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 EBPTracker

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.

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.

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 – EBPTracker 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.

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.

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.

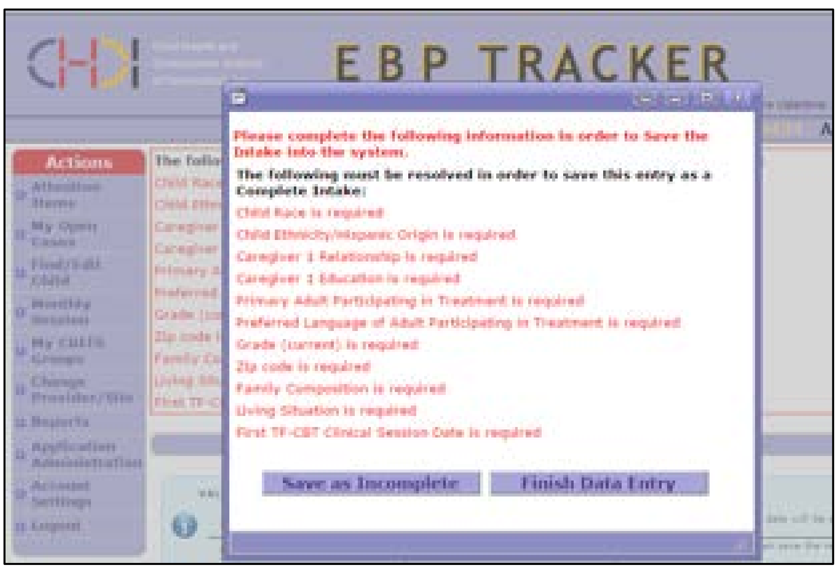
Required Fields

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

! The 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, <u>all of the exclamation points (minimum required data) on the form must be completed</u>. 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

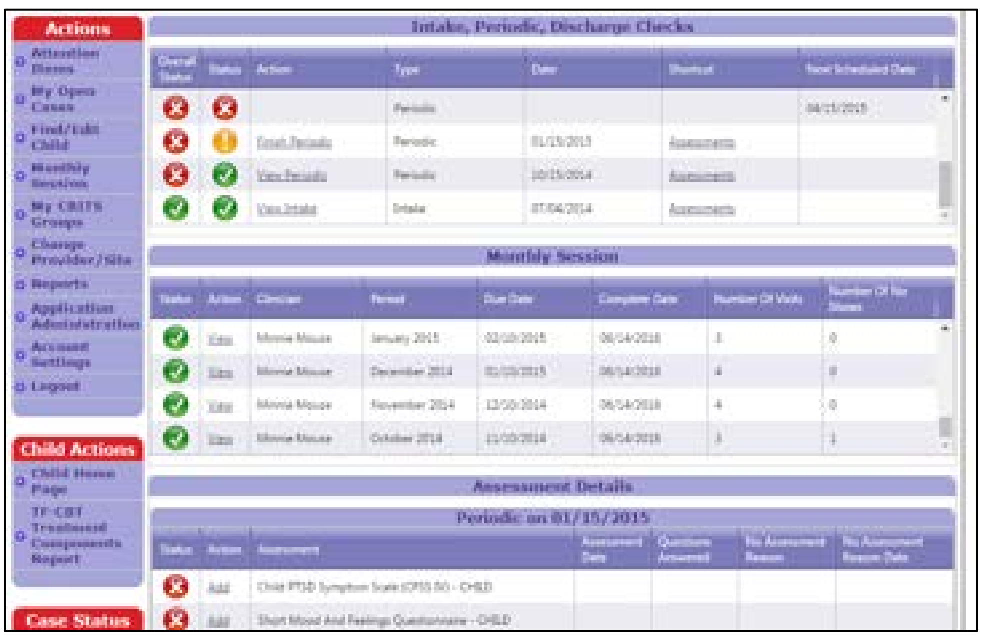
Clicking on 'Save as Incomplete' allows the user to save a form and return later to finish it. This button may be used only when all exclamation point items have been completed. Some asterisk items may not be filled in, but the user intends on entering these items at a later time. The form will close 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.



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.

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.

! 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.

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.

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.

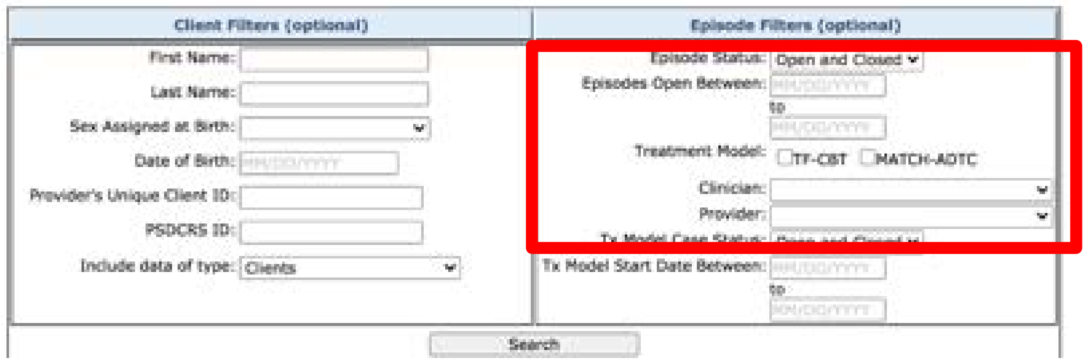
You may enter as much or as little information as you wish in order to limit the search results. For example, you may put in the client's ID the child's initials, child's date of birth, etc.

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.

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:

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.

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

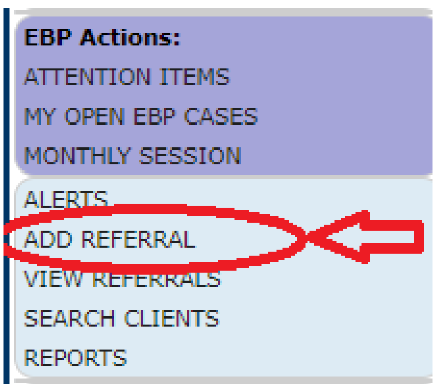
Click on the next button. This will take you to the intake face sheet to enter data for the new client. For more information on completing the intake face sheet, please go to the "Completing Snapshot Face Sheets" section of this manual.

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.**

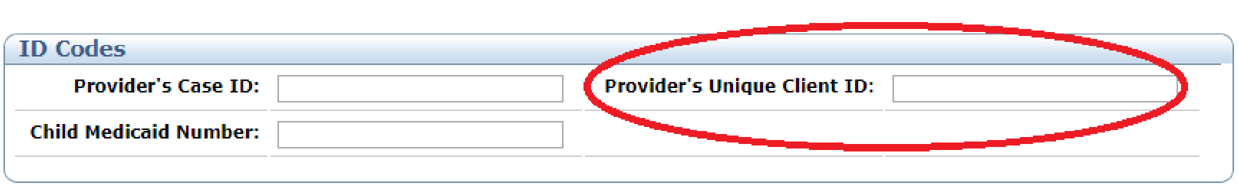


- First & Last name
- Date of Birth
- Sex
- Zip Code
- Date of referral
- Referral source

(**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).

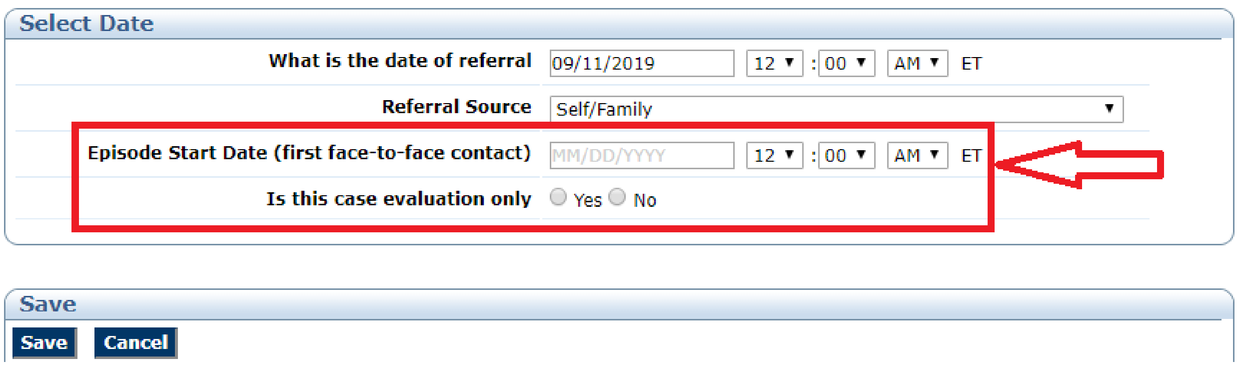
After entering this information, the system will ask you to confirm your PIE project (select **OK**), and then you will be brought to the Add a Client Screen. Confirm the client identifying information, then select **Check for Match**. This will either generate:

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.



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.



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.

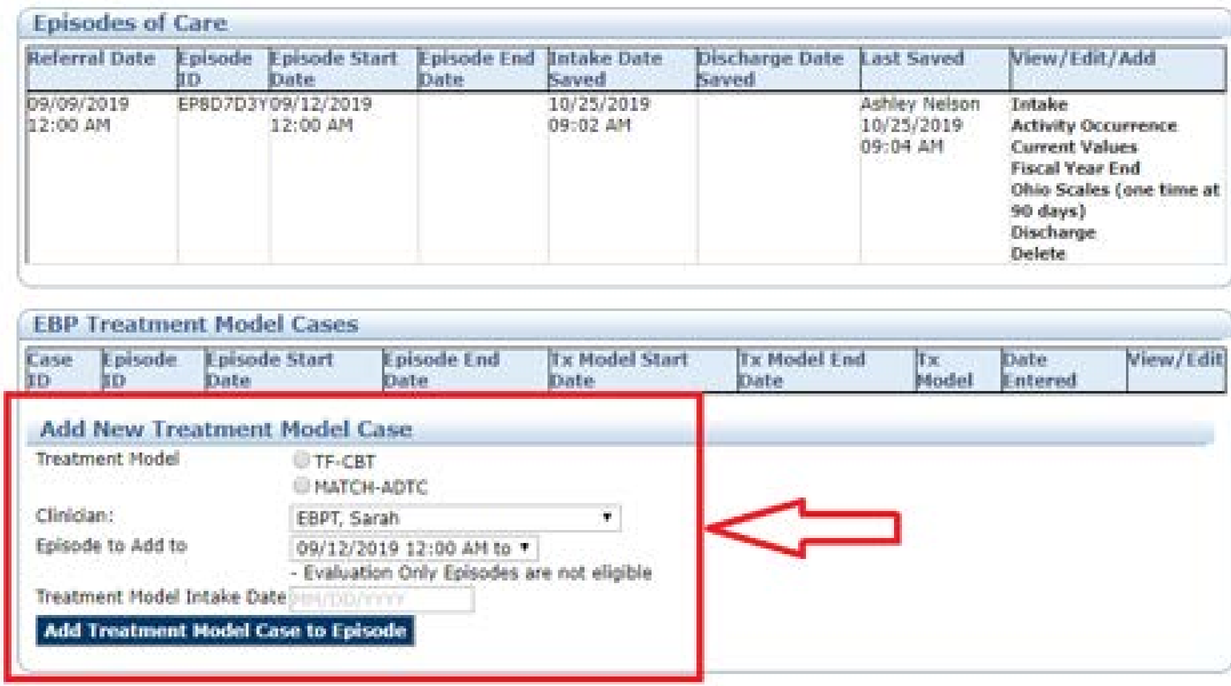
If opting to skip outpatient episode intake information and Ohios, the system will generate a long list of warnings. You can skip any warnings in black text by selecting **Save**. If you have a warning in red text, it means that one of the required fields mentioned in the previous sections were not entered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

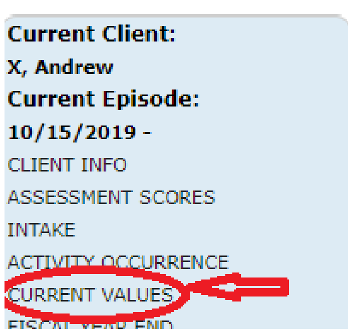
Step 2: Creating the EBP Episode

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.



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.



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: D
First Initial of Child's Last Name: D
Child DOB: 02/02/2001
Child Sex: Male

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

Agency Assigned Client ID Number (not PHI): 88888888
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)

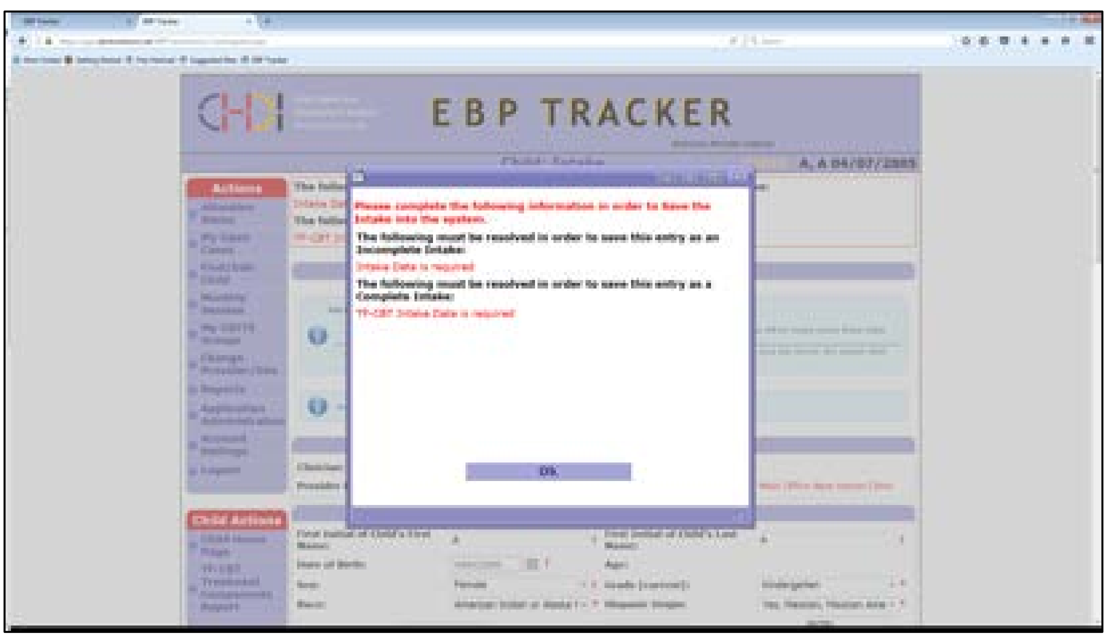
I want to create a new Intake for the existing child that I selected above.
(This option will create a new treatment episode for the existing child).

COMPLETING FACE SHEETS

Client Face Sheet: Intake

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.

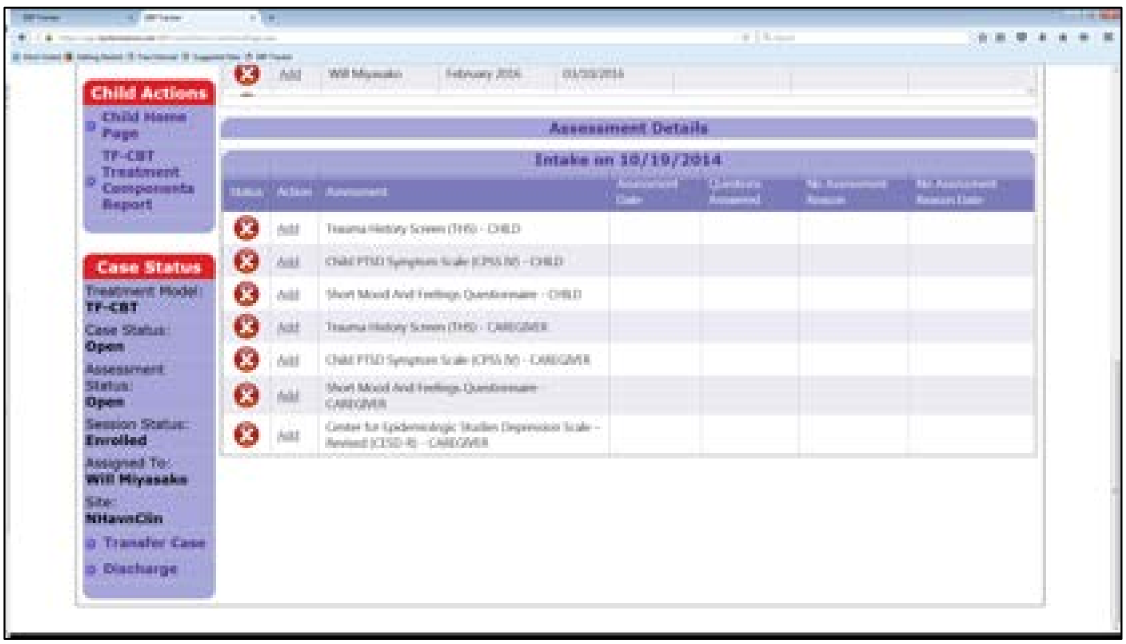


.

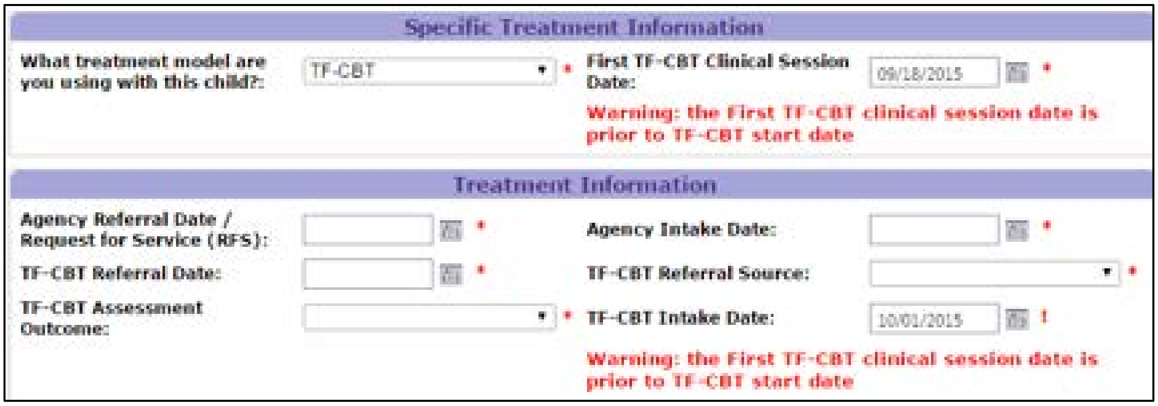
TF-CBT Intake Date: This date refers to the day that the actual assessments were completed. Please make sure this date is correct as this is the date that the next assessment will be based on.

! 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.



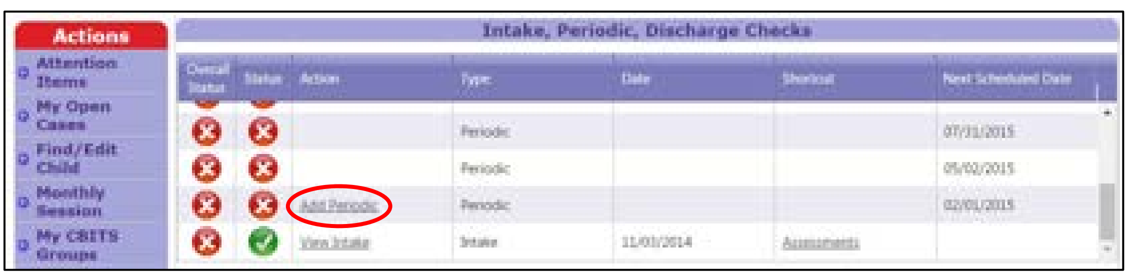
To resolve this error, enter an EBP first clinical session date that occurs on the same day, or on a date that is later than the "TF-CBT Start Date." Click on the "Save" button before exiting the form.

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)

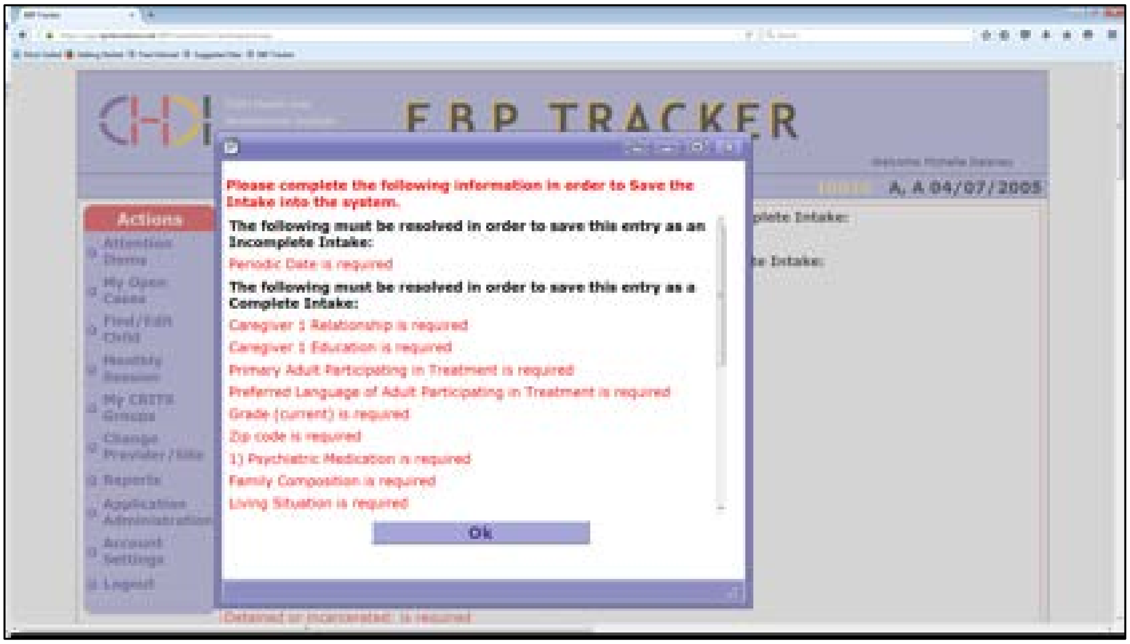


To enter a periodic click on "Add Periodic." The Client Face Sheet Periodic will open to allow for data entry.

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).

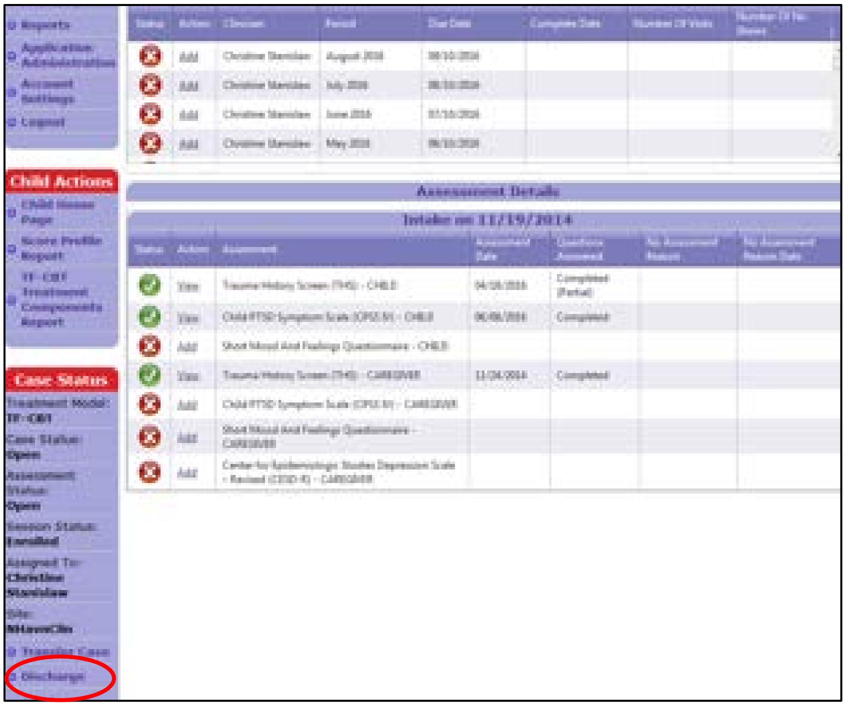
All fields with an asterisk (*) must be complete before the form will show as complete.

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.

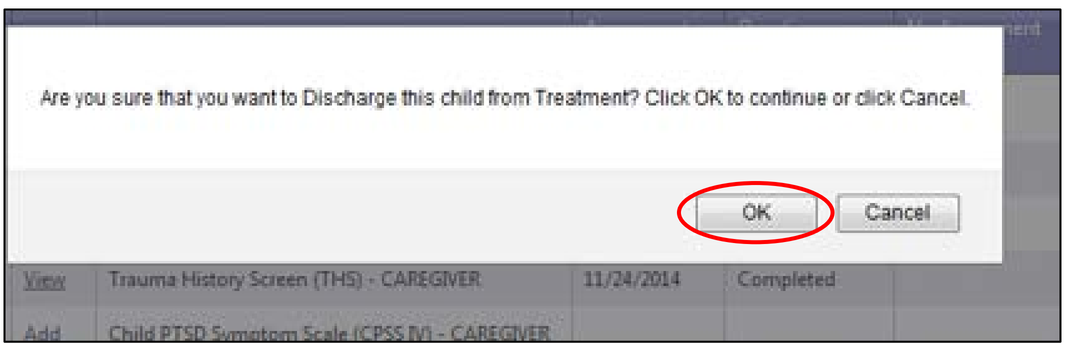


Client Face Sheet: Discharge

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



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).

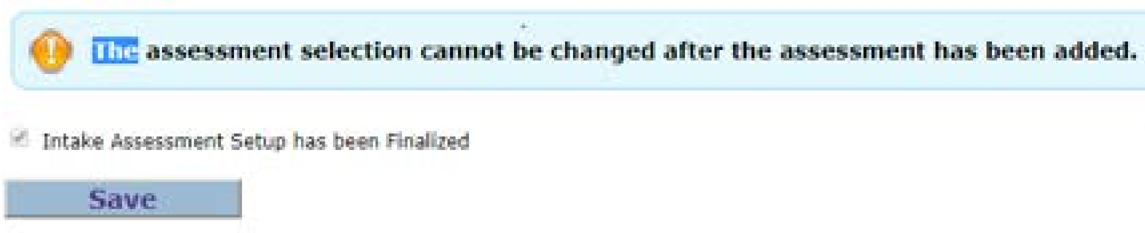
Five assessment categories are shown:

- 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

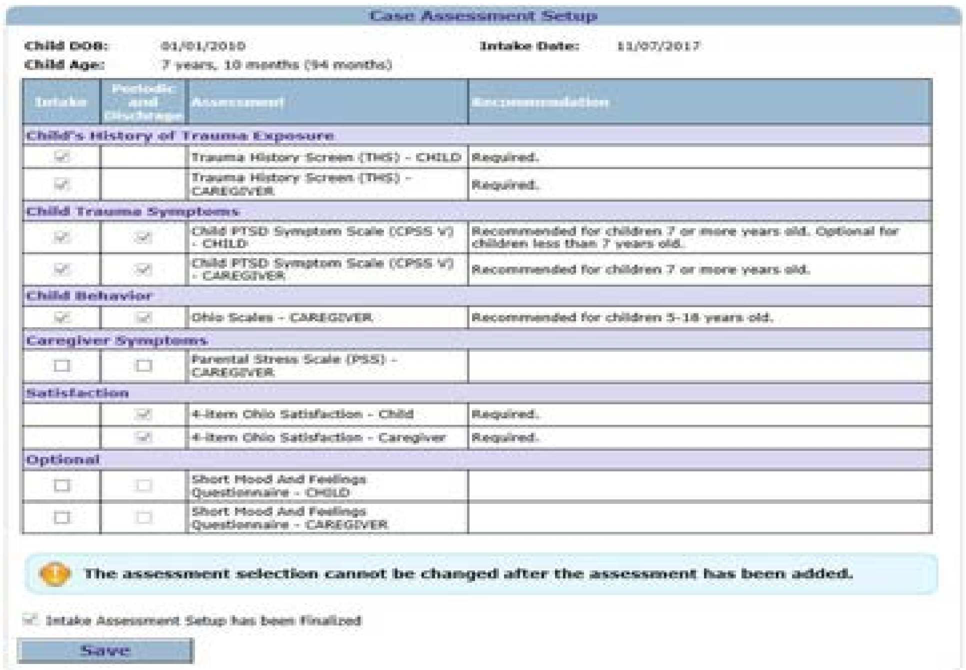
As you prepare to assess your child and/or caregiver, you should consider the following in deciding the most appropriate assessments to track symptom change:

- 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.

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).


Case Assessment Setup

Child DOB: 01/01/2010 Intake Date: 11/07/2017
Child Age: 7 years, 10 months (94 months)

Intake	Periodic and Discharge	Assessment	Recommendation
Child's History of Trauma Exposure			
☑		Trauma History Screen (THS) - CHILD	Required.
☑		Trauma History Screen (THS) - CAREGIVER	Required.
Child Trauma Symptoms			
☑	☑	Child PTSD Symptom Scale (CPSS V) - CHILD	Recommended for children 7 or more years old. Optional for children less than 7 years old.
☑	☑	Child PTSD Symptom Scale (CPSS V) - CAREGIVER	Recommended for children 7 or more years old.
Child Behavior			
☑	☑	Ohio Scales - CAREGIVER	Recommended for children 5-18 years old.
Caregiver Symptoms			
☐	☐	Parental Stress Scale (PSS) - CAREGIVER	
Satisfaction			
	☑	4-item Ohio Satisfaction - Child	Required.
	☑	4-item Ohio Satisfaction - Caregiver	Required.
Optional			
☐	☐	Short Mood And Feelings Questionnaire - CHILD	
☐	☐	Short Mood And Feelings Questionnaire - CAREGIVER	

The assessment selection cannot be changed after the assessment has been added.

☑ Intake Assessment Setup has been Finalized

Save

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.

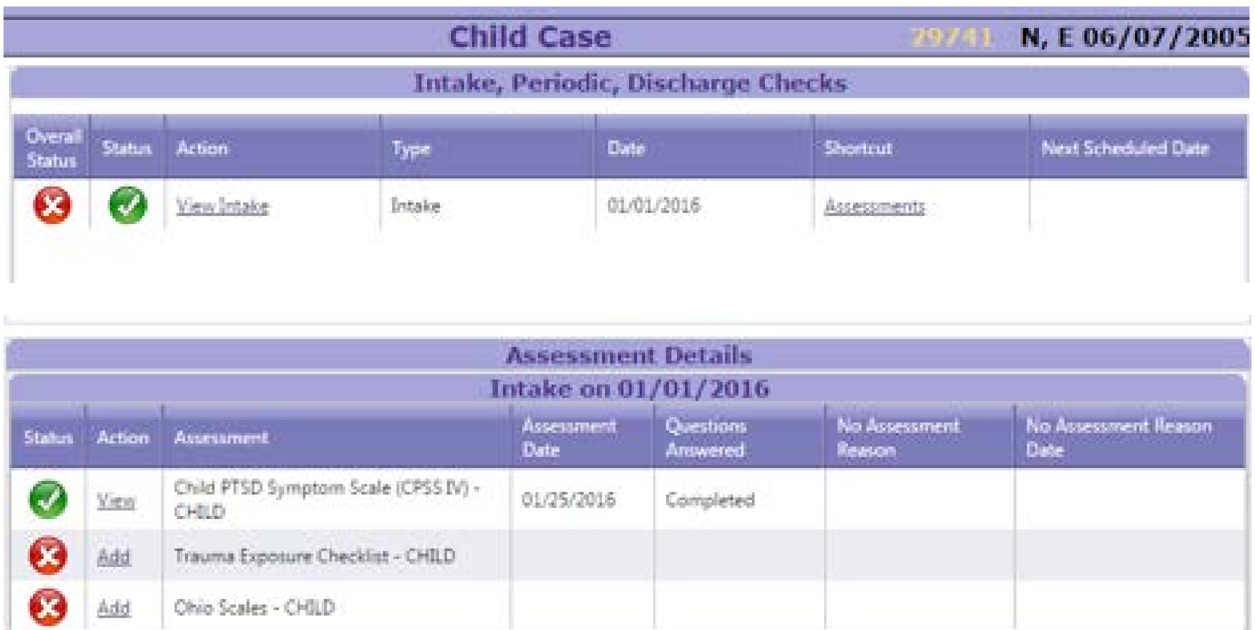
You may also choose to add additional, non-required assessments at this time. Additional assessments may only be added at the FIRST Periodic assessment.

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.



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.

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.

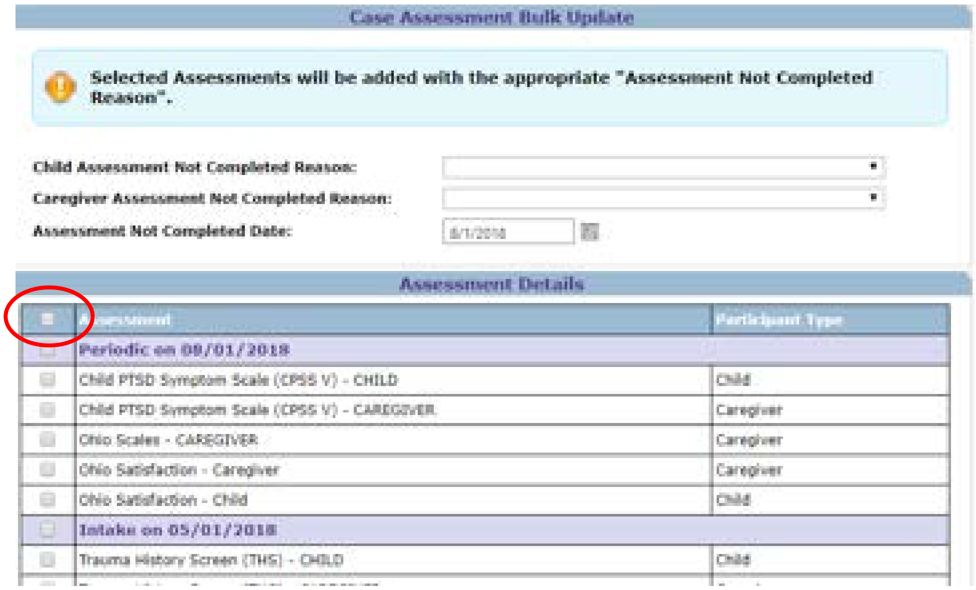
This new feature is available on the child home page of all of your clients, under the “Case Status” tab (see image below). Click on the “Case Assessment Bulk Update” button.

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).

! 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
Assessment
Participant Type
Periodic on 08/01/2018
Child PTSD Symptom Scale (CPSS V) - CHILD
Child
Child PTSD Symptom Scale (CPSS V) - CAREGIVER
Caregiver
Ohio Scales - CAREGIVER
Caregiver
Ohio Satisfaction - Caregiver
Caregiver
Ohio Satisfaction - Child
Child
Intake on 05/01/2018
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."

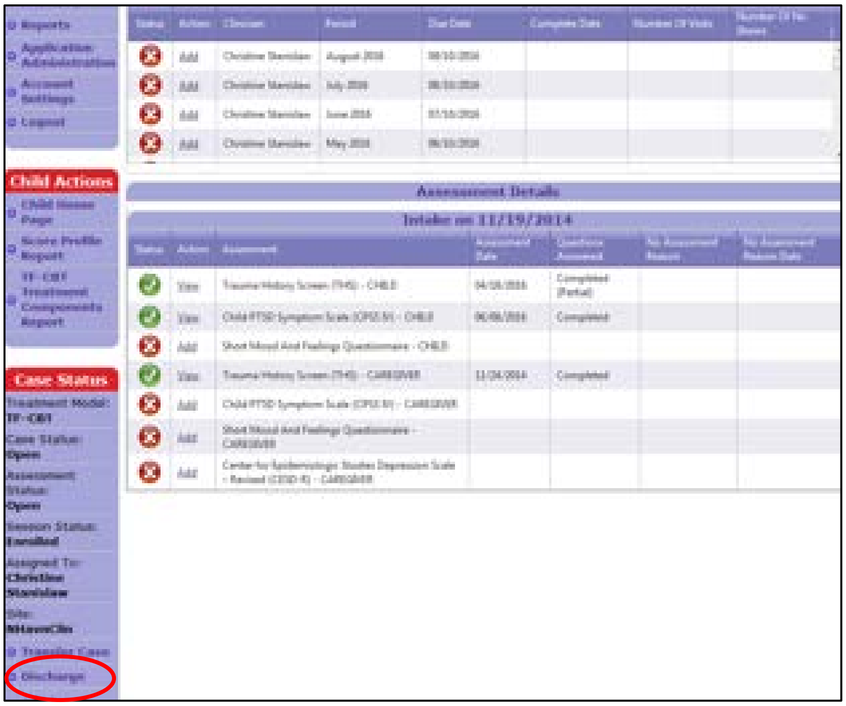
The treatment model intake date located on the face sheet is the date that determines when a monthly session form will appear. For example, if today is 5/15/16 and you enter in 5/15/16 as the intake date this will generate a 'May' monthly session form because the case was opened in May. The monthly session 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 accidently 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 accidently 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!"

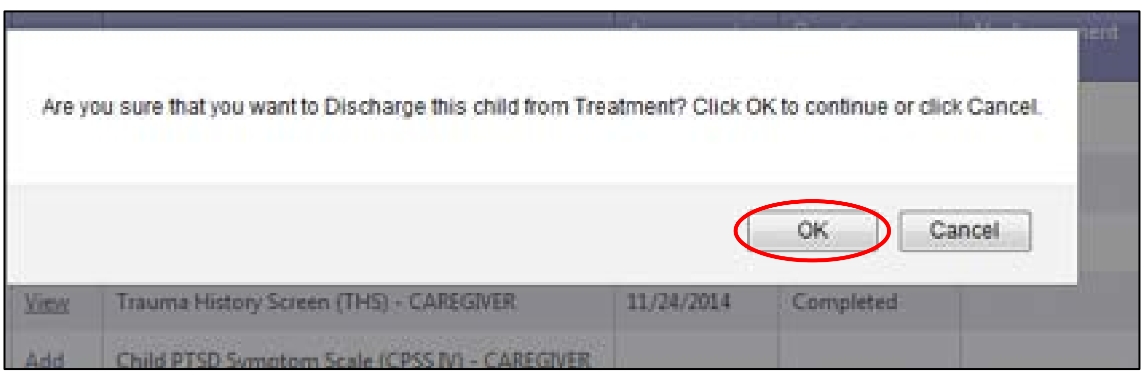
DISCHARGING A CASE

Discharging a Case

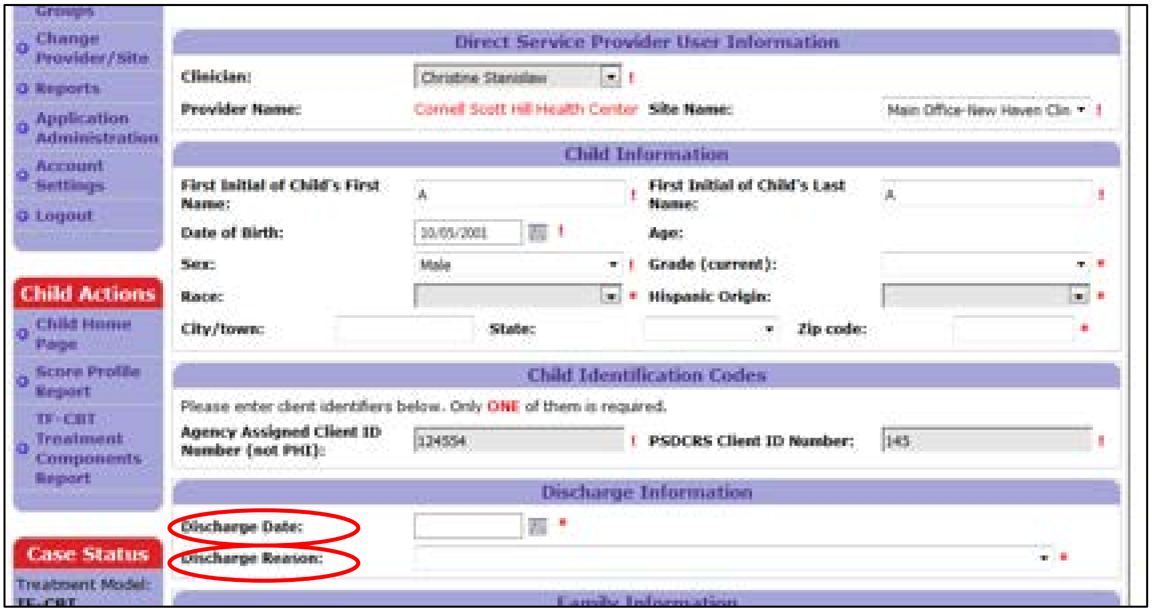
Select “Discharge” on the “Case Status” menu on the “Child Home Page.”



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.

Discharge Assessments

Monthly Session

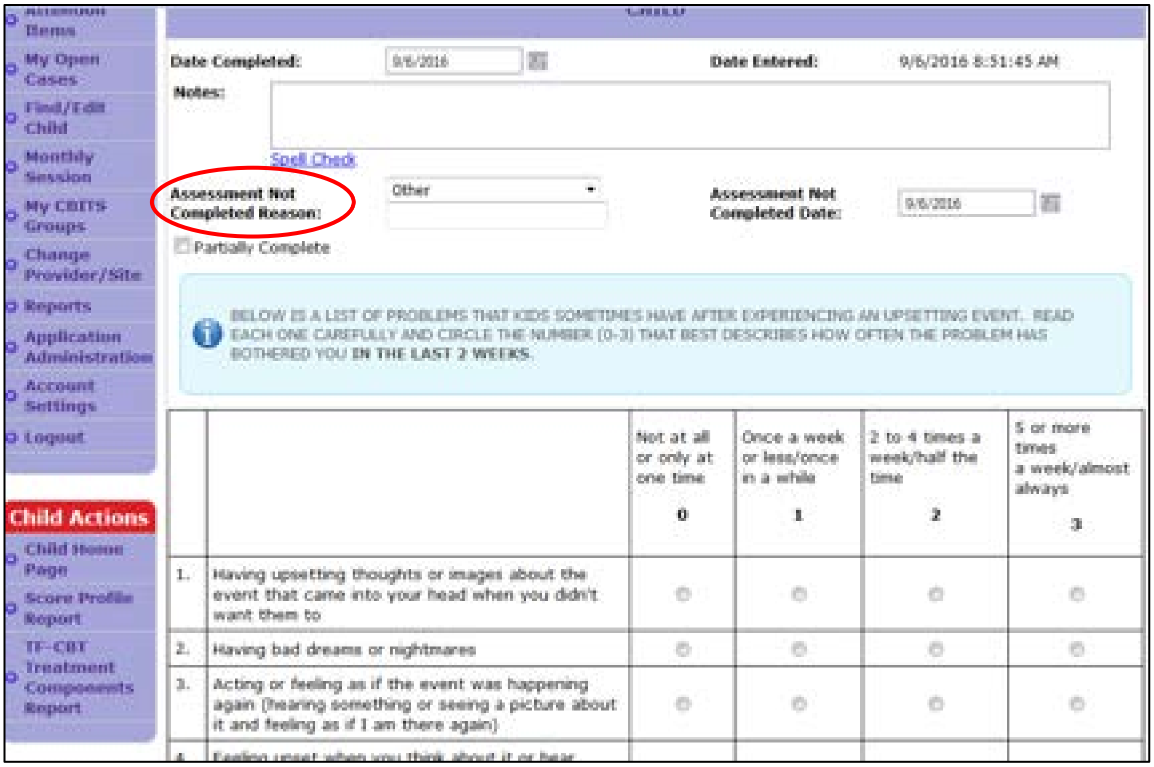
Status	Action	Clinician	Period	Due Date	Complete Date	Number Of Visits	Number Of No Shows
	Add	Christine Stanislaw	August 2016	09/10/2016			
	Add	Christine Stanislaw	July 2016	08/10/2016			
	Add	Christine Stanislaw	June 2016	07/10/2016			
	Add	Christine Stanislaw	May 2016	06/10/2016			

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. ✅



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."

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

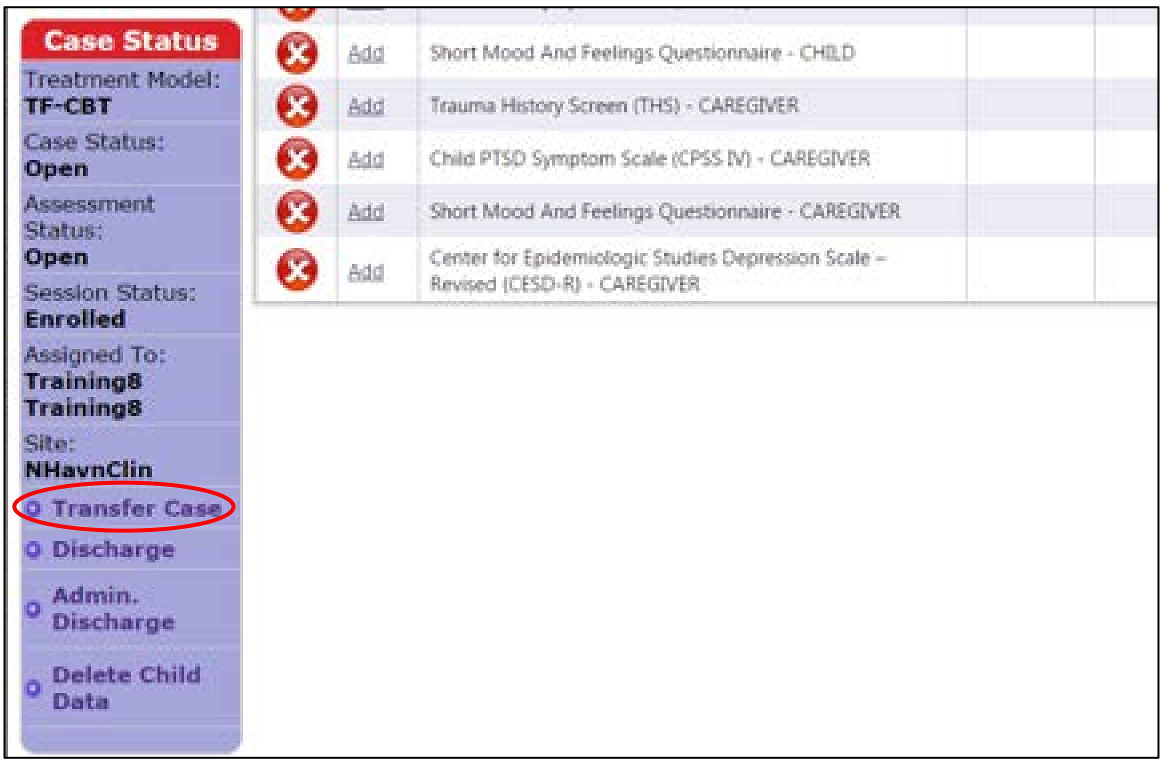
Transferring a Child from One Clinician to Another

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).



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."

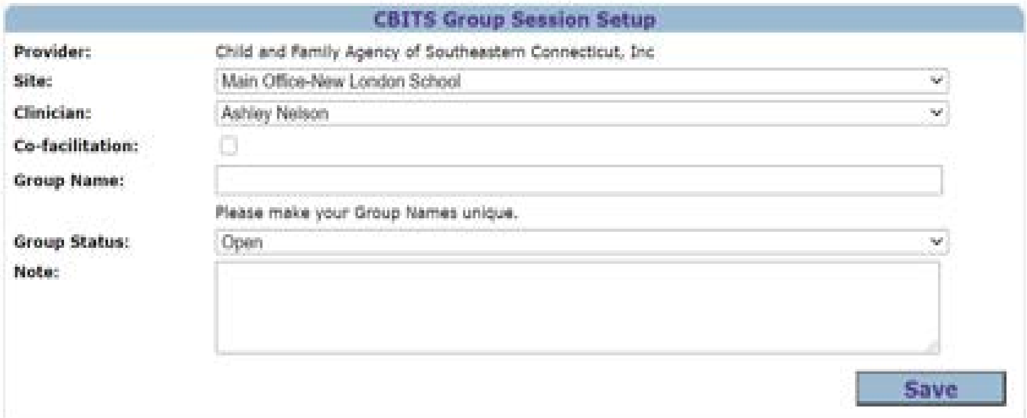
MANAGING CBITS AND BOUNCE BACK GROUPS

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.”



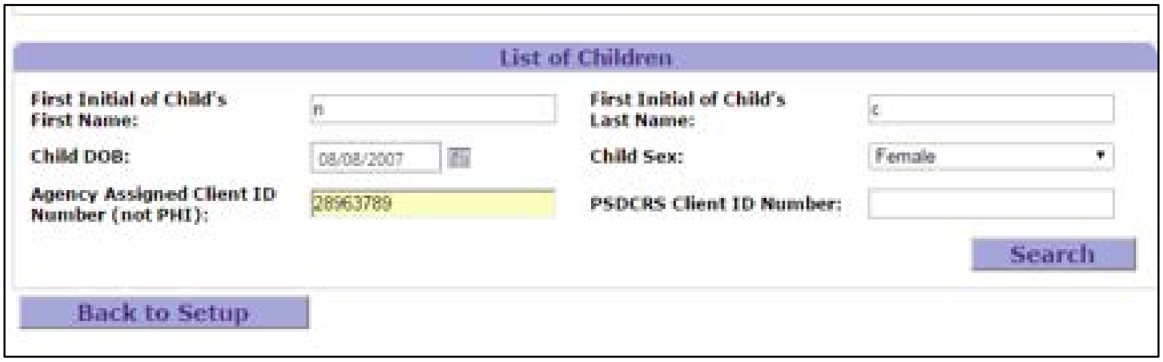
Enter a unique Group Name (something that you will be able to distinguish from your other groups), co-facilitation (if applicable) and any necessary notes, then click "Save". **IMPORTANT : Co-facilitators cannot access child records.**

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."

Enter the child's information, then click "Search."



List of Children

First Initial of Child's First Name:	n	First Initial of Child's Last Name:	c
Child DOB:	08/08/2007	Child Sex:	Female
Agency Assigned Client ID Number (not PHI):	28963789	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:	n	First Initial of Child's Last Name:	c
Child DOB:	08/08/2007	Child Sex:	Female
Agency Assigned Client ID Number (not PHI):	28963789	PSDCRS Client ID Number:	

Search

Select	First Initial	Last Initial	DOB	Sex	Agency Client ID	PSDCRS Client ID	Clinician	Case Status
✔	N	C	08/08/2007	Female	28963789		Heather Sapere	Open

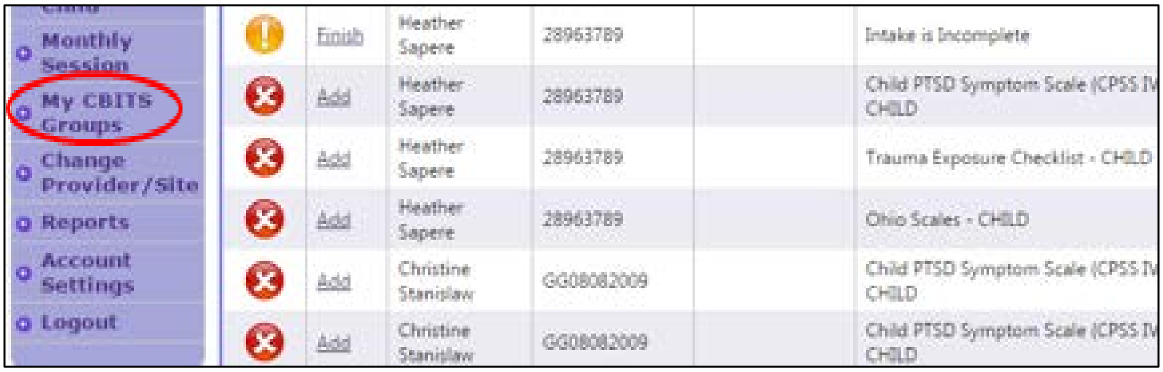
Click on the "Back to Setup" button to go back to the "Group Session Setup." The child that you just added to the group will now be listed under the List of Children.

List of Children

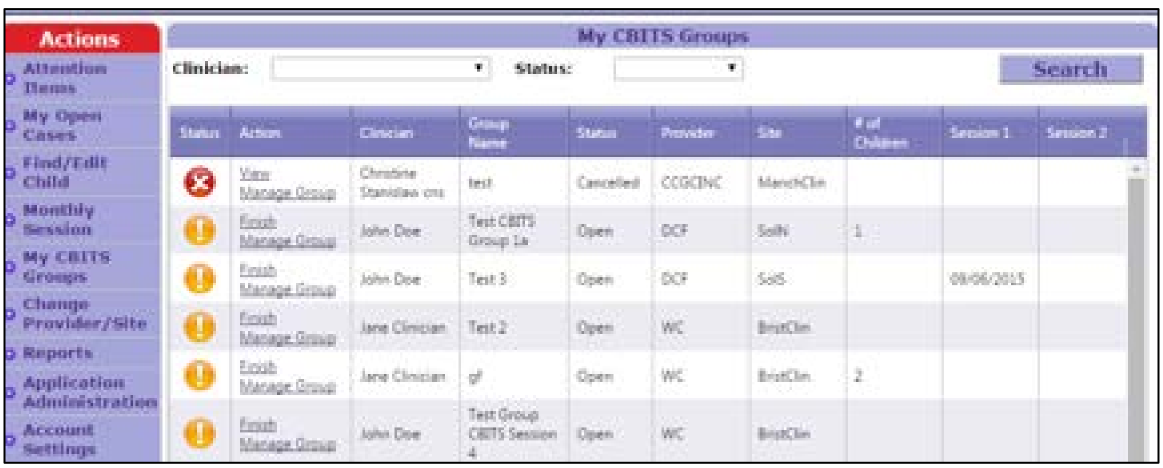
First Initial	Last Initial	DOB	Sex	Agency Client ID	PSDCRS Client ID	Enrollment Status	Action
N	C	08/08/2007	Female	28963789		Enrolled	Unenroll

Viewing/Managing Existing CBITS or Bounce Back Groups

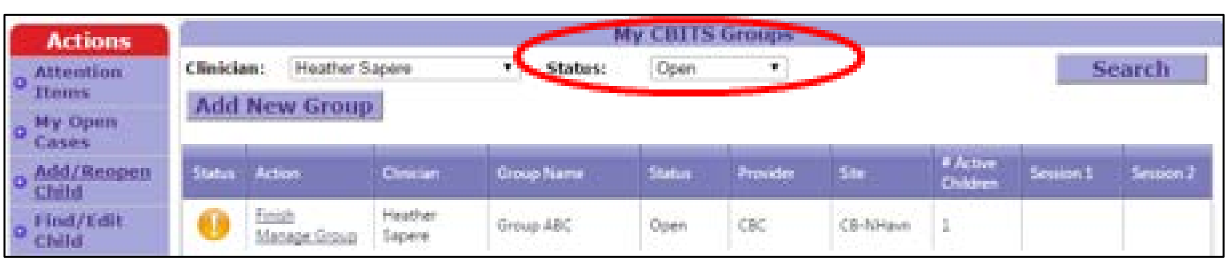
Click on “My CBITS Groups” or “My Bounce Back Groups” in the Actions menu.



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.



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.”



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.

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.

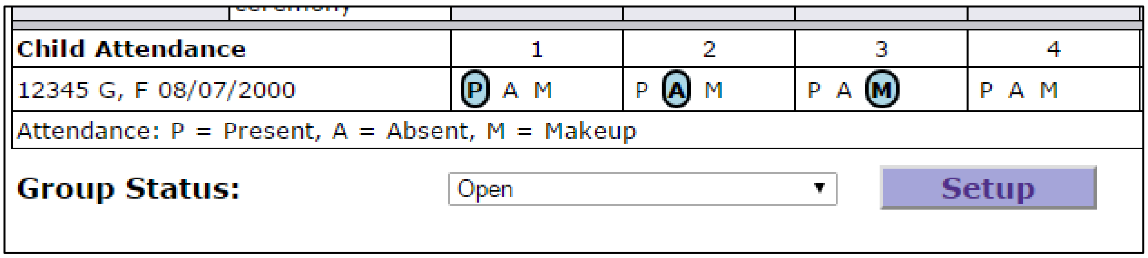
From the "Group Session Setup" screen, you can also view the current group session form and transfer a group.

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.

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.

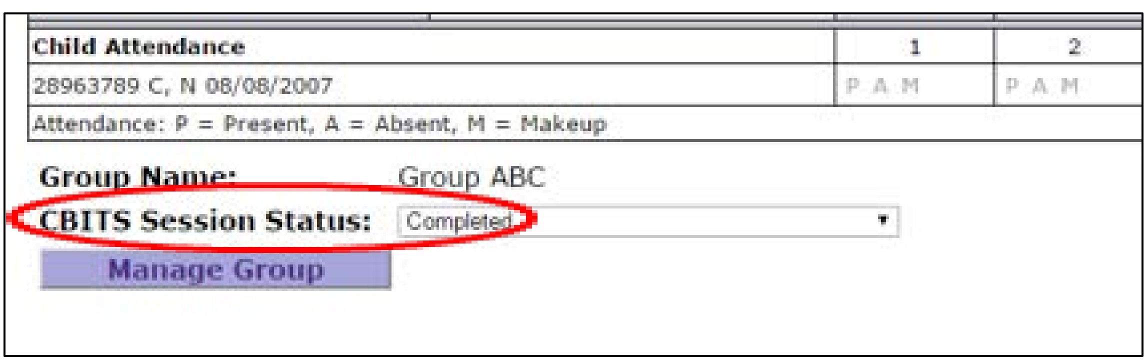
! TIP: If a date is entered for a group session, you will be required to complete the attendance for each child and enter all of the session data, or you will not be able to save the form. If you want to clear out data from one session and still be able to save data entered for previous sessions (without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



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

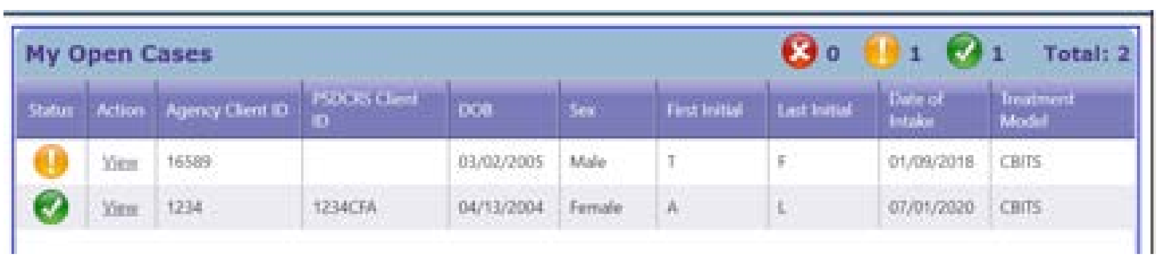
Closing a Group

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.

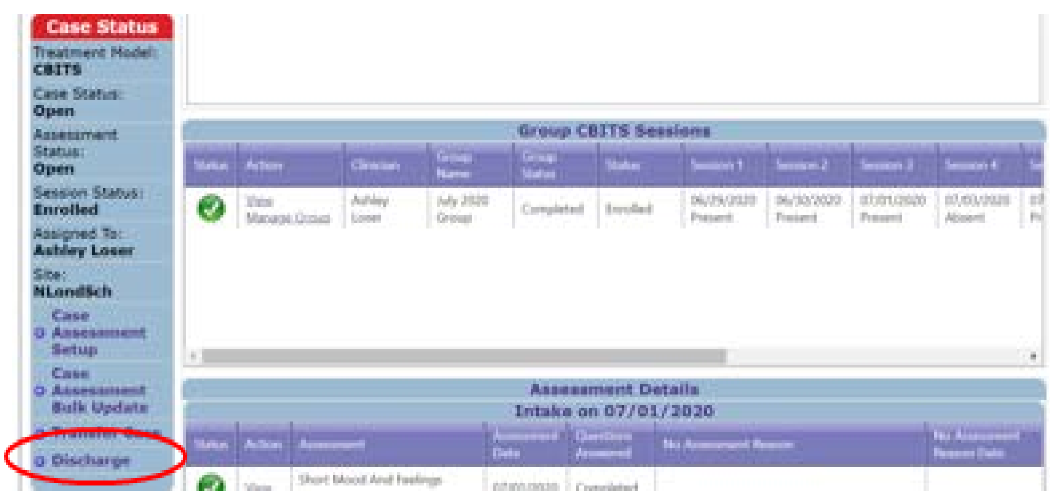


<u>IMPORTANT:</u> After closing a group, clinicians **<u>must discharge each child</u>** in the group in order to close their cases and add discharge assessments.

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



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.



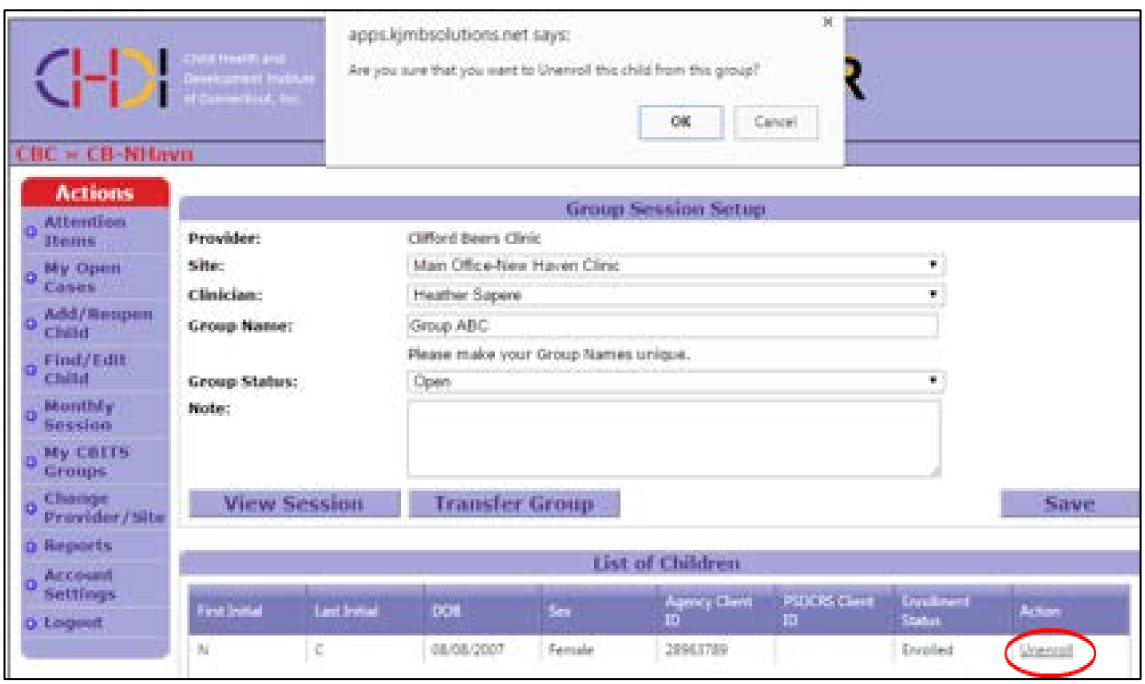
Remember, this will need to be done for each child in your CBITs/BB Groups once the group is COMPLETE.

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.

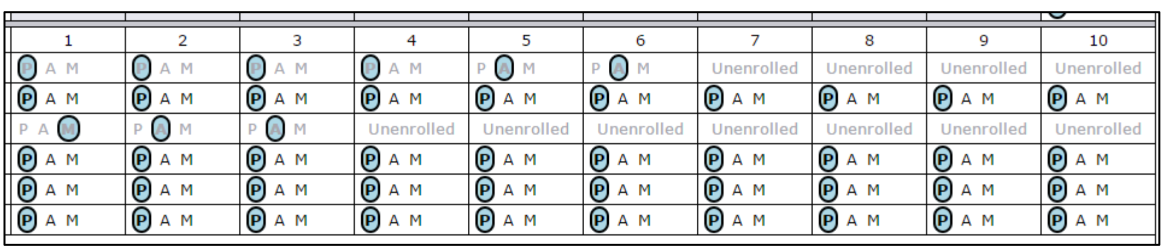
Locate the child you would like to unenroll, and under the Action menu, click "Unenroll." A pop up message will appear asking if you are sure you want to unenroll the child from the group. Click "OK."



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").

! 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
P A M	P A M	P A M	P A M	P A M	P A M	Unenrolled	Unenrolled	Unenrolled	Unenrolled
P A M	P A M	P A M	P A M	P A M	P A M	P A M	P A M	P A M	P A M
P A M	P A M	P A M	Unenrolled	Unenrolled	Unenrolled	Unenrolled	Unenrolled	Unenrolled	Unenrolled
P A M	P A M	P A M	P A M	P A M	P A M	P A M	P A M	P A M	P A M
P A M	P A M	P A M	P A M	P A M	P A M	P A M	P A M	P A M	P A M
P A M	P A M	P A M	P A M	P A M	P A M	P A M	P A M	P A M	P A M

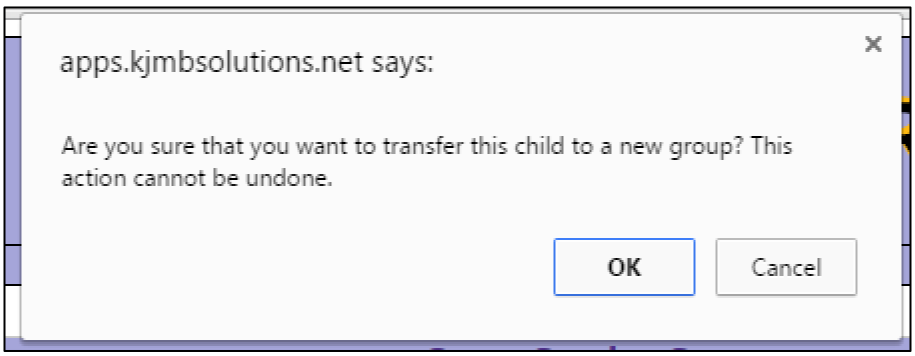
Transferring a Child from One Group to Another (Same Clinician)

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.

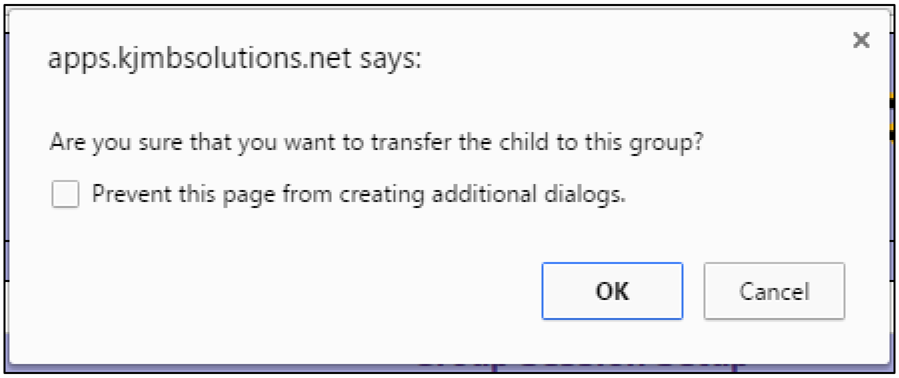
Locate the child you want to transfer in the "List of Children," then click on the "Transfer" link.

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.

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.

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."

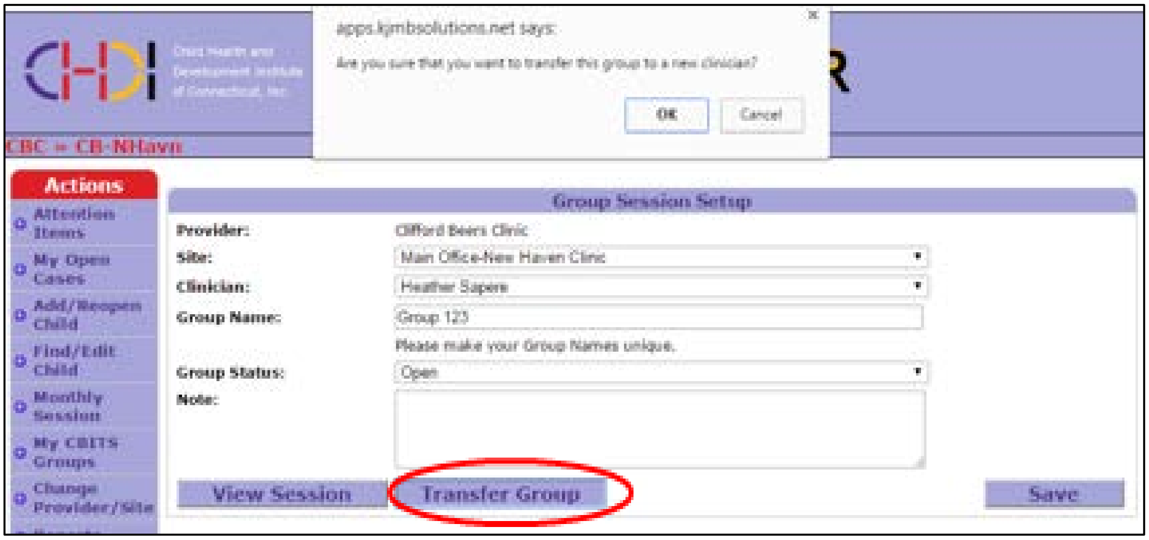
***TIP - Transferring a group requires coordinator or data entry access when transferring from one clinician to another.**

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.

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.

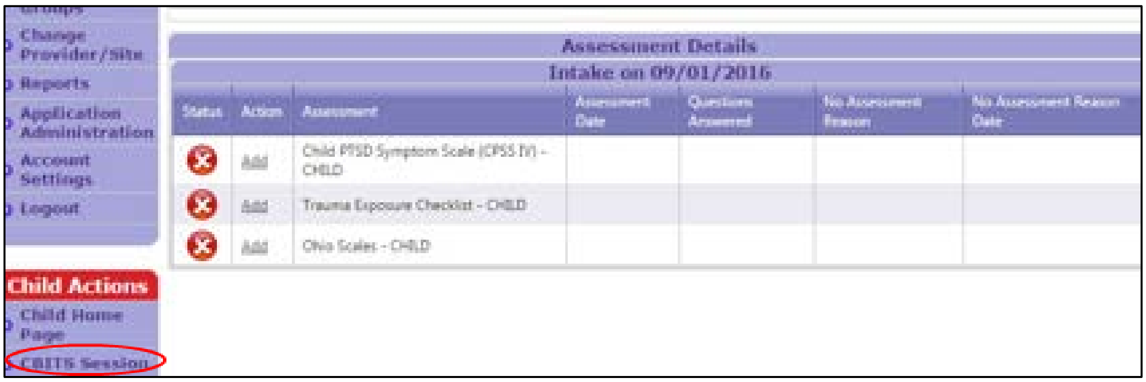
The group that you transferred will now be assigned to the new clinician, and will appear under their CBITS or Bounce Back groups.

! 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			
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 **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

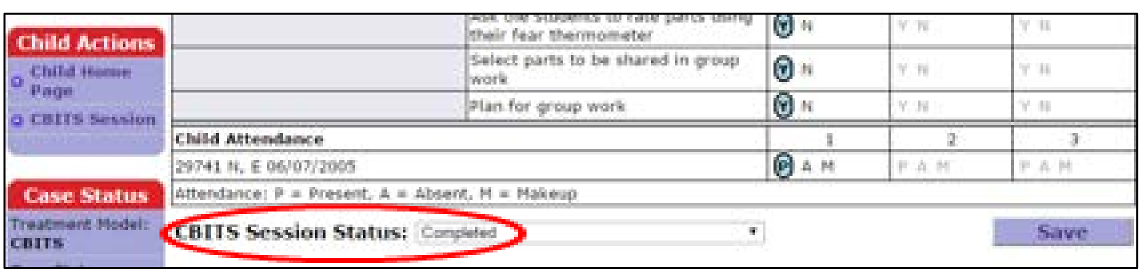
Group: Group 1

1	12/01/2015	Present
2	12/08/2015	Present

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.

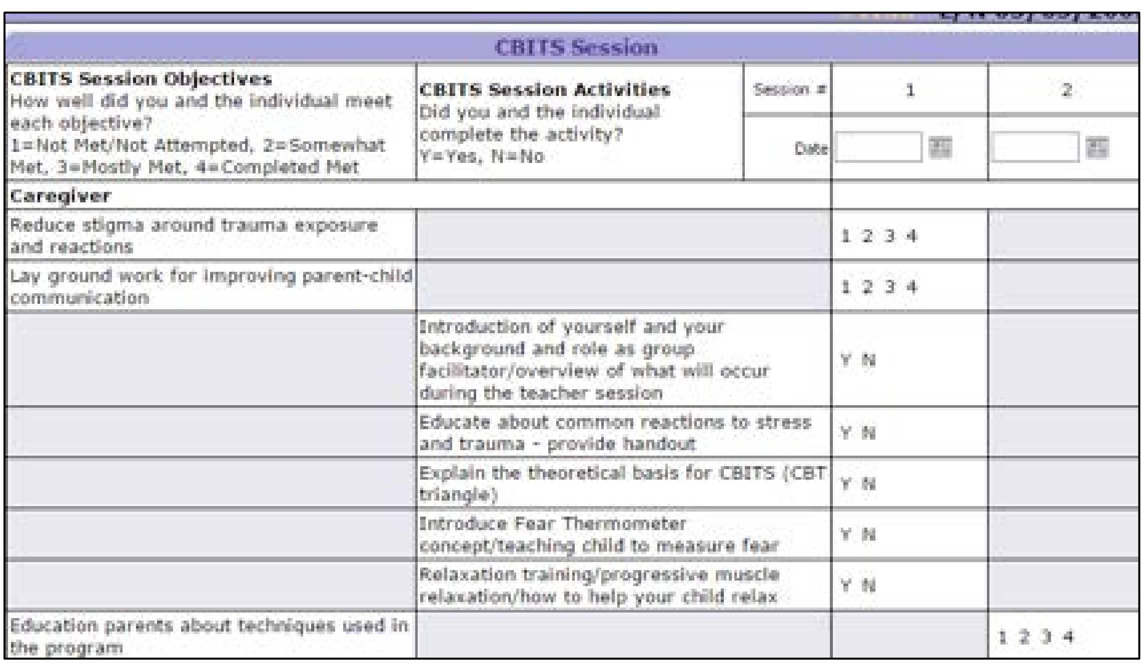
Click on "Add New CBITS Caregiver Session" or "Add New Bounce Back Caregiver Session."

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

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
		Date		
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

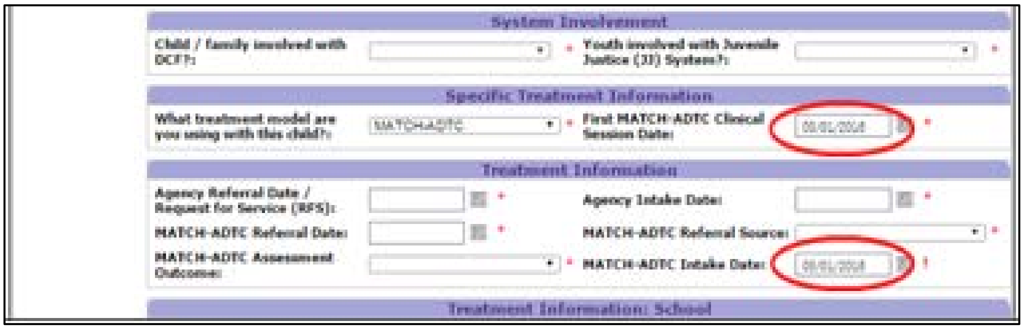
When caregiver sessions are completed, go back into the session form and change the CBITS or Bounce Back session status from "Open" to "Completed."

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.

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.”

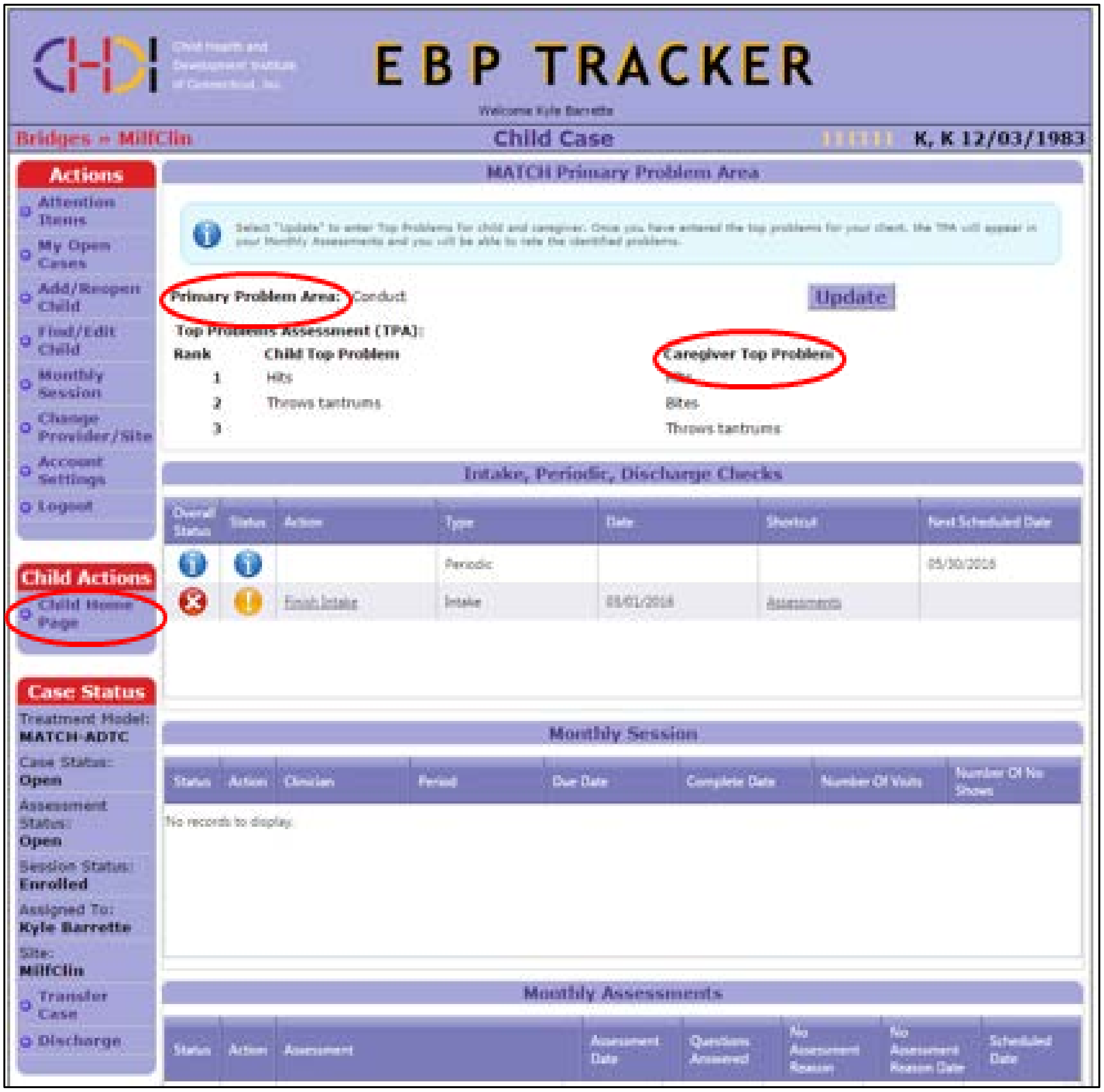


This will bring you to the page where you can fill out the Top Problems identified by the child and caregiver, as well as choose the “Primary Problem Area.”

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.

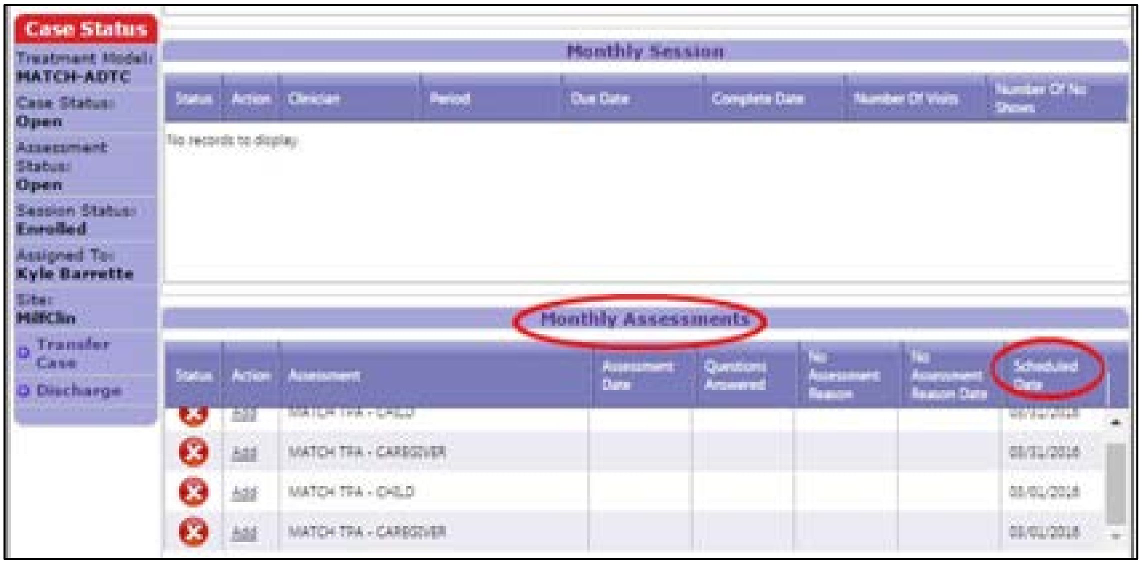
When you have chosen the Primary Problem Area and clicked on "Save," return to the child's home page by clicking on the "Child Home Page" tab.

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



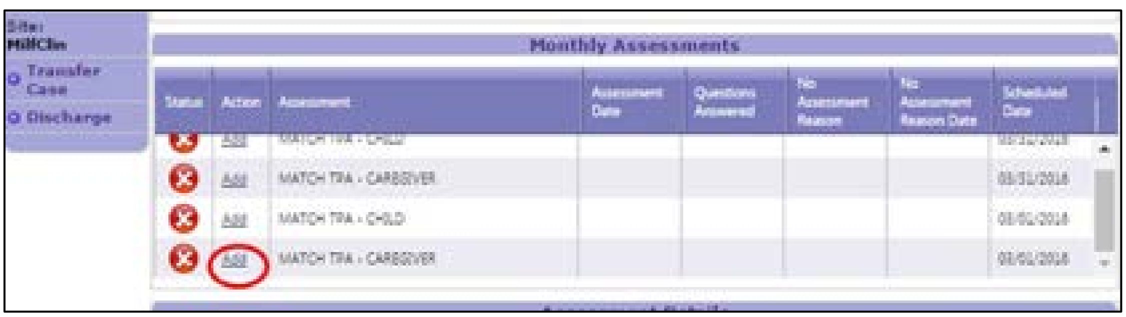
Your first TPA assessments will also appear in EBP Tracker so that you can enter the child and caregiver's ratings of the Top Problems.

! 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.



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.

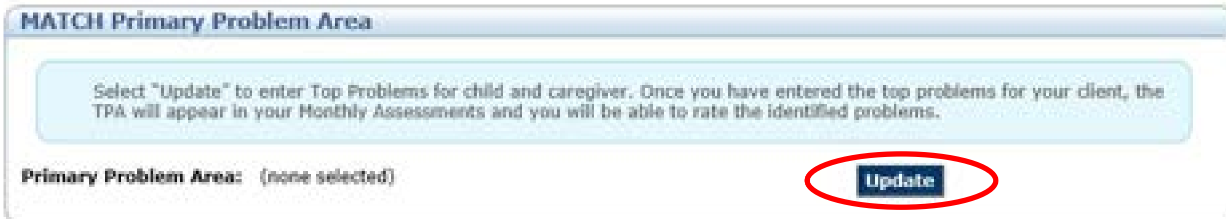
To rate the Top Problems, click on "Add" next to a TPA that is due.

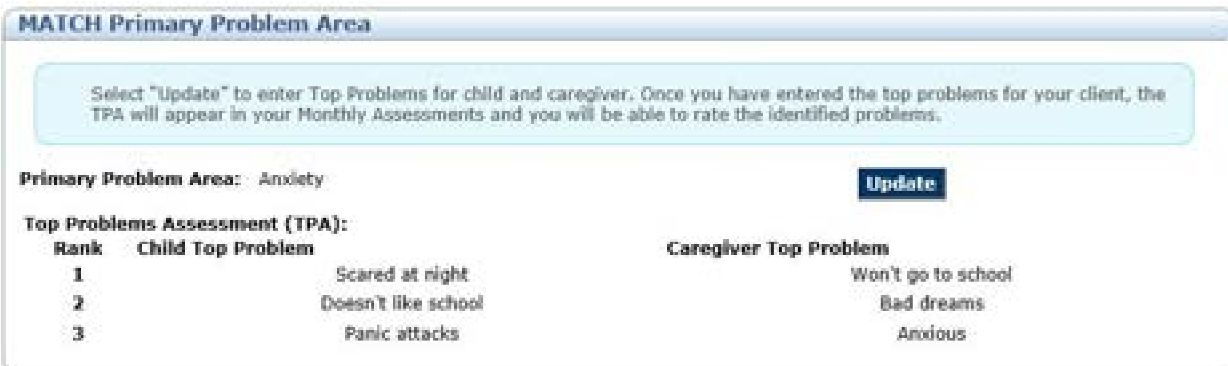


Fill out the rating for each top problem and click on "Save."

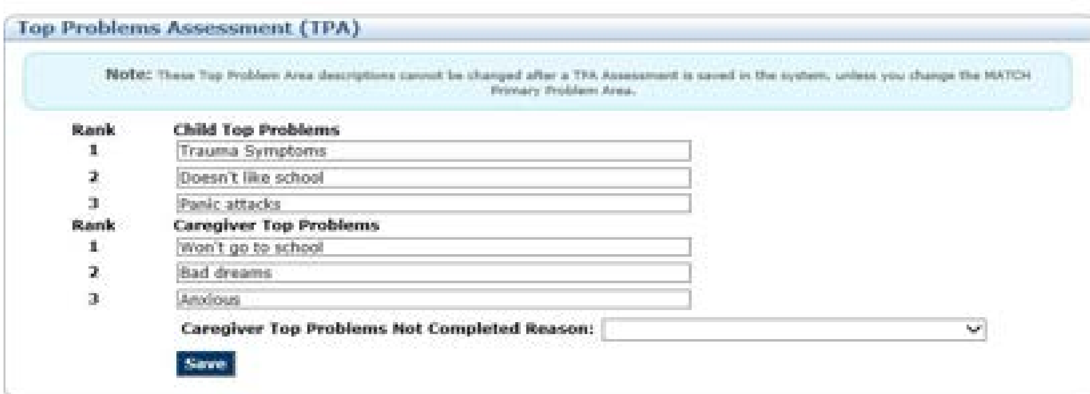
Editing/Updating MATCH Primary Problem Area and Top Problems Assessment

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.





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**.



2) Additionally, **<u>you now need to be up to date on completing monthly TPAs BEFORE changing the Primary Protocol Area and Top Problems</u>**. 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

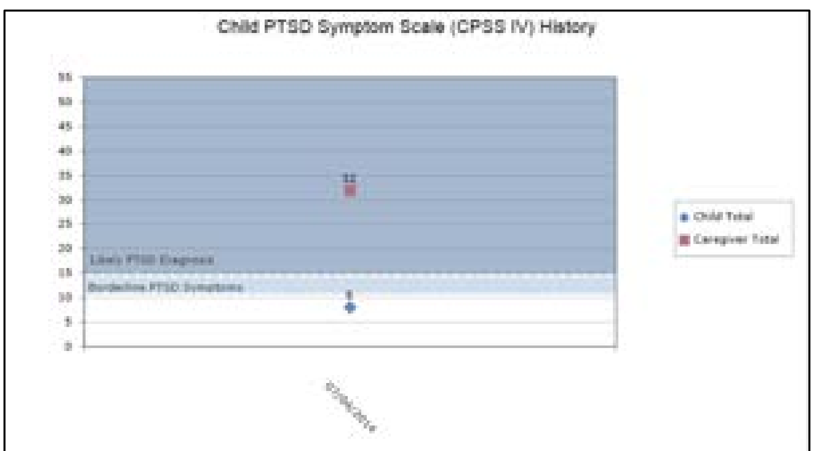
Primary Problem Area	Clinician	Child Problem 1	Child Problem 2	Child Problem 3	Caregiver Problem 1	Caregiver Problem 2	Caregiver Problem 3
Trauma	Bethany Zorba	Trauma Symptoms	Doesn't like school	Panic attacks	Won't go to school	Bad dreams	Anxious
Anxiety	Bethany Zorba	Scared at night	Doesn't like school	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:	10
Assessment Date:	07/12/2014
Worst Trauma:	**Been attacked by a dog or other animal?**
Trauma Events Endorsed:	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? 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, sniffing, 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:	15
Assessment Date:	07/12/2014
Worst Trauma:	**Been in or seen a hurricane, earthquake, tornado, or bad fire?**
Trauma Events Endorsed:	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? 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?



Assessment Scores		
Description		**07/04/2014**
Child Total		**8**
Caregiver Total		**32**
Child Re-experiencing		2
Caregiver Re-experiencing		2

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	AffectiveExpression	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

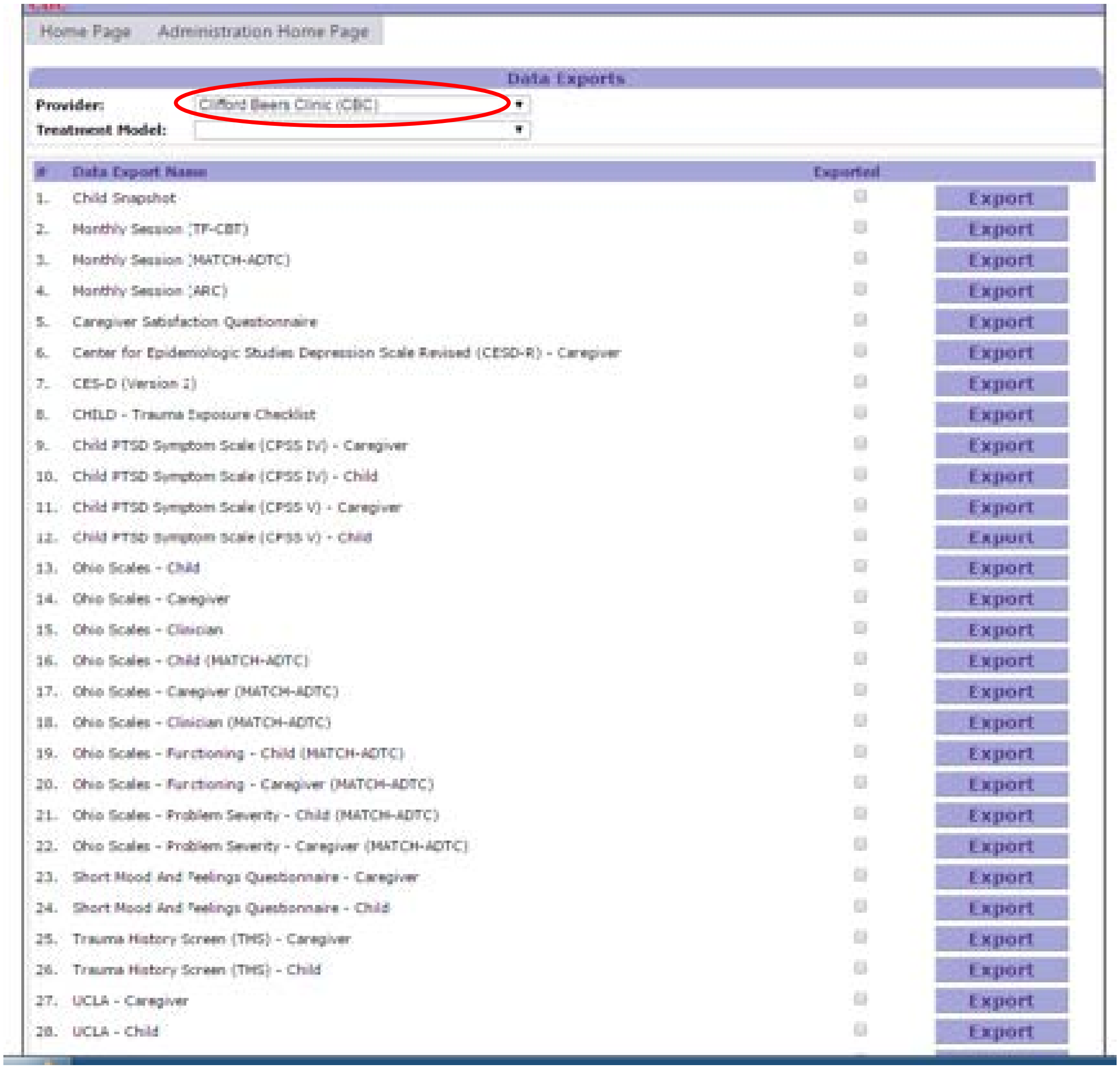
Anyone that can view all child data at any agency (senior leaders, coordinators, supervisors, and data entry) can export their assessment and intake data.

In EBPTracker:

First, select "Application Administration" in the Actions.

Then select "Data Exports" on the Administration Home Page.

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.