



Summary of Job Aid

This job aid walks a user through the process of how to search for a client in ESM and also instructs a user on how to add, enroll and disenroll a new client into the Recovery Support Center program as well as update existing client information.

Refer to this job aid for more information on how to search for clients, add and enroll a new client, update existing client data and disenroll a client from the Recovery Support Center program.

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Steps for Intake: New Client

- In order to locate or create a client record, users must complete a search.

Search for a client:

 - Select the **Client** module and then **Client Search** from the left navigation bar.
 - Enter your search criteria in at least one of the following fields:
 - First or Last name
 - Date of birth
 - ID/ID Type (SNN or Client ID)
 - Click **Search**

Note: The search results are listed below the search criteria. If the client exists as a client of YOUR organization, users can open the record and update data as needed. If no search results were returned you can add a client record.
- If client is not returned (is not already in the system for YOUR organization:**

 - Click the click on [add a client](#) link.
 - Data already entered will populate this screen.
 - Add additional data
 - Click **Save New Client**

Note: You are only required to complete fields marked with a red asterisk (*) and those fields noted on your form required by the program. If the system shows that you created this record, this is a new client who does not exist in the system.



Virtual Gateway: (EIM/ESM)

ESM Client Data Entry Transaction Steps (Recovery Support Center)

3.	Enter Personal Information: Address <ul style="list-style-type: none">On the client's Face Sheet page, select Personal Info from the grey, left navigation barClick the add a new Address link.Enter required information.If the client is Homeless, select "Homeless" as the Address Type. Do not enter a street address but do enter a city where the client was on the street or in a shelter. The system will allow a record to be saved without a street address if the Address Type is "Homeless".Use the Enrollment start date as the Address Effective dateBe sure to click on the "Primary Address" flag. Click Save New Address
4.	Enter Demographics: <ul style="list-style-type: none">Select Demographics from the left navigation bar.Click the Add Cultural Background Information link.Enter required information.Click Save New Cultural Background.
5.	Enter Household Characteristics: <u>Only Default info is entered</u> <ul style="list-style-type: none">Select Household Characteristics from the left navigation bar.Adults: 1 / Children: 0Income:\$ 0Click Save New Household Characteristics.
Go Back to Face Sheet to Select Insurance	
6.	Enter Insurance Information: <u>Only Default info is entered</u> <ul style="list-style-type: none">Return to client's Face Sheet Summary page by clicking the Face Sheet link in the breadcrumbs.Select Insurance from the navigation bar.Click the add Insurance link.Enter Insurance Type as Not CollectedEnter Insurance Name as : OtherClick Save New Insurance



Steps for Intake: Existing Clients

1.	<p>In order to locate or create a client record, user must complete a search.</p> <p>Search for a client:</p> <ul style="list-style-type: none"> Select the Client module and then Client Search from the navigation bar. Enter your search criteria in at least one of the following fields: <ul style="list-style-type: none"> First or Last name Date of birth ID/ID Type (SNN or Client ID) Click Search <p>Note: The search results are listed below the search criteria. If the client exists as a client of YOUR organization,, users can open the record and update data as needed. If no search results were returned you can add a client record..</p>
2.a	<p>If client is returned (is already in the system) -</p> <ul style="list-style-type: none"> Click the Last Name link. You will be taken to client Face Sheet Review data to see if information has changed and if required enter current information for name, Address, Demographics, <p>OR</p>
2.b	<p>If client is not returned (is not a client of your organization)</p> <ul style="list-style-type: none"> You enter the name, SN, birth date, education and gender and Save Record is returned created by another user – the client exists in the system
3.	<p>Review Personal Information: Address</p> <ul style="list-style-type: none"> From the client's Face Sheet page, review current address information. If the information is the same. There is no updating to be done. Go to the next section, Household Characteristics. If the Address has changed: <ul style="list-style-type: none"> Open existing Address record and enter the clients RSC Enrollment Date minus 1 day in the Effective To field (if enrolled as of 3/11/212, enter 3/10/2012.) Save Enter new Address records using the steps listed in New Client Job Aid.”.
4.	<p>Household Characteristics: IF OLDER THAN 60 DAYS</p> <ul style="list-style-type: none"> Select Personal Info then Demographics from the left navigation bar Select Household Characteristics. If the data matches the default data (1 Adult/ 0 Children/ \$0 income) <ul style="list-style-type: none"> Update the “report date” to the Enrollment Date (Current date is Enrollment Date is more than 60 days back) and Save If the information is different, enter a new household Record with the default information <p><i>Note: If this is not updated, an enrollment can't be entered</i></p>



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5.	<p>Insurance: IF OLDER THAN 60 DAYS</p> <ul style="list-style-type: none">• Select Insurance from the left navigation bar.• Open the most current Insurance record.• Click on "Save" <p><i>Note: If this is not updated, an enrollment can't be entered</i></p>
Enrolling Client: Eligibility to Enrollment	
1.	<p>In order to ensure the client is eligible for this activity, users must complete an eligibility determination.</p> <p>Determine Eligibility:</p> <ul style="list-style-type: none">• Start at the client's Face Sheet.• Click Single Activity Eligibility from the navigation bar.• Select BSAS Recovery Support Center from the drop down 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. <p>Notes:</p> <ul style="list-style-type: none">• The system will display a message indicating eligibility status. For eligible clients, users proceed to create an enrollment.
2.	<p>Create Enrollment:</p> <ul style="list-style-type: none">• Enter Enrollment Period Start Date (This date must be within the previous 365 days).• Click Calculate Timeframe <p>Note: There are program-specific time period rules associated with individual programs that range from seven days up to 99 year of age..</p>
3.	<p>Confirm Enrollment:</p> <ul style="list-style-type: none">• Review the information for accuracy, especially Start Date• Click Confirm Enrollment <p>Notes:</p> <ul style="list-style-type: none">• The user must click on Confirm Enrollment, otherwise the enrollment will go to Draft
Fixing Draft Enrollments	
<p>Search for Draft Enrollments</p> <p>One a regular basis, users should use Advanced Client Search to make sure there are no enrollments in "Draft" status.</p>	
1.	<p>Go to Advanced Client Search</p> <ul style="list-style-type: none">• Select the Client module and then Advanced Client Search from the navigation bar.• In Status criteria box located at the bottom of the right column, select "Draft" from the dropdown• Click on Search button• If records are returned, these are enrollments that are in "Draft" and need to be taken to "Active"



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2.	Fix Drafts <ul style="list-style-type: none"> Click on Client Last Name to open record. Repeat Enrollment steps. This will not create a new enrollment but will, instead, update the "Draft" to "Active". Click Single Activity Eligibility from the navigation bar. Select BSAS Recovery Support Center from the drop down 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. Enter Enrollment Period Start Date (This date must be within the previous 365 days). Click Calculate Timeframe CONFIRM
3.	The "Draft" Enrollment will now be "Active"

Service Plan and Member Surveys

You will create a Service Plan at the time of Enrollment, and enter a Member Survey when submitted

1.	Start a Service Plan: Go to Face Sheet to select Services <ul style="list-style-type: none"> Select Services from the left navigation bar. The page displayed is a <u>search</u> page for Service plans This page displays when there are NO service plans or MULTIPLE Service plans Begin by doing a search with Service Plan Org Association: = Bureau of Substance Abuse Service If a plan(s) are returned, select the current plan If no plan is returned, Click the button: Add Plan. For [Service Plan Org Association:] select Bureau of Substance Abuse Service Enter plan details, making sure to populate all required fields. Click [Save New Service Plan].
2.	Once a member Survey has been submitted, you will enter it as a Service Plan Assessment. Search for a client: <ul style="list-style-type: none"> Select the Client module and then Client Search from the navigation bar. Enter your search criteria in at least one of the following fields: <ul style="list-style-type: none"> First or Last name (can be client code) Date of birth ID/ID Type Click [Search]. <ul style="list-style-type: none"> Select Client by clicking on Last Name <p>You will now be on the Face Sheet</p>



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3.	<p>Go to Services & Complete Assessment (Member Survey)</p> <ul style="list-style-type: none">• Select Services from the left navigation bar.• If you are not taken directly to the Service Page, do a search• Search with Service Plan Org Association: = Bureau of Substance Abuse Service• Select the current plan• Select the Service Plan Assessment from the left navigation bar.• Select the radio button in front of RSC_Plan.• Select the Complete Assessment button• Complete and Submit
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Disenrolling a Client

1.	<p>Close an enrollment:</p> <ul style="list-style-type: none">• Start at the client's Face Sheet.• Select Enrollments from the navigation bar. <p>Click the Enrollment ID link for the Enrollment to be closed.</p> <ul style="list-style-type: none">• Edit the necessary information.<ul style="list-style-type: none">○ Enrollment status: Closed.○ Select the Disenrollment Reason from the drop down box○ Enrollment End Date: Edit the actual date the client left the Center or last date contact if client did not notify the Center of their discontinued membership.○ Enter comments (optional).• Click Save Changes
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ESM Client Data Entry Transaction Steps (Recovery Support Center)

View Enrollments

There are two ways for user to review their enrollments in EIM. One is the View Enrollment functionality and the other is the Client enrollment Status Report. This section will guide the user in the use of View Enrollments. From this screen the user can:

- Identify duplicate enrollments
- Identify Draft Enrollments
- Identify clients enrolled to incorrect organization and fix that association

1.	<p>To Review all enrollments, their status and the enrolling organization,</p> <ul style="list-style-type: none">• Select the Client module and then View Enrollments from the navigation bar.• Enter your contract number in the box labeled Filter (You can use a wild card instead of entering the entire number: INTF2352%)• Click on the Filter Button• All contract numbers for the user's organization will populate in the Contract Box• Select the Contract Number for the Fiscal Year to be reviewed, from the Contract dropdown box.• Click View Enrollments.• The Fiscal year box will self populate• The system will return all enrollment records, Active, Closed, Draft
2.	<p>If Enrolling Organization Location is incorrect, it can be changed</p> <ul style="list-style-type: none">• Click on box in front of client(s) enrolled at the wrong location• Scroll to bottom of the page and select the correct location from the Apply Location To Selected Clients dropdown box• Click Apply• Click Save
3.	<p>Review for Duplicates</p> <ul style="list-style-type: none">• Look for duplicates of the same client, enrolled on the same date.• Select one to be Closed as "Enrolled in Error"• Note "Enrollment ID" for the one to be Closed• Go back to Client Search and search for the client with duplicate enrollments• Go to client Face Sheet and click on Enrollments from left navigation Bar• Open the enrollment with the matching "Enrollment ID" and close as "Enrolled in Error" and set the Enrollment End Date to equal the Enrollment Start Date.
4.	<p>Review for Drafts</p> <ul style="list-style-type: none">• If there are Drafts go to the "Fixing Draft Enrollment" Job Aid for the steps required to take "Draft" Enrollments to "Active" status



Client Enrollment Status Report

1.

To Review all enrollments, their status and the enrolling organization in a printable format,

- Select the **Reports** module
- Select **Client Enrollment Status** from the left menu.
- Enter the following values in the criteria fields:
 - **Report Format:** PDF
 - **Date Type:** Enrolment
 - **Period Start Date:** Select start date for period you want to review. For example to view year to date, enter 7/1/2012.
 - **Period End date:** Select end date for period you want to review. For example to view year to date, enter current date.
 - **Activity:** BSAS Recovery Support Centers
 - **Organization Type:** Select Contracted,
 - Then click **Select Organization Button**.
 - A new box will appear labeled **Organization**
 - **Organization:** Your Parent organization's name should display in the new box, if not, select it from the drop down.
 - Click on **Run Report**
- The report will generate in a new window.
- Print

OR

- Once open, Select **Save As** from the Internet Explorer header under "**File**"
- Save to your computer.

Customer Service Assistance

DPH Program Related Questions or Assistance with Clients and/or Enrollments

Contact:

Cathy Wheeler (Cathy.Wheeler@MassMail.State.MA.US)

- OR -

Monique Thompson (Monique.Thompson@MassMail.State.MA.US)

Virtual Gateway (VG) Related Questions or Assistance Accessing the Virtual Gateway

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