ASSESSMENT SCORES
- INTAKE
- ACTIVITY OCCURRENCE
- CURRENT VALUES**
- FISCAL YEAR END

NOTE: The EBP intake form pulls DCF Status and Living Situation from the Current Values page in the outpatient episode. In order to have the data populate on the EBP intake form you must fill out these outpatient fields. You can access the page by selecting **Current Values** in the left hand navigation, entering the Current Values date, DCF status, and Living situation of child on the page and selecting **Save/Summary** at the bottom of the screen.

Reopening a Case (New Treatment Episode)

If the case you searched for **IS FOUND** in the system you will see the following:

Add New Child

A search was performed on the information that was entered, and the results are listed below.
Either no matches were found on the child, and the child is new to the database, or possible matches to existing children are displayed in the grid below.
You can perform a new search at this time, or make a decision using the radio buttons below.

First Initial of Child's First Name: First Initial of Child's Last Name:

Child DOB: Child Sex:

Please enter client identifiers below. Only **ONE** of them is required.

Agency Assigned Client ID Number (not PHI): PSDCRS Client ID Number:

Treatment Model: TF-CBT MATCH-ADTC CBITS

Search

First Initial	Last Initial	DOB	Sex	Agency Client ID	PSDCRS Client ID	Clinician	Treatment Model	Status	Match Score
---------------	--------------	-----	-----	------------------	------------------	-----------	-----------------	--------	-------------

Any potential matches will appear here. You will select the case you would like by checking this box. (Or, if you don't select any box, you can add the child as a new case)

You will then select one of the following options:

This option will open up the child's home page to allow you to view/edit data.

- I want to view the existing child that I selected above.
(Child that I entered will not be added to database)
- I want to create a new Intake for the existing child that I selected above.
(This option will create a new treatment episode for the existing child).

COMPLETING FACE SHEETS

Client Face Sheet: Intake

Client Face Sheet: Intake

VALIDATION REQUIREMENTS AND SYMBOLS EXPLAINED

- This symbol means the field is one of the minimum fields that must be filled out to save the record. No data will be saved unless these fields are completed.
- This symbol means the field is a required field in order to save the record as completed. Although you can save the record, the system does not consider the record to be completed unless ALL of these fields are completed.

Hover your mouse over the question label for a more detailed definition of the question.

Direct Service Provider User Information

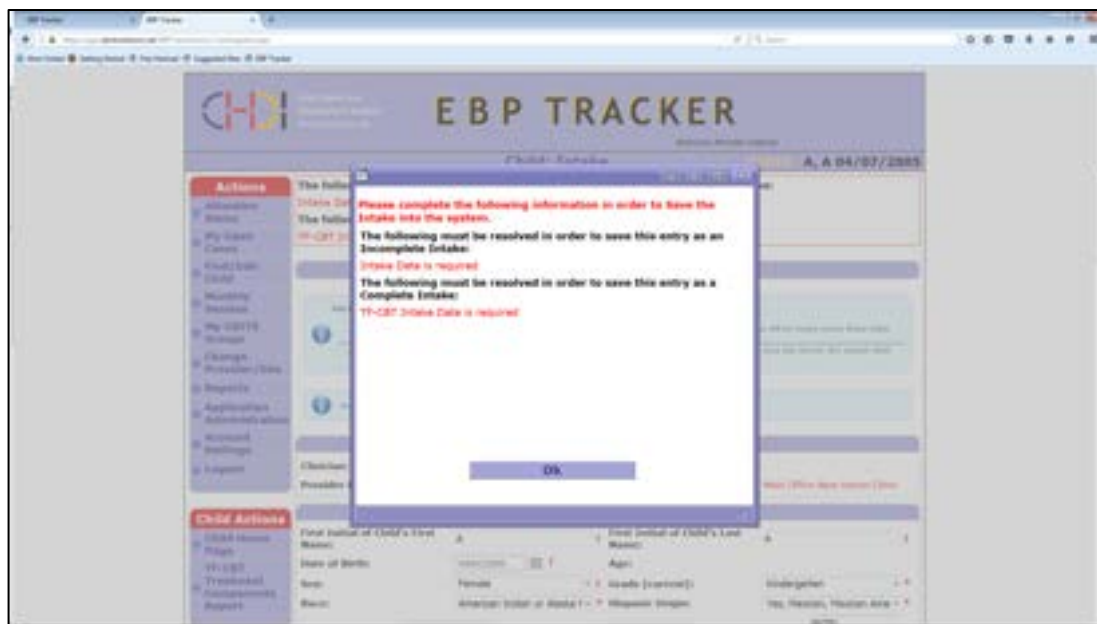
Clinician: Training12 Training12
Provider Name: Clifford Beers Clinic Site Name: Main Office-New Haven Ct

Child Information

First Initial of Child's First Name: A First Initial of Child's Last Name: A
Date of Birth: 04/07/2005 Age: 10 years
Sex: Female Grade (current): Kindergarten
Race: American Indian or Alaska Hispanic Origin: Yes, Mexican, Mexican Am
City/Town: Harwinton State: CT Zip code: 06791

When completing the intake face sheet all fields labeled with an asterisk (*) will need to be filled in before the form will be considered complete in EBP Tracker.

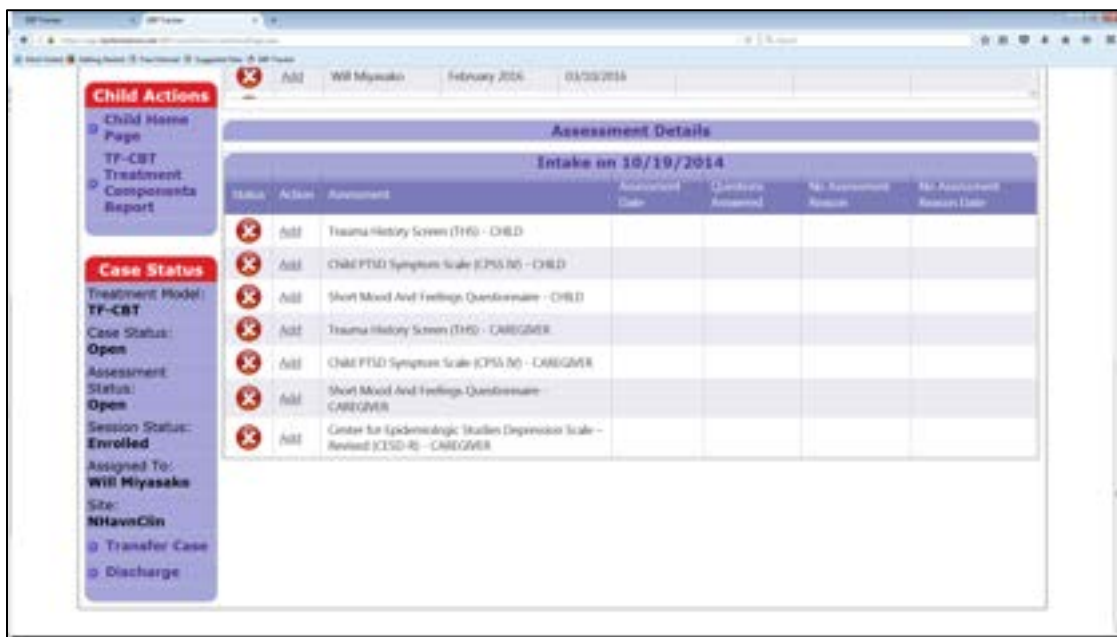
If you need to save the form and return to it later, you must fill out all fields with an exclamation point (!), or the form will not save.



TF-CBT Intake Date: This date refers to the day that the actual assessments were completed. Please make sure this date is correct as this is the date that the next assessment will be based on.

! TIP: You may enter an intake date which is prior to the date you are completing the form. Please be aware that monthly session forms will populate for all months that this case was open BEGINNING WITH the date that is entered in this field.

When you click on “Save” at the bottom of this form, you will automatically be directed to the child’s home page. You will then have a list of all measures that need to be completed.



You may receive the following error message when completing the Client Face Sheet: Intake (All EBPs). The error message below occurs when the first clinical session date that you entered occurred BEFORE the EBP Start Date.

To resolve this error, enter an EBP first clinical session date that occurs on the same day, or on a date that is later than the “TF-CBT Start Date.” Click on the “Save” button before exiting the form.

In EBPtracker Only- If a child had a treatment model episode in the past most demographic fields from the most recently completed face sheet will copy over.

See also [“Managing CBITS and Bounce Back Groups”](#)

Client Face Sheet: Periodic

After completing the intake face sheet the first periodic form will become available with the due date listed as 90 days after the treatment model intake date (see below)

Actions	Intake, Periodic, Discharge Checks						
	Overall Status	Status	Action	Type	Date	Shortcut	Next Scheduled Date
My Open Cases	✗	✗		Periodic			07/31/2015
Find/Edit Child	✗	✗		Periodic			05/02/2015
Monthly Session	✗	✗	Add Periodic	Periodic			02/01/2015
My CBITS Groups	✗	✓	View Intake	Intake	11/01/2014	Assessments	

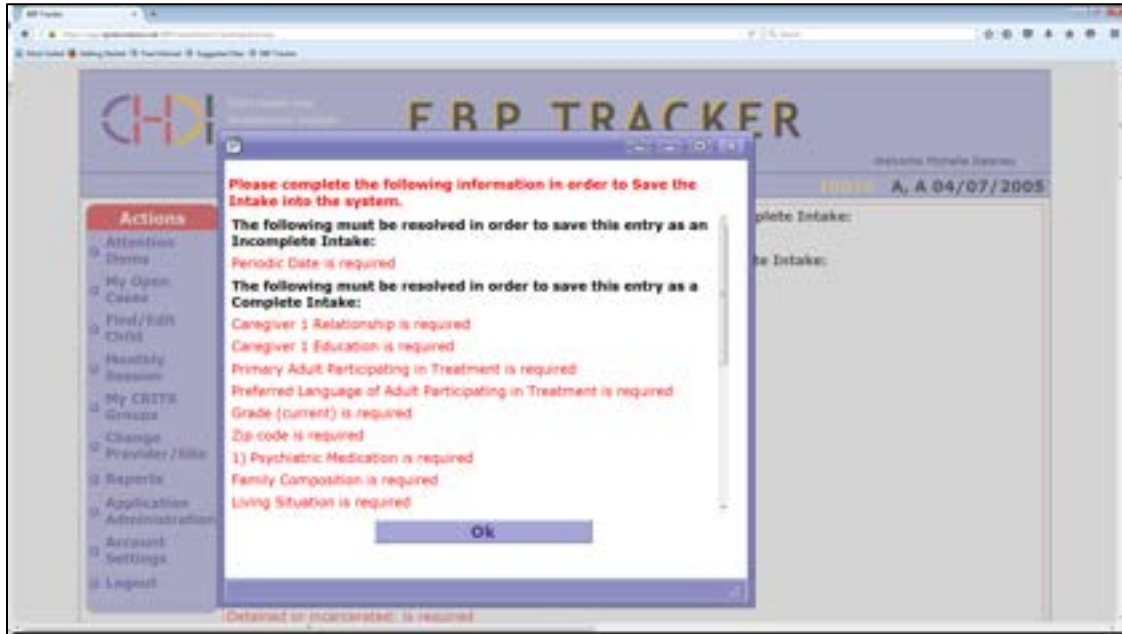
To enter a periodic click on “Add Periodic.” The Client Face Sheet Periodic will open to allow for data entry.

Most fields are prepopulated for you. The only one you will need to enter is the periodic date (the actual date periodic was done with child).

All fields with an asterisk (*) must be complete before the form will show as complete.

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All fields with an exclamation point (!) must be entered before the form can be saved. If you don't enter all the exclamation point (!) fields before exiting the page you will get a pop up message indicating which fields need to be completed before you can save.



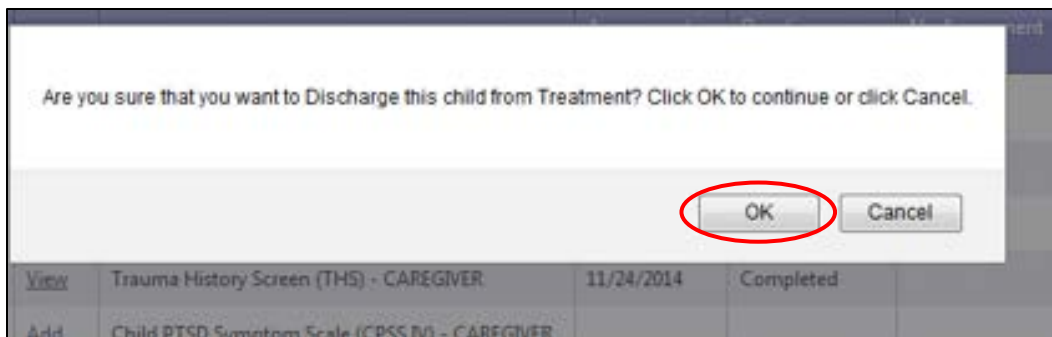
Client Face Sheet: Discharge

Select "Discharge" on the "Case Status" menu on the "Child Home Page."

The screenshot shows a software interface with a sidebar on the left and a main content area. The sidebar has several sections: 'Reports' (Application Administration, Account Settings, Logout), 'Child Actions' (Child Issue Page, Score Profile Report, TF-CBT Treatment Components Report), and 'Case Status' (Treatment Model: TF-CBT, Case Status: Open, Assessment Status: Open, Session Status: Enrolled, Assigned To: Christine Standish, Site: Milwaukee, and a circled 'Discharge' option). The main content area displays a table of assessments under the heading 'Intake on 11/19/2014'. The table has columns for Status, Action, Assessment, Assessment Date, Condition Assessed, No. Assessment Reason, and No. Assessment Reason Date.

Status	Action	Assessment	Assessment Date	Condition Assessed	No. Assessment Reason	No. Assessment Reason Date
View		Trauma History Screen (THS) - CHILD	04/08/2014	Completed (Partial)		
View		Child PTSD Symptom Scale (CPSS) - CHILD	06/06/2014	Completed		
Add		Short Mood And Feelings Questionnaire - CHILD				
View		Trauma History Screen (THS) - CAREGIVER	11/24/2014	Completed		
Add		Child PTSD Symptom Scale (CPSS) - CAREGIVER				
Add		Short Mood And Feelings Questionnaire - CAREGIVER				
Add		Center for Epidemiologic Studies Depression Scale - Revised (CES-D-R) - CAREGIVER				

A pop-up window will appear and ask if you are sure you want to discharge your client. Click “OK” to confirm and move forward to the “Client Face Sheet: Discharge.”



Information from your client’s intake face sheet will pre-populate in the discharge face sheet but you will have to fill in some of the information manually. Most importantly, you must complete the “Discharge Date” and “Discharge Reason.”

Please refer also to the EBP Tracker Manual section “Discharging a Case.”

COMPLETING ASSESSMENTS

Case Assessment Setup: Intake Assessment Schedule

After completing the child’s Intake Face Sheet, the “Case Assessment Setup” screen is presented. When on the Child Home Page, the Case Assessment Setup screen may also be accessed under the “Case Status” menu (toward the bottom of the toolbar at the left of your screen).

The screenshot shows the 'Case Assessment Setup' interface. At the top, it displays 'Child DOB: 10/18/2008' and 'Intake Date: 05/01/2018', along with 'Child Age: 9 years, 5 months (114 months)'. Below this is a table with three columns: 'Intake', 'Assessment', and 'Recommendation'. The table is organized into several sections: 'Child's History of Trauma Exposure', 'Child Trauma Symptoms', 'Child Behavior', and 'Caregiver Symptoms'. Each row in the table has a checkbox in the 'Intake' column, the name of the assessment in the 'Assessment' column, and a recommendation in the 'Recommendation' column. Some assessments are marked as 'Required' (grayed out), while others are 'Recommended' (with a black checkmark). Two assessments, 'Child PTSD Symptom Scale (CPSS IV) - CHILD' and 'Child PTSD Symptom Scale (CPSS IV) - CAREGIVER', are marked as 'CPSS-IV is being phased out'.

Intake	Assessment	Recommendation
Child's History of Trauma Exposure		
<input checked="" type="checkbox"/>	Trauma History Screen (THS) - CHILD	Required.
<input checked="" type="checkbox"/>	Trauma History Screen (THS) - CAREGIVER	Required.
Child Trauma Symptoms		
<input checked="" type="checkbox"/>	Child PTSD Symptom Scale (CPSS V) - CHILD	Recommended for children 7 or more years old. Optional for children less than 7 years old.
<input checked="" type="checkbox"/>	Child PTSD Symptom Scale (CPSS V) - CAREGIVER	Recommended for children 7 or more years old.
<input type="checkbox"/>	Child PTSD Symptom Scale (CPSS IV) - CHILD	Recommended for children 7 or more years old. Optional for children less than 7 years old. Can Use In Place of CPSS-V. CPSS-IV is being phased out.
<input type="checkbox"/>	Child PTSD Symptom Scale (CPSS IV) - CAREGIVER	Recommended for children 7 or more years old. Can Use In Place of CPSS-V. CPSS-IV is being phased out.
<input type="checkbox"/>	Young Child PTSD Checklist (YCPC) - CAREGIVER	Recommended for children less than 7 years old.
Child Behavior		
<input type="checkbox"/>	Ohio Scales - CHILD	Recommended for children 11-18 years old. Optional for children 5 - 10 years old.
<input checked="" type="checkbox"/>	Ohio Scales - CAREGIVER	Recommended for children 5-18 years old.
<input type="checkbox"/>	Preschool Pediatric Symptom Checklist (PPSC) - CAREGIVER	Recommended for children less than 5 years old.
Caregiver Symptoms		
<input type="checkbox"/>	Center for Epidemiologic Studies Depression Scale - Revised (CESD-R) - CAREGIVER	Recommended for children less than 7 years old.

Five assessment categories are shown:

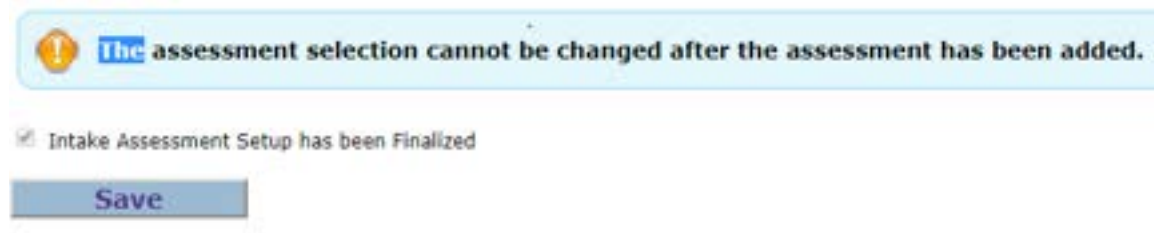
- Trauma exposure
- Trauma Symptoms
- Child behavior
- Caregiver symptoms
- Additional

When the “Case Assessment Setup” screen is presented, required or recommended assessments will appear with checks next to them, based on the EBP Model and the child’s age. Required assessments appear “grayed out” and cannot be unchecked or removed. Recommended assessments appear with black checks that can be

removed (if the clinician deems appropriate) by unchecking the box next to the assessment. All other assessments appear without checks and can be chosen by clicking on the box next to the assessment.

Using the case conceptualization process discussed below, clinicians will decide which assessments to use and will identify these assessments by checking the box next to the listed assessment.

When you have finished selecting or editing assessments, scroll to the bottom of the form. Check the box “Intake Assessment Setup has been Finalized” and click on the ‘Save’ button. The intake assessment setup has now been finalized. The system will return to the Child’s Home Page.



! TIP: The assessment selection can't be changed after the Intake Assessment Setup has been finalized and the Save button has been clicked.

Case Conceptualization

As you prepare to assess your child and/or caregiver, you should consider the following in deciding the most appropriate assessments to track symptom change:

- What assessments show that the child has symptoms in the clinical range?
- What is the primary problem/symptom/functioning area you expect to see improvement on?
- What assessment will best capture that improvement?
- Who will be the most accurate reporter of symptom change (child or caregiver)?
- Is the assessment age appropriate?
- What are the recommended assessments for the treatment model you are using?

Case Assessment Setup: Periodic Assessment Schedule

Follow-up assessments are conducted every 90 days and at discharge using targeted assessment(s), the Ohio scales, and the Satisfaction Questionnaire. After completing a child’s first Periodic Face Sheet, you should be redirected to the “Case Assessment Setup” page to choose the periodic/discharge assessments.

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The Case Assessment Setup screen may also be accessed from the Child Hope Page under the “Case Status” menu (toward the bottom of the toolbar at the left of your screen).

The screenshot shows the 'Case Assessment Setup' interface. At the top, it displays 'Child DOB: 01/01/2010', 'Child Age: 7 years, 10 months (94 months)', and 'Intake Date: 11/07/2017'. Below this is a table with four columns: 'Intake', 'Periodic and Storage', 'Assessment', and 'Recommendation'. The table is organized into sections: 'Child's History of Trauma Exposure' (with two rows for Trauma History Screen (THS) for CHILD and CAREGIVER, both checked and marked 'Required'); 'Child Trauma Symptoms' (with two rows for Child PTSD Symptom Scale (CPSS V) for CHILD and CAREGIVER, both checked and marked 'Recommended for children 7 or more years old. Optional for children less than 7 years old'); 'Child Behavior' (with one row for Ohio Scales - CAREGIVER, checked and marked 'Recommended for children 5-18 years old'); 'Caregiver Symptoms' (with one row for Parental Stress Scale (PSS) - CAREGIVER, unchecked); 'Satisfaction' (with two rows for 4-Item Ohio Satisfaction - Child and CAREGIVER, both checked and marked 'Required'); and 'Optional' (with two rows for Short Mood And Feelings Questionnaire - CHILD and CAREGIVER, both unchecked). A blue banner at the bottom states: 'The assessment selection cannot be changed after the assessment has been added.' Below the banner is a checkbox for 'Intake Assessment Setup has been Finalized' and a 'Save' button.

Assessments that were completed at intake and that are repeated at periodic assessments are automatically selected.

If additional, non-required assessments were selected at intake, you may choose to un-check the box.

The Periodic Assessment Schedule can't be saved unless one version of the OHIO assessment (Child or Caregiver), the Satisfaction measure and ONE ADDITIONAL measure are selected.

! TIP: Periodic Assessment Rule-OHIO plus SATISFACTION PLUS ONE additional assessment.

You may also choose to add additional, non-required assessments at this time. Additional assessments may only be added at the FIRST Periodic assessment.

When you have finished selecting or editing assessments, scroll to the bottom of the form. Check the box “Assessment Setup has been Finalized” and click on the ‘Save’ button. The periodic assessment setup has now been finalized. The system will return to the Child’s Home Page.

! TIP: The assessment selection can't be changed after the Save button has been clicked.

Completing an Assessment

Within the "Child Home Page," click "Add" next to the assessment you are ready to enter; we will use the Child PTSD Symptom Scale (CPSS IV) as an example.




Child Case 29741 N, E 06/07/2005						
Intake, Periodic, Discharge Checks						
Overall Status	Status	Action	Type	Date	Shortcut	Next Scheduled Date
		View Intake	Intake	01/01/2016	Assessments	

Assessment Details						
Intake on 01/01/2016						
Status	Action	Assessment	Assessment Date	Questions Answered	No Assessment Reason	No Assessment Reason Date
	View	Child PTSD Symptom Scale (CPSS IV) - CHILD	01/25/2016	Completed		
	Add	Trauma Exposure Checklist - CHILD				
	Add	Ohio Scales - CHILD				

To complete any of the assessments, click on the Add button next to the assessment. For example, the Child PTSD Symptom Scale (CPSS).

Once you are in the assessment, first enter the date that the assessment was completed at the top of the screen. Then choose a response for each question. Click on 'Save' to save the assessment and get back to the child's page with the remaining assessments. Once back on the Child Home Page, you will see the assessment you just filled out is now showing as complete (green check mark is displayed under status). It also shows the date the assessment was completed.

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Assessment Details						
Intake on 01/01/2016						
Status	Action	Assessment	Assessment Date	Questions Answered	No Assessment Reason	No Assessment Reason Date
	View	Child PTSD Symptom Scale (CPSS IV) - CHILD	01/25/2016	Completed		
	Add	Trauma Exposure Checklist - CHILD				
	Add	Ohio Scales - CHILD				

You can complete the remainder of the assessments, or come back and complete them at a later time. The red x will continue to appear until the assessments are completed, and these items will also appear as **attention items**, until they are completed.

You can see the total score and interpretation of all assessments by going to the "[Score Profile Report](#)."

See also "[MATCH Specific Assessments](#)"

Calculating and Saving Assessment Scores

You must fill out at least 90% of questions in order to save the assessment. If you attempt to save prior to completing all items, a message such as this one for the CPSSIV will pop up:

“Entered 1 answer. Please enter at least 15 more answers to complete the Assessment. Continue with save?”

Exception: If you do not have enough information to complete 90% of questions, you may fill out the form to the best of your ability and **ALSO** select the “Partially Complete” check box located at the top of the form. This will allow you to save the assessment as complete.

Case Bulk Update for Assessments Not Completed

Using the “Case Assessment Bulk Update” feature will allow you to close out multiple assessments so that they no longer appear in your attention items.

This new feature is available on the child home page of all of your clients, under the “Case Status” tab (see image below). Click on the “Case Assessment Bulk Update” button.

The screenshot displays the MATCH Primary Problem Area interface. On the left is a sidebar with navigation options: Actions, Child Actions, and Case Status. The Case Status section includes: Treatment Model: MATCH-ADTC, Case Status: Open, Assessment Status: Open, Session Status: Enrolled, Assigned To: Kyle Barrette, Site: Bridges Mill, and a list of buttons: Case, Case Assessment Bulk Update (circled in red), Transfer Case, and Discharge.

The main content area is titled "MATCH Primary Problem Area" and contains several sections:

- Primary Problem Area:** A section with a message: "Select 'Update' to enter Top Problems for child and caregiver. Once you have entered the top problems for your client, the TPs will appear in your Monthly Assessments and you will be able to rate the checked problems." Below this is a "Primary Problem Area: (none selected)" label and an "Update" button.
- Intake, Periodic, Discharge Checks:** A table with columns: Overall Status, Status, Action, Type, Date, Shortcut, Next Scheduled Date.

Overall Status	Status	Action	Type	Date	Shortcut	Next Scheduled Date
Info	Info	Add Periodic	Periodic			07/09/2017
Close	Success	View Periodic	Periodic	04/10/2017	Assessment	
Close	Success	View Intake	Intake	08/04/2016	Assessment	
- Monthly Session:** A table with columns: Status, Action, Clinician, Period, Due Date, Complete Date, Number Of Visits, Number Of No Shows.

Status	Action	Clinician	Period	Due Date	Complete Date	Number Of Visits	Number Of No Shows
Close	Add	Kyle Barrette	March 2017	04/10/2017			
Close	Add	Kyle Barrette	February 2017	03/10/2017			
Close	Add	Kyle Barrette	January 2017	02/10/2017			
Close	Add	Kyle Barrette	December 2016	01/10/2017			
- Monthly Assessments:** A table with columns: Status, Action, Assessment, Assessment Date, Questions Answered, No Assessment Reason, No Assessment Reason Date, Scheduled Date.

Status	Action	Assessment	Assessment Date	Questions Answered	No Assessment Reason	No Assessment Reason Date	Scheduled Date
Close	Add	Ohio Problem Severity Scale - CHILD					04/24/2017
Close	Add	Ohio Problem Severity Scale - CAREGIVER					04/24/2017
Close	Add	Ohio Problem Severity Scale - CHILD					03/13/2017
Close	Add	Ohio Problem Severity Scale - CAREGIVER					03/13/2017
- Assessment Details:** A section titled "Periodic on 04/10/2017" with a table similar to the Monthly Assessments table.

Status	Action	Assessment	Assessment Date	Questions Answered	No Assessment Reason	No Assessment Reason Date
Close	Add	Child PTSD Symptom Scale (CPSS 10) - CHILD				
Close	Add	Child PTSD Symptom Scale (CPSS 10) - CAREGIVER				
Close	Add	YOUTH SERVICES SURVEY FOR FAMILIES (YSS-F)				
Close	Add	Ohio Functioning Scale - CHILD				
Close	Add	Ohio Functioning Scale - CAREGIVER				

Clicking on the “Case Assessment Bulk Update” button will bring you to a new page where you can identify the reason(s) the assessments were not completed and

choose the specific assessments to close out. First, start by choosing the reasons that the assessments were not completed (see image below).

Assessment	Participant Type	Scheduled Date
<input type="checkbox"/> Ohio Problem Severity Scale - CHILD	Child	04/14/2017
<input type="checkbox"/> Ohio Problem Severity Scale - CAREGIVER	Caregiver	04/14/2017
<input type="checkbox"/> Ohio Problem Severity Scale - CHILD	Child	03/15/2017
<input type="checkbox"/> Ohio Problem Severity Scale - CAREGIVER	Caregiver	03/15/2017
<input type="checkbox"/> Ohio Problem Severity Scale - CHILD	Child	02/13/2017
<input type="checkbox"/> Ohio Problem Severity Scale - CAREGIVER	Caregiver	02/13/2017
<input type="checkbox"/> Ohio Problem Severity Scale - CHILD	Child	01/14/2017

! TIP: If the page shows caregiver and child assessments not completed, then both a child assessment not completed reason and caregiver assessment not completed reason must be selected. If the page only shows child (or caregiver) assessments not completed, then only one reason needs to be selected.

You can only select one child reason and one caregiver reason per save. A bulk update will need to be completed for each different child (or caregiver) assessment not completed reason.

Next, choose the specific assessments you would like to close out by clicking on the box next to the assessment you would like to close out. If you would like to close out all of the assessments in a specific section you can click on the box at the top of the section (see image below) to highlight all of the assessments. Once you have chosen the assessments you would like to close out, click on “Save.”

Case Assessment Bulk Update

Selected Assessments will be added with the appropriate "Assessment Not Completed Reason".

Child Assessment Not Completed Reason:

Caregiver Assessment Not Completed Reason:

Assessment Not Completed Date:

Assessment Details

<input type="checkbox"/>	Assessment	Participant Type
<input type="checkbox"/>	Periodic on 08/01/2018	
<input type="checkbox"/>	Child PTSD Symptom Scale (CPSS V) - CHILD	Child
<input type="checkbox"/>	Child PTSD Symptom Scale (CPSS V) - CAREGIVER	Caregiver
<input type="checkbox"/>	Ohio Scales - CAREGIVER	Caregiver
<input type="checkbox"/>	Ohio Satisfaction - Caregiver	Caregiver
<input type="checkbox"/>	Ohio Satisfaction - Child	Child
<input type="checkbox"/>	Intake on 05/01/2018	
<input type="checkbox"/>	Trauma History Screen (THS) - CHILD	Child

COMPLETING MONTHLY SESSION FORMS

How Monthly Session Forms Are Generated

Monthly session forms are generated on the 1st of each month for any cases that were active at any point or first opened in the previous month.

Clinician:		Type:		Search			
Status	Action	Clinician	Agency Client ID	PSDCRS Client ID	Item	Date	Treatment Model
	Add	Alice Clinician	ZY88		Center for Epidemiologic Studies Depression Scale – Revised (CESD-R) - CAREGIVER		TF-CBT
	Add	Alice Clinician	ZY88		Child PTSD Symptom Scale (CPSS-V)		TF-CBT
	Add	Alice Clinician	ZY88		Child PTSD Symptom Scale (CPSS-V) - CAREGIVER		TF-CBT
	Add	Jane Clinician			Monthly Session for October 2014	11/10/2014	TF-CBT
	Add	Jane Clinician			Monthly Session for November 2014	12/10/2014	TF-CBT
	Add	Jane Clinician			Monthly Session for December 2014	01/10/2015	TF-CBT

Monthly Session Forms can be accessed from three different locations within EBP Tracker.

Monthly Session Forms appear on the Attention Items Tab (located on the “Actions” menu on the left hand side of the screen in EBP Tracker) in a “batch” format. This means that all of a clinician’s monthly session forms for the month are listed on one line. For example: “Monthly Session for October 2014.” To access individual client forms click on “Add.”

Monthly Session							
Status	Action	Clinician	Period	Due Date	Complete Date	Number Of Visits	Number Of No Shows
	Add	Training1 Training1	January 2015	02/05/2015			
	Add	Training1 Training1	December 2014	01/05/2015			
	View	Training1 Training1	November 2014	12/10/2014	09/01/2016	4	0
	View	Training1 Training1	October 2014	11/10/2014	09/01/2016	3	0

This will list out each individual monthly session form that is for this month.

To enter data click on the “Add” button next to each case.

The monthly session forms do not have to be completed in the order they are listed on the screen.

If you complete one monthly session form, EBP Tracker will automatically direct you back to this screen so you can complete the remainder of the forms.

Monthly Session forms can also be accessed within the Monthly Session Tab (located on the “Actions” menu on the left hand side of the screen).

Individual monthly session forms can also be located for each child on their “Child Home Page” which can be accessed by choosing “Find/Edit Child” (EBPTracker) or “Search Client” (PIE) on the “Actions” menu, entering the child’s information and clicking on “Search.” Choose the correct case and select “View.” Monthly session forms are located in the middle of the child’s home page.

Editing an Existing Form

To edit a monthly session form go to the child’s home page. Monthly session forms are located in the middle of the page. Click view and make the necessary changes before clicking on “Save.”

Batching of Monthly Session Forms

Monthly session forms must be completed in full in order to save the form; you may not save a partially completed form. Once you have completed a form it will no longer be accessible from the attention items page but will still be accessible from the “Child Home Page.”

The treatment model intake date located on the face sheet is the date that determines when a monthly session form will appear. For example, if today is 5/15/16 and you enter in 5/15/16 as the intake date this will generate a ‘May’ monthly session form because the case was opened in May. The monthly session form will not appear until June 1st. If you enter in 5/15/16 as the treatment model intake date but today is June the monthly session form will appear immediately.

! TIP: If you accidentally enter the wrong date for the treatment model intake date, you may end up with many extra monthly session forms! For example if today is 5/15/16 and you accidentally enter 5/15/15, EBP Tracker will generate 11 months of monthly session forms for you dating all the back to May of 2015 so please make sure the date is correct on the intake face sheet before clicking on “Save!”

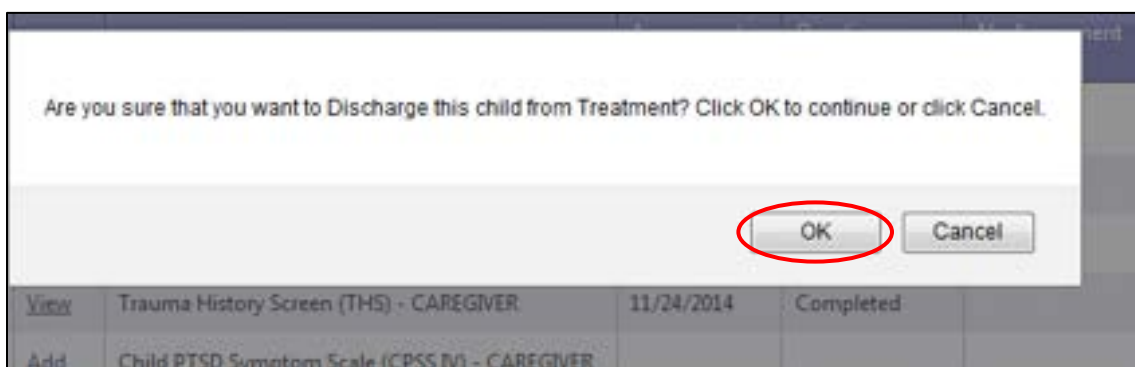
DISCHARGING A CASE

Discharging a Case

Select “Discharge” on the “Case Status” menu on the “Child Home Page.”



A pop-up window will appear and ask if you are sure you want to discharge your client. Click “OK” to confirm and move forward to the “Client Face Sheet: Discharge.”



Information from your client’s intake face sheet will pre-populate in the discharge face sheet but you will have to fill in some of the information manually. Most importantly, you must complete the “Discharge Date” and “Discharge Reason.”

The selections for “Discharge Reason” are detailed below:

Discharge Reason	Description
Assessment Only (no treatment needed)	The client was deemed inappropriate for EBP services after the initial intake assessment.
Family Discontinued Treatment	The client’s family discontinues treatment. Includes families that actively terminate treatment as well as those that fail to return for treatment or fail to follow up with agency staff.
Family Moved Out of Area	Family chooses to discontinue treatment due to relocation. The family’s primary decision is to relocate, not to discontinue services.
Referred for Other EBP (Outpatient) within Agency	The client did not complete treatment but was referred to another EBP (outpatient) within the agency. Another EBP within the agency is defined as an Evidence Based Practice that uses EBP Tracker to collect data (MATCH-ADTC, CBITS and Bounce Back).
Referred for Other Non-EBP (Outpatient) within Agency	The client did not complete treatment but was referred to another non-EBP (outpatient) within the agency. If client was referred to a more intensive outpatient program or higher level of care, then choose “Referred to higher level of care.”
Referred to Higher Level of Care	The client was unable to complete the EBP requirements due to a need for higher level care. Examples include in-home treatment, inpatient care, partial hospitalization, and intensive outpatient therapy.
Referred to Other Agency (Outpatient)	The client was unable to complete the EBP requirements and was referred to a different agency for outpatient therapy. If the client is referred to a higher-level of outpatient therapy, such as intensive outpatient therapy, then choose “Referred to higher level of care.”
Successfully Completed Selected EBP Model Requirements – Continue with Other Treatment	The client has successfully completed all EBP requirements but the clinician decides to continue with another outpatient treatment, such as CBT or group therapy, which is at the same level of care as the EBP provided.
Successfully Completed Selected EBP Model Requirements – No More Treatment Needed	The client has achieved a sufficient reduction in symptoms to be considered eligible for discharge. Clinicians should use their clinical judgement and review client scores on assessment measures to confirm that a reduction in symptoms has occurred.
Other (Specify)	Clients who are discharged for reasons that do not fall into any of the above categories. Specify the unique discharge reason in the text box provided.

When you complete the “Client Face Sheet: Discharge” and click “Save,” you will be returned to the “Child Home Page” and the discharge assessments will now appear.

Monthly Session							
Status	Action	Clinician	Period	Due Date	Complete Date	Number Of Visits	Number Of No Shows
	Add	Christine Stanislaw	August 2016	09/10/2016			
	Add	Christine Stanislaw	July 2016	08/10/2016			
	Add	Christine Stanislaw	June 2016	07/10/2016			
	Add	Christine Stanislaw	May 2016	06/10/2016			

Assessment Details						
Discharge on 09/06/2016						
Status	Action	Assessment	Assessment Date	Questions Answered	No Assessment Reason	No Assessment Reason Date
	Add	Child PTSD Symptom Scale (CPSS IV) - CHILD				
	Add	Short Mood And Feelings Questionnaire - CHILD				
	Add	Child PTSD Symptom Scale (CPSS IV) - CAREGIVER				
	Add	Short Mood And Feelings Questionnaire - CAREGIVER				
	Add	Center for Epidemiologic Studies Depression Scale - Revised (CESD-R) - CAREGIVER				
	Add	Caregiver Satisfaction Questionnaire				
	Add	Ohio Scales - CHILD				
	Add	Ohio Scales - CAREGIVER				
	Add	Ohio Scales - CLINICIAN				

Complete all Discharge assessments for your clients. If you are discharging your client and the child and family are unavailable to complete the discharge assessments, you can choose “Assessment not completed” and choose “Other” as the reason for assessment not complete. (“Other” allows you to type in a reason). If there are multiple assessments not completed, you can use the [Case Assessment Bulk Update](#) function. When you have completed this task, all assessments will show as complete.

Assessment Not Completed Reason: Other

Assessment Not Completed Date: 9/6/2016

BELOW IS A LIST OF PROBLEMS THAT KIDS SOMETIMES HAVE AFTER EXPERIENCING AN UPSETTING EVENT... READ EACH ONE CAREFULLY AND CIRCLE THE NUMBER (0-3) THAT BEST DESCRIBES HOW OFTEN THE PROBLEM HAS BOTHERED YOU IN THE LAST 2 WEEKS.

		Not at all or only at one time 0	Once a week or less/once in a while 1	2 to 4 times a week/half the time 2	5 or more times a week/almost always 3
1.	Having upsetting thoughts or images about the event that came into your head when you didn't want them to	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2.	Having bad dreams or nightmares	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3.	Acting or feeling as if the event was happening again (hearing something or seeing a picture about it and feeling as if I am there again)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4.	Feeling upset when you think about it or hear	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If all has been completed appropriately, you will see a green check mark next to the discharge face sheet at the top of the "Child Home Page."

Child Case 10010 - A, A 04/07/2005

Intake, Periodic, Discharge Checks

Overall Status	Status	Action	Type	Date	Shortcut	Next Scheduled Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	View Discharge	Discharge	08/08/2016	Assessments	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	View Intake	Intake	06/18/2015	Assessments	

ATTENTION ITEMS





Attention Items from the Clinician’s Viewpoint

If you are a clinician assigned to one provider, you will automatically be brought to the Attention Items screen after logging in to EBP Tracker. The “Attention Items” screen will show you all items that need to be added or finished for your clients, for the treatment model(s) that you provide.



Attention Items from Others’ Viewpoints and Access to More Than One Provider

If you have been granted access rights to more than one provider, you will be asked to select a Provider or Security Group after logging in to EBP Tracker. When you click on “Select,” you will be brought to the “Attention Items” screen for the selected Provider. If you are an active Coordinator, Data Entry Specialist, Supervisor, Senior Leader or Executive, all of the items for your EBP Team’s cases and assigned Treatment Model(s) will be displayed. If you are an active Clinician, On the “Attention Items” screen, the “Status” of your case documentation is depicted as follows:

	Due	Indicates the item needs to be added
	Incomplete	Indicates the item needs to be finished
	Notice	Indicates other messages for your attention, such as a child case has been transferred to you
		Indicates the item will be due in the future

The “Action” column provides active links to “Add,” “Finish” or “View” items. For example, by clicking on the word “Add” in the Action column, the form or assessment listed in the “Item” column will open for this child. The “Clinician,”

Child’s “Agency Client ID” and/or “PSDCRS Client ID” columns provide additional information. If you are a clinician or coordinator who provides or manages more than one EBP, please also take note of the “Treatment Model” (column at far right) before making your selection.

When Attention Items are Generated

The Intake Date for the EBP Treatment Model (e.g., TF-CBT, MATCH-ADTC, CBITS or Bounce Back “Intake Date” in the child’s Intake form) sets the initial schedule for documentation due dates.

Form	Date Appears on Attention Items List
Monthly Session	1 st day of the month following the child’s EBP Intake Date
MATCH Top Problems Assessment	1 st day of the month following the child’s EBP Intake Date
Periodic Face sheet: 1 st Periodic	90 days after the EBP Intake Date
Subsequent Periodic Face sheets	90 days after the previous periodic face sheet’s “Date Completed”
Child and Caregiver Assessments: Intake	Immediately after intake face sheet is completed
Child and Caregiver Assessments: 1 st Periodic	90 days after the EBP Intake Date
Child and Caregiver Assessments: Subsequent Periodic Assessments	90 days after the previous periodic face sheet’s “Date Completed”

How to Access Attention Items

If you have been entering data in a form and wish to return to the Attention Items screen, click on “Attention Items” on the Actions menu at the left of your screen.



TRANSFERRING A CASE

Transferring a Child from One Clinician to Another

IMPORTANT - This is only available to coordinators and data entry users

Select the child you wish to transfer by using Find/Edit or Search Client.

When you have found the child you wish to transfer select “View” which will take you to the child’s home page.

On the left hand side under “Case Status” select “Transfer Case” link (you will need to scroll down the page to see this).

The screenshot shows a software interface. On the left is a sidebar menu with a red header 'Case Status'. Below the header, the menu items are: 'Treatment Model: TF-CBT', 'Case Status: Open', 'Assessment Status: Open', 'Session Status: Enrolled', 'Assigned To: Training8 Training8', 'Site: NHavnClin', 'Transfer Case' (circled in red), 'Discharge', 'Admin. Discharge', and 'Delete Child Data'. To the right of the sidebar is a table with five rows. Each row starts with a red 'X' icon in a circle, followed by the word 'Add', and then the name of an assessment tool. The table has four empty columns to the right of the text.

	Add	Short Mood And Feelings Questionnaire - CHILD			
	Add	Trauma History Screen (THS) - CAREGIVER			
	Add	Child PTSD Symptom Scale (CPSS IV) - CAREGIVER			
	Add	Short Mood And Feelings Questionnaire - CAREGIVER			
	Add	Center for Epidemiologic Studies Depression Scale – Revised (CESD-R) - CAREGIVER			

On the transfer page you will have the option to transfer to a new clinician. When you have selected your choices click on “Transfer Case.”



MANAGING CBITS AND BOUNCE BACK GROUPS

Adding a New CBITS or Bounce Back Group

Click on “My CBITS Groups” or “My Bounce Back Groups” under the Actions menu.



Click on “Add New Group.”



Enter a unique Group Name (something that you will be able to distinguish from your other groups), co-facilitation (if applicable) and any necessary notes, then click “Save.”

CBITS Group Session Setup

Provider: Child and Family Agency of Southeastern Connecticut, Inc

Site: Main Office-New London School

Clinician: Ashley Nelson

Co-facilitation:

Group Name:

Please make your Group Names unique.

Group Status: Open

Note:

Save

Enter a unique Group Name (something that you will be able to distinguish from your other groups), co-facilitation (if applicable) and any necessary notes, then click “Save”. **IMPORTANT : Co-facilitators cannot access child records.**

After clicking on “Save,” you will have the option to view the group session form, as well as add children to the group. The List of Children will show as “No records to display” until children are added.

Adding a Child to a CBITS or Bounce Back Group

Under “List of Children,” click on “Edit List of Children.”

List of Children

First Initial	Last Initial	DOB	Sex	Agency Client ID	PSOCKS Client ID	Enrollment Status	Action
No records to display.							

Edit List of Children

Enter the child’s information, then click “Search.”

List of Children

First Initial of Child's First Name:
First Initial of Child's Last Name:

Child DOB:
Child Sex:

Agency Assigned Client ID Number (not PHI):
PSDCRS Client ID Number:

Search

Back to Setup

If there is no existing child in the system, a “no records to display” message will come up.

If there is an existing child in the system, their information will display after clicking on the search button. To add them to the group, check off the “Select” box, then click “Save.”

List of Children

First Initial of Child's First Name:
First Initial of Child's Last Name:

Child DOB:
Child Sex:

Agency Assigned Client ID Number (not PHI):
PSDCRS Client ID Number:

Search

Select	First Initial	Last Initial	DOB	Sex	Agency Client ID	PSDCRS Client ID	Clinician	Case Status
<input checked="" type="checkbox"/>	N	C	08/08/2007	Female	28963789		Heather Sapere	Open

Click on the “Back to Setup” button to go back to the “Group Session Setup.” The child that you just added to the group will now be listed under the List of Children.

List of Children

First Initial	Last Initial	DOB	Sex	Agency Client ID	PSDCRS Client ID	Enrollment Status	Action
N	C	08/08/2007	Female	28963789		Enrolled	Unenroll

Viewing/Managing Existing CBITS or Bounce Back Groups

Click on “My CBITS Groups” or “My Bounce Back Groups” in the Actions menu.

<ul style="list-style-type: none"> Monthly Session My CBITS Groups Change Provider/Site Reports Account Settings Logout 	!	Finish	Heather Sapere	28963789		Intake is Incomplete
	✖	Add	Heather Sapere	28963789		Child PTSD Symptom Scale (CPSS IV) CHILD
	✖	Add	Heather Sapere	28963789		Trauma Exposure Checklist - CHILD
	✖	Add	Heather Sapere	28963789		Ohio Scales - CHILD
	✖	Add	Christine Stanislaw	GG08082009		Child PTSD Symptom Scale (CPSS IV) CHILD
	✖	Add	Christine Stanislaw	GG08082009		Child PTSD Symptom Scale (CPSS IV) CHILD

All groups that are currently open will display. If there are still group sessions that need to be completed, a yellow exclamation point will display under the status column, and a “Finish” link as well as a “Manage Group” link will appear in the action menu.

My CBITS Groups									
Clinician: <input type="text"/> Status: <input type="text"/> <input type="button" value="Search"/>									
Status	Action	Clinician	Group Name	Status	Provider	Site	# of Children	Session 1	Session 2
✖	View/Manage Group	Christine Stanislaw on	test	Cancelled	CCGCINC	ManeClin			
!	Finish/Manage Group	John Doe	Test CBITS Group 1a	Open	DCF	SoH	1		
!	Finish/Manage Group	John Doe	Test 3	Open	DCF	SoS		08/06/2015	
!	Finish/Manage Group	Jane Clinician	Test 2	Open	WC	BristClin			
!	Finish/Manage Group	Jane Clinician	gf	Open	WC	BristClin	2		
!	Finish/Manage Group	John Doe	Test Group CBITS Session 4	Open	WC	BristClin			

You also have the ability to filter for groups that are open, completed, and cancelled, by choosing a status from the dropdown menu, then clicking “Search.”

My CBITS Groups									
Clinician: Heather Sapere Status: Open <input type="button" value="Search"/>									
<input type="button" value="Add New Group"/>									
Status	Action	Clinician	Group Name	Status	Provider	Site	# Active Children	Session 1	Session 2
!	Finish/Manage Group	Heather Sapere	Group ABC	Open	CBC	CB-NHavn	1		

To manage the group and the list of children enrolled in the group, click on the “Manage Group” link. This will bring you to the “Group Session Setup” screen.

July 2020

To add more children to an existing group, click on “Edit List of Children,” and follow the same instructions for adding a child to a new CBITS or Bounce Back group.

First Initial	Last Initial	DOB	Sex	Agency Client ID	POC's Client ID	Enrollment Status	Action
	L	08/08/2007	Female	28881788		Enrolled	Manual

[Edit List of Children](#)

From the “Group Session Setup” screen, you can also view the current group session form and transfer a group.

Entering a Group Session Form

The group session form contains the objectives and activities for all 10 group sessions, and spaces to enter the date that each session was completed. A rating will need to be selected for each session objective by clicking on a number from 1-4, or choosing Y or N for each session activity.

CBITS Session Objectives	CBITS Session Activities	Session 1	2	3	4	5	6	7	8	9	10
How well did your group meet each objective? 1=Not Met/Not Attempted, 2=Somewhat Met, 3=Mostly Met, 4=Completed Met	Did your group complete the activity? Y=Yes, N=No	11/22/15	11/29/15	12/06/15	12/13/15	11/26/15					
1. Introductions											
Build group cohesion		1 2 3 4									
Reduce anxiety about participating in group		1 2 3 4									
Introduction to the group		4 N									
Explanation of CBITS		4 N									

Child attendance for each group session is displayed at the bottom of the session form. The child’s ID number, initials, and birth date will also display. You will need to enter if the child was present (P), absent (A), or if the session was a makeup (M) for each of the ten group sessions. The group status will also be displayed at the bottom of the session form.

! TIP: If a date is entered for a group session, you will be required to complete the attendance for each child and enter all of the session data, or you will not be able to save the form. If you want to clear out data from one session and still be able to save data entered for previous sessions (without having to completely re-do everything), just clear out the date for the session you want to clear out data for, then click “Save.”

Child Attendance	1	2	3	4
12345 G, F 08/07/2000	P A M	P A M	P A M	P A M
Attendance: P = Present, A = Absent, M = Makeup				
Group Status:	Open			Setup

Click the “Save” button to save any changes made on the session form.

Closing a Group

When the group session form is complete, change the “Group Status” to “Completed” using the dropdown menu (The Group Status will display as “Open” initially). The status for the group will then show as complete on the “My CBITS Groups” or “My Bounce Back Groups” screen (green check mark will display). You will still be able to edit the data on the group session form even after you change the status to complete. The “Group Status” can also be changed to “Cancelled” if the group is cancelled while it is still in progress.

Child Attendance	1	2
28963789 C, N 08/08/2007	P A M	P A M
Attendance: P = Present, A = Absent, M = Makeup		
Group Name:	Group ABC	
CBITS Session Status:	Completed	
Manage Group		

IMPORTANT: After closing a group, clinicians must discharge each child in the group in order to close their cases and add discharge assessments.

July 2020

Actions

- Attention Items
- My Open Cases**
- Add/Reopen Child
- Find/Edit Child
- My CBITS Groups
- Change Provider
- Reports
- Application Administration
- Account Settings
- Logout

CBITS Group Session Setup

Session Group ID: 236
Provider: Child and Family Agency of Southeastern Connecticut, Inc
Site: Main Office-New London School
Clinician: Ashley Loser
Co-facilitation: Ashley Nelson
Group Name: July 2020 Group
Please make your Group Names unique.
Group Status: Completed
Note:

List of Children

First Initial	Last Initial	DOB	Sex	Agency Client ID	PSOCIS Client ID	Enrollment Status
T	F	03/02/2005	Male	16589		Enrolled
A	L	04/13/2004	Female	1234	1234CFA	Enrolled

To do this, go to My Open Cases and select “View” on the case(s) you need to discharge.

My Open Cases ✖ 0 ! 1 ✓ 1 Total: 2

Status	Action	Agency Client ID	PSOCIS Client ID	DOB	Sex	First Initial	Last Initial	Date of Intake	Treatment Model
!	View	16589		03/02/2005	Male	T	F	01/09/2018	CBITS
✓	View	1234	1234CFA	04/13/2004	Female	A	L	07/01/2020	CBITS

Once all Individual and Caregiver session data has been entered, click Discharge on the left menu and you will be prompted to fill out the Discharge Facesheet and enter Discharge assessment data. See the Discharging a Case section for more information.

Case Status

Treatment Model: CBITS
Case Status: Open
Assessment Status: Open
Session Status: Enrolled
Assigned To: Ashley Loser
Site: NLandSch

- Case Assessment Setup
- Case Assessment Bulk Update
- Transfer Case
- Discharge**

Group CBITS Sessions

Status	Action	Clinician	Group Name	Group Status	Status	Session 1	Session 2	Session 3	Session 4	...
✓	View	Ashley Loser	July 2020 Group	Completed	Enrolled	06/29/2020 Present	06/30/2020 Present	07/01/2020 Present	07/03/2020 Absent	...

Assessment Details
Intake on 07/01/2020

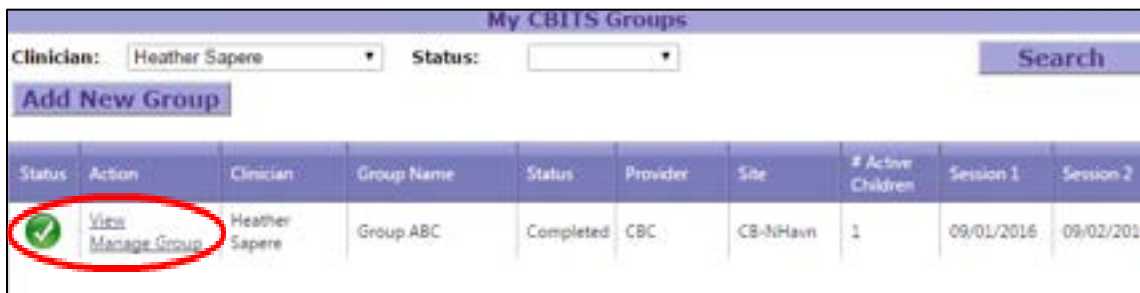
Status	Action	Assessment	Assessment Date	Discharge Assessed	No Assessment Reason	No Assessment Reason Date
✓	View	Short Mood And Feelings	07/01/2020	Completed		

Remember, this will need to be done for each child in your CBITS/BB Groups once the group is COMPLETE.

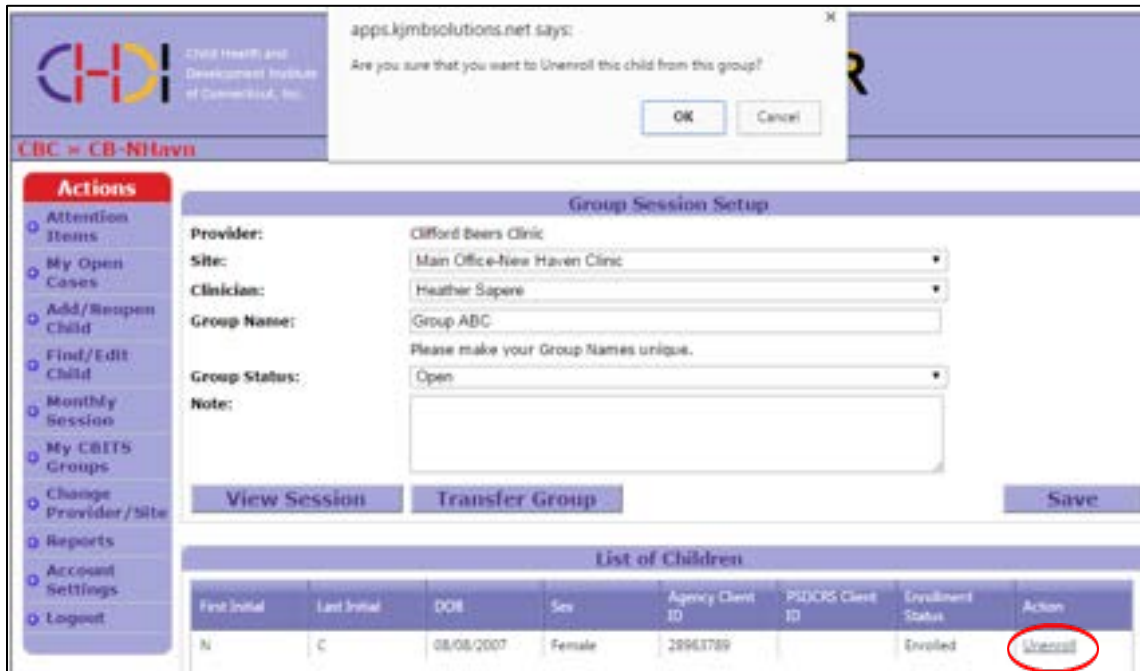
Unenrolling a Child from a CBITS or Bounce Back Group

In some cases, a child may drop out of a group after the group has already started sessions and after the child has completed some sessions. If this does occur, you have the ability to unenroll the child from the group, while still maintaining their attendance for previous CBITS or Bounce Back group sessions on the group session form.

On the “My CBITS Groups” or “My Bounce Back Groups” screen, locate the group the child is enrolled in, and click the “Manage Group” link.



Locate the child you would like to unenroll, and under the Action menu, click “Unenroll.” A pop up message will appear asking if you are sure you want to unenroll the child from the group. Click “OK.”



The child that you unenrolled will now appear at the bottom of the list of children for that group. The “Enrollment Status” is changed to “Unenrolled,” and the “Action” is changed to re-enroll. If the child needs to rejoin the group at a later time, you can click re-enroll to put them back in the group. If the child is not going to be re-enrolled in the current group, or enrolled in a new group, you will need to discharge the child from treatment using the regular discharge process (see manual section “Discharging a Case”).

View Session		Transfer Group						Save
List of Children								
First Initial	Last Initial	DOB	Sex	Agency Client ID	PSDCRS Client ID	Enrollment Status	Action	
N	C	08/08/2007	Female	28963789		Unenrolled	Re-Enroll	

! TIP: If the child is unenrolled from their group and you do not think they will be placed into a new CBITS or Bounce Back group soon after (within the next month), you will need to discharge them from treatment and choose a “Discharge Reason.” If you decide to put them back into treatment at a later time, you can reopen their case and complete new intake assessments, then place them in a new group.

On the group session form, the word “Unenrolled” will appear in place of attendance for any future group sessions that occur after the un-enrollment date.

	1	2	3	4	5	6	7	8	9	10
<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	Unenrolled	Unenrolled	Unenrolled	Unenrolled
<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M
<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	Unenrolled	Unenrolled	Unenrolled	Unenrolled	Unenrolled	Unenrolled	Unenrolled
<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M
<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M
<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M	<input type="radio"/> A M

Transferring a Child from One Group to Another (Same Clinician)

In some instances, a child may begin in one CBITS or Bounce Back group and complete some group sessions, and then get transferred to a different CBITS or Bounce Back group with the same clinician.

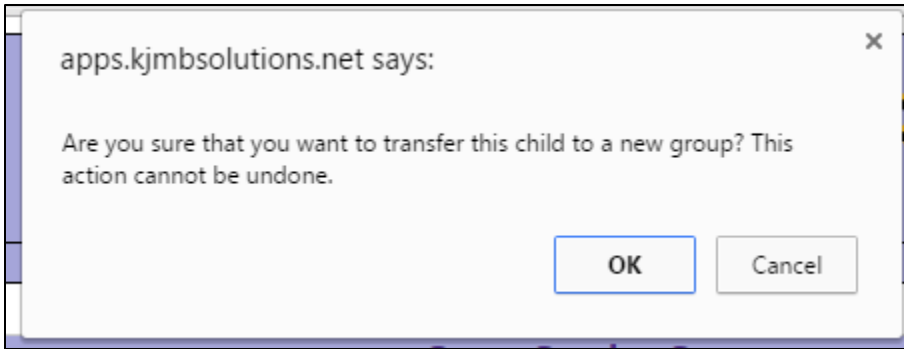
Click on “My CBITS Groups” or “My Bounce Back Groups,” find the group that the child is currently enrolled in, and click on the “Manage Group” link.

Locate the child you want to transfer in the “List of Children,” then click on the “Transfer” link.



View Session	Transfer Group	Save					
List of Children							
First Initial	Last Initial	DOB	Sex	Agency Client ID	PSDCRS Client ID	Enrollment Status	Action
N	C	08/08/2007	Female	28963789		Enrolled	Transfer

A pop up message will appear that asks if you are sure you want to transfer the child to a new group. Click “OK.”



You will be brought to a new screen. At the top of the screen, the name of the group the child is currently enrolled in is listed, along with all of the child’s information. Below that is a list of all of your open groups. Locate the group that you want to transfer the child to, and click on the “Transfer” button.

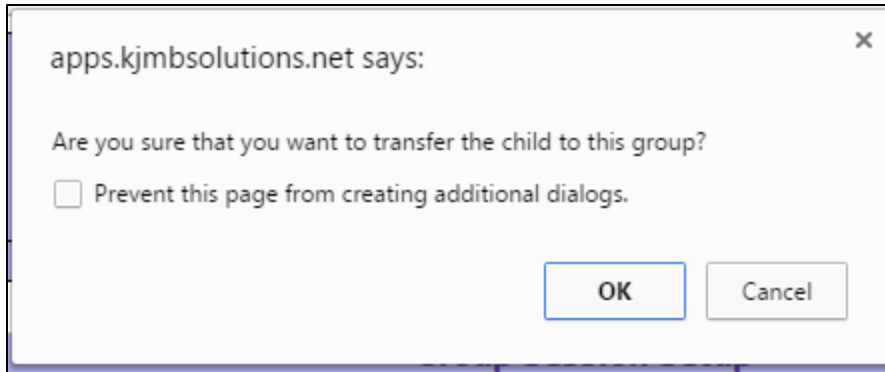


Group Session Setup			
Provider:	Clifford Beers Clinic		
Site:	Main Office-New Haven Clinic		
Clinician:	Heather Sapere		
Group Name:	Group ABC		

Transfer Child					
Child to Transfer					
First Initial	Last Initial	DOB	Sex	Agency Client ID	PSDCRS Client ID
N	C	08/08/2007	Female	28963789	

Group Name	Status	# Active Children
Transfer Group 123	Open	0

A pop up message will appear, asking if you want to transfer the child to this group. Click “OK.”



The child's enrollment status will now display as "Transferred" for their old group.

First Initial	Last Initial	DOB	Sex	Agency Client ID	PSDCRS Client ID	Enrollment Status	Action
N	C	06/08/2007	Female	28953789		Transferred	n/a

If you go into the child's new group, they will be listed under the "List of Children" and on the group session form.

On the group session form for the group that the child was previously enrolled in, the word "transferred" will appear in place of attendance for all remaining group sessions which occur after the transfer date.

Transferring a Child from One Clinician to Another

Please refer to manual section "Transferring a Case."

***TIP - Transferring a group requires coordinator or data entry access when transferring from one clinician to another.**

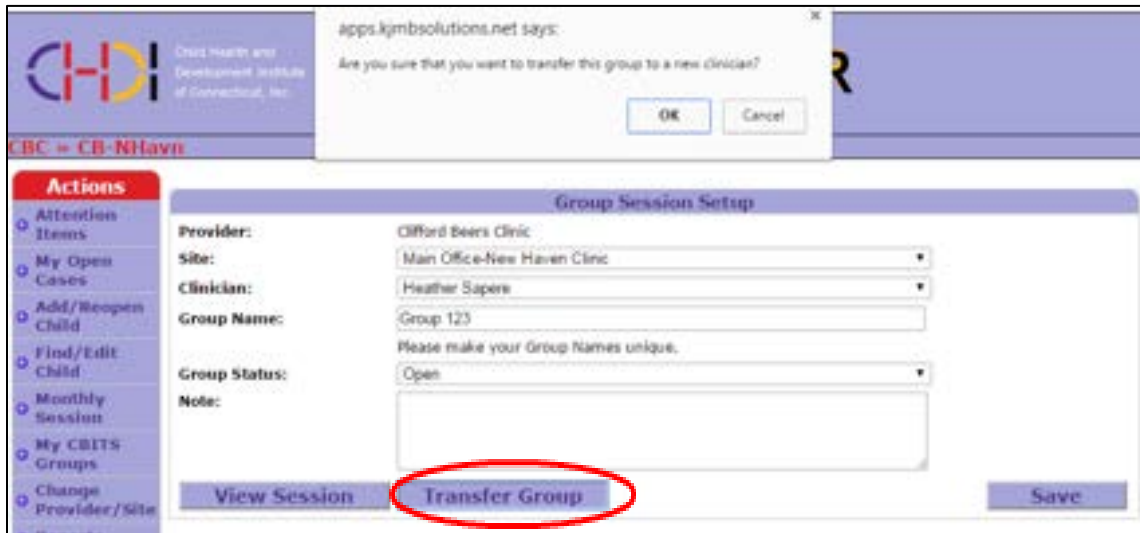
Transferring an Entire CBITS or Bounce Back Group from One Clinician to Another

If you need to transfer an entire CBITS or Bounce Back group from one clinician to another (if a clinician leaves an agency for some reason, but is currently in the middle of running groups for example), there is functionality in EBP Tracker to do so.

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Go to “My CBITS Groups” or “My Bounce Back” and click on the Manage Group link for the group that you would like to transfer.

Click on the Transfer Group button. A pop up message will appear asking if you are sure you want to transfer the group to a new clinician. Click OK.



Choose the clinician you would like to transfer the group to from the dropdown menus, then click Transfer.



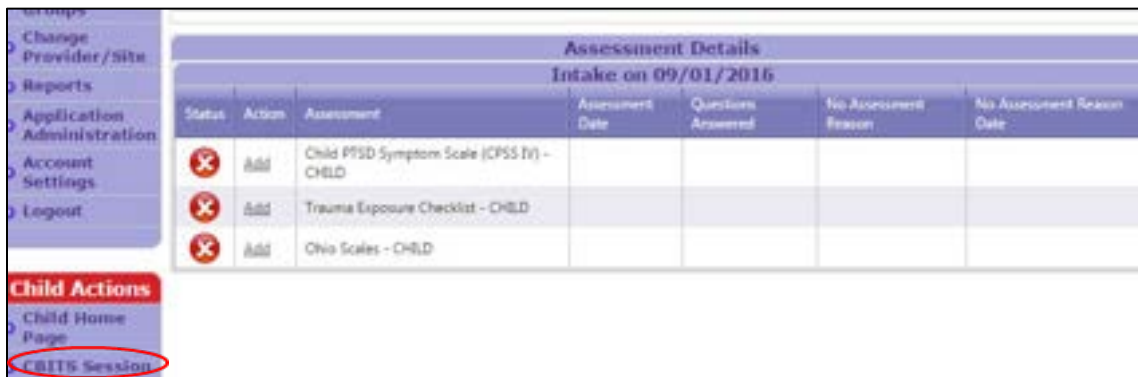
The group that you transferred will now be assigned to the new clinician, and will appear under their CBITS or Bounce Back groups.

! TIP: If only the group is transferred, the clinician will only have access to the group session form, and not the individual child’s data. You will need to go into the child’s individual case and click Transfer Case, then choose a group to place them in if you want the new clinician to have access to their individual child data as well as group data.

CBITS OR BOUNCE BACK INDIVIDUAL SESSIONS

Adding a Child’s Individual CBITS or Bounce Back Session

Search for the child using the “Find/Edit Child” link under the Actions menu OR Click the “My Open Cases” link and click “View” to open the child’s case. Once in the child’s case, click on “CBITS Session” or “Bounce Back Session” on the Child Actions menu.



Under “Child CBITS Sessions” or “Child Bounce Back Sessions,” click on “Add New CBITS Child Session” or “Add New Bounce Back Session.”



The CBITS or Bounce Back individual session form will display. Enter the date for the individual session, and complete the ratings for each session objective using the 1-4 scale. Also click on either Y or N for each of the session activities.

CBITS Session					
CBITS Session Objectives How well did you and the individual meet each objective? 1=Not Met/Not Attempted, 2=Somewhat Met, 3=Mostly Met, 4=Completed Met	CBITS Session Activities Did you and the individual complete the activity? Y=Yes, N=No	Session #	1	2	3
		Date	<input type="text"/>	<input type="text"/>	<input type="text"/>
Child					
Gather information about the trauma for use in treatment planning			1 2 3 4	1 2 3 4	1 2 3 4
Reduce anxiety when remembering trauma			1 2 3 4	1 2 3 4	1 2 3 4
Plan with participant how they will work on trauma group sessions			1 2 3 4	1 2 3 4	1 2 3 4
Build rapport and trust			1 2 3 4	1 2 3 4	1 2 3 4
	Explain rationale for stress and trauma exposure		Y N	Y N	Y N
	Begin imaginal exposure to stressful or traumatic event		Y N	Y N	Y N
	Use the 'Counseling' worksheet to make a list of key parts of the story		Y N	Y N	Y N
	Ask the students to rate parts using that fear thermometer		Y N	Y N	Y N
	Select parts to be shared in group work		Y N	Y N	Y N
	Plan for group work		Y N	Y N	Y N
Child Attendance			1	2	3
94138 L, N 05/05/2005			P A M	P A M	P A M
Attendance: P = Present, A = Absent, M = Makeup					
CBITS Session Status:		Open <input type="text"/>		<input type="button" value="Save"/>	

! TIP: Session date must be on same day or after first CBITS or Bounce Back clinical session date.

While you are in the “Child CBITS Sessions” or “Child Bounce Back Sessions” form, the child’s attendance for each group session will also display.

Group Attendance		
Group: Group 1		
1	12/01/2015	Present
2	12/08/2015	Present

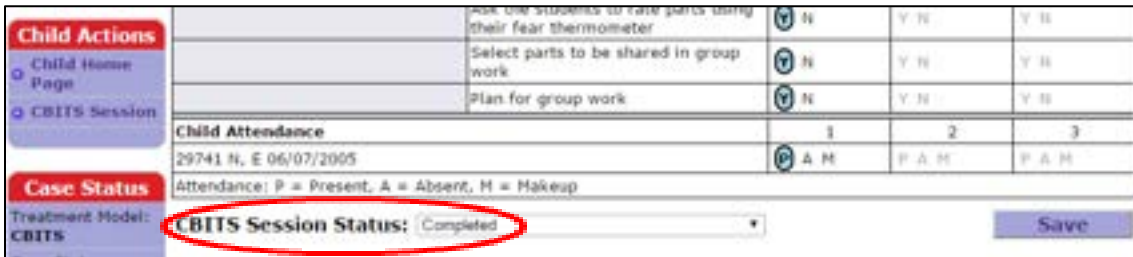
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When you go back to the “Child CBITS Sessions” or “Child Bounce Back Sessions” Page, you will see a yellow exclamation point and a “Finish” link under the action column.



Because there is flexibility in how many individual CBITS or Bounce Back sessions a child can have, the session will continue to show as incomplete until you manually go into the child CBITS or Bounce Back session and **change the CBITS (or Bounce Back) Session Status to Completed** using the drop down menu. You will also notice that you are unable to click on the “Add New Child CBITS Session” or “Add New Child Bounce Back Session” button, because you need to complete the child session instance that you already have open before adding a new set of individual sessions.

To go back into the “Child CBITS Sessions” or “Child Bounce Back Sessions” form and complete additional sessions, click on the “Finish” link, then either add another individual session, or choose “Completed” (if you don’t plan to do any more individual sessions with the child) or “Cancelled” (if you want to cancel this instance of a child session) from the “CBITS Session Status” or “Bounce Back Session Status” drop down menu, then click “Save.”



When you change the “CBITS Session Status” or “Bounce Back Session Status” to “Completed,” the session will then show as complete on the child sessions screen (green check mark).

Adding a Caregiver’s Individual CBITS or Bounce Back Session

On the “Child Home Page,” click on “Caregiver CBITS Sessions” or “Caregiver Bounce Back Sessions” under the Child Actions menu.

Click on “Add New CBITS Caregiver Session” or “Add New Bounce Back Caregiver Session.”



The caregiver session form is set up the same way as the child session form. Up to two caregiver sessions can be entered.

Enter the dates for each caregiver session, complete the form, and click “Save.”

! TIP: Session date must be on the same day or after first CBITS or Bounce Back clinical session date.

! TIP: If both caregiver sessions were completed on the same day, enter the same date in both session date fields.

CBITS Session		Session #	1	2
CBITS Session Objectives How well did you and the individual meet each objective? 1=Not Met/Not Attempted, 2=Somewhat Met, 3=Mostly Met, 4=Completed Met	CBITS Session Activities Did you and the individual complete the activity? Y=Yes, N=No	Date	<input type="text"/>	<input type="text"/>
		Caregiver		
Reduce stigma around trauma exposure and reactions			1 2 3 4	
Lay ground work for improving parent-child communication			1 2 3 4	
	Introduction of yourself and your background and role as group facilitator/overview of what will occur during the teacher session		Y N	
	Educate about common reactions to stress and trauma - provide handout		Y N	
	Explain the theoretical basis for CBITS (CBT triangle)		Y N	
	Introduce Fear Thermometer concept/teaching child to measure fear		Y N	
	Relaxation training/progressive muscle relaxation/how to help your child relax		Y N	
Education parents about techniques used in the program				1 2 3 4

CBITS or Bounce Back Session Status

When caregiver sessions are completed, go back into the session form and change the CBITS or Bounce Back session status from “Open” to “Completed.”

When viewing the CBITS or Bounce Back session screen, you will be able to see which group the child is currently enrolled in (or has previously been enrolled in), and you have the ability to click the “Finish/View” link to go back to the group session form, or to click the “Manage Group” link to edit the list of children that are enrolled in the group.

Caregiver CBITS Sessions										
Add New Caregiver CBITS Session										
Status	Action	Clinician	Status	Session 1	Session 2					
No records to display.										

Group CBITS Sessions										
Status	Action	Clinician	Group Name	Group Status	Status	Session 1	Session 2	Session 3	Session 4	Session 5
!	Finish Manage Group	Heather Sapere	Group ABC	Open	Transferred	08/01/2018 Present	08/02/2018 Present	08/03/2018 Present	09/04/2018 Present	09/05/2018 Present
!	Finish Manage Group	Heather Sapere	Group 123	Open	Enrolled					

MATCH-SPECIFIC ASSESSMENTS

Adding a MATCH Primary Problem Area and Top Problems Assessment

When entering a new MATCH client and completing their intake face sheet, make sure to enter the “First Clinical Session Date” and “MATCH-ADTC Intake Date”. You must fill in these fields, along with other required information, in order to complete the Child and Caregiver Top Problems on the “Child Home Page.”

The screenshot shows a web-based intake form with several sections. The 'System Involvement' section includes dropdowns for 'Child / family involved with DCF?' and 'Youth involved with Juvenile Justice (JJ) System?'. The 'Specific Treatment Information' section has a dropdown for 'What treatment model are you using with this child?' set to 'MATCH-ADTC' and a date field for 'First MATCH-ADTC Clinical Session Date' with the value '05/01/2018'. The 'Treatment Information' section includes fields for 'Agency Referral Date / Request for Service (RFS)', 'Agency Intake Date', 'MATCH-ADTC Referral Date', 'MATCH-ADTC Referral Source', 'MATCH-ADTC Assessment Outcome', and 'MATCH-ADTC Intake Date' with the value '05/01/2018'. A 'Treatment Information: School' section is partially visible at the bottom.

This will bring you to the page where you can fill out the Top Problems identified by the child and caregiver, as well as choose the “Primary Problem Area.”

First, type the child and caregiver Top Problems in the correct fields and click on “Save.” If you make a mistake and need to edit or change these Top Problems, you are able to make changes and resave up until the point you complete your first Top Problems Assessment (TPA). After you rate the Top Problems for the first time and save them, the Top Problems will lock and you will not be able to change them.

The screenshot shows the 'EBP TRACKER' interface. At the top, there is a logo for 'Child Health and Development Institute of Connecticut, Inc.' and the text 'Welcome Elin Barrett'. Below this, there is a navigation bar with 'Bridges = MHClin' and a date 'K, K 12/03/1983'. The main content area is titled 'MATCH Primary Problem Area' and has a dropdown menu set to 'Conduct' with a 'Save' button below it. Below this is the 'Top Problems Assessment (TPA)' section. A note states: 'Note: These Top Problem Area descriptions cannot be changed after a TPA/SFS Assessment is saved in the system.' There are two tables: 'Child Top Problems' and 'Caregiver Top Problems'. Each table has a 'Rank' column and a text input field. The 'Child Top Problems' table has three rows with 'Hits', 'Throws tantrums', and an empty row. The 'Caregiver Top Problems' table has three rows with 'Hits', 'Hits', and 'Throws tantrums'. A 'Save' button is located at the bottom of the TPA section and is circled in red.

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When you have chosen the Primary Problem Area and clicked on “Save,” return to the child’s home page by clicking on the “Child Home Page” tab.

You will now see your clients Top Problems and Primary Problem Area displayed on the “Child Home Page.”

The screenshot displays the EBP Tracker interface. The top header shows the logo for Child Health and Development Institute of Connecticut, Inc. and the title "EBP TRACKER". Below the header, the user is identified as "Welcome Kyle Barrette" and the case is labeled "Child Case" for "K, K 12/03/1983". The main content area is titled "MATCH Primary Problem Area" and includes an "Update" button. A table titled "Top Problems Assessment (TPA)" shows the following data:

Rank	Child Top Problem	Caregiver Top Problem
1	HIS	Bites
2	Throws tantrums	Throws tantrums
3		

The "Intake, Periodic, Discharge Checks" section contains a table with the following data:

Overall Status	Status	Action	Type	Date	Shortcut	First Scheduled Date
			Periodic			05/30/2018
		Finish Intake	Intake	03/01/2018	Assessments	

The "Monthly Session" section shows a table with the following data:

Status	Action	Clinician	Period	Due Date	Complete Date	Number Of Visits	Number Of No Shows
No records to display.							

The "Monthly Assessments" section shows a table with the following data:

Status	Action	Assessment	Assessment Date	Questions Answered	No Assessment Reason	No Assessment Reason Date	Scheduled Date
--------	--------	------------	-----------------	--------------------	----------------------	---------------------------	----------------

Your first TPA assessments will also appear in EBP Tracker so that you can enter the child and caregiver’s ratings of the Top Problems.

! TIP: When you enter a rating for the Top Problems and click on “Save,” you will no longer be able to change the Top Problems, UNLESS you update the Primary Problem Area.

Case Status
 Treatment Model: **Monthly Session**
 Case Status: **Open**
 Assessment Status: **Open**
 Session Status: **Enrolled**
 Assigned To: **Kyle Barrette**
 Site: **MHClin**

Monthly Assessments

Status	Action	Assessment	Assessment Date	Questions Answered	No Assessment Reason	No Assessment Reason Date	Scheduled Date
	Add	MATCH TPA - CHILD					08/24/2018
	Add	MATCH TPA - CAREGIVER					08/31/2018
	Add	MATCH TPA - CHILD					08/01/2018
	Add	MATCH TPA - CAREGIVER					08/01/2018

Depending on your first clinical session date, you may have multiple TPA assessments that appear in your “Monthly Assessments” section. Make sure to follow the “Scheduled Date” to see when each assessment is due.

To rate the Top Problems, click on “Add” next to a TPA that is due.

Monthly Assessments

Status	Action	Assessment	Assessment Date	Questions Answered	No Assessment Reason	No Assessment Reason Date	Scheduled Date
	Add	MATCH TPA - CHILD					08/24/2018
	Add	MATCH TPA - CAREGIVER					08/31/2018
	Add	MATCH TPA - CHILD					08/01/2018
	Add	MATCH TPA - CAREGIVER					08/01/2018

Fill out the rating for each top problem and click on “Save.”

CAREGIVER ASSESSMENT

Date Completed: 8/2/2018 Date Entered: 2/23/2018 9:11:23 AM

Notes:

Assessment Not Completed Reason:

Partially Complete

Top Problems Assessment (TPA)

How much has your child had each of the following problems (circle the number) Use a 0 to 4 scale. 0=not a problem 4= a very big problem	0	1	2	3	4
1. Wets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
2. Bites	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
3. Throws tantrums	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Save

Editing/Updating MATCH Primary Problem Area and Top Problems Assessment

Top Problem Assessments (TPAs) can now be updated in PIE when the child's Primary Problem Area changes. New TPAs are finalized once the next monthly TPA is completed.

MATCH Primary Problem Area

Select "Update" to enter Top Problems for child and caregiver. Once you have entered the top problems for your client, the TPA will appear in your Monthly Assessments and you will be able to rate the identified problems.

Primary Problem Area: (none selected) **Update**

MATCH Primary Problem Area

Select "Update" to enter Top Problems for child and caregiver. Once you have entered the top problems for your client, the TPA will appear in your Monthly Assessments and you will be able to rate the identified problems.

Primary Problem Area: Anxiety **Update**

Top Problems Assessment (TPA):

Rank	Child Top Problem	Caregiver Top Problem
1	Scared at night	Won't go to school
2	Doesn't like school	Bad dreams
3	Panic attacks	Anxious

IMPORTANT: 1) Top Problem Area descriptions cannot be changed after a TPA Assessment is saved in the system, **unless you change the MATCH Primary Problem Area.**

MATCH Primary Problem Area

Primary Problem Area: Trauma **Save**

Top Problems Assessment (TPA)

Note: These Top Problem Area descriptions cannot be changed after a TPA Assessment is saved in the system, unless you change the MATCH Primary Problem Area.

Rank	Child Top Problems
1	Trauma Symptoms
2	Doesn't like school
3	Panic attacks

Rank	Caregiver Top Problems
1	Won't go to school
2	Bad dreams
3	Anxious

Caregiver Top Problems Not Completed Reason:

Save

2) Additionally, **you now need to be up to date on completing monthly TPAs BEFORE changing the Primary Protocol Area and Top Problems.** If you are not up to date on your monthly TPAs, and update Primary Protocol Area and Top Problems, any past-due or upcoming TPAs will show the new Top Problems, even if the form is old. You can also view a history of the child’s Top Problems and Primary Protocol Areas, should they change throughout the course of treatment.

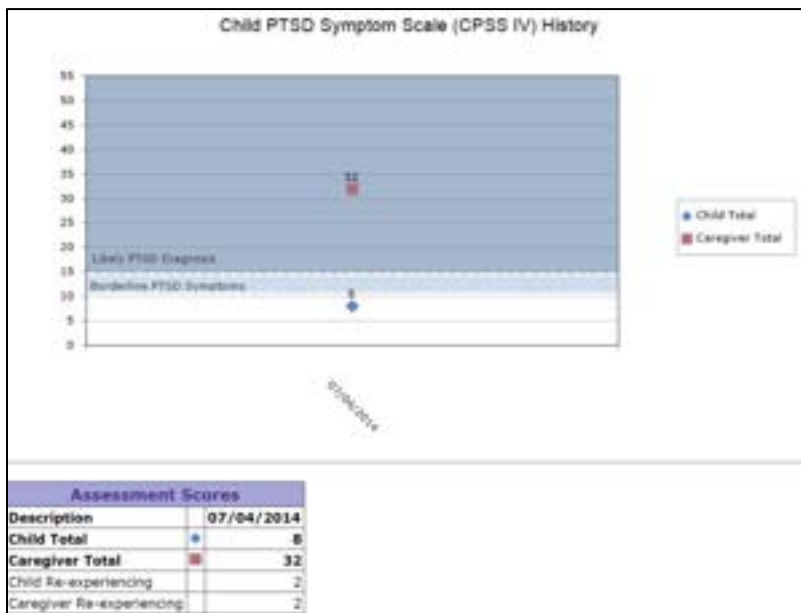
MATCH Primary Problem Area History							
Primary Problem Area	Clinician	Child Problem 1	Child Problem 2	Child Problem 3	Caregiver Problem 1	Caregiver Problem 2	Caregiver Problem 3
Trauma	Bethany Zorba	Trauma Symptoms	Doesn't like school	Panic attacks	Won't go to school	Bad dreams	Anxious
Anxiety	Bethany Zorba	Scared at night	Doesn't like school	Panic attacks	Won't go to school	Bad dreams	Anxious

REPORTS

Score Profile Report

After “Adding a new case” or searching for an existing child using the “Fine/Edit Child” action, select “Score Profile Report” on the “Child Actions” menu at the left of your screen. The Score Profile Report is available for all EBP treatment models in EBP Tracker. When each assessment measure is completed, a graph and table is presented summarizing the results. The advantage provided by the Score Profile Report is that the results of ALL assessments are presented in one place. The clinician can quickly run one report to view client outcomes across all assessments, and print or export the report as a pdf for addition to the provider’s file.

Trauma History	
Trauma History Screen (THS) - CHILD	
# Different Trauma Exposures: 12	
Assessment Date: 07/13/2004	
Worst Trauma:	Been attacked by a dog or other animal?
	Had someone you know been so badly injured or sick that s/he almost died? Been so sick or hurt that you or the doctor thought you might die? Been robbed or seen someone get robbed? Been kidnapped by somebody? Trauma Events Endorsed: Been in or seen a hurricane, earthquake, tornado, or bad fire? Been attacked by a dog or other animal? Seen or heard people physically fighting or threatening to hurt each other? Seen or heard someone else being forced to do something sexual? Watched people using drugs (like smoking, snorting, or using needles)? Seen something else that was very scary or where you thought somebody might get hurt or die?
Trauma History Screen (THS) - CAREGIVER	
# Different Trauma Exposures: 11	
Assessment Date: 07/13/2004	
Worst Trauma:	Been in or seen a hurricane, earthquake, tornado, or bad fire?
	Been in or seen a very bad accident? Had someone s/he knows been so badly injured or sick that s/he almost died? Been physically hurt or threatened by someone? Been robbed or seen someone get robbed? Been kidnapped by somebody? Trauma Events Endorsed: Been in or seen a hurricane, earthquake, tornado, or bad fire? Been attacked by a dog or other animal? Seen or heard people physically fighting or threatening to hurt each other?



Treatment Component Report

After “Adding a new case” or searching for an existing child using the “Fine/Edit Child” action, select “Score Profile Report” on the “Child Actions” menu at the left of your screen. The report provides a helpful summary of the EBT treatment components used in sessions with the child and caregiver to date, as logged in the clinician’s Monthly Session forms. This report also tracks the number of visits, no shows and relative session time dedicated to the child and/or caregiver. The Treatment Component Report assists the clinician and team leader in ensuring fidelity to the treatment model. The clinician can print or export the report as a pdf for addition to the provider’s file.

123456 M, M 07/01/2010																
TF-CBT Treatment Components- Child Level Report																
Client #:	123456	Initials:	MM													
D.O.B:	07/01/2010	Sex:	Female													
Race:	White	Model Intake Date:	07/04/2014													
History of Sessions/Components																
Client ID# 123456	Monthly Session form date	Visits	# of no shows	% with caregiver only	% with child only	% with child and caregiver together	Psycho-education	Parenting	Relaxation	Affective Expression	Cognitive Coping	Trauma Narrative	Trauma Narrative Completed	In Vivo	Conjoint Sessions	Enhancing Safety
	October 2014	3	1	0%	50%	50%										
	November 2014	4	0	0%	25%	75%	X	X								

EXPORTS

Anyone that can view all child data at any agency (senior leaders, coordinators, supervisors, and data entry) can export their assessment and intake data.

In EBPTTracker:

First, select “Application Administration” in the Actions.

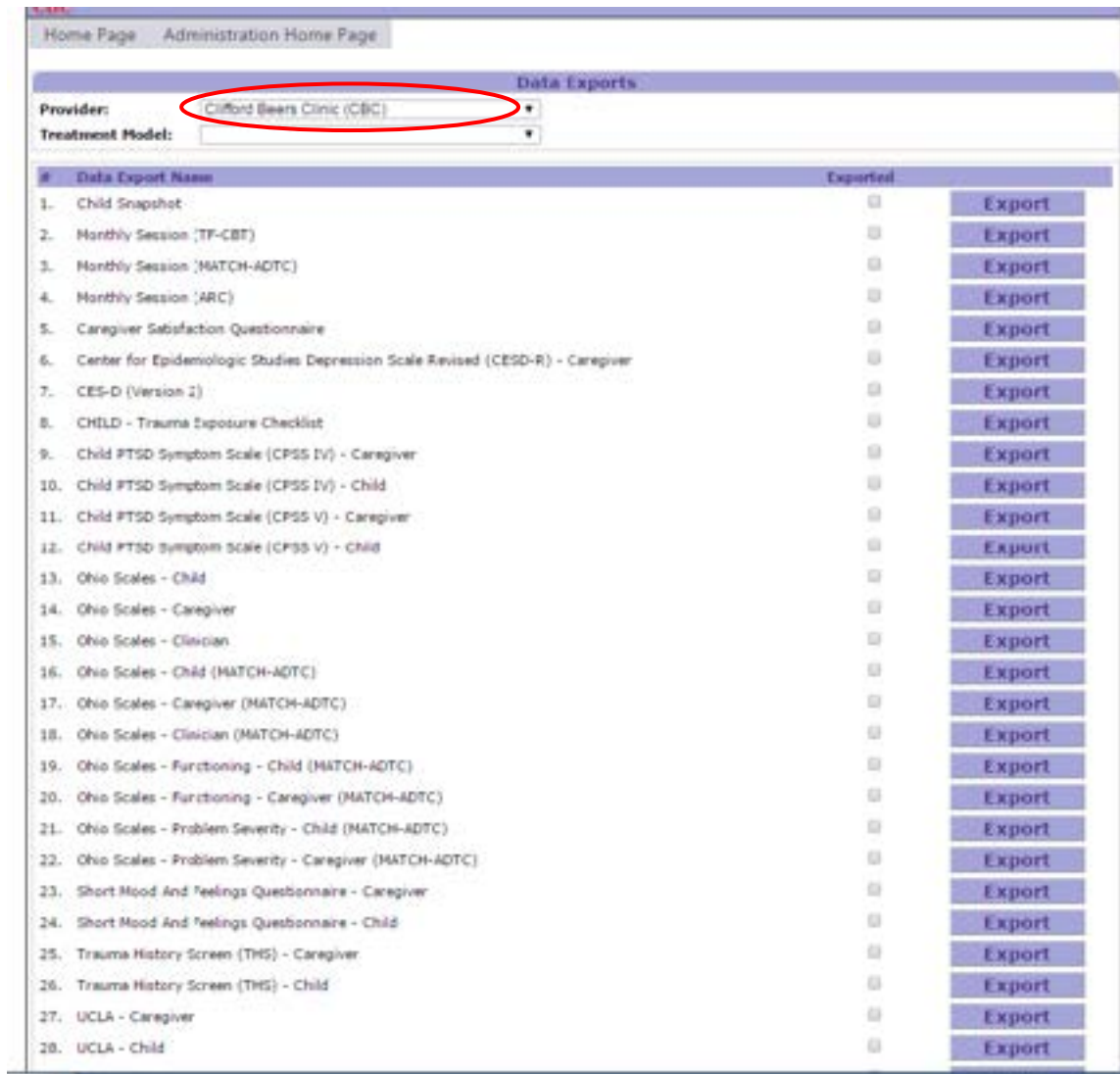
The screenshot shows the 'Find Child' search interface. On the left is a vertical 'Actions' menu with the following items: Attention Items, My Open Cases, Find/Edit Child, Monthly Session, My CHITS Groups, My Bounce Back Groups, Change Provider, Reports, Application Administration (circled in red), Account Settings, and Logout. The main area is titled 'Find Child' and contains search instructions and a form. The form includes fields for: First Initial of Child's First Name, First Initial of Child's Last Name, Child DOB, Child Sex, Agency Assigned Client ID Number (not PHI), Provider, Site, Clinician, Case Status, Treatment Model (with checkboxes for TF-CBT, MATCH-ADTC, CBITS, Bounce Back, and ARC), Treatment Model Intake Date, and EBP Tracker Child ID. A 'Search' button is located at the bottom of the form.

Then select “Data Exports” on the Administration Home Page.

The screenshot shows the 'Administration Home Page' with a breadcrumb trail at the top: Home Page > Administration Home Page. The page title is 'Administration Home Page'. A link labeled 'Data Exports' is visible on the left side of the page and is circled in red.

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Agencies can export all child data, or they can filter by treatment model. To filter by treatment model, select the treatment model from the dropdown (see below) and then select the “Export” button next to the desired Data Export Name (see below).



After selecting “Export” Excel should open with a message box saying “The file format and extension of (filename) don’t match. The file could be corrupted or unsafe. Unless you trust its source, don’t open it. Do you want to open it anyway?” Select “Yes.” You should see the data file in Excel.



! TIP: Files export from EBP Tracker as webpage files. To save an export as an Excel file in Excel, go to “File” then “Save As” and select the desired folder. In the “Save as Type” dropdown, change the type to Excel Workbook (*.xlsx).

In PIE:

You can also export data in PIE by navigating to the Reports page, located on the bottom left menu. Then, select Data Exports on the bottom under EBP Tracker Reports.



! TIP: You can choose filter your export by Agency Project and Treatment Model. A CSV file will download once you select the exports you wish to view.

Connecticut State
Department of Children and Families
PIE Provider Information Exchange



Data Exports

Project: (KJMB-OPCC) KJMB-OPCC ▼

Treatment Model: ▼

#	Data Export Name	Exported	
1.	Child Snapshot	<input type="checkbox"/>	Export
2.	Monthly Session (TF-CBT)	<input type="checkbox"/>	Export
3.	Monthly Session (MATCH-ADTC)	<input type="checkbox"/>	Export
4.	Caregiver Satisfaction Questionnaire - Historical	<input type="checkbox"/>	Export
5.	Center for Epidemiologic Studies Depression Scale Revised (CESD-R) - Caregiver	<input type="checkbox"/>	Export
6.	Child PTSD Symptom Scale (CPSS IV) - Caregiver	<input type="checkbox"/>	Export
7.	Child PTSD Symptom Scale (CPSS IV) - Child	<input type="checkbox"/>	Export
8.	Child PTSD Symptom Scale (CPSS V) - Caregiver	<input type="checkbox"/>	Export
9.	Child PTSD Symptom Scale (CPSS V) - Child	<input type="checkbox"/>	Export
10.	Ohio Scales - Child (TF-CBT)	<input type="checkbox"/>	Export
11.	Ohio Scales - Caregiver (TF-CBT)	<input type="checkbox"/>	Export
12.	Ohio Scales - Child (MATCH-ADTC)	<input type="checkbox"/>	Export
13.	Ohio Scales - Caregiver (MATCH-ADTC)	<input type="checkbox"/>	Export