Home Clinic Portal: Add Enrolment

This quick reference contains instructions for enrolling an existing client with a registered Home Clinic, and associating them with an MRP (optional).

Getting Started

1. Log onto the Home Clinic Portal.

2. Acknowledge the Confidentiality Statement by selecting *OK*.

3. Select *Client/Enrolment* from the Home page menu bar.

4. Search for and view existing client record.

Add Enrolment

1. Select the *Enrolment Wizard* button within the Enrolment History area of the Client Details window.

2. From within the Enrolment Wizard, select the *Add Enrolment* option. The Add Enrolment wizard will display.

3. Within the Add Enrolment wizard, confirm the *Home Clinic* to which the client is enrolled. You will need to select the appropriate Home Clinic from the drop down list.

4. For Active Enrolment, enter the actual *Enrolment Start Date* as recorded in the EMR. For Passive Enrolment, do <u>not</u> enter the 01/01/1899 date recorded in the EMR. Enter the date that the enrolment information was recorded in the EMR. If that is not known, enter the current date.

5. Select the Active or Passive *Enrolment Method*.

6. Select the *Save* button. A pop-up window will display, asking if you want to add (i.e. associate) an MRP to the enrolled client. If you are not associating an MRP select *No* and close the Enrolment Wizard. If you are associating an MRP, select *Yes*, and follow the steps below.

Associate MRP

Follow these steps to associate an MRP as part of the initial client enrolment or as a stand-alone activity (i.e. associating an MRP to a previously enrolled client).

1. Select *Add MRP* from the Providers section of the Enrolment Wizard.

2. Select the *Provider* using the drop-down list.

3. Select the *Client-Provider Relationship Start Date*. For initial client enrolment, this may be the same date as the Enrolment Start Date. For subsequent associations, enter the actual start date.

4. Select the *Save* button.