



Overview:

In order to view and/or manage client level information, users are required to have a consent created in EIM/ESM. Users that enter client data for their organization will have this consent automatically generated by the system and will not need to create one manually. This system consent does not replace any program-specific *Consent to Serve* or *Sharing of Data* consents, requiring wet signatures.

However, if users are preparing to facilitate a client referral/transfer of client information, users can manually create consent through EIM/ESM. Users will be required to select what information to be shared including the following scenarios:

Note: This functionality should only be used if users plan to share information with another provider organization.

Scenario A: How to access a student record to share basic demographic information (i.e. Face Sheet) across sites.

Complete the following steps to add a consent: Viewing Client Information

Log into EIM/ESM.

1. Select the **[Clients]** module.

Figure 1: EIM top bar with the Clients module highlighted



2. Select the **[Clients]** link from the left navigation menu.

The **Client Search** page opens.

On this page, the user searches for a Client by entering search criteria in one or more of the fields: **Last Name, First Name, ID, ID Type, or Date of Birth.**

Figure 2: Client Search page

Current Location: Client > Client Search

Client Search

At least one search criteria must be entered

Last Name: First Name:

ID:

ID Type:

Date of Birth:

3. Enter Search criteria in the fields.

4. Select the **Search** button.

The **Search Results** appear at the bottom of the page.

Figure 3: Client Search page with Results at the bottom

Current Location: Client > Client Search

Client Search

Last Name: First Name:

ID:

ID Type:

Date of Birth:

Search Results

Last Name	First Name	ID	ID Type	Date of Birth	Address	City	Region	State
300068 Last Name	300068 First Name	000000000	SSN	08/07/1988	Homeless	Somerset	EOHHS REGION 5: SOUTHEAST	MA
300077 Last Name	300077 First Name	000000000	SSN	03/25/1958	Homeless	Boston	EOHHS REGION 6: BOSTON REGION	MA
300080 Last Name	300080 First Name	000000000	SSN	10/07/1979	Homeless	Boston	EOHHS REGION 6: BOSTON REGION	MA
300088 Last Name	300088 First Name	000000000	SSN	06/15/1990	Homeless	Hanover	EOHHS REGION 5: SOUTHEAST	MA

[Display 1 to 4 of 4](#)



5. Select the contract link.

The **Applicant Face Sheet Summary** appears.

Figure 4: Applicant Face Sheet Summary

Current Location: Client > Client Search > Applicant FaceSheet Summary

Manage Client

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

Client #120398759 : 300068 First Name 3. 300068 Last Name

Application Summary

Application Number	Enrollment Status	Submission Date	Expiration Date

Client Summary

First Name	Middle Name	Last Name	Suffix	Type
300068 First Name	300068 Middle Name	300068 Last Name		Primary

Personal Information

Date of Birth: 08/07/1988	Age: 30 Year(s) 3 Month(s) 28 Day(s)	Gender: M
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		

Contact Information

Address	Type	Effective From	Effective To	Restricted	Primary
300068 Address Line 01 . Somerset, MA, 02726	Homeless	09/02/2018		No	Yes
300068 Address Line 01 . Somerset, MA, 02726	Homeless	12/02/2014		No	No
300068 Address Line 01 . Boston, MA, 02118	Homeless	05/05/2018		No	No
300068 Address Line 01 . Somerset, MA, 02726	Home	12/14/2017		No	No
300068 Address Line 01 . Somerset, MA, 02726	Homeless	01/25/2018	05/04/2018	No	No
300068 Address Line 01 . Somerset, MA, 02725	Home	03/31/2014		No	No
300068 Address Line 01 . Somerset, MA, 02725	Homeless	11/10/2014		No	No
300068 Address Line 01 . Worcester, MA, 01608	Homeless	02/25/2014		No	No
300068 Address Line 01 . Boston, MA, 02118	Homeless	06/25/2014		No	No
300068 Address Line 01 . Boston, MA, 02127	Homeless	09/22/2014		No	No

Phone Number	Extension	Type	Effective From	Effective To	Restricted	Primary

6. Select **Consents** from the navigation bar.

The **Consents** page appears.

Figure 5: Consents page

Current Location: Clients> Client Search > Face Sheet > Consents

Manage Client

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

Client #120398759 : 300068 First Name 3. 300068 Last Name

Consents

Consenting Person	Consenting Name	Consent Type	Effective From	Effective To
Self	2735713 First Name 2735713 First Name	Default/Value	03/31/2014	

| Display 1 to 1 of 1 |

[Add Consent](#)

7. Select the auto-generated **Self** link.

The **Update Consent** page appears.

Figure 6: Update Consents page with Add Organization Link button highlighted

Current Location: Clients> Client Search > Face Sheet > Consents > Update Consent

Manage Client

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

Client #120398759 : 300068 First Name 3. 300068 Last Name

Update Consent

Consenting Person First Name: Consenting Person Last Name:

*Consenting Person: *Consent Type:

Consent Procedure:

*Effective From: Effective To:

Comments:

Date Created: 03/31/2014 03:49:53 PM Created By: SYSTEM

Date Changed: Changed By:

[Associate Service Plan](#) **[Add Organization Link](#)** [Save Changes](#) [Delete Consent](#)

Associated Organizations

Organization Name	Effective Date	Expiration Date	Primary
DPH - Bureau of Substance Addiction Services	09/29/2014		No
Bay Cove Human Services	03/31/2014		Yes

Associated Service Plans

Service Plan	Version	Service Coordinator	Service Plan Type	Status	First Service Delivery Date	Effective From
S36045	1			Active		09/14/2014

8. Select the **[Add Organization Link]** button.



The Add Consent Organization Link page appears.

Figure 7: Add Consent Organization Link page

Current Location: Clients > Client Search > Face Sheet > Consents > Consent Summary > Add Consent Organization Link

Manage Client

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

Client #120398759 : 300068 First Name 3. 300068 Last Name

Add Consent Organization Link

Legal Name:

DBA Name:

Organization ID: Organization ID Type:

City: HHS Region:

Organization Group:

9. Add a legal name of the school in the **Legal Name** field. (*Hint*: Use %name for search criteria).
10. Select the [**Search**] button.

The Add Consent Organization Link page appears with search results at the bottom.

Figure 8: Add Consent Organization Link page with Legal Name added and Search results

Current Location: Clients > Client Search > Face Sheet > Consents > Consent Summary > Add Consent Organization Link

Manage Client

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

Client #120398759 : 300068 First Name 3. 300068 Last Name

Add Consent Organization Link

Legal Name:

DBA Name:

Organization ID: Organization ID Type:

City: HHS Region:

Organization Group:

Search Results

Select Code	Legal Name	DBA Name	Type	City	State	HHS Region
<input checked="" type="radio"/>	YMCA of Greater Worcester		Non Government	Worcester	MA	EOHHS REGION 2: CENTRAL MASS
<input type="radio"/>	YMCA of Greater Springfield		Non Government	Springfield	MA	EOHHS REGION 1: WESTERN MASS
<input type="radio"/>	YMCA of Greater Boston		Non Government	Boston	MA	EOHHS REGION 6: BOSTON REGION

[Display 1 to 3 of 3]

*Effective From: Effective To:

11. Select the radio button next to the individual site/school of your choice.
12. Enter a date in the **Effective From** field or use the Calendar icon to select a date. (*Note*: This should match enrollment date).
13. Select the [**Save**] button.

The Update Consent page appears.

Figure 9: Update Consent page with the Associated Service Plans at the bottom

Current Location: Clients > Client Search > Face Sheet > Consents > Update Consent

Manage Client

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

Client #120398759 : 300068 First Name 3. 300068 Last Name

Update Consent

Consenting Person First Name: Consenting Person Last Name:

*Consenting Person: *Consent Type:

Consent Procedure:

*Effective From: Effective To:

Comments:

Date Created: 03/31/2014 03:48:53 PM Created By: SYSTEM

Date Changed: Changed By:

Associated Organizations

Organization Name	Effective Date	Expiration Date	Primary
DPH - Bureau of Substance Addiction Services	09/29/2014		No
Bay Cove Human Services	03/31/2014		Yes
YMCA of Greater Worcester	10/01/2018		No

Associated Service Plans

Service Plan	Version	Service Coordinator	Service Plan Type	Status	First Service Delivery Date	Effective From
836045	1			Active		09/14/2014



Scenario B: How to access a student to share basic demographic information as well as all service plan data (i.e. encounters).

Complete the following steps to view or update information:

1. Access a Client's Application Face Sheet Summary.
2. Select **Consents** from the navigation bar.

Figure 10: Applicant Face Sheet Summary

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

Manage Client	Client #120398759 : 300068 First Name 3. 300068 Last Name																																																																																																								
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The **Update Consent** page appears with a link for the **Associated Service Plans** at the bottom.

Figure 11: Update Consents page with Associated Service Plan link highlighted

Current Location: Clients > Client Search > Face Sheet > Consents > Update Consent

Manage Client	Client #120398759 : 300068 First Name 3. 300068 Last Name																										
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3. Select the **Associated Service Plan** link to find the appropriate provider to verify that a school has been identified. If no school is identified, complete Scenario C.



Scenario C: A parent organization is enrolling a student in a sub-organization or satellite site (how to connect a service plan with basic information to forward).

Complete the following steps to enroll a student in sub-organizations or satellite sites to add services to be delivered:

1. Access the **Update Consent** page.

Figure 12: Update Consents page with Add Organization Link button highlighted

Current Location: Clients> Client Search > Face Sheet > Consents > Update Consent

Manage Client » Face Sheet » Client Summary » Personal Info » Referrals » Relations » Insurance » Consents » Single Activity Eligibility » Enrollments » Waivers » Services » Primary Care Provider	<p>Client #120398759 : 300068 First Name 3. 300068 Last Name</p> <p>Update Consent</p> <p>Consenting Person First Name: <input type="text" value="2735713 First Name"/> Consenting Person Last Name: <input type="text" value="2735713 First Name"/></p> <p>*Consenting Person: <input type="text" value="Self"/> *Consent Type: <input type="text" value="Default/Value"/></p> <p>Consent Procedure: <input style="width: 100%;" type="text"/></p> <p>*Effective From: <input type="text" value="03/31/2014"/> Effective To: <input type="text"/></p> <p>Comments: <input style="width: 100%;" type="text"/></p> <p>Date Created: 03/31/2014 03:49:53 PM Created By: SYSTEM Date Changed: Changed By:</p> <p style="text-align: right;"> <input type="button" value="Associate Service Plan"/> <input style="border: 2px solid red;" type="button" value="Add Organization Link"/> <input type="button" value="Save Changes"/> <input type="button" value="Delete Consent"/> </p> <p>Associated Organizations</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Organization Name</th> <th>Effective Date</th> <th>Expiration Date</th> <th>Primary</th> </tr> </thead> <tbody> <tr> <td>DPH - Bureau of Substance Addiction Services</td> <td>09/29/2014</td> <td></td> <td>No</td> </tr> <tr> <td>Bay Cove Human Services</td> <td>03/31/2014</td> <td></td> <td>Yes</td> </tr> </tbody> </table> <p>Associated Service Plans</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Service Plan</th> <th>Version</th> <th>Service Coordinator</th> <th>Service Plan Type</th> <th>Status</th> <th>First Service Delivery Date</th> <th>Effective From</th> </tr> </thead> <tbody> <tr> <td>936045</td> <td>1</td> <td></td> <td></td> <td>Active</td> <td></td> <td>09/14/2014</td> </tr> </tbody> </table>	Organization Name	Effective Date	Expiration Date	Primary	DPH - Bureau of Substance Addiction Services	09/29/2014		No	Bay Cove Human Services	03/31/2014		Yes	Service Plan	Version	Service Coordinator	Service Plan Type	Status	First Service Delivery Date	Effective From	936045	1			Active		09/14/2014
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936045	1			Active		09/14/2014																					

2. Select the **[Add Organization Link]** button, if no school is identified.

The Add Consent Organization Link page appears.

Figure 13: Add Consent Organization Link page

Current Location: Clients> Client Search > Face Sheet > Consents > Consent Summary > Add Consent Organization Link

Manage Client » Face Sheet » Client Summary » Personal Info » Referrals » Relations » Insurance » Consents » Single Activity Eligibility » Enrollments » Waivers » Services » Primary Care Provider	<p>Client #120398759 : 300068 First Name 3. 300068 Last Name</p> <p>Add Consent Organization Link</p> <p>Legal Name: <input style="border: 2px solid red;" type="text"/></p> <p>DBA Name: <input type="text"/></p> <p>Organization ID: <input type="text"/> Organization ID Type: <input type="text" value="Select Below"/></p> <p>City: <input type="text"/> HHS Region: <input type="text" value="Select Below"/></p> <p>Organization Group: <input type="text"/></p> <p style="text-align: right;"><input style="border: 2px solid red;" type="button" value="Search"/></p>
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3. Enter the legal name of school in the **Legal Name** field.
4. Select the **[Save]** button.

Virtual Gateway Customer Service
1-800-421-0938