

# 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:
      - o First and/or Last Name
      - ID and ID Type (must fill in both)
      - o Date of birth
    - Click [Search].

Home   Clients   Case Managem Current Location: Client > Client Sea	ent Billing Credentials Report Help Logout rch	
Client	Client Search	
Client Search     Advanced Client Search     Case Search     Cross Activity Eligibility     Applicant Search	Last Name: Client First Name: James ID: ID: Date of Birth:	
		Search

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

Last Name	First Name	ID	ID Type	Date of Birth	Address	City	Region	State
<u>Client</u>	Carl	999999999	SSN	02/03/1987	Homeless	AnyTown	EOHHS REGION 1: WESTERN MASS	МА
<u>Client</u>	Jane	999999999	SSN	02/21/1974	25 Applewood Lane	AnyTown	EOHHS REGION 4: METRO WEST	MA
<u>Client</u>	Renne	999999999	SSN	03/13/1958	12 Pine Street	AnyTown	EOHHS REGION 1: WESTERN MASS	МА
<u>Client</u>	Туга	999999999	SSN	03/04/1985	Homeless	AnyTown	EOHHS REGION 2: CENTRAL MASS	МА
Display 1 to 4	of 4							
								Add Clie

Virtual Gateway

Add a Client		
Add a client: Face She Start at the Cli Enter both a [F If no search results	eet ent Search page. first Name] and [Last Nan s are found,	ne].
Click the Add a	Client IINK.  Illing Credentials Report Help Logout  ent Search Last Name: Client ID: DD Type: Select Below Date of Birth: Search did not return any results. Please add a client	First Name: James
<ul> <li>Enter Required</li> <li>First N</li> <li>Last N</li> <li>Date d</li> <li>Gende</li> <li>Social</li> <li>Click [Save Net</li> </ul>	d Information: ame ame f Birth (Format: mm/dd/yyy r Security Number (Format: <b>ew Client]</b> .	yy) xxx-xx-xxxx)
Home     Clients     Case Managem       Current Location:     Client > Client Ser       > Client Search     >       > Advanced Client Search       > Cose Search       > Cross Activity Eligibility       > Applicant Search	ent Billing Credentials Report Help Logo arch > Add Client Add Client Prefix: Select Below *First Name: James Suffix: Select Below *Date of Birth: 03/17/1991 *Social Security Number: 9999999999 g	Note: You are required to complete fields marked with a red asterisk (*).
Home Clients Case Manageme Current Location: Client > Client Sear Manage Client » Face Sheet » Client Summary » Personal Info » Referrals	nt Billing Credentials Report Help Logou ch>Face Sheet > Client Summary Client #4533578 : James Clien Client Summary	<b>Note</b> : The message "Client Added Successfully" will appear at top of page.
Relations     Relations     Insurance     Consents     Single Activity Eligibility     sEnrollments     Waivers     Services     Primary Care Provider	Primary Address: Primary Phone Number: Prefix: Select Below v *First Name: Suffix: Select Below v *Date of Birth: 03/17/1991 *Social Security Number: 999-99-9999 Re	Middle Name: Highest Grade Completed: Age: Day(s) Middle Name: Client Client Middle Name: Client Middle Name: Client Name: Name: Name: Name: Name: Name: Name: Name: Name: Name: Name: Name: Name: Client Name: Name: Name: Name: Client Name: N
	Date Created: 03/08/2010 01:21:37 Date Changed:	PM Created By: ddph Changed By: Save Changes Delete Client



In order to ensure	the client is eligible for this ac	ctivity, users must cor	mplete an eligibility determina	tion.
Determine Eligibi	lity:			
<ul> <li>Start at the</li> </ul>	e client's Face Sheet.			
Click Sing	<b>Activity Eligibility</b> from th	e navigation har		
	ivity from the radio buttone of	and aliak [Salast A ati	v : i 4 v 2	
	ivity from the radio buttons a		vity].	
Select Col	ntract from the drop down an	id click [Select Contr	ractj.	
<ul> <li>Select Enr</li> </ul>	rolling Organization from the	e drop down and click	< [Determine Eligibility].	
Click [Created and the content of the content	ate Enrollment].			
Home Clients Case	e Management   Billing   Contracts   Credentials	Report Help Logout		
Current Location: Client	Client Search > Face Sheet > Single Activity Eligibilit	ty		
Manage Client	Client #438991 : James	s Client		
» Client Summary	Single Activity Eligibility			
» Personal Info » Relations	Select Activity Name	Туре	Description	
» Insurance	MRC Vocational Services	Activity	Vocational Services	A - 47-14
» Single Activity Eligibility			Select	Activity
» Eligibility Assessment » Enrollments	Display 1 to 1 of 1			
» Services	*Contract: UR1111111	11111002P-2010-CT 💌 Select Cor	ntract	
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### 5. **Confirm Enrollment:**

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

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

ID field. T	S Providers should use the <i>M</i> . This is a required field for all MI S Providers should use the Se	RCIS ID number w RC CIES Providers	vhen comple s. ion Number	eting the Agency Enrollme
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» Referrals » Relations » Insurance » Insurance » Insurance » Referrals MRC ABI	<b>Providers</b> should use the <b>Ma</b> t Field in ESM. This is a requi	ssHealth ID Num red field for all MR	<i>ber</i> when co C ABI Provi	mpleting the Agency
» Consents				
» Single Activity Eligibility				Calculate Timefran
» Waivers	Enrollment Confirmation			
» Services	Enrollment ID:	Agency Enrollment ID:	123456789	Enrollment Status: Active
» Fillinary Care Flovider	Enrollment Start Date: 03/08/2010	Enrollment End Date:	03/08/2041	Duration: 99999 Dave
	Medical Record Number:	En onnone end bate.	00.0072041	buration, 55555 Days
	Enrolling Corporation Bravider			
	Enrolling Contract/Credential 4324567900097	854321 - 2010 - CT		Activity: MR.C. Vocational S
	Enrolling Facility:	554521-2010-01		not the second s
	Comments:			
	Date Created: 03/08/2010 02:24:0	7 PM Created By:	:	
	Date Changed:	Changed By:	:	
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### 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.

Home   Clients   Case Manageme	ent Billing Contracts C	redentials Administration	on Report Help Logo	out		
Current Location: Client > Client Sear	rch > Face Sheet > Enrollment	s				
Manage Client	Client #451322	: Jane M. Con	sumer			
» Face Sheet						
» Client Summary	Enrollments					
» Personal Info	Enrollment ID	ActivityCode	Activity Name	Status	Start Date	End Date
» Referrals		Hearingcouc	2200 MPC CIES Hourty	Julua	Starroute	
» Relations	<u>16440</u>	2200	Procurement	Active	07/01/2009	04/14/2283
» Insurance			2201 MRC CIES Component			
» Consents	16475	2201	Procurement	Closed	05/01/2009	05/01/2009
» Single Activity Eligibility						
» Enrollments	Uisplay 1 to 2 of 2					
» Waivers						
» Services						
» Primary Care Provider						

- 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

Manage Enrollment						
» Enroliment	Client #451322 : J	ane M. Consu	imer			
» Enrollment Assessment	Update Enrollment					
» Enroliment lindate						
» Disenrollment Assessment	Enrollment ID:	16440	Agency Enrollment ID: 260003	689	Enrollment Status: Closed	
» Disenrollment Preview	Medical Record Number:		Disenrollment Reason: Comple	ed	<b>_</b>	
» Disenrollment Update	*Enrollment Start Date:	07/01/2009	Enrollment End Date: 03/04/2	)10	Duration: 99999 Da	ys
	Enrolling Corporation:	Provider 2				
	Enrolling Contract/Credential:	SCMRCCIES3333101000001	1 - 2010 - CT		Activity: 2200 MRC Procurem	CIES Ho ent
	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 But huper			
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Home   Clients   Case Manag Current Location: Client > Client Manage Enrollment	ement   Billing   Contracts   Crede Search > Face Sheet > Enrollments > U	ntials Administration	Report   Help   Logout		<u>s</u>	ive Char
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## 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 Manageme	ent   Billing   Contracts rch > Face Sheet > Enrollm	Credentials Admir	nistration   Report   Help   Log	out		
Manage Client	Client #452	346 : Andre	ew Consumer			
» Face Sheet						
» Client Summary	Enrollments					
» Personal Info	Encollment ID	ActivityCode	Activity Namo	Status	Start Data	End Date
» Referrals	LITOITTETLID	ActivityCode		Status	<u>start bate</u>	<u>End bate</u>
» Relations	<u>16440</u>	2200	2200 MRC CIES Hourly Procurement	Active	07/01/2009	04/14/2283
» Insurance			2201 MRC CIES Component			
» Consents	<u>16475</u>	2201	Procurement	Closed	05/01/2009	05/01/2009
» Single Activity Eligibility						
» Enrollments	Display 1 to 2 of 2					
» Waivers						
» Services						
» Primary Care Provider						

- 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

* Encollment	Client #452346	: Andrew Co	nsumer			
» Enrollment Assessment						
» Enrollment Preview	Update Enrollment					
» Enrollment Update	Encollmont ID:	16440	Agonou Encollmont ID:	260002580	Enrollmont Statuo	Antivo
» Disenrollment Assessment	Enroiment ib.	10440	Agency Enrollment ID:	260003369	Enroinnent status:	Active
» Disenrollment Preview	Medical Record Number:		Disenrollment Reason:	Select		•
» Disenrollment Update	*Enrollment Start Date:	07/01/2009	Enrollment End Date:	04/14/2283	Duration:	99999 Days
	Enrolling Corporation:	Provider 2				
	Enrolling Contract/Credential:	SCMRCCIES3333101000001	I - 2010 - CT		Activity:	2200 MRC CIES Hou 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 Chang

