

Updating address information in ESM when there is an existing address

- 1. Select [Client] Module.
- 2. Search for client using [ID/ID Type] or [Last Name/First Name].
- 3. From the Search Results, select the Client by clicking on [Last Name] link.

Home Clients Billing C	ontracts Cred	lentials Rep	ort Help	Logout					
Current Location: Client > Clien	t Search								
Client	Client S	earch							
» Client Search									
» Advanced Client Search	Last Name:	10002				First Name	: 10002		
» Cross Activity Eligibility		·							
» View Enrollments	ID:	I							
	ID Type:	Select Below	v 🗸						
	Date of Birth:								
									Search
Search Results									
	Last Name	First Name	ID	ID Type	Date of Birth	Address	City	Region	State
	<u>Client</u>	Lisa	000000000	SSN	12/11/1985	100020 Address Line 01	Pembroke	EOHHS REGION 5: SOUTHEAST	ма

4. From the Client Face Sheet Summary, select **[Personal Info]** from left navigation menu.

Home Clients Billing Contracts Credentials Report Help Logout									
Current Location: Client > Client Search > Applicant FaceSheet Summary									
Manage Client	Client #117657 : Lisa Client								
» Face Sheet									
» Client Summary	Application Sum	mary							
» Personal Info	Application Number		Enrollment Status	Submission I	Date	Expiration Dat	te		
» Referrals									
» Relations	Client Summany								
» Insurance	Client Summary								
» Consents	First Name		Middle Name	Last Name	Suffix	Туре			
» Single Activity Eligibility	Lisa			Client		Primary			
» Enrollments									
» Waivers									
» Services	Personal Information	ation							
» Primary Care Provider	Date of Birth:	12/11/1985	Age:	32 Year(s) 9 Month(s) 29 Day(s)	Gender:	F		
	Social Security Number:	000-00-000	Highest Grade Completed:	High School diploma	/ GED				
In what language do you prefer to read or discuss health related materials? English									

5. The Addresses page will display all addresses for that client.

	Contracts Credentials Report Help Log	out				
Personal Info	Client #117657 : Lisa Cli	ent				
» Addresses						
» Phones	Addresses					
» Email Addresses	Address	Type	Effective From	Effective To	Restricted	Primary
» Alternate Names	100020 Address, Pembroke, MA, 02359	Home	06/17/2015		No	Yes
» Identifiers						
» Demographics	Display 1 to 1 of 1					
					1	Add Address



Notes:

- If the address listed is correct, no additional data entry is required.
- If the current address listed is not correct, a new address record will need to be added. Before adding the new address, the current address needs to be closed.
 - Select current record and fill-in Effective To date to close before adding new address.
- If a new address record is needed, select [Add Address] button. See <u>ESM Client Data Entry Transaction</u> <u>Steps (BSAS) Job Aid</u> for steps on adding a client to ESM. When adding a new address, never select existing address and overwrite the existing address. The previous address record will be lost.

Adding a New Address

1. Select [Address Type] from drop-down menu.

Note:

If the client is homeless, select 'Homeless' as Address Type

- You will leave the street address blank, but a City and Zip code must be included
- The address of the facility should never be used as a client's address
- 2. Enter Address Information (Address Line 1; Address Line 2, if necessary; City)
 - State defaults to MA for Massachusetts
 - A selection of area Zip codes will be generated; Choose the correct one for the client
 - County listing will be generated automatically
- 3. Check the [Primary Address] Flag
 - If you do not select that the address is primary, you will be prompted for an address when you go to enroll the client. This is to ensure that the client has a primary Massachusetts residence.
- 4. Enter [Effective From:]; usually matches enrollment date of client into program.

Home Clients Billing Contracts	Credentials Report	Help Logout				
Current Location: Client > Client Search >	> Face Sheet > Addresses	> Add Address				
Personal Info		Cllent #117657 : Lisa	Client			
a Addresses						
» Phones		Add Address				
» Email Addresses		*Address Type:	Home V			
» Alternate Names			Contraction of the Contraction o			
* Identifiers		*Address Line 1:	123 Washington Street			
* Demographics		Address I ine 2:				
		*State:	MA 🗸 Get City	*City:	Whitmon Get Postal Code	*Postal Code: 02382
		County:	Plymouth V	EOHHS Region:	EOHHS REGION 5: SOUTHEAST	
		Primary Address:	0	Address Restriction:		
		*Effective From:	10/15/2018	Effective To:		
		Comments:				^
						v
						Save New Address



5. Click [Save New Address] button

ESM returns you to the Addresses page and displays the new address in the results listing.

Current Location: Client > Client Search						
Personal Info	Client #117657 : Lisa Client					
* Addresses						
a Phones	Addresses					
» Email Addresses	Address	Type	Effective From	Intertive To	Restricted	Pressary
» Alternate Names	 123 Washington Street, Whitman, MA, 02382	Home	10/15/2018	the strength of the strength o	No	No
» Identifiers » Demographics	 19605 Address Line 01 East Somerville, MA, 02143	Home	11/18/2001		No	Yes
* Demographica						
	Display 1 to 2 of 2					

For system and access questions call:

Virtual Gateway Customer Service (www.Mass.Gov/vg): 1-800-421-0938

For program policy or data forms questions call:

DPH Resource Center: 1-800-232-0093