The enrollment module is utilized to enroll NC consumers in State insurance. This guide explains the process from start to finish in each step of the way.

To launch the Enrollment module and create an enrollment; click on your **Menu > Enrollment**

**Demographics Tab**
- Base Tile
- Diagnosis Tile
- SA Tile
- TP Tile
- Review Tile

**Others Tab**
- Base Tile
- COB Tile
- Med Tile
- Transfer Tile
- Referrals Tile

**Creating an Enrollment**
- STR Page
- Clinical Page

**Sent Back to Provider**
- Confirm Enrollment

**Tiles Explained**

The tiles displayed in both the **Demographics** and **Others** tab is designed to give you a quick glimpse of clinical data and other information such as Refferal and Transfer history without having to open and view the enrollment itself.
Default View – Demographics Tab

The enrollment record selected in the prominent BAGE field will display the corresponding consumer information in the surrounding fields.

Default View – Others Tab

The enrollment record selected in the prominent BAGE field will display the corresponding consumer information in the surrounding fields.
Demographics Tab (TOP)

Base Tile

The base tile is considered the enrollment *Header* that includes base information. From the Base Tile you can **Create** and **Filter** enrollments. Also, there are buttons where you can toggle between ALL saved enrollments, or ALL saved enrollments created by you (My Enrollment).

The below example shows a completed, approved and enrolled consumer after clicking my 3 view to see the most detail without opening the enrollment:

- **Enrollment #:** displays the unique AlphaMCS # to identify this particular enrollment
- **Submitted Date:** displays the day the enrollment was submitted for review.
- **Cons LME ID:** the unique AlphaMCS ID for this consumer. Assigned after approval.
- **Screening Date:** displays the actual date the assessment/screening was performed.
- **Status:** displays the current status of the enrollment (covered later).
- **SS#:** displays the known SSN # for the consumer.
- **No SS #:** if the consumer does not have a SSN or is unknown, this box will be checked.
- **Enrolled in Medicaid:** if the consumer is already Medicaid eligible, it will be indicated here.
- **Medicaid #:** if the consumer is Medicaid eligible, then the Med # will display here.
- **QP Last/First Name:** displays the first and last name of the Qualified Professional.
- **Str staff ph #:** displays the contact # at the agency to contact if the MCO has inquiries.
- **Current Owner:** displays the MCO staff currently assigned to review or reviewed this enrollment.
- **Scores:** displays the current consumer scores if recorded.
Diagnosis Tile

The diagnosis tile will display the diagnosis submitted on the enrollment:

Substance Abuse Tile

The Substance Abuse Tile is used to quickly identify the SA record on the enrollment. This record holds a bit more information so the below view displays the detailed view after clicking the 3 view:

Target Pop Tile

The Target Population tile is used to quickly identify the TP record on the enrollment. Every enrolled consumer must have an effective TP in order to bill successfully for State funded claims.
Review Tile  (TOP)

The Review Tile is used to trace the history of this enrollment from submission to approval and the consumer being created in the system to receive State funded services. Since it’s common to not see all the MCO’s comments on these lines, we incorporated a “View Comments” button to view the comments in it’s entirety:

Others Tab

Base Tile

The Base Tile is the prominent tile in this module so this tile displays under both the Demographics tab and Others tab.

COB Tile

The COB Tile is used to identify any coordination of benefits submitted with the enrollment:
Medication Tile (TOP)

The Medication tile will display any medications submitted with the enrollment:

Transfer History Tile

You can check the transfer tile to see if your enrollment has been assigned to an MCO staff for review. If this tile is blank, then your submitted enrollment is not yet under review:

Referrals Tile

The referral tile will give you a glimpse of the referred appointments that the consumer either accepted or declined on the enrollment:
Creating an Enrollment  

To enroll a consumer in State funded services, you will launch the Enrollment module and click Create:

Enrollment View – STR Page; broken up into sections

**Note:** it will be in the best interest of data integrity to make sure the consumer is not already enrolled. To do this, you can search for the consumer by clicking the **SEARCH** button in the enrollment and search by name + SSN or Date of Birth. If not, this will cause duplicates and more overhead on both the providers and MCOs.

**Demographic Section pt. 1**

When starting a new enrollment, you will notice that a lot of information is already prepopulated for you by default. This was collectively agreed upon by all NC MCOs to alleviate some of the data entry overhead by populating these fields with common answers. If the consumer is already in the system, then most of the work is done for you; you will only need to review and update as needed.

Please Review this for accuracy prior to submission! After you have confirmed that your consumer is not already entered into the system, proceed by manually entering the consumers name:
Demographic Section pt. 2

In section 2 of the enrollment, you will run into “Populate as you Type” fields. It is imperative that you select from the populated dropdown inorder for the record to register correctly in the system.

Demographic Section pt. 3

Not much to explain here. This section has basic radio buttons to select to explain the consumers current status:
Demographic Section pt. 4

The final section of the STR page before you proceed to the Clinical page, you will be asked about referral, special needs and the time the screening ended:

After finishing the first page, and regardless of if you choose SAVE or SUBMIT, you will be presented with an option to EXIT (to finish the enrollment later), Stay on STR Page (to continue reviewing) or Go to Clinical Page to continue documenting the clinical data. In this example, I’m going to click “Go to Clinical Page.”

Note: You do have the ability to delete an enrollment ONLY if it has not been submitted. You’ll only see this button if it is OK to delete the saved enrollment:
Clinical Page

The clinical page is used to document clinical information such as Diagnosis, Target Pops, Drug of Choice, COBs, Medications as well as Provider Attempts at making appointments:

Adding Diagnosis

The first clinical record is the diagnosis section. To get started, click the Add button. To Remove or Modify an entered diagnosis; click the Dx record in the list and choose either Remove or Modify.

Adding Target Pops

Next, you can add a Target Pop. This works just like adding Diagnosis by clicking the add button:
Drug of Choice

COBs

Medications
Once you are finished, and you were able to complete all clinical criteria; then your clinical page will look similar to mine below:

After choosing **Save** at the bottom of the Clinical Page, you will be taken back to the STR page where you can scroll to the very bottom and **Submit** your enrollment. Once **Submit** is clicked, you will be prompted to verify. Choose YES, Submit – or choose another option to continue working with the enrollment:
After the Enrollment is submitted successfully, you will be exited out of the enrollment and back to the enrollment module. You will not see the enrollment because it has been submitted. If you would like to review the enrollment again after submission, we’ll have to search for it:

Now I see that my enrollment has been submitted, but not yet approved:
Sent back to Provider

There may be occasions where an enrollment will be sent back to you by the MCO. This could be for various reasons, one reason could be the justification is not clear enough. We’ll use that scenario as the example:

**Note:** as long as there is a current and active email address registered along with your portal user account, the provider staff who initially submitted the enrollment will receive a notification email stating that the enrollment was sent back.

Identify the reason it was sent back by dragging over your Review tile and clicking View Comments, this is also listed in the comments section of the enrollment itself when you open it:

Open the enrollment by going back to the Base tile, choosing your 3 view and clicking the Update button:
After opening the enrollment, scroll to the bottom and you can also review the MCOs comments in the comments section. You’ll also notice the radio button is marked to “Send back to Provider.” After you’ve made the requested changes, simply click submit to send back to the MCO for review:

After resubmitting the enrollment, you will be brought back to the enrollment module and you can see where the enrollment status changed back to submitted:

After the MCO has approved the enrollment, the status changes to Approved. You can now go to the Patient Module and search for this consumer and confirm their State eligibility:

Now you can confirm in the Patient module by searching for the consumer you just enrolled, and while in the Base tab, drag over your Insurance tile. You’ll see the COB insurance (Aetna) I entered and the State insurance record: