



***This job aid is only to be used by DTA and MRC providers.***

### How will providers receive the information they need to enroll clients in ESM?

For some programs such as CIES, agencies will send providers referral and/or service authorization forms on clients for whom services have been authorized. These forms will contain the information required to enroll clients in ESM. If there is information missing, contact your Agency Contract Manager.

### Search for a Client

1. In order to locate or create a client record, a user must complete a search in EIM/ESM Client Module.

#### Search for a client:

- Select the **Client** module and then **Client Search** from the navigation bar.
- Enter your search criteria in at least one of the following fields:
  - First and/or Last Name
  - ID and ID Type (must fill in both)
  - Date of birth
- Click **[Search]**.

Home | Clients | Case Management | Billing | Credentials | Report | Help | Logout

Current Location: Client > Client Search

**Client Search**

Last Name: Client First Name: James

ID: ID Type: Select Below Date of Birth:

Search

*If search results are found, click on the Last name link to open client record.*

Search Results								
Last Name	First Name	ID	ID Type	Date of Birth	Address	City	Region	State
<a href="#">Client</a>	Carl	999999999	SSN	02/03/1987	Homeless	Any Town	EOHHS REGION 1: WESTERN MASS	MA
<a href="#">Client</a>	Jane	999999999	SSN	02/21/1974	25 Applewood Lane	Any Town	EOHHS REGION 4: METRO WEST	MA
<a href="#">Client</a>	Renne	999999999	SSN	03/13/1958	12 Pine Street	Any Town	EOHHS REGION 1: WESTERN MASS	MA
<a href="#">Client</a>	Tyra	999999999	SSN	03/04/1985	Homeless	Any Town	EOHHS REGION 2: CENTRAL MASS	MA

| Display 1 to 4 of 4 |

Add Client



## Add a Client

## 2. Add a client: Face Sheet

- Start at the **Client Search** page.
- Enter both a **[First Name]** and **[Last Name]**.  
*If no search results are found,*
- Click the [Add a Client](#) link.

Home | Clients | Case Management | Billing | Credentials | Report | Help | Logout

Current Location: Client > Client Search

**Client Search**

Last Name: Client First Name: James

ID:

ID Type: Select Below

Date of Birth:

Search

Your search did not return any results. Please [add a client](#)

- Enter Required Information:
  - First Name
  - Last Name
  - Date of Birth (Format: mm/dd/yyyy)
  - Gender
  - Social Security Number (Format: xxx-xx-xxxx)
- Click **[Save New Client]**.

Home | Clients | Case Management | Billing | Credentials | Report | Help | Logout

Current Location: Client > Client Search > Add Client

**Add Client**

Prefix: Select Below

\*First Name: James Middle Name:  \*Last Name: Client

Suffix: Select Below Highest Grade Completed: Select Below

\*Date of Birth: 03/17/1991 Age: System Generated \*Gender: M-Male

\*Social Security Number: 999999999 Refused ☐ Unknown ☐

Save New Client

**Note:** You are required to complete fields marked with a red asterisk (\*).

Home | Clients | Case Management | Billing | Credentials | Report | Help | Logout

Current Location: Client > Client Search > Face Sheet > Client Summary

**Client #453578 : James Client**

**Client Summary**

Client Added Successfully

Primary Address:

Primary Phone Number:

Prefix: Select Below

\*First Name: James Middle Name:  \*Last Name: Client

Suffix: Select Below Highest Grade Completed: Select Below

\*Date of Birth: 03/17/1991 Age: 18 Year(s) 11 Month(s) 19 Day(s) \*Gender: M-Male

\*Social Security Number: 999-99-9999 Refused ☐ Unknown ☐

Date Created: 03/08/2010 01:21:37 PM Created By: ddph

Date Changed:  Changed By:

Save Changes Delete Client

**Note:** The message "Client Added Successfully" will appear at top of page.

**Eligibility to Enrollment:**

3. In order to ensure the client is eligible for this activity, users must complete an eligibility determination.

**Determine Eligibility:**

- Start at the client's **Face Sheet**.
- Click **Single Activity Eligibility** from the navigation bar.
- Select **Activity** from the radio buttons and click **[Select Activity]**.
- Select **Contract** from the drop down and click **[Select Contract]**.
- Select **Enrolling Organization** from the drop down and click **[Determine Eligibility]**.
- Click **[Create Enrollment]**.

Home | Clients | Case Management | Billing | Contracts | Credentials | Report | Help | Logout

Current Location: Client > Client Search > Face Sheet > Single Activity Eligibility

Manage Client

- » Face Sheet
- » Client Summary
- » Personal Info
- » Relations
- » Insurance
- » Consents
- » Single Activity Eligibility
- » Eligibility Assessment
- » Enrollments
- » Services

Client #438991 : James Client

Single Activity Eligibility

Select Activity Name	Type	Description
MRC Vocational Services	Activity	Vocational Services

[Display 1 to 1 of 1]

\*Contract: UR11111111111002P-2010-CT Select Contract

\*Enrolling Organization: Provider 2 Determine Eligibility

**Eligibility Results**

This person is eligible for the selected activity.  
This person is eligible for 99999 days, ending 03/08/2041

Create Enrollment

**Note:** The system will display a message indicating eligibility status. For eligible clients, users proceed to create an enrollment.

4. After determining eligibility, proceed with creating the enrollment.

**Create Enrollment:**

- Enter **[Enrollment Period Start Date]**.
- Click **[Calculate Timeframe]**.

Home | Clients | Case Management | Billing | Credentials | Report | Help | Logout

Current Location: Client > Client Search > Face Sheet > Single Activity Eligibility > Create Enrollment

Manage Client

- » Face Sheet
- » Client Summary
- » Personal Info
- » Referrals
- » Relations
- » Insurance
- » Consents
- » Single Activity Eligibility
- » Enrollments
- » Waivers
- » Services
- » Primary Care Provider

Client #453578 : James Client

Create Enrollment

\*Enrollment Period Start Date: 03/08/2010

Comments:

Calculate Timeframe



## 5. Confirm Enrollment:

- Enter [Agency Enrollment ID].
- Click [Confirm Enrollment].

**Note:** Without completing this step, the enrollment will not be saved in ESM.

**Important Information Regarding the Agency Enrollment ID field:**

**MRC CIES Providers** should use the **MRCIS ID** number when completing the Agency Enrollment ID field. This is a required field for all MRC CIES Providers.

**DTA CIES Providers** should use the **Service Authorization Number** when completing the Agency Enrollment ID field. This is a required field for all DTA CIES Providers.

**MRC ABI Providers** should use the **MassHealth ID Number** when completing the Agency Enrollment Field in ESM. This is a required field for all MRC ABI Providers.

Home | Current Location: Client > Client Search > Face Sheet > Enrollments > Update Enrollment

Manage Enrollment

- » Enrollment
- » Enrollment Assessment
- » Enrollment Preview
- » Enrollment Update
- » Disenrollment Assessment
- » Disenrollment Preview
- » Disenrollment Update

**Enrollment Confirmation**

Enrollment ID: [ ] Agency Enrollment ID: 123456789 Enrollment Status: Active

Enrollment Start Date: 03/08/2010 Enrollment End Date: 03/08/2041 Duration: 99999 Days

Medical Record Number: [ ]

Enrolling Corporation: Provider

Enrolling Contract/Credential: 1234567890987654321 - 2010 - CT Activity: MRC Vocational Services

Enrolling Facility: [ ]

Comments: [ ]

Date Created: 03/08/2010 02:24:07 PM Created By: [ ]

Date Changed: [ ] Changed By: [ ]

Calculate Timeframe

Confirm Enrollment

Home | Clients | Case Management | Billing | Credentials | Report | Help | Logout

Current Location: Client > Client Search > Face Sheet > Enrollments > Update Enrollment

Manage Enrollment

- » Enrollment
- » Enrollment Assessment
- » Enrollment Preview
- » Enrollment Update
- » Disenrollment Assessment
- » Disenrollment Preview
- » Disenrollment Update

**Client #453578 : James Client**

**Update Enrollment**

Enrollment Added Successfully!!

Enrollment ID: 16512 Agency Enrollment ID: 123456789 Enrollment Status: Active

Medical Record Number: [ ] Disenrollment Reason: Select

\*Enrollment Start Date: 03/08/2010 Enrollment End Date: [ ] Duration: 99999 Days

Enrolling Corporation: Provider

Enrolling Contract/Credential: 1234567890987654321 - 2010 - CT Activity: MRC Vocational Services

Enrolling Facility: [ ]

Comments: [ ]

Date Created: 03/08/2010 02:29:55 PM Created By: [ ]

Date Changed: [ ] Changed By: [ ]

Save Changes

**Note:** The message "Enrollment Added Successfully" will appear at top of page.



## How to Close a Client Enrollment

Enrollments need to be closed for a number of reasons, including:

- Client enrolled to the wrong contract.
- Client has completed a service and is no longer receiving services.
- Duplicate enrollments have been created for a client.

To close a client enrollment in ESM,

- Select the **[Clients]** module.
- Search and locate client.
- From Client Facesheet Summary page, select **[Enrollments]** from left navigation menu.
- Click on **[Enrollment ID]** for enrollment that needs to be closed.

Enrollment ID	Activity Code	Activity Name	Status	Start Date	End Date
16440	2200	2200 MRC CES Hourly Procurement	Active	07/01/2009	04/14/2023
16475	2201	2201 MRC CES Component Procurement	Closed	05/01/2009	05/01/2009

- From the Update Enrollment page,
  - Select **[Closed]** from the Status drop-down menu.
  - Select **[Disenrollment Reason]** from Disenrollment Reason drop-down menu.
  - Enter **[Enrollment End Date]**. (Format: mm/dd/yyyy)

**Note:** If this is an incorrect enrollment, enter the same date as the Enrollment Start Date. The client will still show on the SDR for this one month.

- Click **[Save Changes]** button

Enrollment ID: 16440	Agency Enrollment ID: 260003589	Enrollment Status: Closed
Medical Record Number:	Disenrollment Reason: Completed	
*Enrollment Start Date: 07/01/2009	Enrollment End Date: 03/04/2010	Duration: 99999 Days
Enrolling Corporation: Provider 2		Activity: 2200 MRC CES Hourly Procurement
Enrolling Contract/Credential: SCMRCCES3333101000001 - 2010 - CT		
Enrolling Facility:		
Comments:		
Date Created: 11/02/2009 01:32:27 PM	Created By: buser	
Date Changed: 11/02/2009 03:15:02 PM	Changed By: buser	

Save Changes

Enrollment updated Successfully!!!

Note: The message "Enrollment updated Successfully" will appear at top of page.



## How to Edit a Client Enrollment

At times, enrollments will need to be updated in ESM. Common items to be edited in on an enrollment include:

- Agency Enrollment ID (i.e., MRCIS ID, Beacon Service Authorization #, MassHealth ID Number)
- Enrollment End Date

To edit a client enrollment in ESM,

- Select the **[Clients]** module.
- Search and locate client.
- From Client Facesheet Summary page, select **[Enrollments]** from left navigation menu.
- Click on **[Enrollment ID]** for enrollment that needs to be updated.

Home | Clients | Case Management | Billing | Contracts | Credentials | Administration | Report | Help | Logout

Current Location: Client > Client Search > Face Sheet > Enrollments

Manage Client

- » Face Sheet
- » Client Summary
- » Personal Info
- » Referrals
- » Relations
- » Insurance
- » Consents
- » Single Activity Eligibility
- » Enrollments**
- » Waivers
- » Services
- » Primary Care Provider

**Client #452346 : Andrew Consumer**

**Enrollments**

Enrollment ID	ActivityCode	Activity Name	Status	Start Date	End Date
<a href="#">16440</a>	2200	2200 MRC CES Hourly Procurement	Active	07/01/2009	04/14/2283
<a href="#">16475</a>	2201	2201 MRC CES Component Procurement	Closed	05/01/2009	05/01/2009

| Display 1 to 2 of 2 |

- From the Update Enrollment page,
- Edit any of the editable fields:
  - Agency Enrollment ID (i.e., MRCIS ID, Beacon Service Authorization #, MassHealth ID Number)
  - Enrollment End Date
- Click **[Save Changes]** button

Home | Clients | Case Management | Billing | Contracts | Credentials | Administration | Report | Help | Logout

Current Location: Client > Client Search > Face Sheet > Enrollments > Update Enrollment

Manage Enrollment

- » Enrollment**
- » Enrollment Assessment
- » Enrollment Preview
- » Enrollment Update
- » Disenrollment Assessment
- » Disenrollment Preview
- » Disenrollment Update

**Client #452346 : Andrew Consumer**

**Update Enrollment**

Enrollment ID: 16440	Agency Enrollment ID: 260003589	Enrollment Status: Active
Medical Record Number:	Disenrollment Reason: Select	
*Enrollment Start Date: 07/01/2009	Enrollment End Date: 04/14/2283	Duration: 99999 Days
Enrolling Corporation: Provider 2		
Enrolling Contract/Credential: SCMRCCES3333101000001 - 2010 - CT		Activity: 2200 MRC CES Hourly Procurement
Enrolling Facility:		
Comments:		
Date Created: 11/02/2009 01:32:27 PM	Created By: buser	
Date Changed: 11/02/2009 03:15:02 PM	Changed By: buser	

**Save Changes**



Home	Clients	Case Management	Billing	Contracts	Credentials	Administration	Report	Help	Logout
Current Location: Client > Client Search > Face Sheet > Enrollments > Update Enrollment									
<b>Manage Enrollment</b>		<b>Client #452346 : Andrew Consumer</b>							
» Enrollment		<b>Update Enrollment</b>							
» Enrollment Assessment		Enrollment updated Successfully!!!							
» Enrollment Preview									
» Enrollment Update									
» Disenrollment Assessment									
» Disenrollment Preview									
» Disenrollment Update									
Enrollment ID: 16472				Agency Enrollment ID: 62000586PROV			Enrollment Status: Active		

**Note:** The message "Enrollment updated Successfully" will appear at top of page.

### Duplicate Client Information - Client is entered incorrectly

There should only be one client record per client. If a client record is entered incorrectly or a duplicate record for the same client has been created, the client record cannot be deleted. The duplicate/ incorrect client record may, however, be marked as incorrect so it is not used. To do so follow the steps below.

- Search and locate incorrect client record.
- On the Client Summary page , replace the First and Last Name fields with the following:
  - First Name: Type the first and third initials of the First Name, the Middle initial, first and third initials of the Last Name (Example: James L. Client = **JMLCI**)
  - Last Name: Type the first and third initials of the First Name, the Middle initial, first and third initials of the Last Name (Example: James L. Client = **JMLCI**)

**Note:** In order to avoid instances of duplicate clients, only legal names should be entered in ESM and not nicknames. If the name is too short or if there is no middle name, substitute an "X" in those positions. (Example: James Client = JMXCI)

- Click **[Save Changes]** button.

### Questions or need assistance?

**Call Virtual Gateway Customer Service**

**1-800-421-0938**

**(617-847-6578 - TTY for the deaf and hard of hearing)**

**8:30 am to 5:00 pm Monday through Friday**