

## Enrolling a Client with a Primary Care Practitioner

Begin in the Patient section of the EMR. Press F1 and select the appropriate client. On the Demographics tab of the Patients section there is a field titled **Current Enrollment Status**. When you are enrolling a client for the first time you will see the following:

Current Enrollment Status: **Not Enrolled** Enroll

You will need to click on the Enroll button on the right hand side to select the applicable Physician or Nurse Practitioner from the drop down box

Once you've selected the appropriate Provider, you will need to indicate the Enrollment Date. Then click Ok

**Provider Enrollment**

Please select the provider and date of enrollment.

Provider: **Provider01, Kelly**

Enrollment Date: **08/19/2013**

Ok Cancel

The client is now enrolled with the appropriate Physician or Nurse Practitioner and the field should look like this:

Current Enrollment Status: **Enrolled (Provider01, Kelly)** Terminate Enrollment

## TERMINATING A CLIENT'S ENROLLMENT WITH A PRIMARY CARE PRACTITIONER

If a client's Enrollment needs to be terminated, start in the Patient section and this time instead of the Enroll button, you will only see the **Terminate Enrollment** button. Click the Terminate Enrollment button and then select the appropriate reason and a Termination Date.

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**Terminate Enrollment**

Please select the date and reason for termination.

Reason: **(1) Patient Deceased**

Termination Date: **09/11/2019**

OK

Please enter a valid/full date in the format M = Month; D = Day; Y = Year

## PROVIDER ENROLLMENT HISTORY

To view the history of a client's Enrollment within the EMR, go to the Patients section and then to the Provider Enrollment History Tab. This will give you the Current Enrollment Status of the client as well as the History:

Demographics	Other	Relationships	Notes	Status History	Private Billing	Insurer Rules	Providers	Provider Enrollment History	
Current Enrollment Status: <b>Enrollment Terminated</b>									Enroll
Status History		Provider		Reason		Date			
Enrolled		Provider01, Kelly				19 Aug 2013			
Terminated		Provider08, Reece		(12) Health Number error		19 Aug 2013			
Enrolled		Provider08, Reece				12 Aug 2013			
Enrolled		Provider03, Jessie				12 Aug 2013			
Terminated		Provider03, Jessie		(35) Patient transferred from roster per physician request		09 Aug 2013			

## CLIENT DECLINES ENROLLMENT

To ensure a client who declines enrolment with a Provider at a Primary Care clinic is not asked about enrolment repeatedly during future visits, you will need to indicate this on the client's chart. Go to the Patients section and under the Demographics tab beneath **Ethnicity** and just above the **Current Enrolment Status** buttons you will find a field called '**Enrolment Declined**'. There are two options in the drop down box; '**Patient Declined Clinic/Provider Enrolment**' or '**Patient Enrolled with Provider Elsewhere**'. Select the appropriate option and then click on **Update Patient**.

Ethnicity	
Enrolment Declined	Patient Declined Clinic / Provider Enrolment
Current Enrollment Status: <b>Unenrolled</b>	