Managing Client Agency Enrollment

Click [HERE](#) for a video on how to use this guide.

The Enrollment Information page is where all of a client's enrollment details can be found and managed.

Breadcrumbs: Client > Client Information > Critical Information > Enrollment Information

Included Guidance:

- [Enrollment Page Overview](#) (p. 1)
- Correct/Edit Agency Enrollment ([p. 2](#))
- [Add a New Program Enrollment](#) ([p. 3](#))
- [End a Program Enrollment](#) ([p. 5](#))

- [Transfer Primary Worker](#) ([p. 7](#))
- [Add/End Direct Staff Assignment](#) ([p. 9](#))
- [Discharge a Client](#) ([p. 10](#))
- [Readmit a Client](#) ([p. 12](#))

Enrollment Information Page Overview

- **Program**: Each program enrollment and Start/End dates are listed in bold.
  - Most recent enrollment will be listed first.
  - Ended enrollments will move to the bottom of the page.
- **Facility Provider**: Facility responsible for enrollment will populate on most service entries
- **Worker assignments**: Primary workers and start dates are listed in bold. Direct staff assignments and start dates listed in regular font.
- **Workgroup Assignments**: Work groups are groups of staff allowed access to client records not listed as primary worker/direct staff assignments.
  - Not all program enrollments will have workgroups.
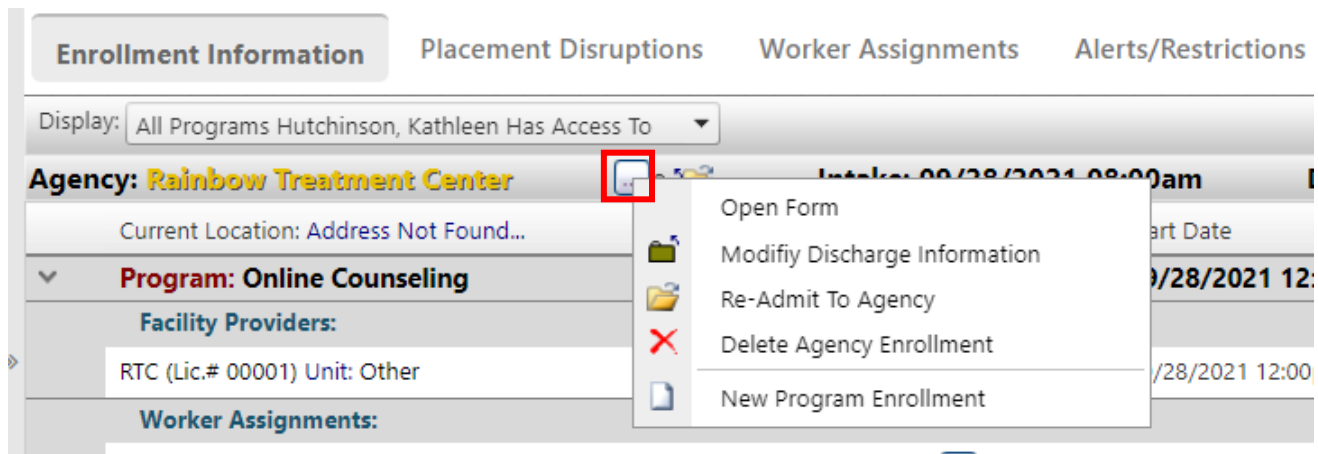
Editing Agency Enrollment

Click the button with three dots across from **Rainbow Treatment Center** to open menu.

Your assigned Worker Role will determine what options you have.

- **Open Form**: Opens agency enrollment information.
  - Very little information can be edited. If your worker role permits, you may be able to edit the Intake date/time.
- **Discharge From Agency**: Opens discharge form to close a client record.
  - Discharging a client closes the client record, making the client inactive.
- **Delete Agency Enrollment**: This option is only available for System Administrators.
- **New Program Enrollment**: Opens form to enroll client in new program.

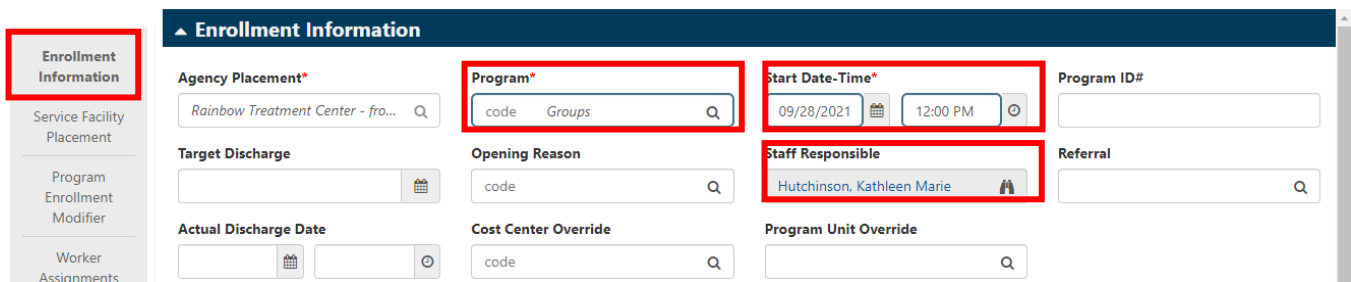# Managing Client Agency Enrollment

Adding Program Enrollment

Click the button with three dots across from **Rainbow Treatment Center** to open menu.
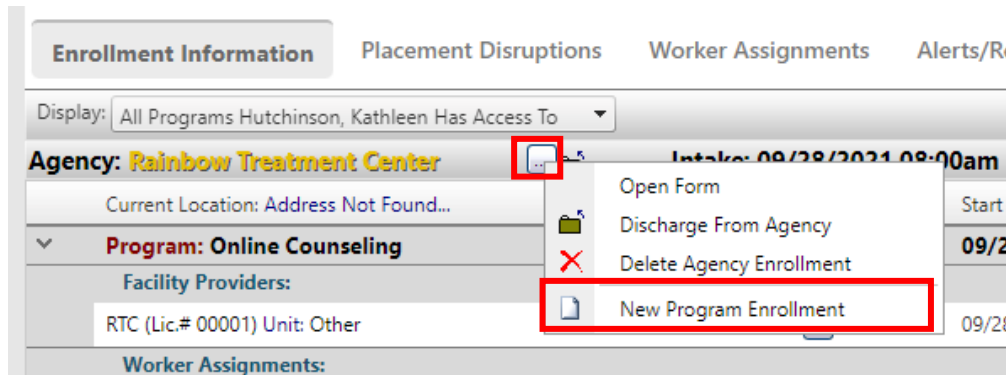
Enrollment Information

- **Agency Placement**: This field will automatically populate and cannot be changed
- **Program**: Use magnifying glass to select program
- **Start Date-Time**: Use calendar/clock icons to complete fields
- **Staff Responsible**: This field will automatically populate. Use binocular icon to edit if necessary
- Complete other fields as necessary

Service Facility Placement

- **Placement Type**: Select Facility Placement
- **Service Facility**: Use binoculars to make appropriate selection
- **Unit**: Select Other unless otherwise trained
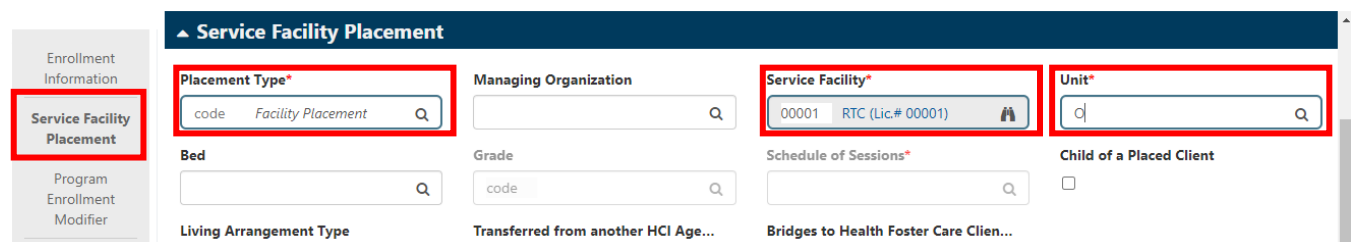
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Program Enrollment Modifier

- Select Modifier and complete Effective Date as trained by supervisor

Worker Assignments

- **Primary Worker**: Use binoculars to make selection
- **Primary Worker's Role**: Use magnifying glass to make selection
- **Other workers**: Add direct staff assignments as necessary

Click Save.

New program enrollment will now be listed on the Enrollment Information page.

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Ending Program Enrollment
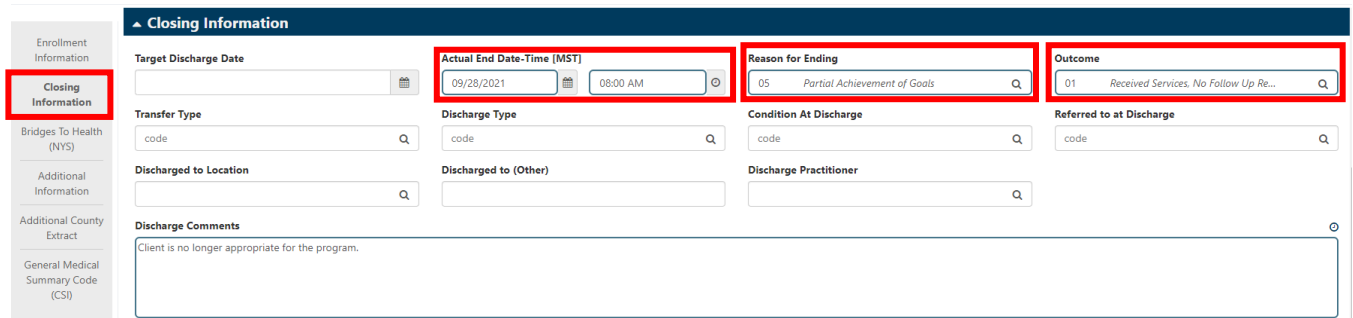
Locate current program you wish to end.

Click the box with three dots > Correct/Close Program Enrollment.
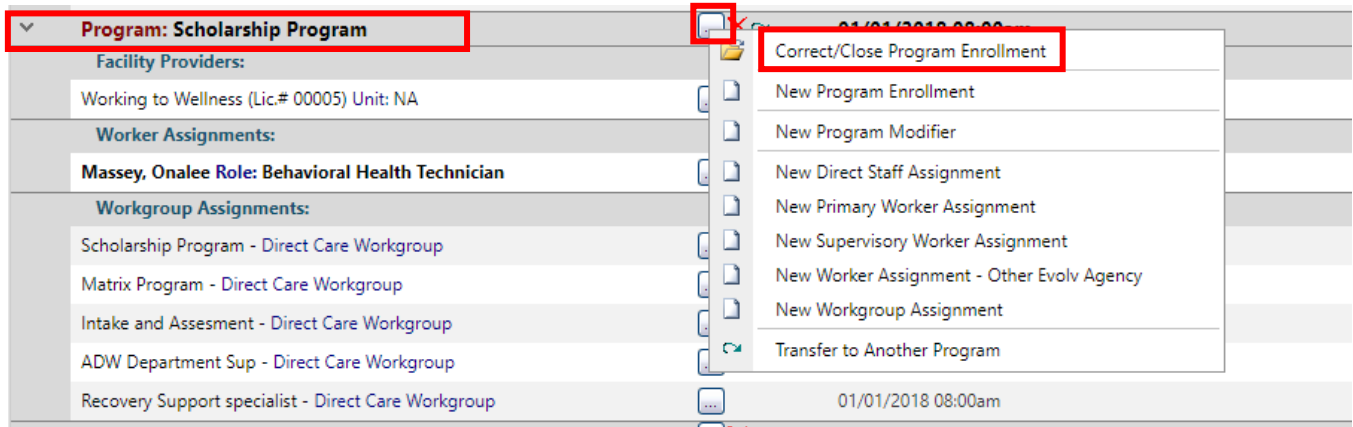
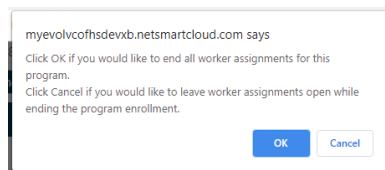Scroll to Closing Information in the menu on the left.

Complete Actual End Date-Time, Reason for Ending, and Outcome and any additional relevant fields.

Click Save.

A system alert will pop up.

- Click Okay to end all worker assignments within the program you are ending.
- Click Cancel to leave worker assignments open. If worker assignments are not ended clients will remain on worker's roster.

If the client has events scheduled, a pop-up window will appear.

- Delete the tasks by checking the box in the Delete? column and click Save.

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Enrollment is now ended along with Facility Provider and Worker Assignments.

Ended programs will move to the bottom of the page.

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Transferring Primary Worker

Locate the current program enrollment under which you wish to transfer primary worker.

- Click the blue curved arrow to the right of the name to open transfer form.

Transfer From

- **Program Enrollment**: This field will automatically populate and cannot be changed
- **Worker Assignment**: This field will automatically populate and cannot be changed

Transfer To

- **Program**: This field will automatically populate and cannot be changed
- **Type**: This field will automatically populate and cannot be changed
- **Worker**: Use binocular icon to search/select staff
- **Worker Role**: Use magnifying glass to complete field

Transfer Information

- **Transfer Date/Time**: Use calendar/clock icon to complete fields
- **Transfer Staff**: This field will automatically populate. Use binoculars to edit if needed

Click Save.

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If the client has events scheduled, a pop-up window will appear.

- Click Transfer? check box next to each event and save to transfer responsibility to the new primary worker.

New primary worker will now be listed in bold font.

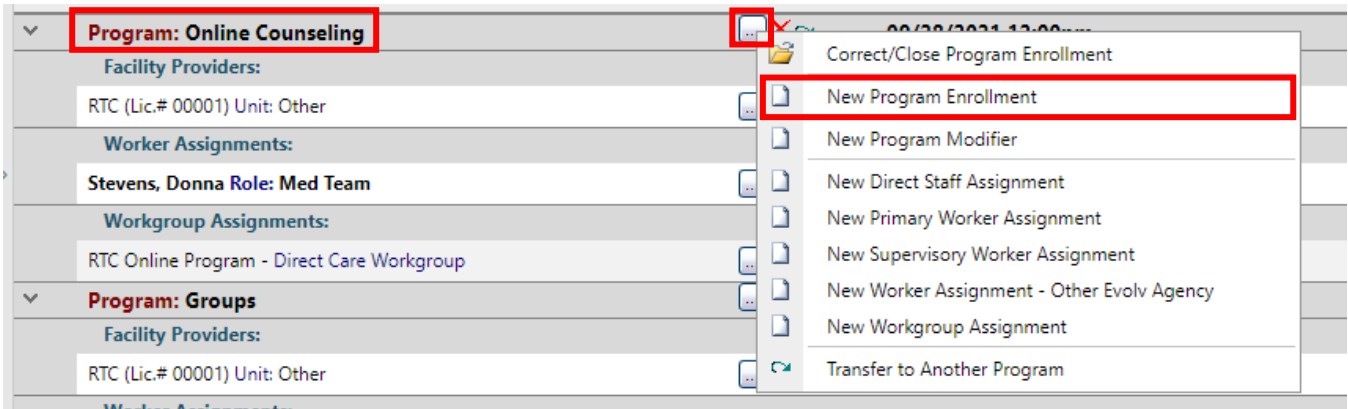Previous primary worker will now show as end dated and to whom the was client transferred.

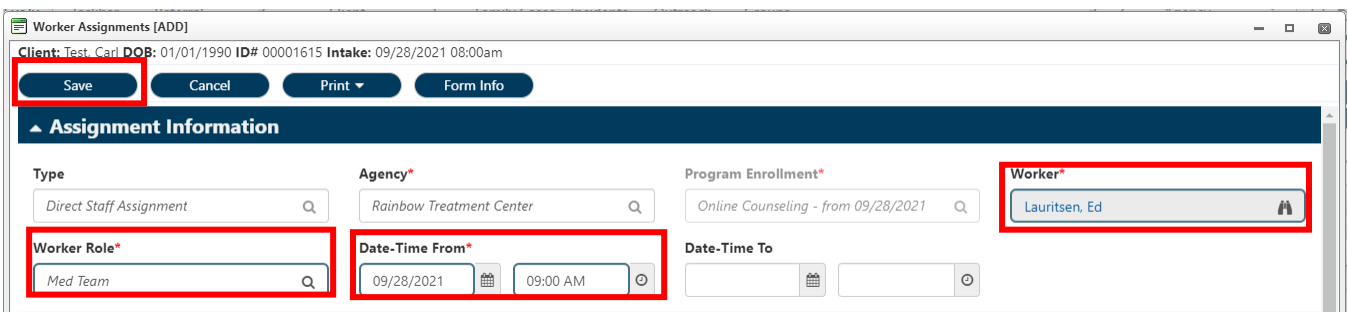# Managing Client Agency Enrollment

Adding a Direct Staff Assignment

Locate program enrollment under which you wish to add a direct staff assignment and open menu.

Worker Assignment Information

- **Type**: This field will automatically populate and cannot be changed.
- **Agency**: This field will automatically populate and cannot be changed.
- **Program Enrollment**: This field will automatically populate and cannot be changed
- **Worker**: This field will automatically populate. Use binoculars to edit if necessary
- **Worker Role**: Use magnifying glass to make selection
- **Date-Time From**: Use calendar/clock icons to complete fields
- **Date-Time To**: Complete this field only when ending worker assignment

Save.

New Direct Staff Assignment will now be listed under Primary Worker Assignments.
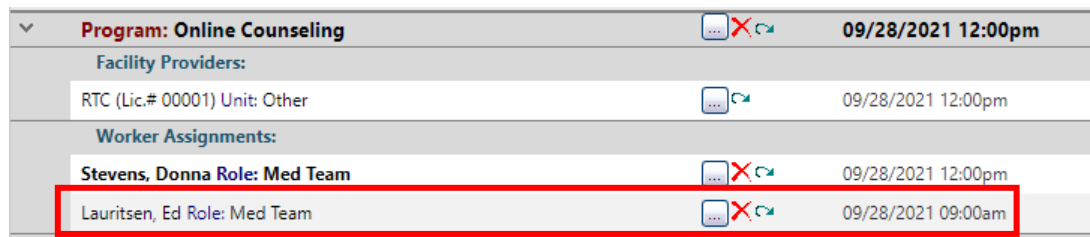
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Discharging a Client from Agency

Click the little brown folder to open discharge form.

- **Discharge Date-Time**: Complete fields using calendar/clock icons.
- **Discharge Type**: Select Planned or Unplanned Discharge
- **Closing Reason**: Use magnifying glass to select outcome from table of options
- **Outcome**: Use magnifying glass to select outcome from table of options.
- Complete other fields as trained.

Click Save.

If the client has events scheduled, a pop-up window will appear.

- Delete the tasks by checking the box in the Delete? column and click Save.

Client is now discharged from agency and all program enrollments ended.

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To finish the process, make sure all worker assignments are ended.

- o If worker assignments are not ended, the clients will remain on worker case load reports.
- o **Breadcrumbs**: Client > Client Information > Critical Information > Worker Assignments
- o Or instead, click the Worker Assignments tab

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Re-Admitting a Client to the Agency

Click the button with three dots across from **Rainbow Treatment Center** to open menu.

Click Re-Admit To Agency.

Re-Admission

- **Re-Admission Date**: Enter re-admission date and time
- **Re-Admit to Program**: This field will automatically populate to original program the client was enrolled in RTC. Use magnifying glass to edit as necessary
- **Placement Type**: This field will automatically complete as Facility Placement
- **Re-Admit to Facility**: This field will automatically complete to the original facility the client was enrolled in at RTC. Use magnifying glass to edit as necessary.

New Workers

- **Initial Primary Worker**: This field will automatically populate to original primary worker. Use binoculars to edit as necessary
- **Worker Role**: Use magnifying glass to make appropriate selection.

Save.

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Client is now re-admitted to the agency and services/tickets can be entered in the system.

The original Intake and Re-Admission date will be visible along the top of the window.