

FAQS: PIE-EBP TIPS – SEARCHING FOR EBP CLIENTS

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This PIE Tip is about searching for EBP clients in PIE.

Clinicians- you will only be able to see your own cases when you search.

Coordinators and above- you will be able to see other clinicians' clients as well as your own when you search.

On the left-hand PIE menu, select "Search Clients" in the blue box. Then, use the right side of the search bar using the episode filters to search for EBP cases. The left side client filters is for **OPCC episodes only**.

The screenshot displays the PIE search interface. On the left is a vertical menu with several sections:

- Authorized Lead Links:** ACCOUNT APPROVAL, USER ACCOUNTS, QUERIES
- EBP Actions:** ATTENTION ITEMS, MY OPEN EBP CASES, MONTHLY SESSION, EBP DATA EXPORTS
- ALERTS:** ADD REFERRAL, VIEW REFERRALS, **SEARCH CLIENTS** (circled in red), REPORTS
- Event/Incident Reporting:** ADD NEW REPORT, VIEW REPORT LIST

On the right is the search filter form, divided into two columns:

- Client Filters (optional):** First Name, Last Name, Sex Assigned at Birth, Date of Birth, Provider's Unique Client ID, PSDCRS ID, and Include data of type (set to Clients).
- Episode Filters (optional):** Episode Status (Open and Closed), Episodes Open Between (MM/DD/YYYY to MM/DD/YYYY), Treatment Model (TF-CBT, MATCH-ADTC), Clinician, Provider, Tx Model Case Status (Open and Closed), and Tx Model Start Date Between (MM/DD/YYYY to MM/DD/YYYY).

A "Search" button is located at the bottom center of the filter form.

Remember - if your agency uses more than one **project**, you'll need to be viewing the correct one to search for your case that is assigned there. (See PIE-EBP Tip on EBP Access for additional support on this topic) If you can't find one of your cases, try switching projects, or search by using the PSDCRS ID. You can also utilize the "My Open EBP Cases" in the purple EBP menu to view a list of all EBP cases currently open and assigned to you.