Intake	

1.	**Search for a client:**
	• Select the **Client** module and **Client Search** from the navigation bar.
	• Enter your search criteria in one of the following fields:
	  o First or last name
	  o Date of birth
	  o ID/ID Type
	• Click **[Search]**.
	Tip: *The search results are listed below the search criteria. Or, if no search results were returned you can add a client.*

2.	**Add a client: Face Sheet** • Start at the **Client Search** page. • Enter both a first and last name. • Click the add a client link. • Enter required information. • Click **[Save New Client]**.
3.	**Enter Personal Information: Address and Phone** • Start on the **Applicant Face Sheet Summary** page, select **Personal Info** from the navigation bar. • Click the add a new Address link. • Enter required information. • Click **[Save New Address]**. • Select **Phones** from the navigation bar under **Personal Info**. • Click the add phone link. • Enter required information. • Click **[Save New Phone]**.
4.	**Enter Demographics:** • Select **Demographics** from the navigation bar. • Click the Add Cultural Background Information link. • Enter required information. • Click **[Save New Cultural Background]**.
5.	**Enter Insurance information:** • Select **Insurance** from the navigation bar. • Click the add Insurance link. • Enter required information. • Click **[Save New Insurance]**.

Eligibility to Enrollment	
1.	**Determine Single Activity Eligibility:** • Access the applicant's **Face Sheet**. • Select Single Activity Eligibility from the navigation bar. Select Activity Name . • Click **[Select Activity]**. • Select a Contract from the pick list. • Click **[Select Contract]**. • Select Enrolling Organization from the pick list. • Click **[Determine Eligibility]**. ***Note:*** This is how you determine eligibility for enrollment.
2.	**Create Enrollment:** • Access the **Single Activity Eligibility** page and determine eligibility. • Click **[Create Enrollment]**. • Enter **Enrollment Period Start Date**. This date must be within the last **365** days. • Click **[Calculate Timeframe]**. • Enter a medical record number (optional) • Click **[Confirm Enrollment]**. ***Optional:*** Add comments and click **[Save Changes]**.
3.	**Confirm Enrollment:** • Access the **Face Sheet** page. • Click Enrollments from the navigation bar. ***Note:*** A client may have multiple enrollments for a program, but only one can be **active**.
4.	**Complete an enrollment assessment:** • On the **Update Enrollment page**, select **Enrollment Assessment** from the navigation bar. • Enter required field information. • Click **[Next page]**. • Click **[Submit survey]**.
5.	**Update Enrollment Start Date:** • On the **Update Enrollment page**, enter the new **Enrollment Start Date**. • Click **[Save Changes]**.

Encounters/Services:

1. **Start a Service Plan: Go to Face Sheet – Services**

Tip: Search from this page to determine whether a service plans exists for the client.

- Select **Services** from the navigation bar.
- Click the start a new service plan link or click **[Add Plan]**.
- Enter plan details, making sure to populate all required fields.
- Click **[Save New Service Plan]**.

Important: When entering the first service code you must complete steps 2 – 5. For any additional services entered on the *same day (encounter form),* only complete steps 2 and 5.

2. **Add Professional Services: Go to Service Plan Calendar or Services**

- Select a **Service Code**.
- Select a **Rendering Provider**.
- Select a **Rendering Clinician**.
- Select a **Taxonomy Code**.
- Use **Facility Code** default: office visit.
- Enter **Service Date**.
- Use **Units**: default 1.
- Click **[Save New Service]**.

Note: Lab results are *only* entered as services. Risk and Resiliency Assessment data is *only* entered on the Screening Assessment.

3. **Complete Screening Assessment, only required for first service code (usually office visit)**

- Access the **Service Summary** page.
- Select **Screening Assessment** from the navigation bar.
- Select Assessment Name.
- Click **[Complete Assessment]**.
- Click **[Next page]**.
- Click **[Submit survey]**.

4. **Report Diagnosis:**

- Start from the **Service Summary** page.
- Click **[Add Diagnosis]**.
- Enter **ICD-9 Code** in textbox.

Tip: If your search results do not generate the expected results, use a % before a partial ICD-9 Code.

- Click **[Search]**.
- Click **[Save Diagnosis]**.

5. **Update Service Status:**

- Start from the **Service Summary** page.
- Update Status to **Reported** and then click **[Save Changes]**.

Disenrollment

Close an enrollment:

- Access the **Enrollments** page.
- Click the link for the enrollment to close.
- Edit the necessary information.
    - Mark enrollment status closed.
    - Select reason for disenrollment.
    - Enter Enrollment End Date.
    - Optional: enter comments.

Tip: The Enrollment End Date can only be edited if an enrollment is in "**closed**" status.

- Click **[Save Changes]**.

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