

# 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.

**TEST, CLIENT** | ID# 00000002 | DOB 01/01/1980 | Intake 01/01/2018 | (D) (928) 338-4911 | Location PO BOX 123, WHITERIVER, AZ 85941

41 yrs Male

Enrollment Information | Placement Disruptions | Worker Assignments | Alerts/Restrictions | Workgroup Assignments | Auto Assigned Workgroups | Perm

Display: All Programs Hutchinson, Kathleen Has Access To

**Agency: Rainbow Treatment Center** | Intake: 01/01/2018 08:00am

Current Location: PO BOX 123, WHITERIVER, AZ 85941

Program	Actions	Start Date	End Date	Transfer
<b>Program: New Dawn</b>	[...]	<b>05/10/2021 08:00am</b>		
<b>Facility Providers:</b>				
RTC (Lic.# 00001) Unit: Other	[...]	05/10/2021 08:00am		
<b>Worker Assignments:</b>				
<b>Stevens, Donna Role: Med Team</b>	[...]	05/10/2021 08:00am		
<b>Program: Online Counseling</b>	[...]	<b>08/01/2020 09:00am</b>		
<b>Facility Providers:</b>				
Eagle Building (Lic.# 00002) Unit: NA	[...]	08/26/2020 08:00am		
RTC (Lic.# 00001) Unit: Other	[...]	08/01/2020 09:00am	08/26/2020 08:00am	Transferred to Eagle Building...
<b>Worker Assignments:</b>				
<b>Stevens, Donna Role: Med Team</b>	[...]	05/01/2021 08:00am		
<b>Atole, Ivan Role: Clinical Supervisor</b>	[...]	08/02/2020 09:00am	05/01/2021 08:00am	Transferred to Stevens, Donna...
<b>Atole, Shawnnia (Ended: 12/31/2019) Role: Behavioral Health Technician</b>	[...]	08/01/2020 09:00am	08/02/2020 09:00am	Transferred to Atole, Ivan...
<b>Workgroup Assignments:</b>				
RTC Online Program - Direct Care Workgroup	[...]	08/01/2020 09:00am		

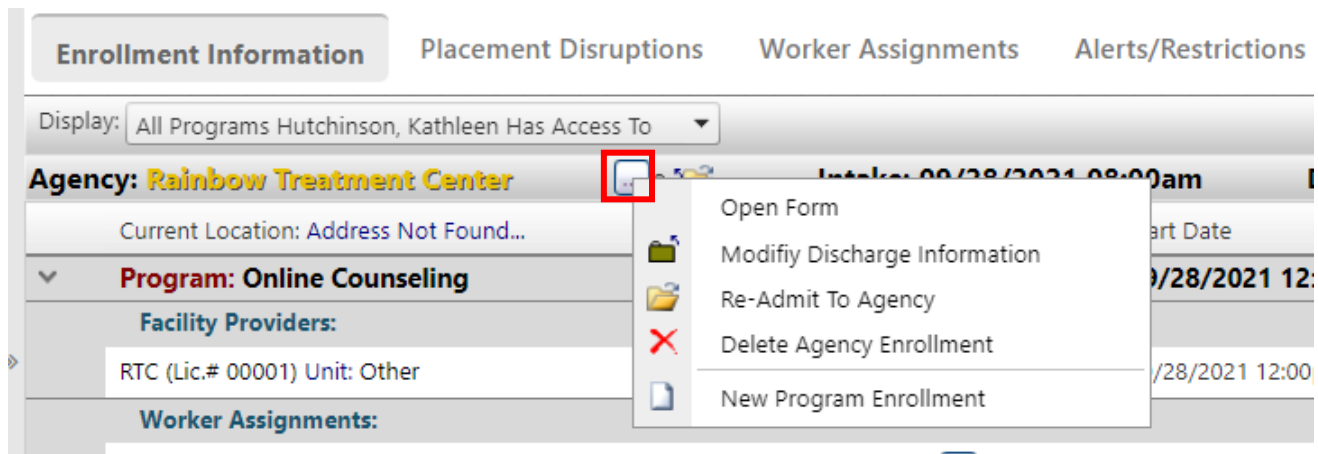
# Managing Client Agency Enrollment

## 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.

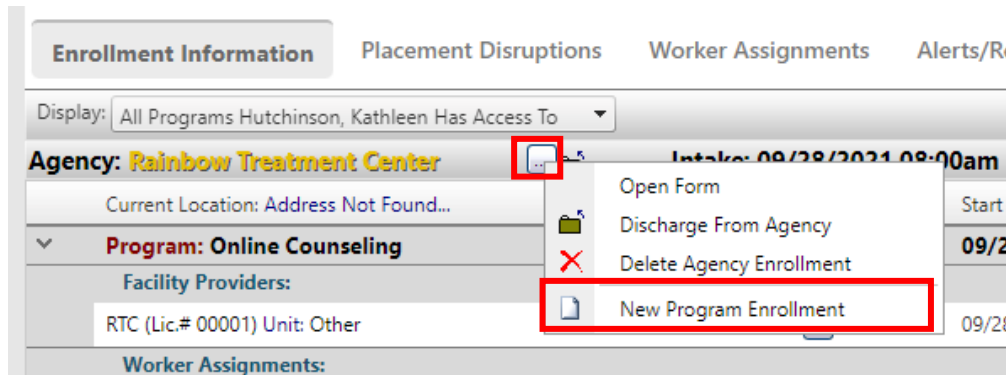
- **Open Form:** Opens agency enrollment information.
  - Very little information can be edited. If your worker role permits, you may be able to edit the Intake date/time.
- **Discharge From Agency:** Opens discharge form to close a client record.
  - Discharging a client closes the client record, making 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

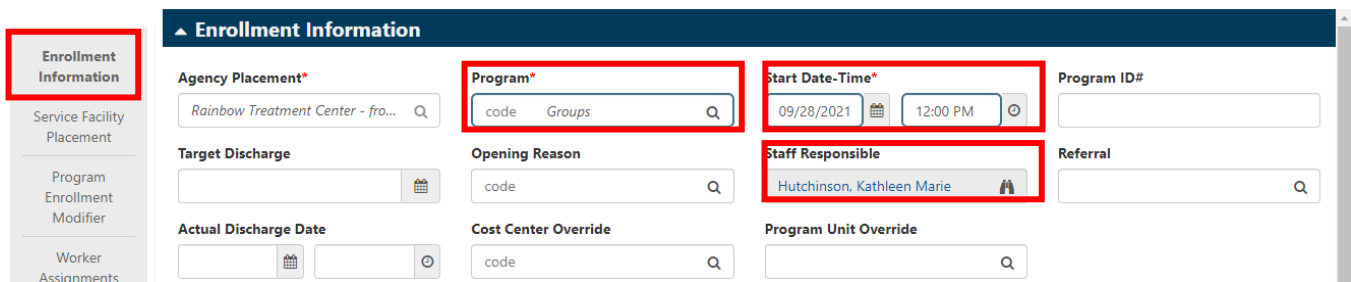
## Adding Program Enrollment

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



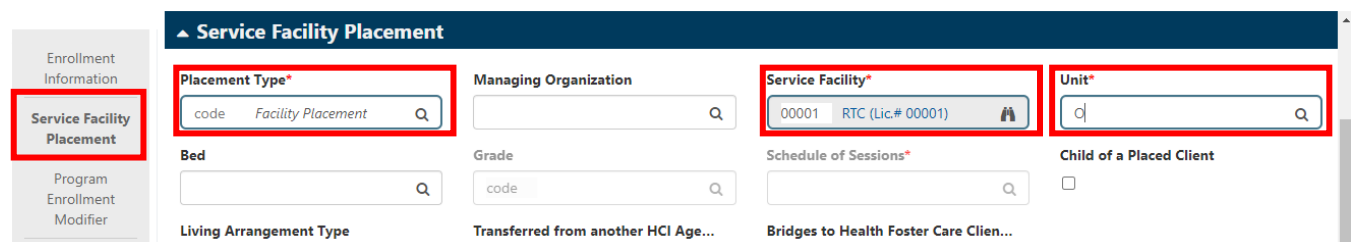
### Enrollment Information

- **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



# Managing Client Agency Enrollment

## Program Enrollment Modifier

- Select Modifier and complete Effective Date as trained by supervisor

**Program Enrollment Modifier**

Modifier: code

Effective Date\*

Date Received

Expiration Date

## 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.

**Worker Assignments**

Primary Worker\*: Stevens, Donna

Primary Worker's Role\*: Med Team

Other Workers

Worker*	Worker Role*	Actions
+		Actions

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

Enrollment Information | Placement Disruptions | Worker Assignments | Alerts/Restrictions | Workgroup

Display: All Programs Hutchinson, Kathleen Has Access To

Agency: **Rainbow Treatment Center** Intake: 09/28/2021 08:00am

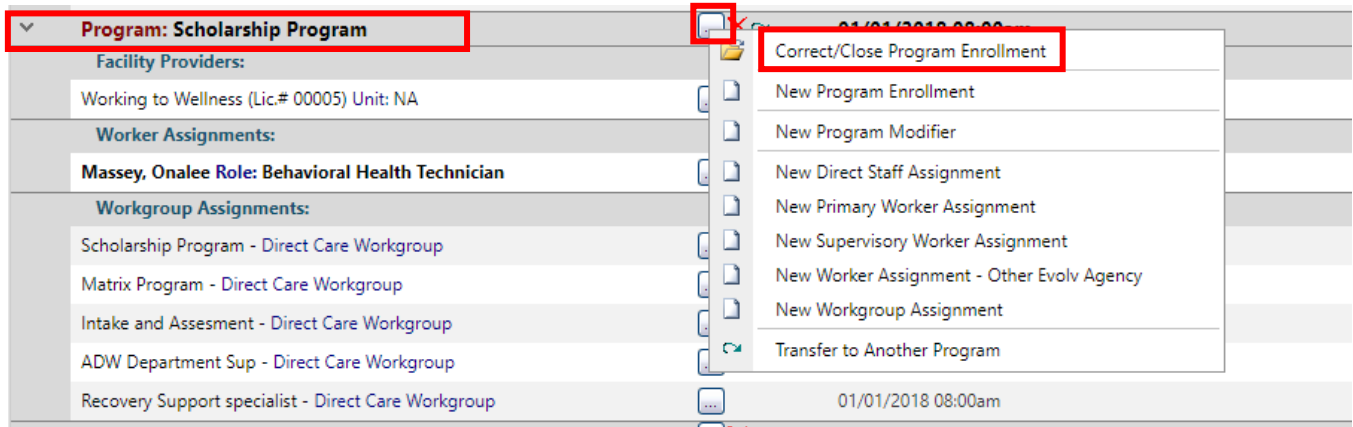
Current Location: Address Not Found...	Actions	Start Date
<b>Program: Online Counseling</b>	[...]	09/28/2021 12:00pm
<b>Facility Providers:</b>		
RTC (Lic.# 00001) Unit: Other	[...]	09/28/2021 12:00pm
<b>Worker Assignments:</b>		
Stevens, Donna Role: Med Team	[...]	09/28/2021 12:00pm
<b>Workgroup Assignments:</b>		
RTC Online Program - Direct Care Workgroup	[...]	09/28/2021 12:00pm
<b>Program: Groups</b>	[...]	09/28/2021 12:00pm
<b>Facility Providers:</b>		
RTC (Lic.# 00001) Unit: Other	[...]	09/28/2021 12:00pm
<b>Worker Assignments:</b>		
Stevens, Donna Role: Med Team	[...]	09/28/2021 12:00pm
<b>Workgroup Assignments:</b>		
Groups - Direct Care Workgroup	[...]	09/28/2021 12:00pm

# Managing Client Agency Enrollment

## Ending Program Enrollment

Locate current program you wish to end.

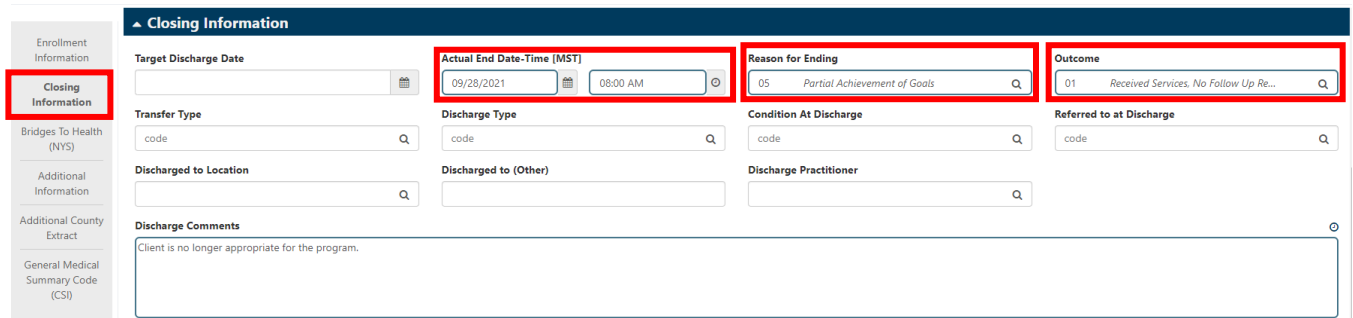
Click the box with three dots > Correct/Close Program Enrollment.



Scroll to Closing Information in the menu on the left.

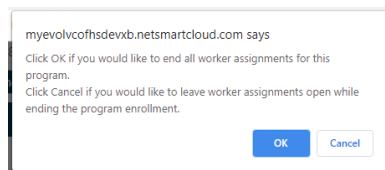
Complete Actual End Date-Time, Reason for Ending, and Outcome and any additional relevant fields.

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.

# Managing Client Agency Enrollment

Delete?	Write Off?	Task	Due Date	Scheduled Date	Program	Staff
<input checked="" type="checkbox"/>	<input type="checkbox"/> Other	Substance Use Assessment	5/10/2027 12:00:00 AM		Scholarship Program	Massey, Onalee

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

Ended programs will move to the bottom of the page.

# Managing Client Agency Enrollment

## 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.

▼ <b>Program: Intake Program</b>			12/17/2018 08:00am
<b>Facility Providers:</b>			
RTC (Lic.# 00001) Unit: Other			12/17/2018 08:00am
<b>Worker Assignments:</b>			
<b>Massey, Onalee Role: Behavioral Health Technician</b>			12/17/2018 08:00am
<b>Workgroup Assignments:</b>			
Intake Program - Direct Care Workgroup			12/17/2018 08:00am

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.

Worker Transfer [ADD]

Save Cancel Form Info

**Transfer From**

**Program Enrollment\*** Intake Program - from 12/17/2... Q **Worker Assignment\*** Massey, Onalee Role: Behavioral... Q

**Transfer To**

**Program\*** Intake Program Q **Type\*** Primary Worker Assignment Q **Worker\*** Stevens, Donna **Worker Role\*** Med Team Q

**Transfer Information**

**Transfer Date/Time\*** 09/28/202 08:00 AM **Transfer Staff\*** Hutchinson, Kathleen Marie

# Managing Client Agency Enrollment

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.

Transfer?	Delete?	Write Off?	Task	Due Date	Scheduled Date	Former Program	New Program	Former Staff	New Staff	Scheduled For	Resource Family
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Other	Substance Use Assessment	12/24/2027		Intake Program	Intake Program	Massey, Onalee	<b>Stevens, Donna</b>	Test, Client	NA
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Other	Substance Use Assessment	12/24/2024		Intake Program	Intake Program	Massey, Onalee	<b>Stevens, Donna</b>	Test, Client	NA
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Other	Substance Use Assessment	01/24/2022		Intake Program	Intake Program	Massey, Onalee	<b>Stevens, Donna</b>	Test, Client	NA

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.

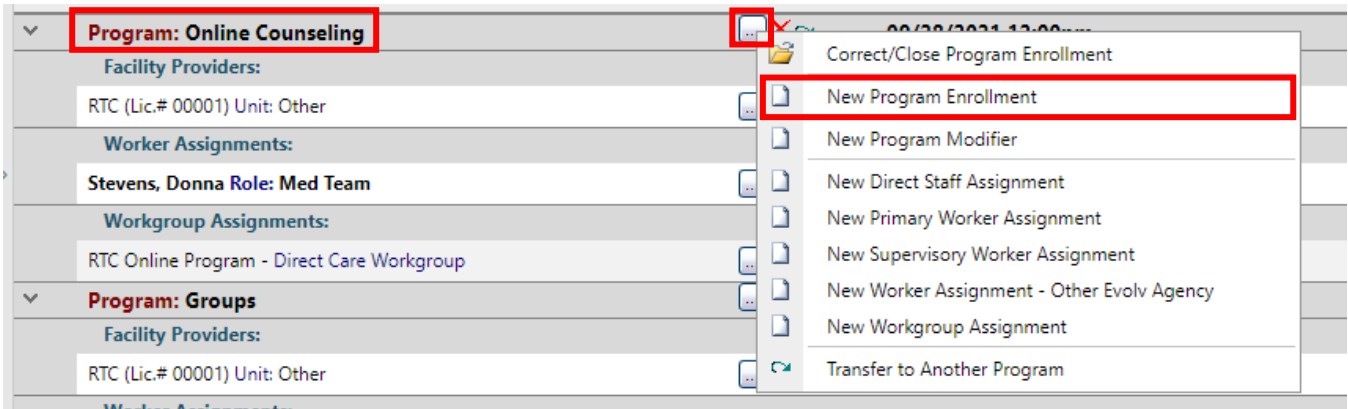
<b>Program: Intake Program</b>			<b>12/17/2018 08:00am</b>
<b>Facility Providers:</b>			
RTC (Lic.# 00001) Unit: Other			12/17/2018 08:00am
<b>Worker Assignments:</b>			
<b>Stevens, Donna Role: Med Team</b>			09/28/2021 08:00am
<b>Massey, Onalee Role: Behavioral Health Technician</b>			12/17/2018 08:00am      09/28/2021 08:00am      Transferred to <b>Stevens, Donna...</b>



# Managing Client Agency Enrollment

## Adding a Direct Staff Assignment

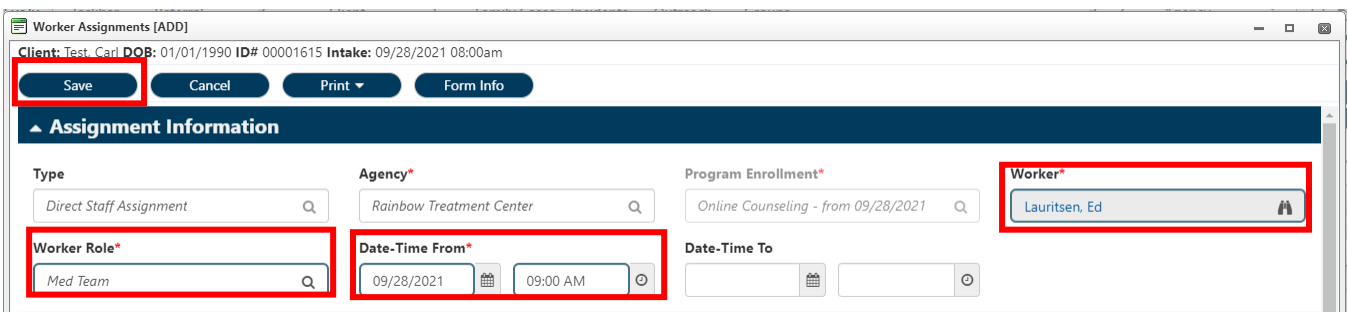
Locate program enrollment under which you wish to add a direct staff assignment and open menu.



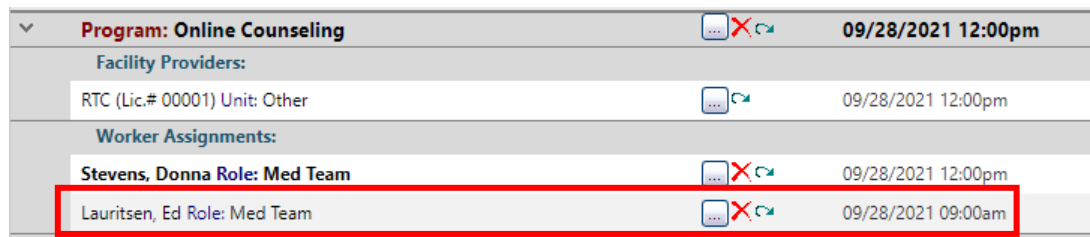
### Worker Assignment Information

- **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.



# Managing Client Agency Enrollment

## Discharging a Client from Agency

Click the little brown folder to open discharge form.

<b>Agency:</b> Rainbow Treatment Center		<b>Intake:</b> 09/28/2021 08:00am
Current Location: Address Not Found...	Actions	Start Date
<b>Program:</b> Groups	 	<b>09/28/2021 12:00pm</b>
<b>Facility Providers:</b>		
RTC (Lic.# 00001) Unit: Other	 	09/28/2021 12:00pm

- **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.

Delete?	Write Off?	Task	Due Date	Scheduled Date	Program	Staff
<input checked="" type="checkbox"/>	<input type="checkbox"/> Other	Consent to Treatment and Privacy of Information	10/1/2021 12:00:00 AM	9/30/2021 8:00:00 AM	Intake Program	Hutchinson, Kathleen Marie

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

# Managing Client Agency Enrollment

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

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

The screenshot displays a client profile for Carl Test. The top section includes a profile picture, name (TEST, CARL), age (31 yrs Male), ID# (00001615), DOB (01/01/1990), Intake (09/28/2021), Discharge (09/29/2021), and Location (Address Not Found...). Below this is a navigation bar with tabs: Enrollment Information, Placement Disruptions, Worker Assignments, Alerts/Restrictions, Workgroup Assignments, and Auto Assigned W. The Worker Assignments tab is highlighted. A dropdown menu shows 'All Programs Hutchinson, Kathleen Has Access To'. The Agency is listed as 'Rainbow Treatment Center'. The Intake date and time are '09/28/2021 08:00am', and the Discharge date and time are '09/29/2021 02:00pm'. The Discharge date and time are highlighted with a red box.

# Managing Client Agency Enrollment

## 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.

The screenshot displays a client profile for TEST, CARL, 31 yrs Male, with ID# 00001615, DOB 01/01/1990, Intake 09/28/2021, and Discharge 09/29/2021. The interface includes tabs for Enrollment Information, Placement Disruptions, Worker Assignments, Alerts/Restrictions, and Workgroup. A dropdown menu is open for the 'Rainbow Treatment Center' agency, listing options: Open Form, Modify Discharge Information, Re-Admit To Agency (highlighted with a red box), Delete Agency Enrollment, and New Program Enrollment. The menu is also highlighted with a red box. The background shows enrollment details for 'Online Counseling' at RTC (Lic.# 00001) Unit: Other, with intake and discharge dates and times.

### 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.

# Managing Client Agency Enrollment

Agency Re-Admission [EDIT]  
Client: Test, Carl DOB: 01/01/1990 ID# 00001615 Intake: 09/28/2021 08:00am Discharge: 09/29/2021 08:00am

Save Cancel Print Send Alert History Refresh Form Info

### Re-Admission

Re-Admission Date\* 09/29/2021 02:00 PM  
Re-Admit to Program\* INTAKE Intake Program  
Placement Type\* FP Facility Placement  
Re-Admit To Facility\* 00001 RTC (Lic.# 00001)

Unit\* Bed Grade Schedule of Sessions\*

### Re-Admission Program Enrollment Modifier

Modifier Effective Date\* Received Date Expiration Date

### New Workers

Initial Primary Worker Stevens, Donna  
Worker Role\* Med Team

Workers

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.

TEST, CARL ID# 00001615 DOB 01/01/1990 Intake 09/28/2021 Readmitted 09/29/2021 Location Address Not Found...

31 yrs Male

Enrollment Information Placement Disruptions Worker Assignments Alerts/Restrictions Workgroup Assignments Auto Assigned Wor

Display: All Programs Hutchinson, Kathleen Has Access To

Agency: Rainbow Treatment Center Intake: 09/28/2021 08:00am

Current Location: Address Not Found... Actions Start Date End Date