

## How to Assign a Client to a Program

- Open client chart. Please refer to page 2 of ‘Quick Guide to EHR’ (A.8.) for instructions on how to open a chart.
- Once the chart is opened one of three things will be shown
  1. If the client is not assigned to any Program then this will be seen at the top of their Patient Summary.



In order to add the client to a Program follow the next steps.

- Click on the words “Prog: None”
- A box will appear with all three Programs listed. Click on the appropriate Program
- Once the appropriate Program is selected the following box will appear. Fill in the applicable information, delete the “discharged by” name, click save.

Add Program Episode Details for " [redacted] "
Save ? [refresh] [close]

\*Program

Program Enrolled Date ✗   
 \*Program Start Date ✗   
 Program End Date ✗

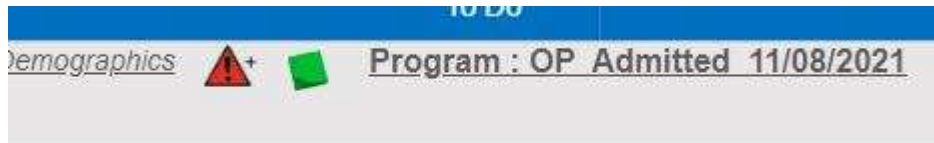
Admitting Provider ✗   
 \*Status ✗   
 Bill to [Ins. / Grant](#) [Patient](#) [Do Not Bill](#) ✗

Discharged By ✗   
 Discharge Reason ✗

Comments

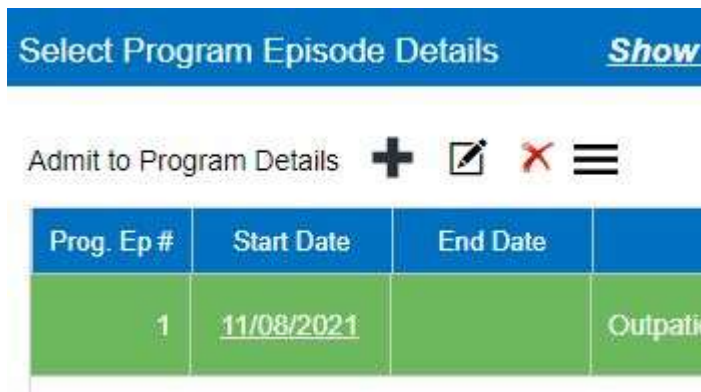
Save
Cancel


- If the client is assigned to only one Program then this will appear above their Patient Summary. Please note that this could be OP, MSR or MPN, but that all will state "Program : \_\_\_\_\_ Admitted DATE"




In order to add the client to a Program follow the next steps.

- Click on the word "Program : "
- The following box will appear.














- Click on the Add button 
- A box will appear with all three Programs listed. Click on the appropriate Program
- Once the appropriate Program is selected the following box will appear. Fill in the applicable information, delete the "discharged by" name, click save.





Add Program Episode Details for "   " 
Save
?
⌵
✕

**\* Program**

Outpatient Clinic ▼

Program Enrolled Date   \* Program Start Date   Program End Date  




Admitting Provider   \* Status   Bill to [Ins. / Grant](#) [Patient](#) [Do Not Bill](#) 


Discharged By   Catherine Minnerly BSW Discharge Reason  





Comments

Save
Cancel

3. If the client is assigned to more than one Program then this box will appear.

Admit to Program Details    				Program Status
				All
Prog. Ep #	Start Date	End Date	Program Name	
3	06/26/2019		Mobile Social Rehabilitation	
1	03/05/2018		Mobile Psychiatric Nursing	
2	03/05/2018		Outpatient Clinic	


- Click on the Add button 
- A box will appear with all three Programs listed. Click on the appropriate Program
- Once the appropriate Program is selected the following box will appear. Fill in the applicable information, delete the “discharged by” name, click save.


Add Program Episode Details for    Save   


**\*Program**


Outpatient Clinic ▼


---


Program Enrolled Date 



 



**\*Program Start Date** 


04/11/2022 



Program End Date 



Admitting Provider  

**\*Status**  

Bill to [Ins. / Grant](#) [Patient](#) [Do Not Bill](#) 

Discharged By  

Catherine Minnerly BSW

Discharge Reason  

Comments

Save
Cancel