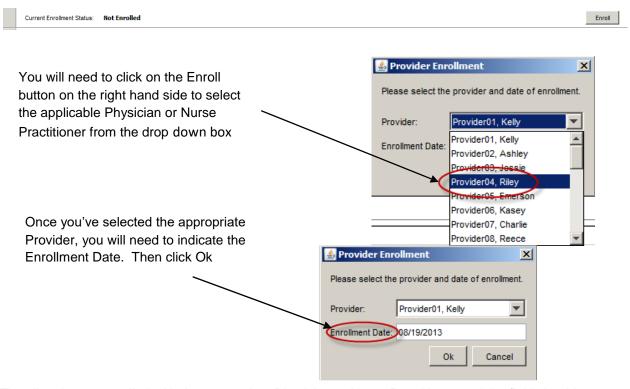
## **Enrolling a Client with a Primary Care Practitioner**

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:



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



## 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. Terminate Enrollment × Please select the date and reason for termination. Click the Terminate Enrollment button and then select the appropriate reason Reason: (1) Patient Deceased and a Termination Date. (1) Patient Deceased Termination Date Terminate Enrollment × (2) Patient moved out of area Please select the date and reason for termination (3) Patient added in error of area (4) Patient added to roster in error (1) Patient Deceased (5) Patient no longer in Primary Care Termination Date 09/11/2019 (6) Patient request OK Please enter a valid/full date in th (7) Clinic/provider request M = Month; D = Day; Y = Year (8) Other

## 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:



## **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**.

