FITWAY ALABAMA COLORECTAL CANCER PREVENTION PROGRAM

ENROLLMENT INSTRUCTIONS

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In order to enroll, you have to use Breast and Cervical Cancer Site for women and the CRC site for men.

- A. Breast and Cervical Site: For women enrolling for :
 - breast and cervical cancer services only (present method);
 - breast and cervical cancer services and CRC services ; or
 - CRC services only
- B. Colorectal Cancer Site: For men enrolling for CRC services

You can select **Breast and Cervical Cancer** site or **Colorectal Cancer** site by using the drop down box as shown by a red arrow in this figure.

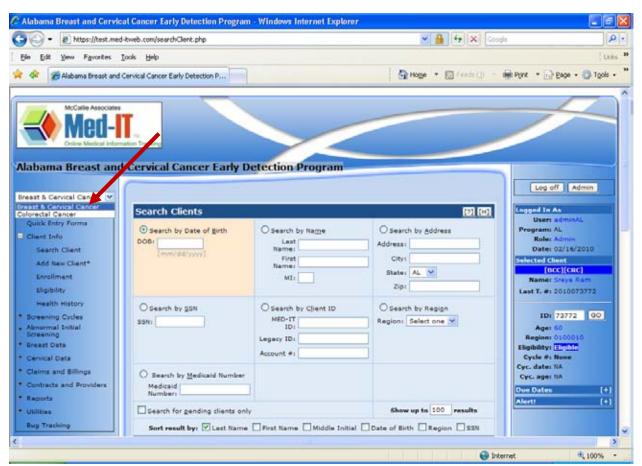


Figure 1: Selecting the enrollment site

1-a. ENROLLING A NEW PATIENT FROM BREAST & CERVICAL CANCER SITE

Click on **"Add New Client"** under **"Client Info"** on the left hand side (use "+" and "-" to collapse and expand the Client Info) to open a new screen. The center of the screen will show **"Client Information."**

On the "Client Information" screen, there are three sections: **Personal Information; Contact Information; and Residency, Race, Ethnicity, Language and Education information.**

In the "Personal Information" section, enter last name, first name, middle name, SSN, date of birth.

Under the "**Contact Information**" section, enter address and Zip code. Once you enter Zip Code, State, County and City information automatically comes up. Enter the Home phone number and work and cell phone numbers if available.

In the **"Residency, Race, Ethnicity, Language and Education"** section, enter Hispanic information and race information as these are necessary fields. Country of birth, primary language and last grade completed are optional fields. Once you enter the information click on "Add Client."

Client Information Screenshot

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Figure 2: Personal Information and contact information screenshot

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"Add Client" button on Client Information Screen Screenshot

Figure 3: Add client screenshot

Once you click on **"Add Client,"** you will get a message that says new client has been added successfully. Then click, **"Set Appointment"** to make an appointment.

Confirmation of addition of client

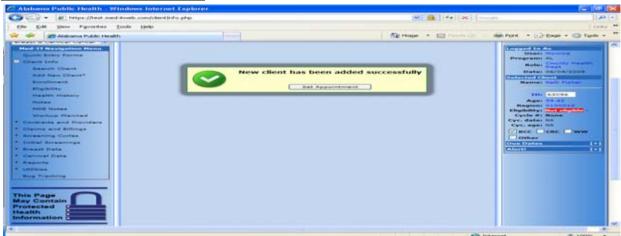


Figure 4: Message about confirmation of addition of the client

Once you click "Set Appointment" that will take you to "Screening Guidelines" screen. You need to check both the boxes if the women is in the office for BCC and CRC services. Otherwise, you need to check BCC checkbox only.

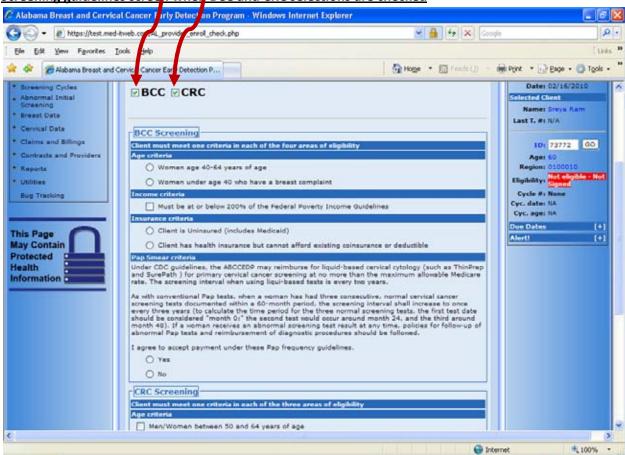
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Figure 5: View of BCC and CRC check boxes

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Screening Guidelines Screenshot when BCC is only checked

Figure 6: Screening guidelines screen with BCC checked



Screening guidelines screen when BCC and CRC selections are checked

Figure 7: Screening guidelines screen with BCC and CRC checked

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Figure 8: Selecting the criteria for BCC and CRC

Once you click "Accept" for the screening guidelines, it will take you to the **"Set Appointment"** screen. <u>If you are a county health department</u>, on the **"Set Appointment"** screen indicate if the patient is a "County Health Department Family Planning Patient" by selecting "Yes" or "No". All other facilities should have "no" selected. Eligibility to enroll will be defaulted to "yes." Enter the appointment date and then click "**Update/Set Appointment**."

On the bottom of the page you will see "**Existing Cycles.**" This gives information about the patient's earlier appointments. As this is a new patient, it will indicate "No BCC cycles found" and "No CRC cycles found."

Set Appointment Screenshot

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Figure 9: Set appointment

Once you click **"Update/Set Appointment"** you will get a message as shown below and the appointment information will be on the screen. Click on **"Download PDF"**, open the PDF and **print**. **The printout will include the tracking number and can be used for patient records.**

Confirmation of the Appointment Screenshot

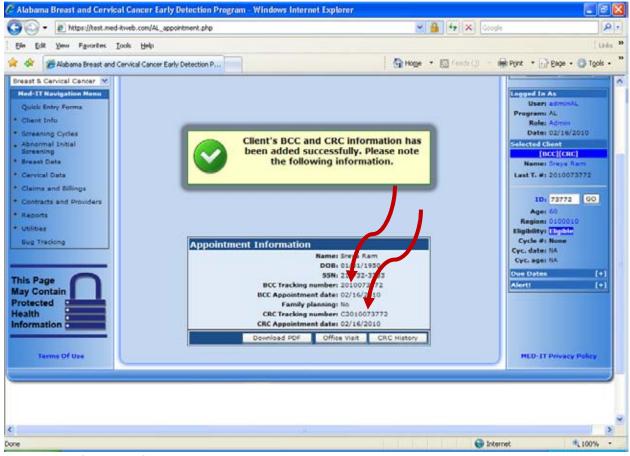


Figure 10: Confirmation of appointment screenshot

Patient Tracking Number Screenshot:



Figure 11: Tracking number info

1-b. ENROLLING A NEW PATIENT FROM COLORECTAL CANCER SITE

Select **Colorectal Cancer** site from the drop down box located above Med-IT Navigation Menu. You need to enter "**Gender**" under Personal Information while enrolling male patients/other patients from this screen.

Then add all the information. Once the client has been added, then click "**Set Appointment**" to get the tracking number info. After clicking "**Set Appointment**" you will be in "**Screening Guidelines**" screen.

Once you are on screening guidelines screen, then you will have option to only check CRC when you are enrolling the patient from this site. <u>The BCC check box has been disabled in this view.</u>

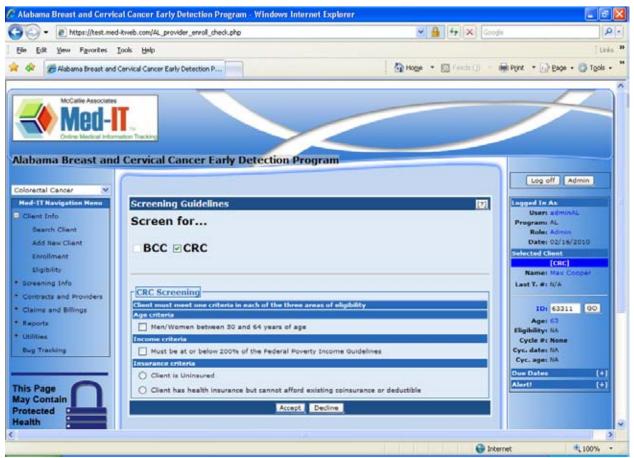


Figure 12: Screening guidelines form CRC screen

You need to enter CRC appointment date on the **"Set Appointment "** screen. Hit **"Update /Set Appointment"** and then it will bring you the tracking number info.

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Figure 13: Set appointment screen for CRC services only

Please use "**Download pdf**" option to download the tracking number and take a print out of the CRC tracking number.

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Figure 14: Tracking number for CRC

2. ENROLLING EXISTING PATIENT THROUGH BCC SITE:

To find an existing patient, click on **"Search Client"** under **"Client Info."** A box will appear in the center of the screen. <u>You can search for the patient by using SSN, date of birth, or first name and last name</u>. <u>Enter SSN and click on the **"Quick Search."**</u>

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Figure 15: Searching with SSN

This brings the client information with the SSN you entered. <u>Make sure all of the information is correct</u> and click on **"Set Appointment"** to proceed further.

Client Information Screenshot

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Figure 16A: Enrollment information for a client already in the system

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"Set Appointment" button on Client Information Screen Screenshot

Figure 16B: Enrollment information for a client already in the system, second part

Once you click **"Set Appointment"**, you will be on the screening guidelines screen. Select the age criteria, income criteria, insurance criteria and Pap smear criteria. Click accept, and you will be returned to the **"Set Appointment"** screen. See 17A, <u>Screening Guidelines Screenshot</u>



Figure 17A: Screening guidelines screenshot

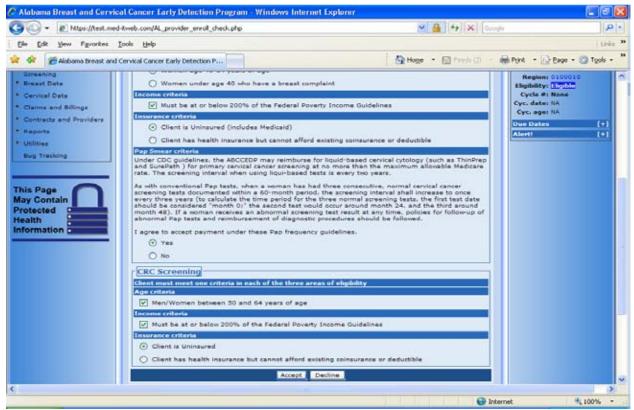


Figure 17A: Screening guidelines screenshot, continued

As the patient is already an established patient, the "Family Planning" information and "Eligible to enroll" information will be already there. <u>If you are a County Health Department</u>, you can update the patient's family planning status by clicking "yes" or "no." Enter the appointment date and click **"Update/Set Appointment"** to confirm her appointment.

On the bottom there is a box that shows "Existing Cycles." This provides the dates of previous appointments. In this example, the patient was enrolled and was seen on 02/16/2010.

Set Appointment Screenshot

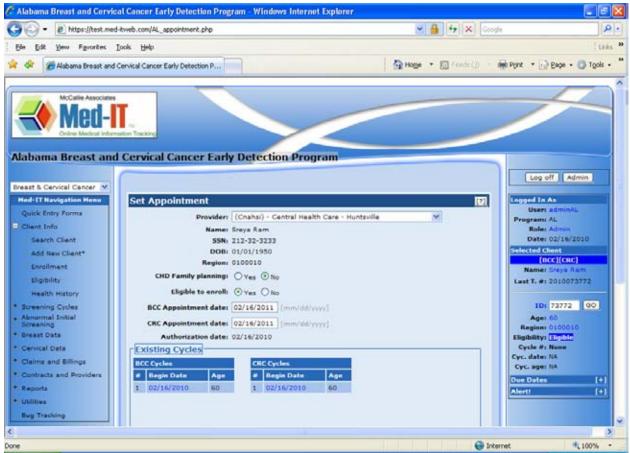


Figure 18: Set appointment for a client who is already in the system

Once you select **"Update/ Set Appointment"**, you will get a confirmation of the appointment and the tracking number information. Click **"Download PDF"**, open the PDF and print for patient's records.

Appointment Confirmation Screenshot

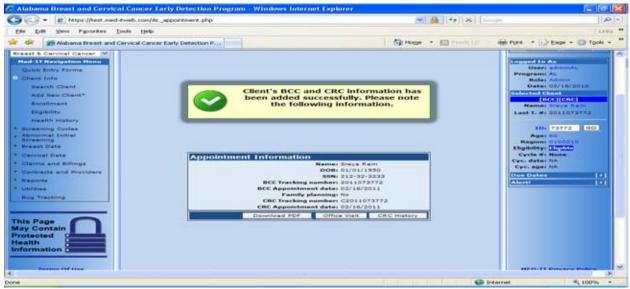


Figure 19: Tracking number info

3. Duplicate Clients

Some times when you are adding a new client, after entering SSN, you might get a message that indicates **"Possible duplicates."**

This means the patient you are adding has the same information as someone already in the system or this patient has already been enrolled by you or another provider in the past. At the top is "Your Client" (the patient you are trying to add). Below that is a list of **"Possible Duplicates"** – a list of patients that have the similar information. Review the list of patients and determine if the patient was already in the system. If the patient is already in the system, then select the patient and continue the set appointment process. If the patient is not in the system, remove the message by clicking "X" on the **"Found Possible Duplicate Clients"** box and continue entering the patient information.

If the patient is already in the system and has been enrolled by a different provider in the past, you must determine if you intend to provide services to this patient. If you do, click on the patient and you will be prompted to agree to **HIPAA terms**. The terms as they appear on the computer are below.

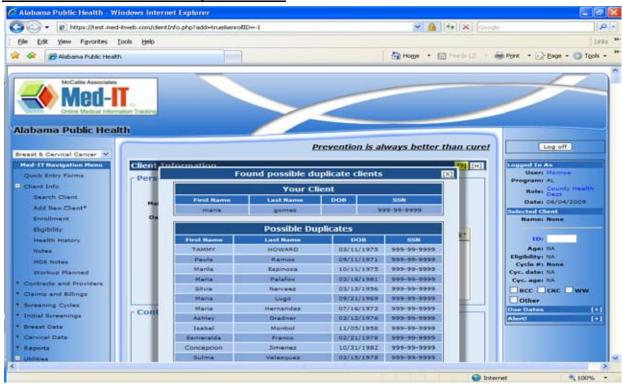
"According to system records you have never provided health services to this client before and do not have access to her health records. If you continue, you certify that you are providing health services to this client at the request of the client and therefore have the right to access past health information. Proceeding without proper authorization may leave you liable for a breach in HIPAA privacy regulations. Your decision to proceed will be recorded within the system. Do you wish to continue with the enrollment process for this client?"



Screenshot of Found Possible Duplicates Clients

Figure 20: Possible duplicate information when you are entering the client example 1

This is a screenshot when the SSN of 999-99-9999 was selected.



Screenshot of Found Possible Duplicate Clients

Figure 21: Possible duplicate information when you are entering the client example 2

Note: A patient can be enrolled only once in a grant year. A grant year begins on 06/30 and ends on 06/29.

Please contact your regional coordinator if you have questions or concerns.