



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 | Contracts | Credentials | Report | Help | Logout

Current Location: Client > Client Search

Client

- » Client Search
- » Advanced Client Search
- » Cross Activity Eligibility
- » View Enrollments

Client Search

Last Name: <input type="text" value="10002"/>	First Name: <input type="text" value="10002"/>
ID: <input type="text"/>	
ID Type: <input type="text" value="Select Below"/>	
Date of Birth: <input type="text"/> <input type="button" value="Calendar"/>	

Search Results

Last Name	First Name	ID	ID Type	Date of Birth	Address	City	Region	State
Client	Lisa	000000000	SSN	12/11/1985	100020 Address Line 01	Pembroke	EOHHS REGION 5: SOUTHEAST	MA

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 Face Sheet Summary

Manage Client

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

Client #117657 : Lisa Client

Application Summary

Application Number	Enrollment Status	Submission Date	Expiration Date

Client Summary

First Name	Middle Name	Last Name	Suffix	Type
Lisa		Client		Primary

Personal Information

Date of Birth:	12/11/1985	Age:	32 Year(s) 9 Month(s) 29 Day(s)	Gender:	F
Social Security Number:	000-00-0000	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.

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

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

Personal Info

- » Addresses
- » Phones
- » Email Addresses
- » Alternate Names
- » Identifiers
- » Demographics

Client #117657 : Lisa Client

Addresses

Address	Type	Effective From	Effective To	Restricted	Primary
100020 Address, Pembroke, MA, 02359	Home	06/17/2015		No	Yes

| Display 1 to 1 of 1 |



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 [ESM Client Data Entry Transaction Steps \(BSAS\) Job Aid](#) 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.

