

Assigning to a Program

1. Click on “Search” icon. Type “Program Assignments”



2. Select “Program Assignments - Client” from the drop-down menu. Continue to step 4 below.

a. If you don't have a client selected, you will need to use the client search option.



- i. The “Client Search” screen will pop-up. Type in the clients name you want to add the program to. Click the “Broad Search” button.
- ii. You can also utilize the other search options such as DoB.

Client Search

Clear

Name Search Include Client Contacts Only Include Active Clients (Checking will not allow option to create new Client)

Broad Search Narrow Search Type of Client Individual Organization

Last Name patient First Name one Program

Other Search Strategies

SSN Search Phone # Search

DOB Search Master Client ID Search

Primary Clinician Search Client ID Search

Authorization ID / # Insured ID Search

Records Found

- iii. The client should pop up in the “Records Found” area. Click the circle button for the person you want and click the select button.

Records Found

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
<input checked="" type="radio"/> 1	1	Patient V, One		9999	01/01/19...	Active	Fresno	
<input type="radio"/> 146431	146431	Patient, One Q		0000	01/01/20...	Active	Fresno	

Select Cancel


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3. This will bring up the “Client Programs” screen.

Client Programs (9)

All Programs ▾ All Statuses ▾ Other ▾ **Apply Filter**

Program Name	Status	Enrolled ▾	Discharged	Assigned Staff	Primary	Last DOS	Next DOS
2922-Doctors Main Bui...	Enrolled	06/28/2023		Acosta, Yessica	No		
4312A-MHSA Rural Sc...	Enrolled	06/28/2023			Yes		
2233A-Children Psychi...	Enrolled	06/22/2023			No		
4316A-Children's Outp...	Enrolled	06/19/2023			No	06/22/2023 11:00 AM	
4782-WestCare Califor...	Enrolled	06/12/2023		Gomez, Gabriel	No		
4315A-Youth Wellness...	Discharged	06/09/2023	06/22/2023	Martzen, Christ...	No	06/16/2023 03:00 PM	
4311A-MHSA School B...	Enrolled	06/09/2023			No	06/22/2023 01:00 PM	
4315-Youth Wellness ...	Enrolled	06/09/2023			No		
4519-Community Cons...	Enrolled	04/26/2023			No	06/28/2023 10:07 AM	

4. Click the “New” icon in the top left corner . This will open the program Details window.

Program Assignment Details

Program Assignment


General


Program Name Primary Current Status


Client...

Assigned Staff

Comment

Requested Date 

Enrolled Date 

Discharged Date 

Next Schedule Service

Removed

5. Enter the following information:

- Select the program name the person is being referred to from the drop down.
- Use the drop down to mark “Current Status” as “enrolled”.
- Put the date the request was made in the request date box.
- Enter the same date as the enrollment date if the enrollment is being done the same day as the request.
- In the comment section put the name of the person who asked you to enroll the client.
- Leave assigned staff box blank.** You will assign a provider on the Treatment Team screen – refer to Treatment Team how to guide.

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g. Make sure the check box next to “Primary” at the top is checked.

Program Assignment Additional Information

General

Program Name	<input type="text" value="2922-Doctors Main Building"/>	<input checked="" type="checkbox"/> Primary	Current Status	<input type="text" value="Enrolled"/>
Client...	<input type="text" value="Patient V, One"/>			
Assigned Staff	<input type="text"/>		Requested Date	<input type="text" value="05/30/2024"/>
			Enrolled Date	<input type="text" value="05/30/2024"/>
Comment	<input type="text"/>		Discharged Date	<input type="text"/>
			Next Schedule Service	<input type="text"/>

6. Click the “Save” icon in the top right corner.



7. Once you assign a program, you will need to schedule an appointment. You can follow the steps below to utilize the Appointment Search option. You can also use the Staff Calendar to schedule.

Accessing the program assignment page for an existing client:

1. Have the client profile open
2. Using the search option in the top right, type in “programs” and select “Client Programs (Client)”.
 - a. You can also use the menu on the left-hand side by navigating to “Client” and then selecting “Client Programs” near the bottom of the list.
3. This will bring you to the Client Programs page where you will be able to discharge the client from a specific program or enroll them into a new program.
 - a. Follow steps above for enrollment.
 - b. See additional how to guides for discharge.