

Overview

This job aid is intended as a guide for Office of Long-Term Living (OLTL) program office staff and providers to understand how the search functionalities work within EIM. There are four different searches in EIM, each with their own requirements for retrieving results. Users may search EIM for:

- Individuals
- Providers
- Incidents
- Complaints

Note: Users will have access to incident and complaint searches as their roles allow. For example, a user with the Incident Reporter role will only have access to the Individual, Provider and Incident Search.

Use the table of contents below to view the details for each search feature.

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Individual Search

The *Individual Search* looks for participants within HCSIS. It is used in the following locations in EIM:

- Main Search
- Complaint Report
- Reports

EIM looks for certain criteria when searching in HCSIS for an individual. The table below lists the requirements for a state program office user, a Service Coordinator and a direct service provider to view individuals in an individual search.

Individual Must...	State	SC	Provider
... Match all search criteria entered	✓	✓	✓
... Have an MCI number	✓	✓	✓
... Have a residential address	✓	✓	✓
... Have a residential county	✓	✓	✓
... Be enrolled in at least one waiver/program	✓	✓	✓
... Be related to the user's organization	✓	✓	
... Have an authorized service from the provider			✓

Note: Direct service providers will only see individuals associated with their agency. SCs will be able to search for other provider organizations.

! **Important:** Aging Waiver participants will not appear in an EIM search. EIM searches for participants in HCSIS only. Aging Waiver participant information is stored in the SAMS case management system.

Provider Search

The *Provider Search* looks for providers within HCSIS. It is used in the following locations in EIM:

- Main Search
- Incident Report
- Complaint Report
- Reports

EIM looks for certain criteria when searching in HCSIS for a provider. The table below lists the requirements for a state program office user, a Service Coordinator and a direct service provider to view providers in a provider search.

Provider Must...	State	SC	Provider
... Match all search criteria entered	✓	✓	✓
... Have at least one Site/Service Location which is active or has been active within the past 365 days.	✓	✓	✓
... Have a contract with OLTL (past, present or future)	✓	✓	✓
... Match the MPI number and Service Location ID for the logged in user			✓
... MPI and Service Location ID must be associated with an authorized service on the individual's plan (this only applies when searching within an incident)	✓	✓	✓

Note: Providers can only search for their own service locations. SCs will be able to search for other provider organizations

Tip: EIM does not search by abbreviations.

! **Important:** Aging Waiver provider service locations will not appear in an EIM search. EIM searches for providers in HCSIS only. Aging Waiver provider service location information is stored in the SAMS case management system.

Incident Search

The *Incident Search* looks for incident reports within EIM. It is used in the following locations in EIM:

- Main Search
- Linking Incidents/Complaints

EIM looks for certain criteria when searching in EIM for an incident report. The table below lists the requirements for a state program office user, a Service Coordinator and a direct service provider to view incidents in an incident search.

Criteria:	State	SC	Provider
The incident must match all search criteria entered.	✓	✓	✓
The user must have adequate roles to see incidents.	✓	✓	✓
The incident must belong to one of the user's organizations.	✓	✓	✓
If the incident is confidential, the only point person from the provider who will be able to see the incident is the one assigned on the confidentiality screen.			✓

Note: Program office users are still able to search for incidents that have been marked confidential by the provider Point Person.

Complaint Search

The *Complaint Search* looks for complaint reports within EIM. It is used in the following locations in EIM:

- Main Search
- Linking Incidents/Complaints

EIM looks for certain criteria when searching in EIM for a complaint report. The table below lists the requirements for a state program office user to view complaint in a complaint search.

Criteria:	State
The complaint must match all search criteria entered	✓
The user must have adequate roles to see complaints.	✓
The complaint must belong to one of the user's organizations.	✓



Important: Providers and Service Coordinators will not have access to search for complaints.