This job aid is <u>only</u> to be used by DTA and MRC providers.

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

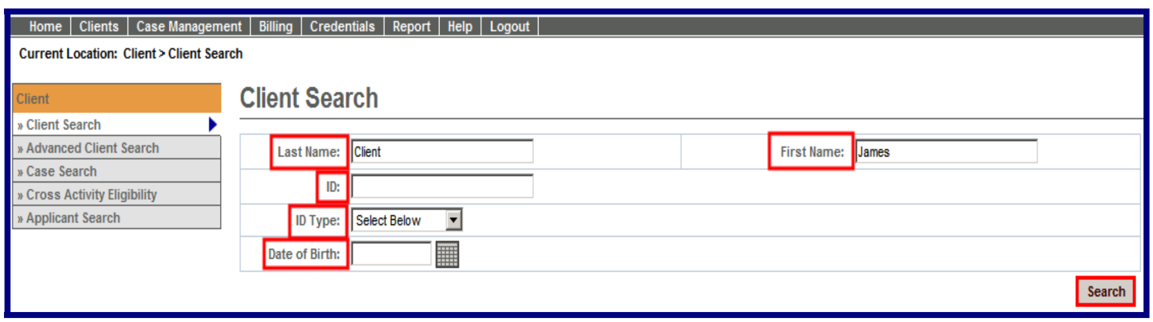
For some programs such as CIES, agencies will send providers referral and/or service authorization forms on clients for whom services have been authorized. These forms will contain the information required to enroll clients in ESM. If there is information missing, contact your Agency Contract Manager.

Search for a Client

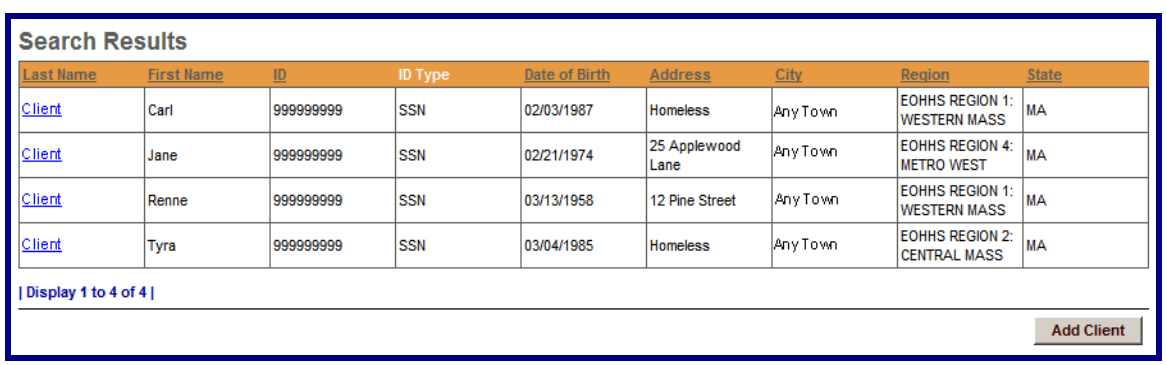
1. In order to locate or create a client record, a user must complete a search in EIM/ESM Client Module.

   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]**.



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
Client	Carl	999999999	SSN	02/03/1987	Homeless	Any Town	EOHHS REGION 1: WESTERN MASS	MA
Client	Jane	999999999	SSN	02/21/1974	25 Applewood Lane	Any Town	EOHHS REGION 4: METRO WEST	MA
Client	Renne	999999999	SSN	03/13/1958	12 Pine Street	Any Town	EOHHS REGION 1: WESTERN MASS	MA
Client	Tyra	999999999	SSN	03/04/1985	Homeless	Any Town	EOHHS REGION 2: CENTRAL MASS	MA

| Display 1 to 4 of 4 |

Add Client

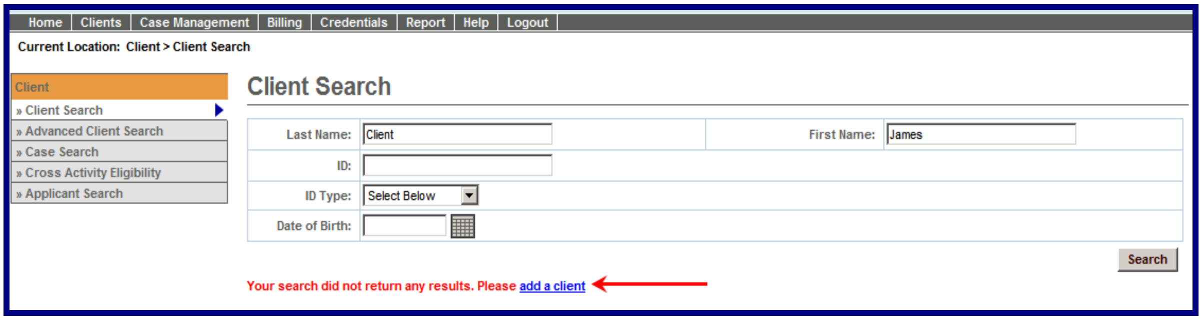
Add a Client

2. **Add a client: Face Sheet**

- Start at the **Client Search** page.
- Enter both a [**First Name**] and [**Last Name**].

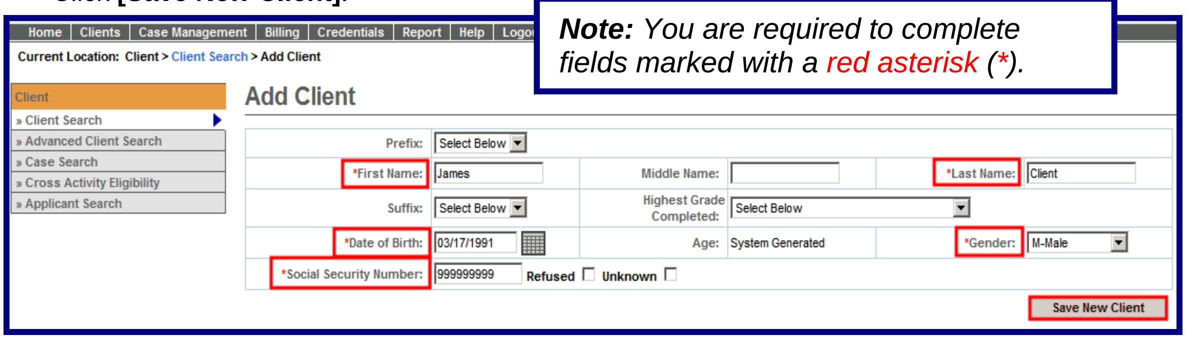
If no search results are found,

- Click the Add a Client link.

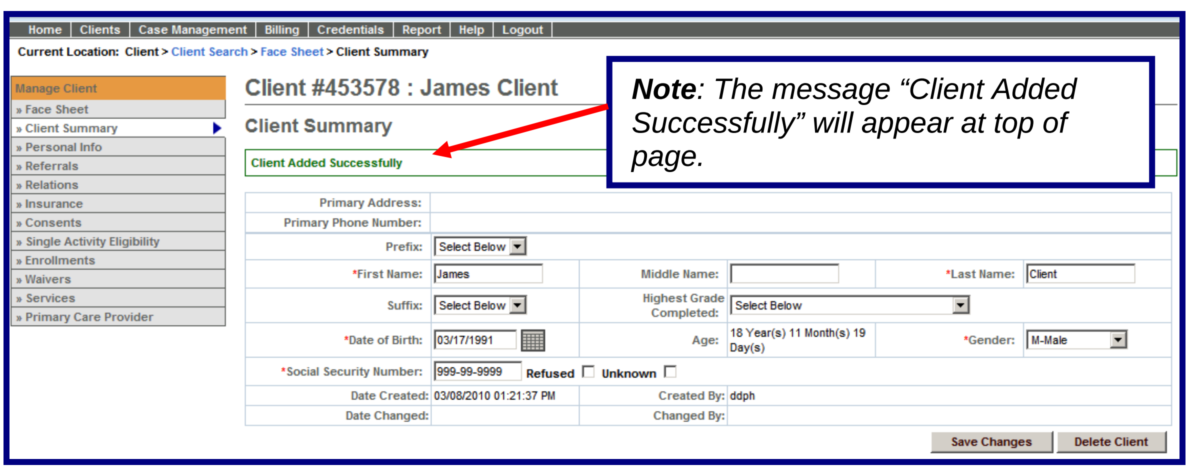


- Enter Required Information:
  - o First Name
  - o Last Name
  - o Date of Birth (Format: mm/dd/yyyy)
  - o Gender
  - o Social Security Number (Format: xxx-xx-xxxx)
- Click **[Save New Client]**.

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



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

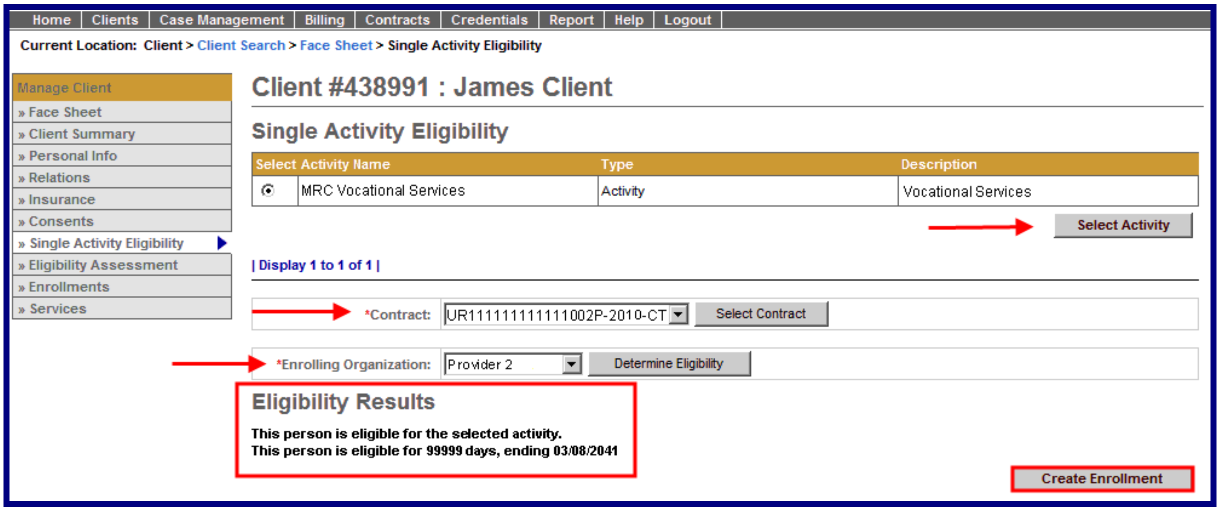


Eligibility to Enrollment:

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]**.

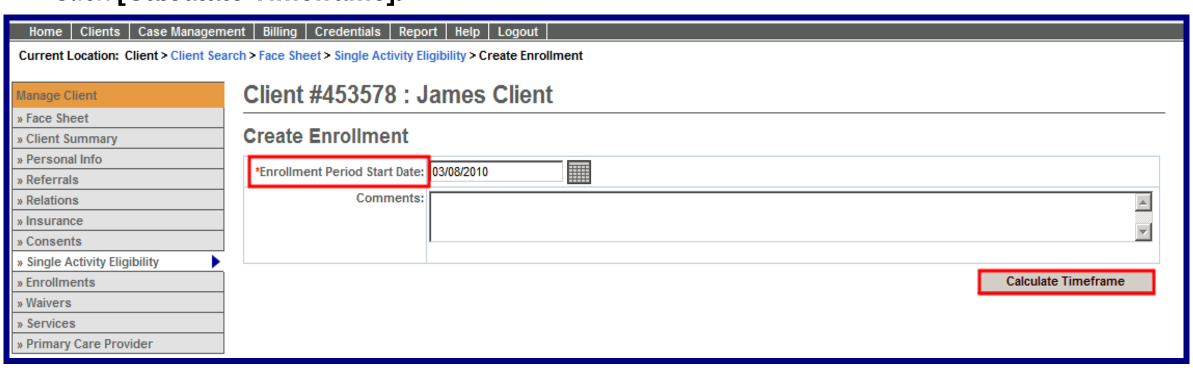


Note: The system will display a message indicating eligibility status. For eligible clients, users proceed to create an enrollment.

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

Create Enrollment:

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



5. **Confirm Enrollment:**

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

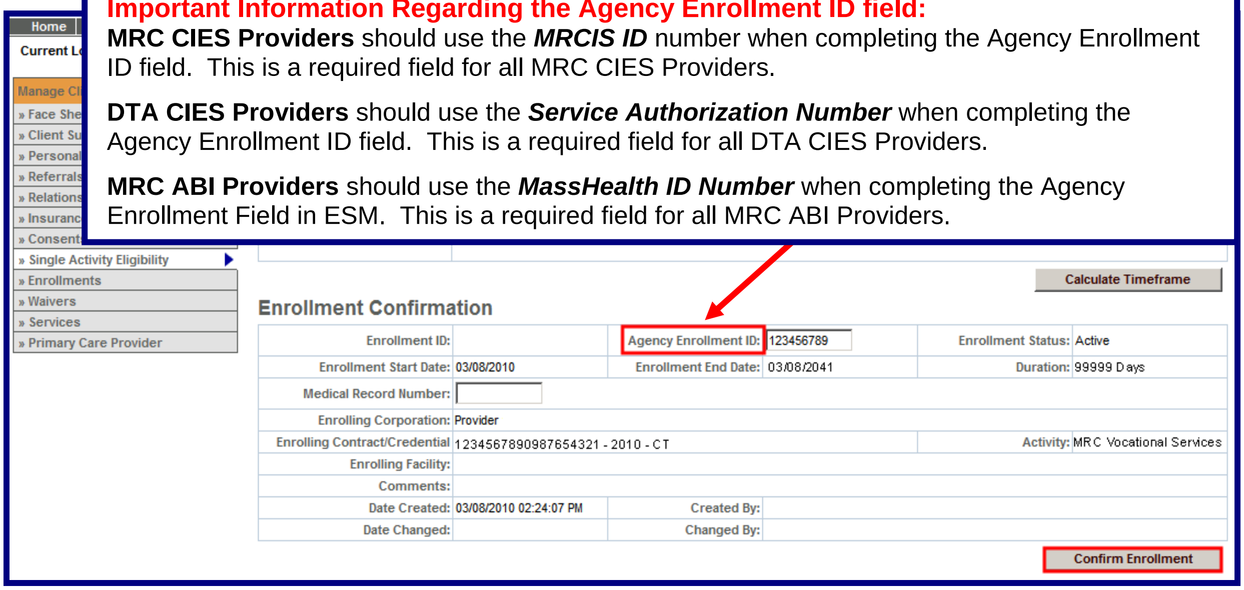
Note: Without completing this step, the enrollment will not be saved in ESM.

Important Information Regarding the Agency Enrollment ID field:

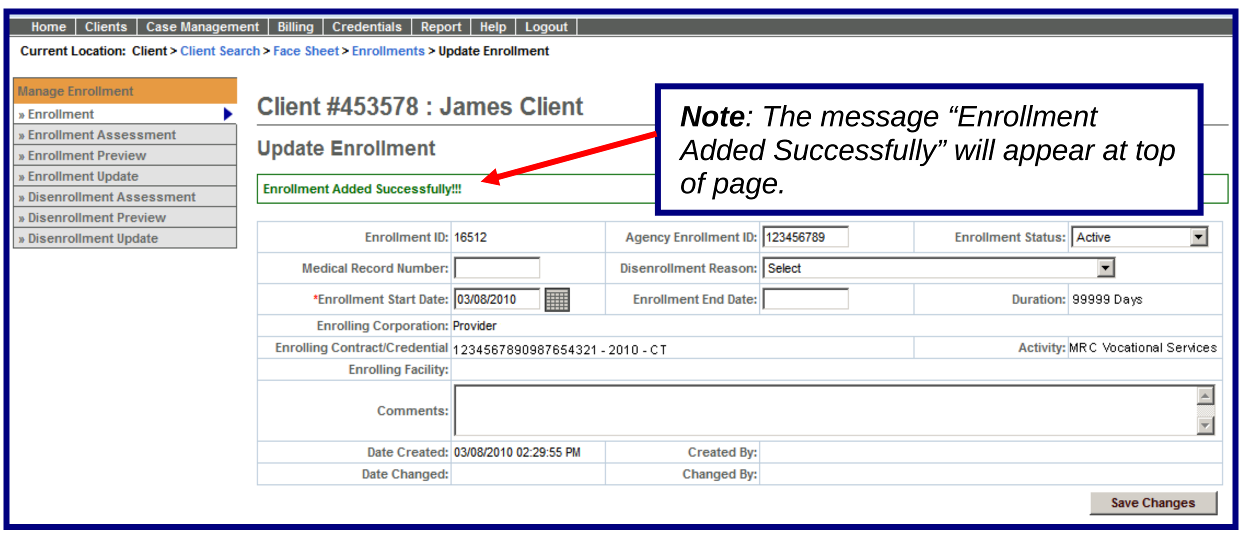
MRC CIES Providers should use the ***MRCIS ID*** number when completing the Agency Enrollment ID field. This is a required field for all MRC CIES Providers.

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.



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



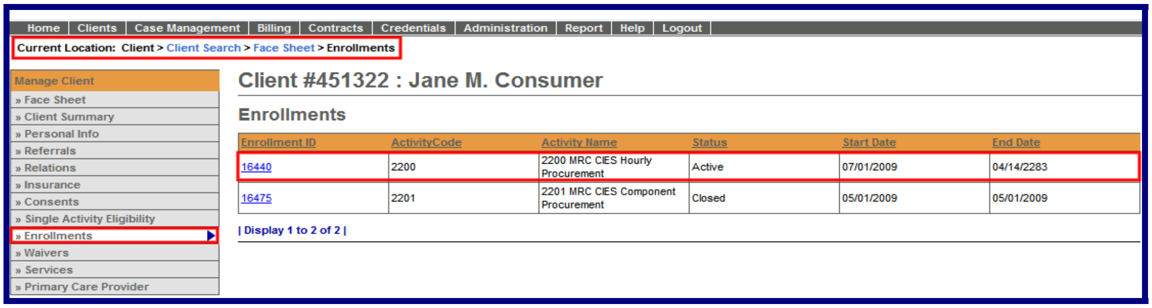
How to Close a Client Enrollment

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,

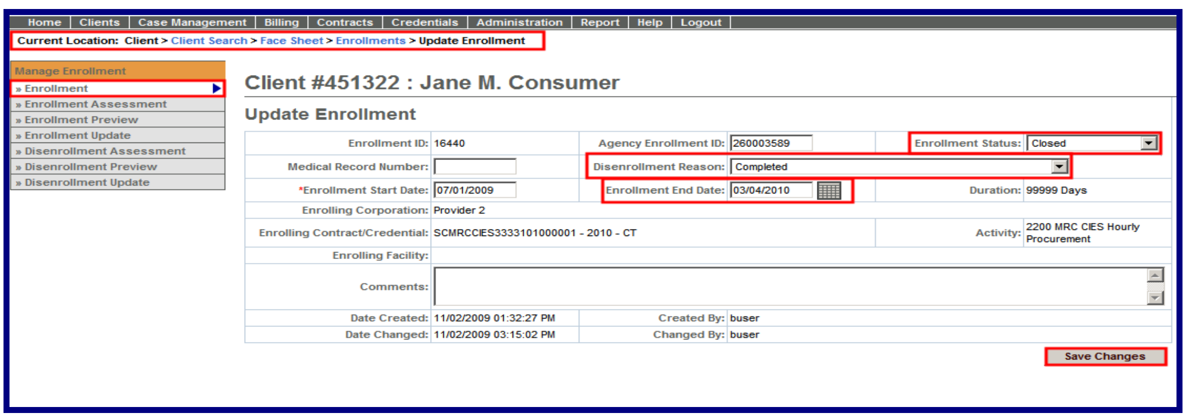
- Select the [**Clients**] module.
- Search and locate client.
- From Client Facesheet Summary page, select [**Enrollments**] from left navigation menu.
- Click on [**Enrollment ID**] for enrollment that needs to be closed.

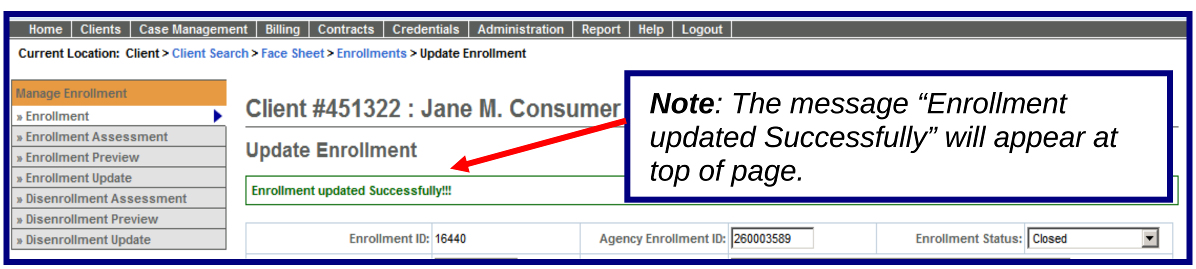


- From the Update Enrollment page,
  - Select [**Closed**] from the Status drop-down menu.
  - Select [**Disenrollment Reason**] from Disenrollment Reason drop-down menu.
  - Enter [**Enrollment End Date**]. (Format: mm/dd/yyyy)

  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





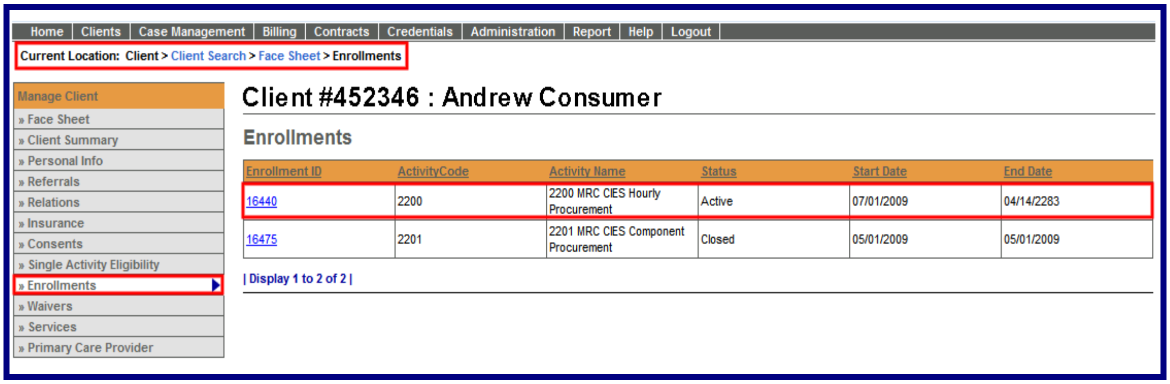
How to Edit a Client Enrollment

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

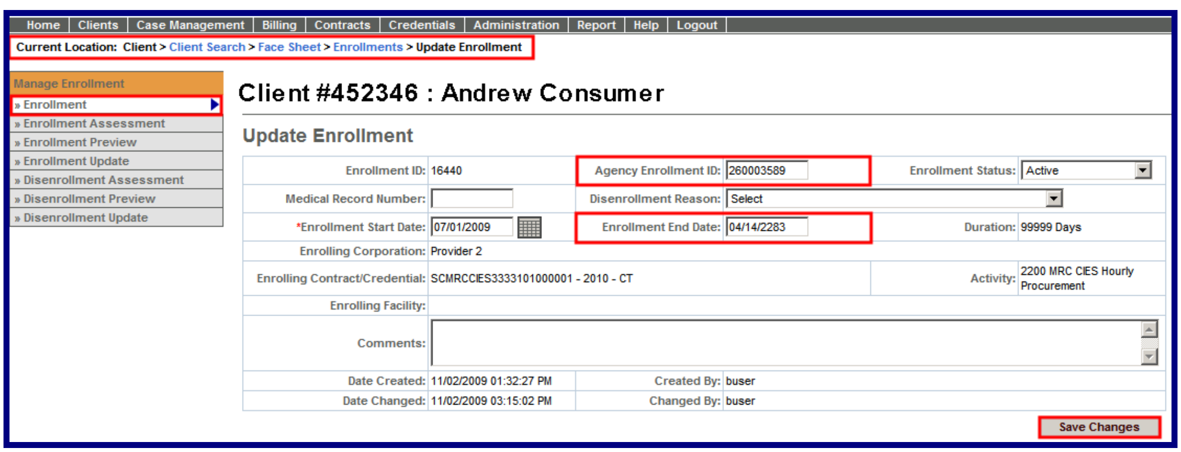
- Agency Enrollment ID (i.e., MRCIS ID, Beacon Service Authorization #, MassHealth ID Number)
- Enrollment End Date

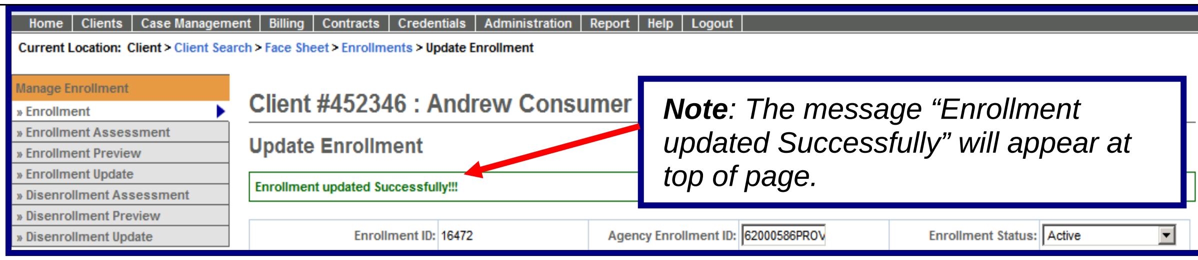
To edit a client enrollment in ESM,

- 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.



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





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