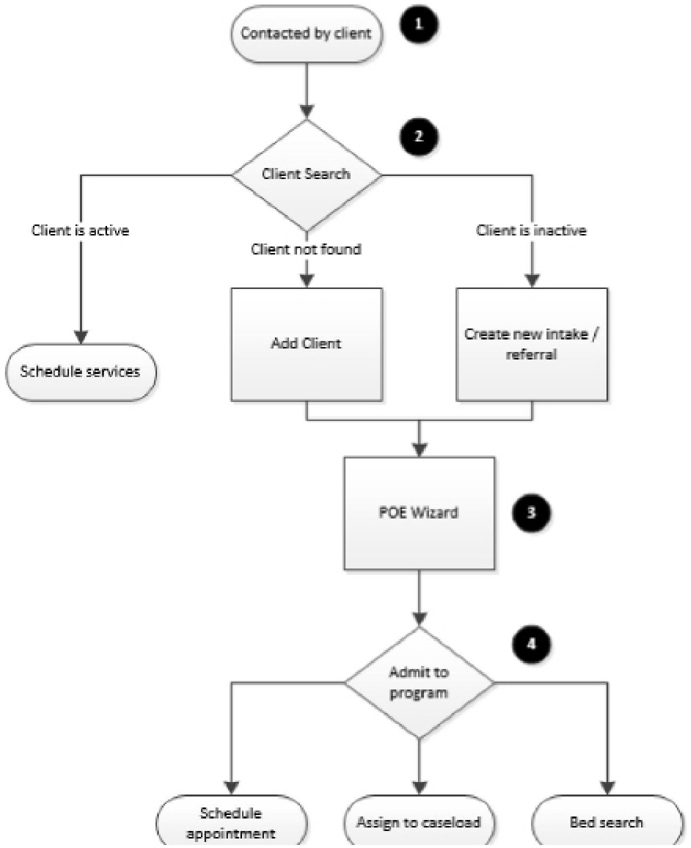
Point of Entry

Point of Entry (POE) is used to enter new clients into the system

This is done through completion of the **POE Wizard**. It collects basic information about the client, including demographic information, client guarantors, client payers, payer authorizations, and client responsibility.

Once the **POE Wizard** is complete, and the client is admitted into the system, their data can be accessed and modified in the **ECR (Electronic Clinical Record)** module. The **ECR** is used to view and manage a client's data once they are admitted into the system.
The **POE** module is used only to gather initial client data and then admit clients into the system.

Point of Entry Process Flow



Process Continued

- *Contacted by Client* - Clients generally make contact with a treatment facility through a referral source or by calling directly.

- *Client Search* - The **POE** module is used to admit new clients into the system. A client search is performed in order to confirm that a client does not already exist in the system.

- "If the client is found in the system as active, the **POE Wizard** does not need to be completed. Instead, the **ECR** module can be used to add the client to a new program if needed, then the **Schedule** module should be used to schedule new services for the client.

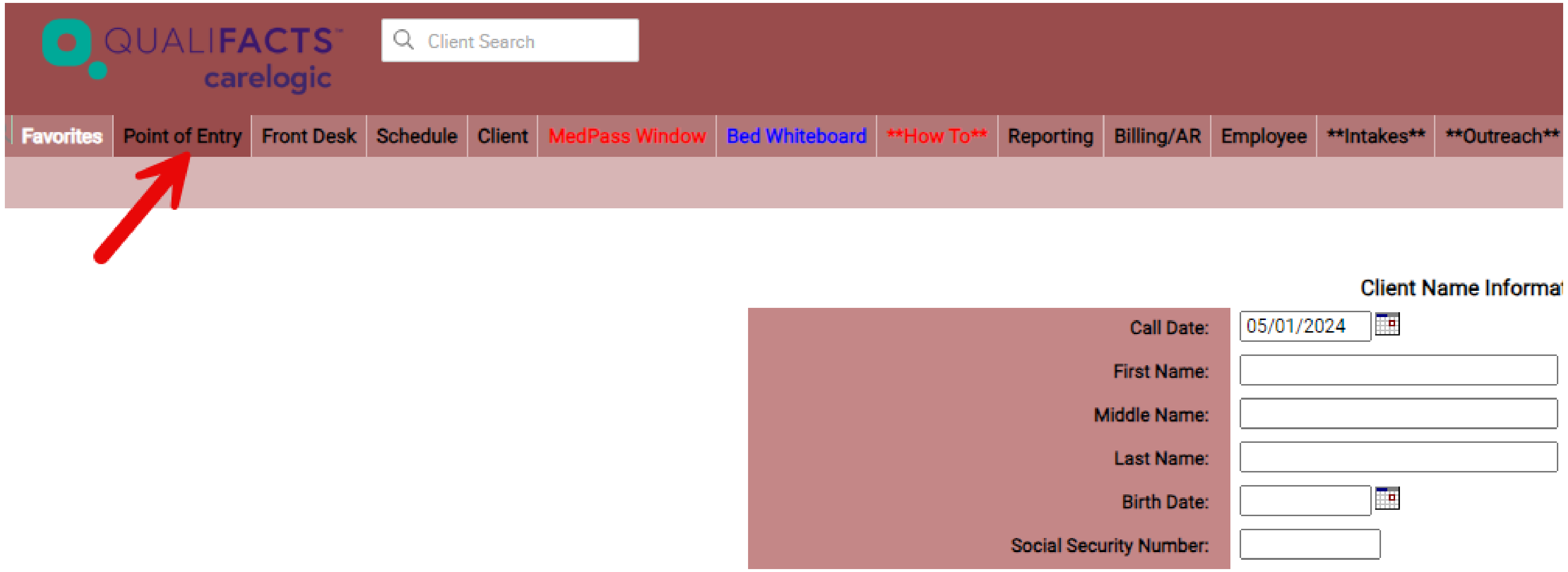
- POE Wizard - The **POE Wizard** is used to collect information about the client like demographics, guarantors, payers, and payer authorizations.

Process Continued

- *Admit to Program* - There are three ways to admit a new client to a program:
  - *Schedule Appointment* - Assign the client to a treatment program while scheduling an appointment. Once an appointment is marked as Kept, the client is assigned to a staff member's caseload.
  - *Assign to Caseload* - Assign the client to a treatment program while placing them on a staff member's caseload. This is particularly useful if the clinician is adding the client to their own caseload or if one clinician provides all services in a program, like music or art therapy.
  - *Bed Search* - For inpatient or residential services, assign the client to a treatment program using the bed search. Once a bed is located, the client is admitted to the bed and an appointment is scheduled. Once the appointment is marked as Kept, the client is assigned to the caseload of the default per diem staff member. (Contact Qualifacts for assistance setting up this configuration.)

Starting the Point of Entry Wizard

Navigate to **Point of Entry**. The **Client Name Information** page appears. This page is used to search the client database to see if a record already exists for the client. The more search criteria entered on this page, the more accurate the search results will be.



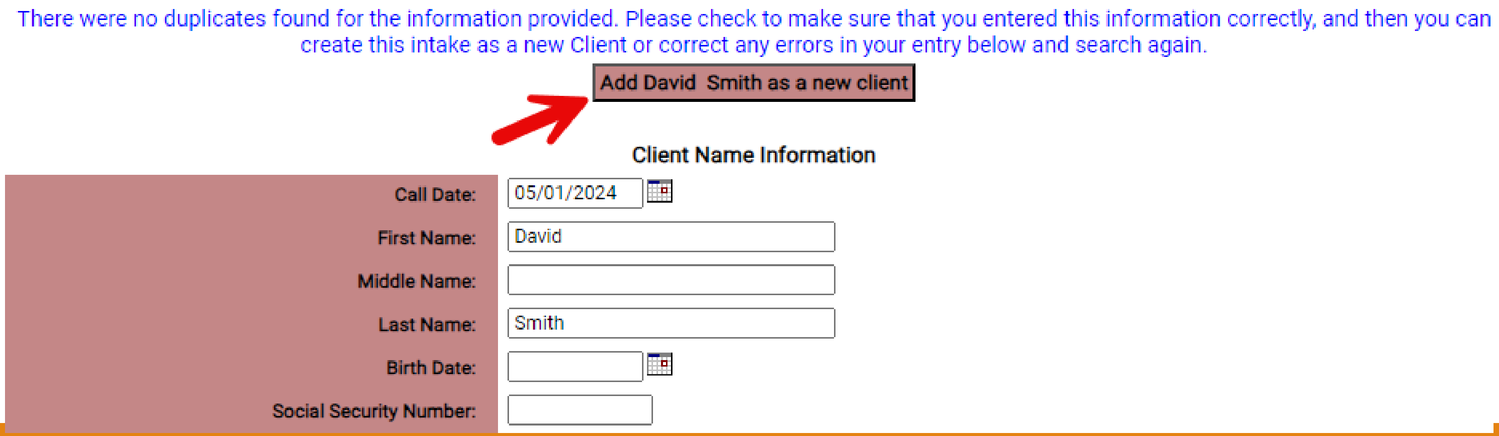
Point of Entry Wizard

Once data is entered, click **Submit** in the status bar. The system attempts to locate an existing client record that matches the search criteria by looking across all available organizations.

If no matches are found, confirm that the information entered in the search fields is accurate.

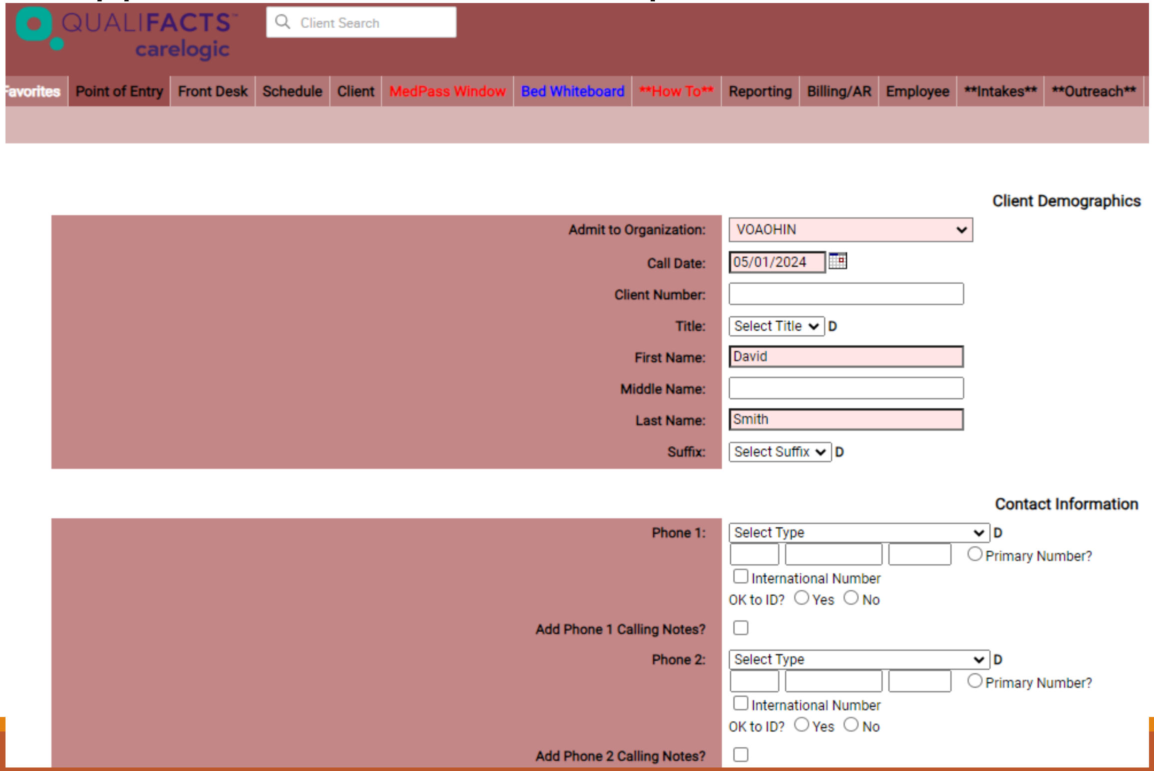
If the system finds a record that matches the search criteria, the **Duplicate Person Search** page appears.

Click the **Add as a New Client** button



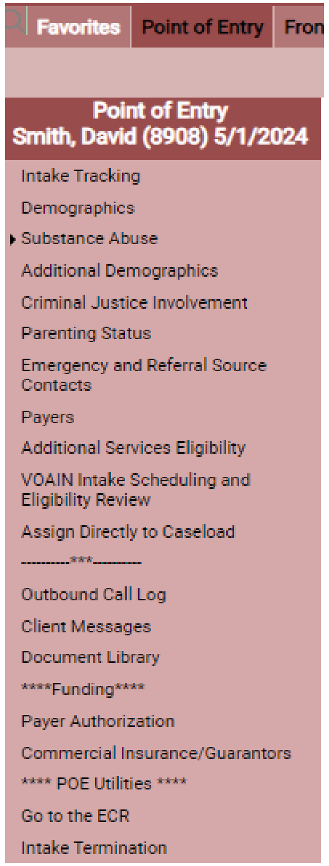
Point of Entry Wizard

Click the **Add as a New Client** button. The **Client Demographics** page appears. After completing **Client Demographics** and clicking **Submit**, the page is refreshed, and the **Point of Entry Wizard** menu appears similar to the example shown below:



Point of Entry

After clicking submit the Point of Entry wizard will proceed to the next selection box each time. This is similar to the below example.



Required Fields

During the Point of Entry initial process there are 9 minimum required fields to enter information before proceeded to the next stage.

1. Social Security Number
2. Date of Birth
3. Gender
4. Birth sex
5. English Fluency
6. Race
7. Ethnicity
8. Tobacco Use/Type of User or Non-User
9. Preferred Language

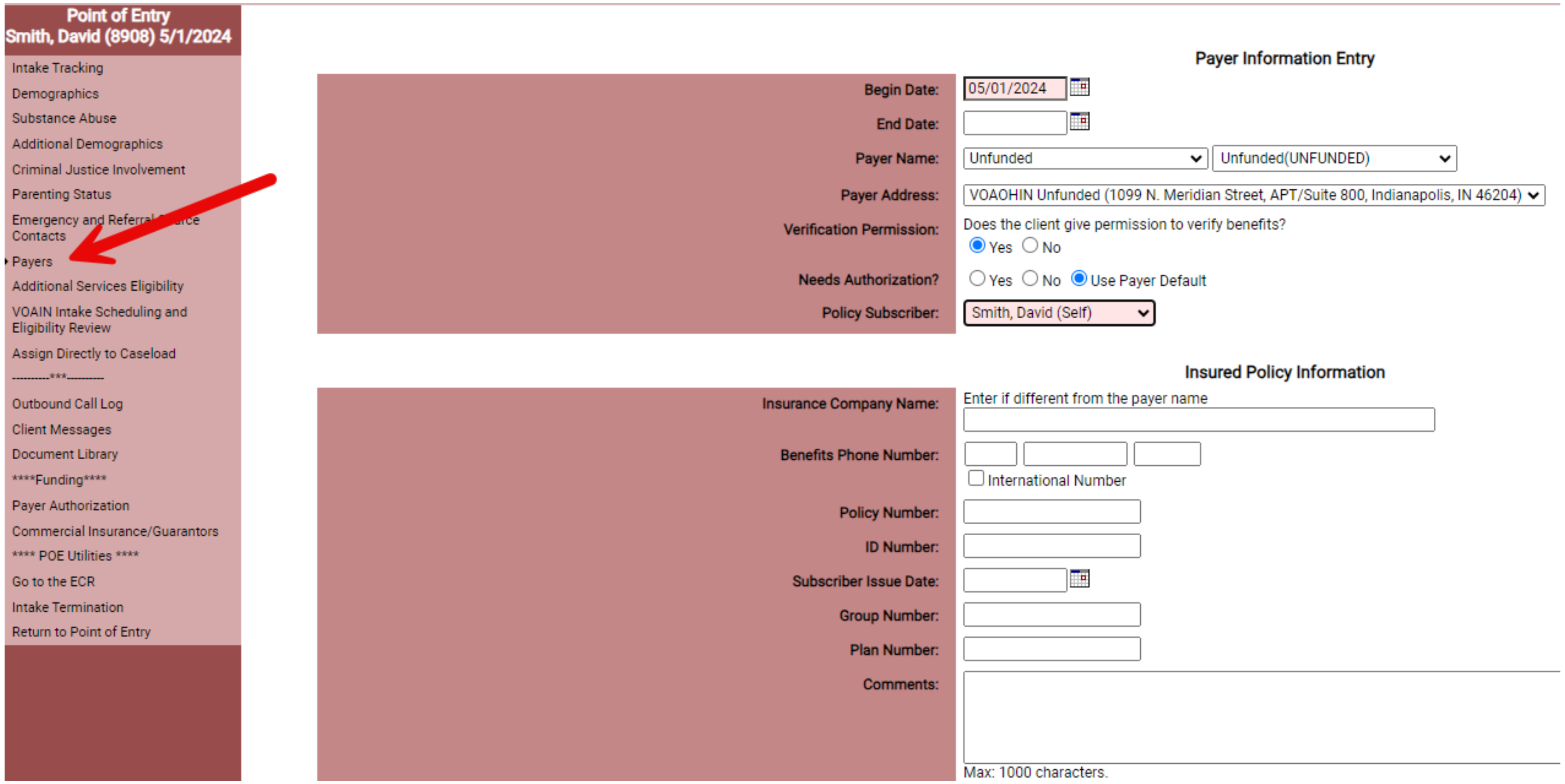
Point of Entry-Adding Insurance

Each client is required to have an active payer, or can be marked as self-pay on the Guarantors page.

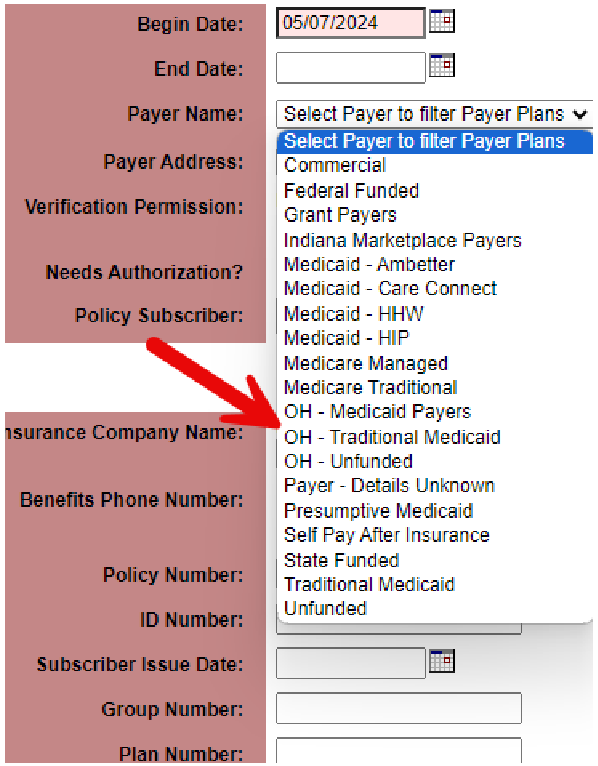
This can be done on the Point of Entry Page or by navigating to:

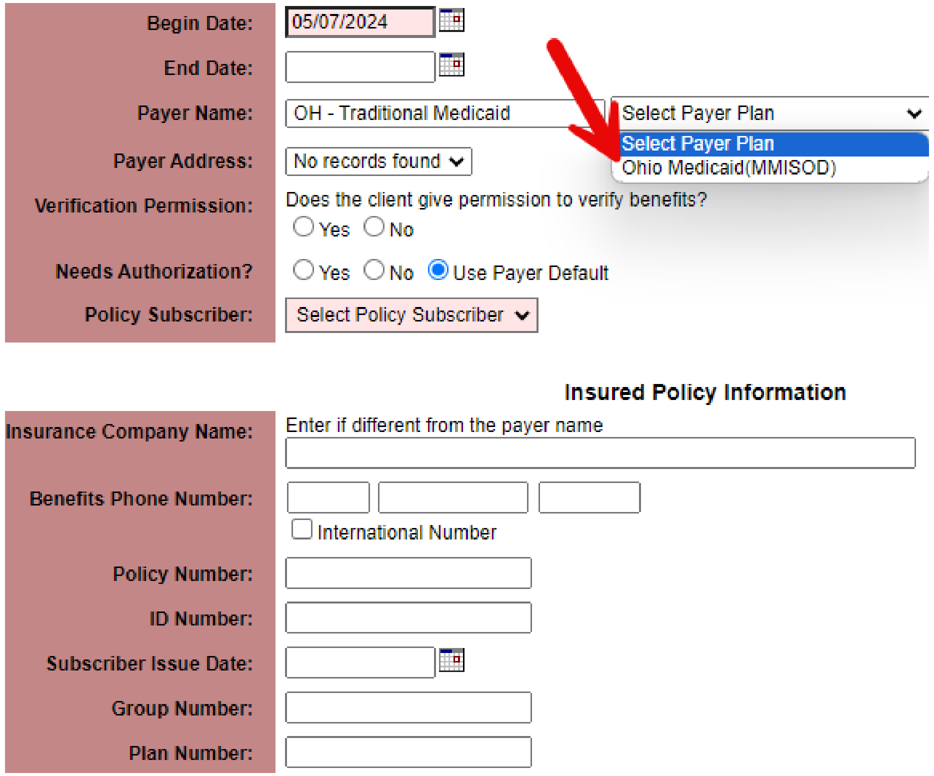
Navigate to **Point of Entry Wizard** menu > **Payers** > **Add a Client Payer** button.
The **Payer Information Entry** page appears.

Adding Client Payers



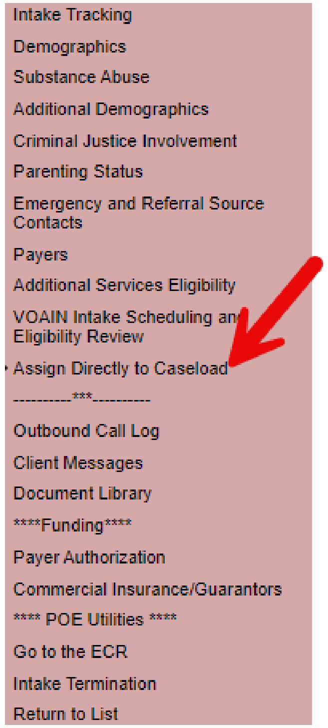
Adding Payer Names

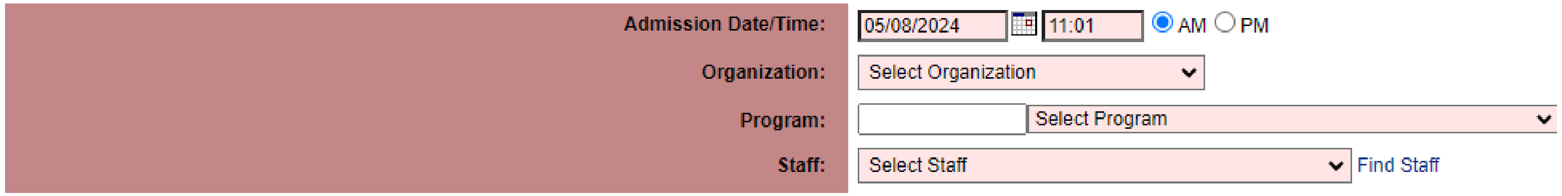




Assigning to Caseload

Assign to Caseload - Assign the client to a treatment program while placing them on a staff member's caseload. This is particularly useful if the clinician is adding the client to their own caseload or if one clinician provides all services in a program, like music or art therapy.





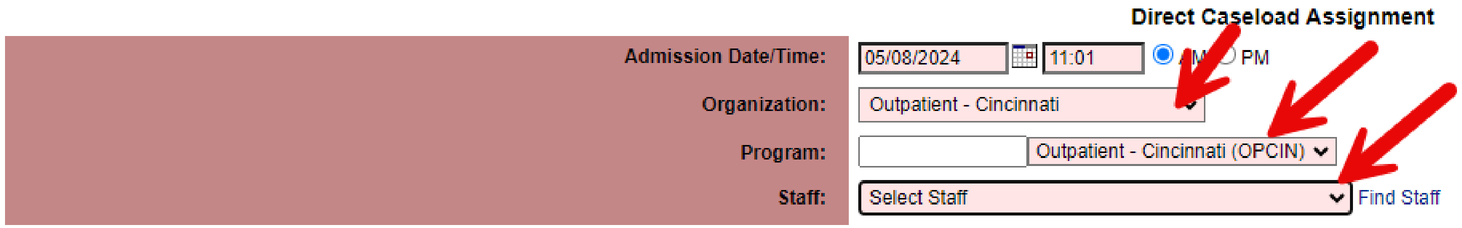
Assigning to Caseload

Direct Caseload Assignment required fields:

1. Select the organization

2. Select program

3. Select staff that will be assigned to the client



Support

If you encounter any technical issues, please **reach out to EHR support** at **ehrsupport@voaohin.org** for assistance.