FMS Engine
Enrollment Module Training Manual

for

PCM Agency Skills Trainers and Administrators
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Create a Consumer

- Search to determine if the Consumer is “existing” using SSN, MMIS, SIMS ID or SCO ID. If the Social Security Number already exists in the system, the system will not allow you to enter the consumer. Send an email to Intake@TempusUnlimited.org with the information listed below.

- To add a new consumer to the system, click “Consumers” on the blue navigation bar.

- On the “Listing Consumers” page, click the “Create New Consumer” link at the bottom of the page.

- On the “Creating New Consumer” page, fill in the consumer’s basic demographic information. The fields marked with a star indicate that that field is required.
• If you do not fill in a required field, the system will not permit you to add the consumer until the field is filled in (see below). However, fields that are not marked with a star are not required and can be left blank.

• **NOTE: Do not hit enter at any point prior to creating the enrollment or you will not be able to see the Consumer.**

• Gender Start Date may be left blank. A blank Gender Start Date will default to the consumer’s date of birth.
• Enter the consumer’s Social Security Number. This is a required field. You do not need to enter dashes or spaces between digits, but you can if you prefer.

• If the consumer’s Date of Birth is known, enter it. Date of Birth must be in the format of MM/DD/YY, MM/DD/YYYY, MMDDYY, or MMDDYYYY.

• If the consumer’s email address is known, enter it in the format of username@domain.com.

• If the consumer will need a translator when communicating with Tempus, check the box for “Needs Translator?”

• In the fields under the “Addresses” heading, enter the consumer’s address information if it is known.
• Select the address type. Later, you can denote which address should be used as the consumer’s payroll address and physical address.

• The Start Date of the address will default to today’s date, indicating that today is the date after which you would like to use the address you entered for this consumer. In general, the Start Date should be today’s date. To make an address effective for a future or past date, enter the future or past date. Leave the End Date field blank.

• If the address entered is the consumer’s primary address, select “Yes”.

• If the consumer has multiple addresses (e.g., one home address and one mailing address), click “Add Address” and fill out information for the second address.

• There is no limit on the number of addresses that may be entered for a consumer.

• Next, fill in the consumer’s phone number information if it is known.

• The Start Date of the phone number will default to today’s date, indicating that today is the date after which you would like to use the phone number you entered for this consumer. In general, the Start Date should be today’s date. To make a phone number effective for a future or past date, enter the future or past date. Leave the End Date field blank.
• If the phone number entered is the consumer’s primary phone number, select “Yes”.
• If the consumer has multiple phone numbers (e.g., one cell phone and one home phone), click “Add Phone Number” and fill out information for the second phone number. There is no limit on how many phone numbers can be entered for a consumer.

• Under the “Languages” heading, add language information for the consumer if it is known.

• Select “Yes” for the Primary field if the selected language is the consumer’s first language.
• If you wish to add another language, click the “Add Language” button. There is no limit to how many language records a consumer can have.
• Fields under the “Enrollment Information” heading can be filled in with information about the consumer’s program, PCM agency, and skills trainer.

ALWAYS USE YOUR MOUSE
• The Program/Payor field allows the user to select the program the consumer is in and the payer.

• MassHealth PCA Program consumers should have “FFS – MH” selected on their records.
• Senior Care Options (SCO) consumers should have a SCO option selected depending on their SCO’s name; for example, a consumer enrolled with Senior Whole Health should have “SCO – SWH” selected.
• CDC consumers should have “CDC – CDC” selected.

• Select the PCM Agency with which the consumer is associated.

• Fill in the Agency Start Date field with the date the consumer became associated with the agency for the selected program.

• Next, select the Skills Trainer with whom the consumer is associated for the selected program.

• Fill in the Skills Trainer Start Date field with the date the consumer became associated with the skills trainer.

• Enter the consumer’s referral date and/or referral source if they are known. These fields are not required.

• Under the “Identifiers” heading, select the consumer’s identifier type.

For example, if the consumer has a MassHealth ID or MMIS Number, select “MassHealth ID”.

• Enter the ID in the Identifier field.

• If the consumer has multiple IDs (for example, a MassHealth ID and a SCO ID), click “Add Identifier”.

For example, if the consumer has a MassHealth ID or MMIS Number, select “MassHealth ID”.
• Enter information for the second identifier. There is no limit on the number of identifiers that may be entered for a consumer.

• Click the blue “Create Consumer” button when you are finished entering the consumer’s information.

• After you click the “Create Consumer” button, you will see a green box with a checkmark, saying that “Consumer was successfully created.”

• The consumer will now be visible on the main “Listing Consumers” page.

Add a Surrogate

• To add a surrogate for a consumer, go to the “Listing Consumers” page.

• Click on the magnifying glass next to the consumer for whom you wish to add a surrogate on the “Listing Consumers” page. If the consumer has not yet been added to the system, create the consumer first (see Create a Consumer.)
On the left hand navigation bar, click on “Surrogates”.

- Click “Create New Surrogate Record”.

- Enter the surrogate’s information. The fields marked with a star are required to be filled in before the surrogate can be saved in the system. For any fields not marked with a star, the information is optional. For example, a Social Security Number is never required for a surrogate and can be skipped.
• If the surrogate’s address will be used as a consumer’s Payroll or Physical address, be sure to enter an address for the surrogate.

• Under the “Surrogate Record Information” heading, the surrogate’s relationship may be entered if it is known. For example, select “Parent” if the surrogate is the parent of the consumer. If the relationship is not known, select “Other”. The Start Date defaults to today’s date, although you can enter a past or future effective date. **The effective date of the Surrogate must match the date of Page 8 of the Service Agreement. The Surrogate cannot sign any NHP (New Hire Paperwork) or documents prior to the date on page 8 of Service Agreement of r Page 5 of the MassHealth Assessment (For FFS and SCO consumers ONLY).**

• Under the “Responsibilities” heading, the surrogate’s responsibilities may be entered if they are known. For example, if the surrogate has been granted durable power of attorney, check the “Durable Power of Attorney” box. Multiple boxes may be checked if appropriate.
When you are finished entering information, click the blue “Create Surrogate Record” button.

Add a Guardian

To add a guardian for a consumer, go to the “Listing Consumers” page.

Click on the magnifying glass next to the consumer for whom you wish to add a guardian. If the consumer has not yet been added to the system, create the consumer first (see Create a Consumer).

On the left hand navigation bar, click on “Guardians”.
• Click “Create New Guardian Record”.

• Enter the guardian’s information. The fields marked with a star are required to be filled in before the guardian can be saved in the system. For any fields not marked with a star, the information is optional. For example, a Social Security Number is never required for a guardian and can be skipped.

• If the guardian’s address will be used as a consumer’s Payroll or Physical address, be sure to enter an address for the guardian.

• Under the “Guardian Relationship Information” heading, the guardian’s relationship to the consumer can be entered if it is known. For example, select “Parent” if the guardian is the parent of the consumer. If the relationship is not known, select “Other”.

• Under the “Responsibilities” heading, the guardian’s responsibilities may be entered if they are known. For example, if the guardian is court appointed, check the “Court Appointed Guardian” box. Multiple boxes may be checked if appropriate.
• Click “Create Guardian Record”.

Set and Change Consumer Address Type (For New and Existing Consumers)
• Because consumers may have multiple address records associated with them, address types may be set in FMS Engine.

• To set and/or change a consumer’s address type to their Payroll and Physical addresses, click on the View magnifying class next to the consumer for whom you wish to set their address type on the “Listing Consumers” page.

• On the consumer’s left hand navigation bar, click on “Address Type Records”.
• Click “Update Addresses”.

• All addresses associated with the consumer and, if the consumer has a surrogate and/or guardian, addresses of the consumer’s surrogate and/or guardian will appear. If the surrogate or guardian does not yet exist in the system, enter the surrogate or guardian information now. Make sure to complete their address information so that their address may be assigned to the consumer. (See Create New Surrogate or Create New Guardian.) If the surrogate or guardian and their address information has already been entered in the system, go on to the next step.

• With your mouse arrow, hover over the consumer’s addresses at the top of the columns to view the actual address.
Select the “Payroll” and “Physical” addresses by clicking the Payroll and Physical buttons underneath the appropriate address. The “Physical” address should be primary address at which services are being provided to the consumer.

The “Payroll” address should be where checks and other paperwork should be sent (e.g., a P.O. Box). In many cases, the Payroll and Physical addresses should be the same. However, the Physical address should never be a P.O. Box.

Click the blue “Update Address Type Record” button to save.

Printing a Consumer Startup Packet

From a consumer you just created, select “PDFs” on the consumer’s left navigation bar. Next, skip to Step 5.
If you wish to print PDFs for a consumer who was previously created, click on “Consumers” on the top left navigation bar.

On the “Listing Consumers” page, click on the consumer for whom you want to create a startup packet. If the consumer has not yet been entered into the system, enter the consumer first. (See the Create a Consumer section, p.3.) You can also use the Search navigation bar on the left hand side of the screen to search by consumer’s name, consumer number, ID, status, date of birth, identifier (e.g., MMIS #), or surrogate name.

On the consumer’s left hand navigation bar, click on “PDFs”.
- Based on the program the consumer is in; select the appropriate packet. For example, if a consumer is a MassHealth FFS consumer or a SCO consumer, click on the “Create New FFS/SCO Employer Packet” link.

  Listing PDFs

  Create New CDC Employer Packet
  Create New FFS/SCO/PACE/One Care Employer Packet
  Create New VIP Employer Packet
  Create New Gritswold Employer Packet

  Download CDC Employer Packet Forms to Keep
  Download FFS/SCO/PACE/One Care Employer Packet Forms to Keep
  Download VIP Employer Packet Forms to Keep

  Download IRS 3678 Form
  Download 2017 Payment Schedule 1
  Download 2017 Payment Schedule 2

- Select the “Create (Program Payer) Employer Packet"
You will next see a green box with a checkmark, saying that “FFS/SCO Employer Packet was successfully created.”

Click on the PDF icon to download the packet. This packet will be prepopulated with the consumer's information that was entered when the consumer was created.

You should also download the “Forms to Keep” packet which contains a Welcome letter explaining all forms for the consumer's program from the PDFs page. The packets consist of forms that are for the consumer to keep or submit at a future date and do not need to be completed and sent to the consumer's FI for the initial enrollment.
Change a Consumer Address

- To change a consumer's address, click the pencil “Edit” icon next to the consumer for whom you wish to change the address.

- Scroll to the “Addresses” heading.

- If a consumer has moved or has changed their address for any other reason, fill in the “End Date” field on the old address with the date you were notified of the change.
**Note:** it is not necessary to click “Remove Address”. This should only be used if you entered an address incorrectly. Adding an end date to an old address rather than deleting the old address ensures that the FI and the PCM Agency will always have a record of the consumer’s entire address history.

- Next, click “Add Address”.

- Fill in the new address information.

- If the new address is the consumer’s primary address, select “Yes” on the Primary field.

- Click “Update Consumer” at the bottom of the page.

**Add an Additional Address to a Consumer Record**

- To add another address to a consumer’s record, click the pencil “Edit” icon next to the consumer for whom you wish to add an address.

- Scroll to the “Addresses” heading.
• Click “Add Address”.

• Fill in the new address information.
• If the new address is the consumer’s primary address, select “Yes” on the Primary field.
• Click “Update Consumer” at the bottom of the page.

Close a Consumer
• To close a consumer who has left the PCA Program, find the consumer to be closed on the “Listing Consumers” page and click the “View” magnifying glass icon next to their name.

• Click “Closures” on the left hand navigation bar.
• Click on “Create New Consumer Closure Record”.

• Select the closure reason and the effective date. For example, if you haven’t been able to reach the consumer, Select “No Conduct” and enter the effective date, in this example; 10/13/16.
Click “Create Consumer Closure Record”.

You MUST put a reason for reporting to MH.