

How to Enrol Patients to Central Profile Using Enrolment Manager



For questions, please email sales@amjaysoftware.ca

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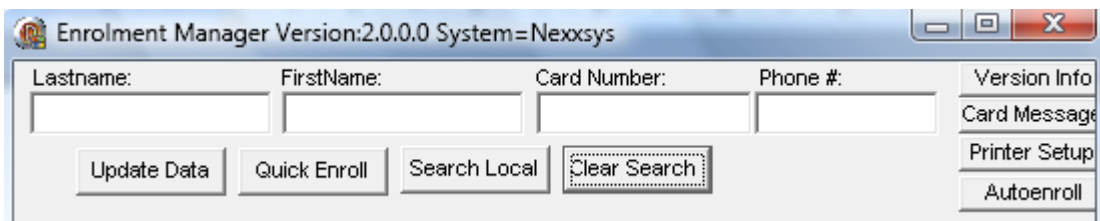
1. Enrolment

- This Program Allows you to enroll and issue cards to your patients.
- Double Click On the Enrolment Manager icon on your Dispensary server Desktop



- **Note** :We only install the Enrolment icon on the MAIN DISPENSARY SERVER.
- If you would like to enrol on another workstation please email sales@amjaysoftware.ca and we will send you instructions

Here is the main screen of the Enrolment Manager. Click on the buttons to lead you to the appropriate help sections.

A screenshot of the Enrolment Manager software window. The title bar reads "Enrolment Manager Version:2.0.0.0 System=Nexsys". The window contains several input fields and buttons. At the top, there are four input fields labeled "Lastname:", "FirstName:", "Card Number:", and "Phone #:". Below these fields are four buttons: "Update Data", "Quick Enroll", "Search Local", and "Clear Search". On the right side of the window, there is a vertical stack of buttons: "Version Info", "Card Message", "Printer Setup", and "Autoenroll".

2. How to Enrol a Patient

There are 3 ways to enrol a patient to Central Profile

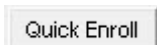
1. [Quick Enrol](#): Allows you to enroll a patient by typing in a prescription number
2. [Auto Enrol](#): The card automatically prints out with your prescription label.
3. [Manually Enrol a Patient](#): Allows you to enroll a patient by searching by lastname, firstname, phonenumber etc.

2.1 Quick Enrol

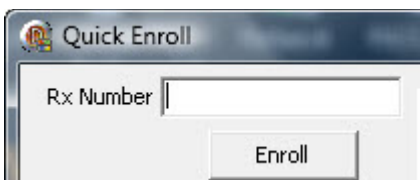
- Allows you to enroll a patient by typing in a prescription number.
- Double Click On the Enrolment Manager icon on your Dispensary server Desktop



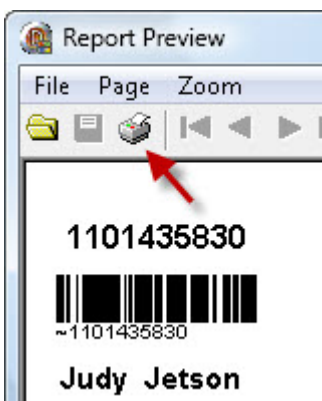
Step 1: Click on Quick Enroll



Step 2 : Type in a prescription # of the patient and Click on Enroll



Step 3 : Press the Print Icon



- If the Card was printed on a Prescription Label Continue to the next Step 4.
- If the Card was printed on paper go to [Printer Setup](#) and then [Reprint Card](#)

Step 4 : You are now ready to Prepare the Card for the Patient. Go To [Preparing the Patient Card](#)

2.2 Auto Enrol

When Auto enrol is switched on a card is printed automatically for each patient.

- If you would like to slow down auto enroll click on Auto enroll on the main page of the enrolment manager.
- Type in a number. Auto Enroll will only print a card every X number of patients. (X= the number you typed in)

For instructions on what to do with the printout go to [Preparing the Patient Card](#) .

2.3 Manually Enrol

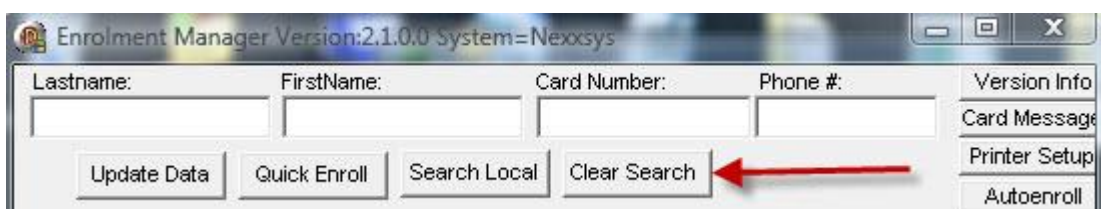
Allows you to enrol a patient by searching by lastname, firstname, phonenumber etc.

Double Click On the Enrolment Manager icon on your Dispensary server Desktop



Step 1: Type in Search Criteria on the main page of the Enrolment Manager. You can search by Cardnumber, firstname, lastname or phonenumber.

Step 2 : Click on Search Local



Step 3: A grid will appear showing all the matching entries in your dispensary system. If the grid is empty or none of the patients match then the patient is not in your dispensary system. Click **New Patient**, If the patients name appears in the grid then Click the entry in the grid and then Click Choose Matching Patient

Step 4 : A second grid will appear showing the matching entries in the Card database .

If one of the entries match then click on the correct entry in the grid and do the following

- a) Click Choose Matching Patient
- b) Click Add to Store or [Link to Store](#) . Whichever Button is visible.

You have now added/updated the patient in your dispensary system and enrolled them at your store

If none of the entries in the grid match or the grid is empty then do the following

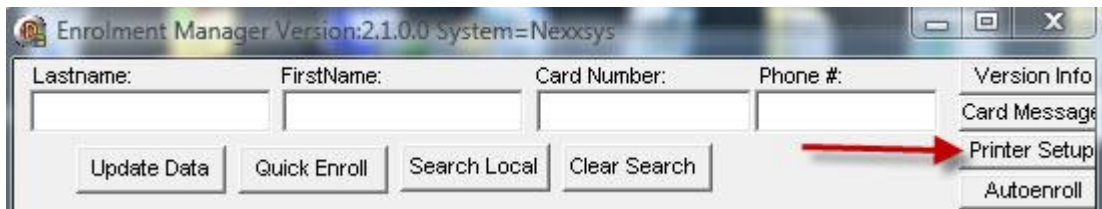
- a) Click New Patient
- b) Click Create New Card
- c) Fill in any missing information
- d) Click Get Card Number
- e) Click ok
- f) Click on the print icon.
- g) A prescription label will now print out with the patient Cardnumber and

pin. You can now give the patient their card. Go to Preparing the patient Card if you need more information

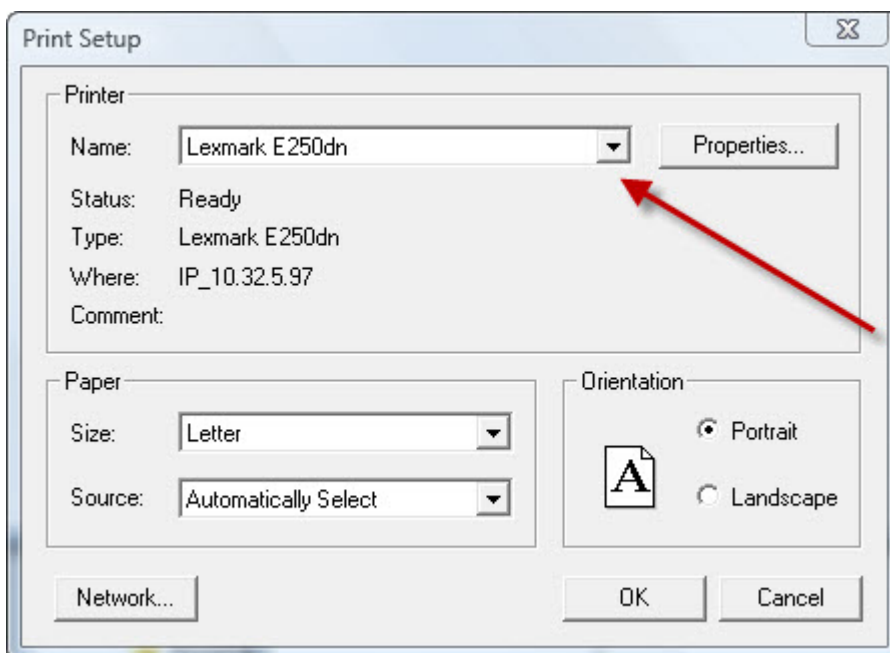
3. Printer Setup

You must setup the printer to print on labels. This is used to print out the enrolment cards.

Click the Print Setup button on the main Enrolment Page



Click the dropdown menu and choose the printer that you print labels on.



4. Reprint Card

Step 1: Type in Search Criteria on the main page of the Enrolment Manager. You can search by Cardnumber,firstname,lastname or phonenumber

Step 2:Click on Search Local

Step 3: A grid will appear showing all the matching entries in your dispensary system Click on the correct entry in the grid and then click Choose Matching Patient Continue Step 4

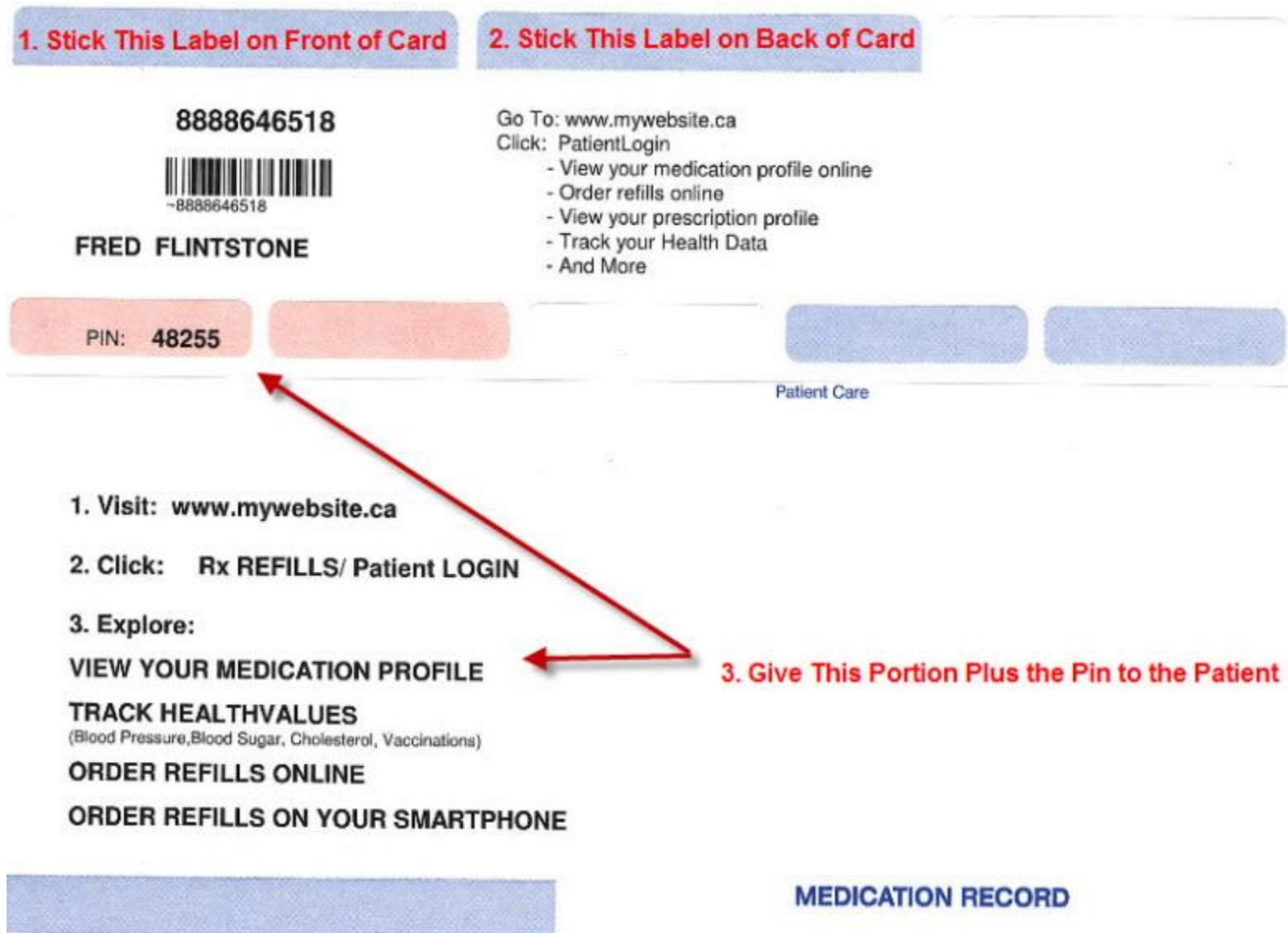
If the correct name did not appear then you may have typed in the search criteria incorrectly click Clear Search and type carefully.

If the patient is not in your dispensary system then they may have enrolled in another store. Go to [How to Reprint a Card](#) this is enrolled at another store for more information

Step 4: A second grid will appear showing the matching entries in the Card database .Click on the correct entry in the grid and then click Choose Matching Patient

Step 5: Click on RePrint Card

A prescription label will now print out with the patient Cardnumber and pin. You can now give the patient their card. Go to [Preparing the patient Card](#) if you need more information. If the entry is colored red then the Card is cancelled and you will not be able to Reprint the card until you reactivate it. Go to [Reactivate Card](#) for more instructions



5. Preparing the Patient Card

Step 1: Remove the Label on the top left hand Corner and place it on the Card

Step 2: Tear the bottom portion of the label page and keep it for internal use.

Note: A Full set of Instructions appears on the bottom right hand corner of the label page for your convenience.

Step 3: Give the top portion of the label page to the patient.

Step 4: Collect Any missing information from the patient and write it down in the Internal use section. Go to Update Data for an easy way to update the patients Information

Step 5: Speak to the Patient About the Program. Go to Why Every Patient Should have a Card for Tips on explaining the program

If the Patient does not want the Card Go to [Refuse Card](#)

6. Why Every Patient Should Have a Card

It is not necessary to have a computer to benefit from this program. Here are some benefits you can talk about.

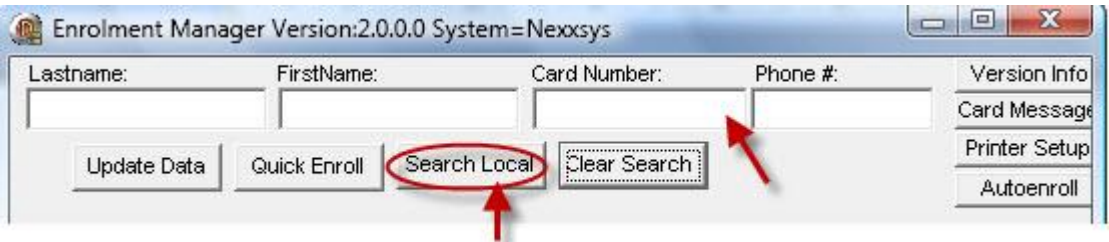
1. Mention any discounts available to them by using the card (*)
2. Mention that if they end up in the emergency room or require some other health card provider to view their Personal health record they can authorize them to look at the information by providing their cardnumber and pin. (*)
3. Easy Online Refill Ordering 7 days a week 24 hours a day
4. Ability to track health values and have them available to show healthCare Providers.
5. Ability to view a picture of the medication
6. Ability to view Drug Information from home.
7. Ability to order from a web enabled mobile device

***Note:** Items 1 & 2 do not require a computer

7. Refuse Card

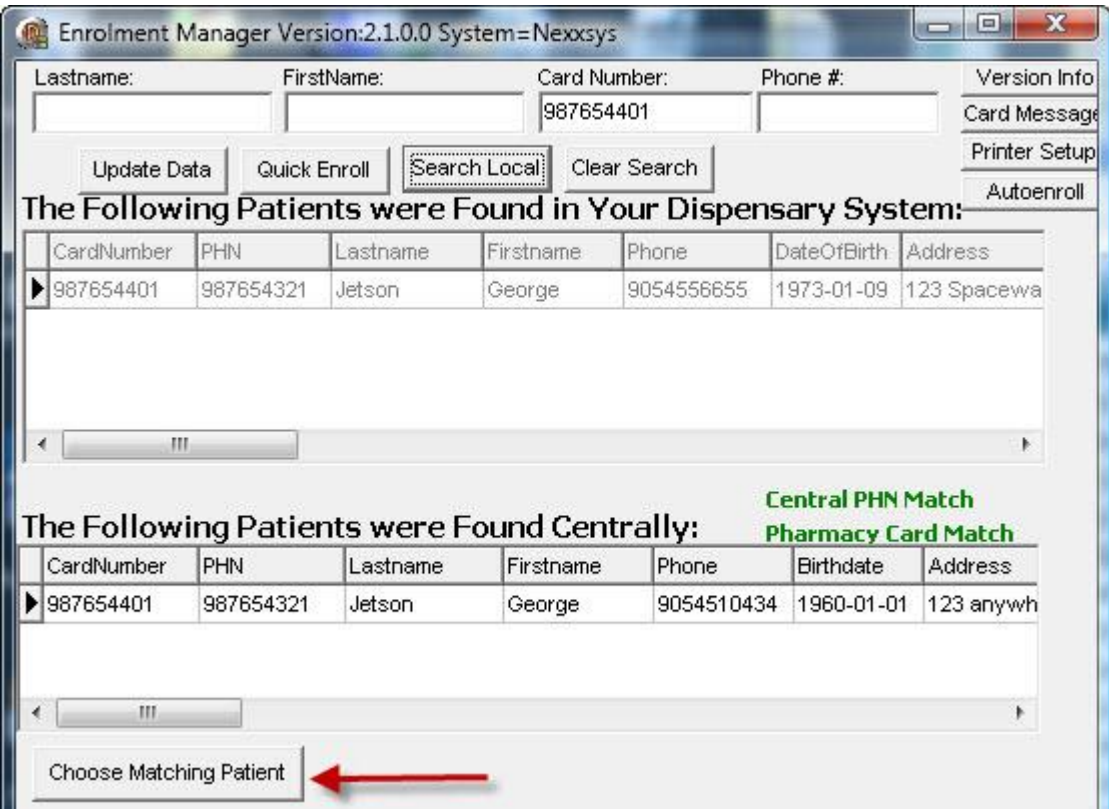
Step 1:Type in the Card Number on the Main screen of the enrolment manager

Step 2: Click on Search Local



Step 3: Confirm the patient name on both grids
If the correct name did not appear click Clear Search and start again

Step 4: Click choose matching patient once the correct Patient name shows up



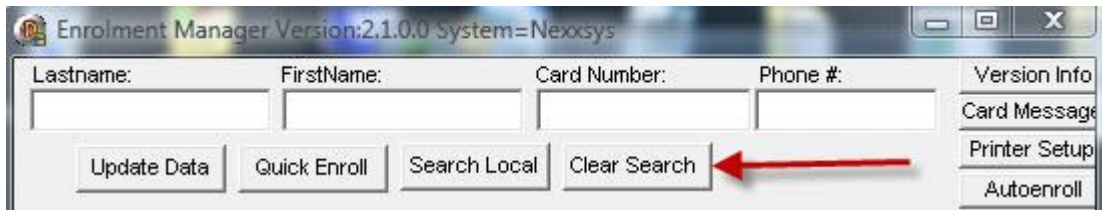
Step 5: Click on Refuse Card

Refused Card

You have now recorded that the Patient has refused the card.

8. Clear Search

Click on Clear Search on the main Enrolment Screen to Clear the screen and type in new search Criteria



9. How to Reprint a Card

Double Click On the Enrolment Manager icon on your Dispensary server Desktop



Step 1: Type in Search Criteria on the main page of the Enrolment Manager. You can search by Cardnumber, firstname, lastname or phonenumber

Step 2: Click on Search Local

Step 3: A grid will appear showing all the matching entries in your dispensary system Click on the correct entry in the grid and then click Choose Matching Patient Continue Step 4.If the correct name did not appear then you may have typed in the search criteria incorrectly click Clear Search and type carefully. If the patient is not in your dispensary system then Click New Patient

Step 4: A second grid will appear showing the matching entries in the Card database .Click on the correct entry in the grid and then click Choose Matching Patient

Step 5: If the patient would like you to add them to your store then Click Add to Store or Link to Store. Whichever Button is visible. If the patient would just like you to Reprint the Card then Click Reprint Card. A prescription label will now print out with the patient Cardnumber and pin. You can now give the patient their card. Go to Preparing the patient Card if you need more information.If the entry is colored red then the Card is cancelled and you will not be able to Reprint the card until you reactivate it. Go to Reactivate Card for more instructions

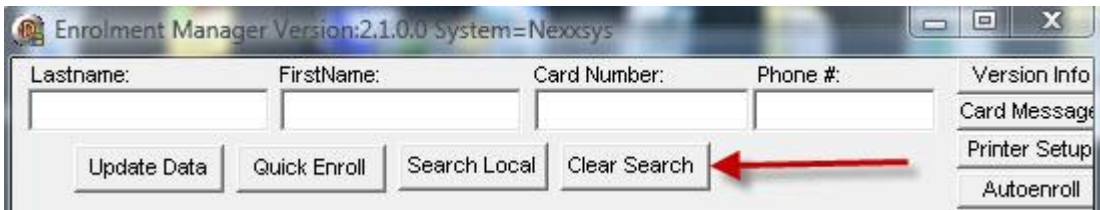
10. Re-Activate Card

Double Click On the Enrolment Manager icon on your Dispensary server Desktop



Step 1 :Type in the Card Number on the Main screen of the enrolment manager

Step 2 : Click on Search Local



Step 3: Confirm the patient name on both gridsIf the correct name did not appear you may have made a typing error click Clear Search and start again

Step 4: Click choose matching patient once the correct Patient name shows up

Step 5 : Click on Reactivate Card

You have now reactivated patient's card. Now you can [Reprint the Card](#) .

11. Link to Store

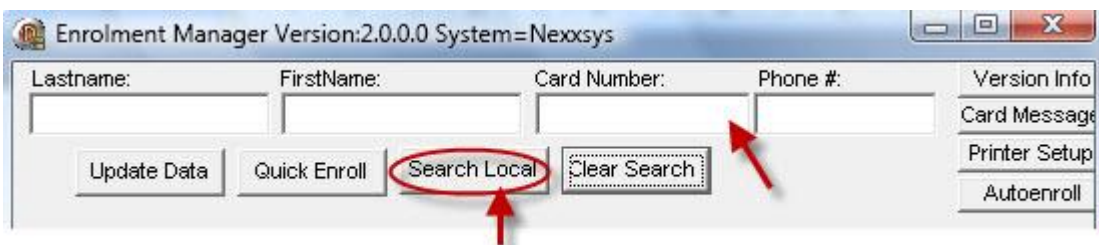
This feature is used when:

1. The patient is enrolled at another store
2. The patient would like to Enroll at your store
3. The patient is already in your Dispensary System (i.e. Patients that visits more than one store regularly

This feature allows you to look up the patient and automatically enroll their card with your store.

Step 1: Type in Search Criteria on the main page of the Enrolment Manager. You can search by Cardnumber,firstname,lastname or phonenumber

Step 2: Click on Search Local



Step 3: A grid will appear showing all the matching entries in your dispensary system. Click on the correct entry in the grid and then click Choose Matching Patient Continue to Step 4

If the grid is empty or none of the patients match then the patient is not in your dispensary system.and you need to go to Add to Store

Step 4: A second grid will appear showing the matching entries in the Card database .Click on the correct entry in the grid and then click Choose Matching Patient

Step 5: Click on Link to Store

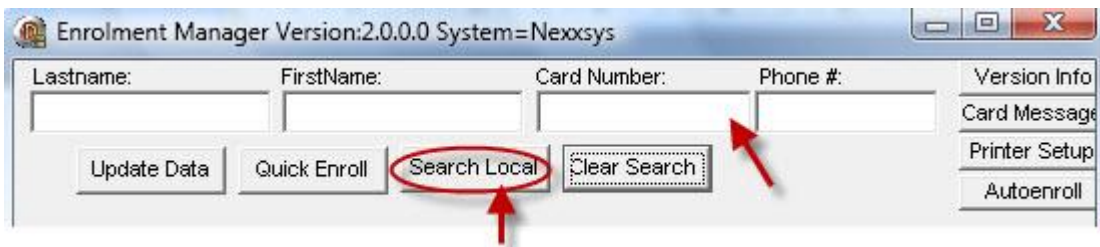
You have now enrolled the patient at your store.

12. Cancel Card

This function is used when the patient no longer wants to be part of the program.

Step 1: Type in the Card Number on the Main screen of the enrolment manager

Step 2: Click on Search Local



Step 3: Confirm the patient name on both grids If the correct name did not appear you may have made a typing error click Clear Search and start again

Step 4: Click choose matching patient once the correct Patient name shows up

Step 5: Click on Cancel Card

You have now cancelled the patient's card.