

DEACTIVATING A CONSUMER

Removing the check mark in the “Active” box shown in the consumer list or in the detail screen under “Basic Information” WILL NOT deactivate a consumer. The consumer must be deactivated using the Status Wizard. (This function is available in the Consumer Detail screen.)

Here are the steps to effectively deactivate a consumer from the Detail screen.

1. In the NOTES box, indicate the last date of service (Example: LST SV 6/22/2017, Deactivated **(insert date)**), then enter **(first name initial, last name)**.

The last service date can be found in the Provider box to the right – below the Date Registered date – (Not Specified) verbiage. See below.

Providers		Add New	Open	Delete	Show Current (1)	
 	Mason County Action Group, Inc. First Service Date: 07/01/2016					08/01/2012 - (Not Specified) Last Service Date: 04/04/2017
 	Putnam Nutrition In Kanawha First Service Date: 08/01/2012					08/01/2012 - 12/31/2012 Last Service Date: 12/01/2012

2. **IF THERE IS A CARE RECIPIENT BOX COMPLETED** (in the Detail screen).....Click on the yellow folder to open it and enter an End Date in the box. End Date is the last day of the month in which the consumer received a service – see Item #1 example above.

End Date

This will close out the care recipient in the caregiver Detail screen ONLY. *The care recipient needs to be deactivated in their own Detail screen if they are no longer receiving services.*

3. Go up to the Care Enrollment box in the Detail Screen and click on the yellow folder to open up the folder. Change the Status Date from Active to Inactive.

Status

4. Then, click on Status Wizard function located just above the Care Enrollment information box.
5. The first box is already defaulted to Deactivate and Close Consumer.



Click on Next (in blue), in the right hand corner of this box, to see the SECOND box to pop up called "Status Wizard Defaults".

6. Click on the Set Consumer Inactive Reason box. Make the proper selection as to the reason why the consumer is being deactivated in the Status Wizard Defaults box.



7. Enter the Default End Date (shown below). This date is the LAST DAY OF THE MONTH IN WHICH THE CONSUMER RECEIVED A SERVICE. (The last service date can be found in the Provider box to the right – below the Date Registered date – (Not Specified) verbiage.)



(See Item #1 example – Last Service Date.) Both the Default End Date and the Default Status Date must be the same date as shown above.

8. The Items to Edit should reflect all boxes as being checked as shown below.

The screenshot shows a form titled "Items to Edit". At the top left, there is a checkbox labeled "All" which is checked and circled in blue. Below this, there are several rows of checkboxes, each with a corresponding dropdown menu. The checkboxes are: "Consumer Status", "Providers", "Activities", "Fund Identifiers", "Enrollments", "Care Managers", "Care Plans", "Routes", "Service Plans", "Co-Pays", "Service Orders", and "Service Suspensions". The dropdown menus are: "Activity Status", "Enrollment Status", "Care Plan Status", "Service Plan Status", "Service Order Status", and "Suspension Reason". At the bottom right, there is a checkbox labeled "Apply End Date to open Service Plans/Schedules" which is also checked and circled in blue.

9. Click on Next (blue selection) located at the top right corner of this Items to Edit box.

The screenshot shows a form titled "Status Wizard Defaults". At the top right, there are three buttons: "Back", "Next", and "Clear". The "Next" button is circled in blue. Below the buttons, there is a dropdown menu with "Other" selected.

10. A THIRD box will pop in once the "Next" button is selected. Click on the "Commit" (blue selection at the top right corner of the third box).

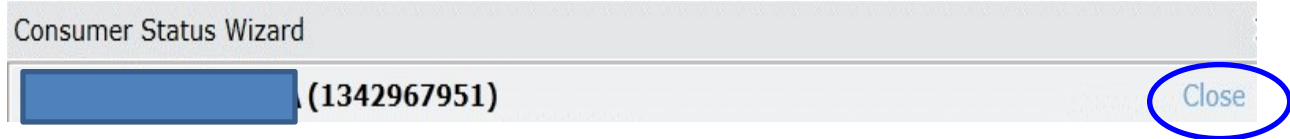
The screenshot shows a form titled "Modifications". At the top right, there are four buttons: "Back", "Clear", "Validate", and "Commit". The "Commit" button is circled in blue.

11. Once Commit is clicked on, the next screen that pops up will confirm whether the deactivation was successful or not.

The screenshot shows a dialog box titled "Success". The text inside the dialog box reads: "The update was successful, you may close this window." At the bottom right, there is an "OK" button.

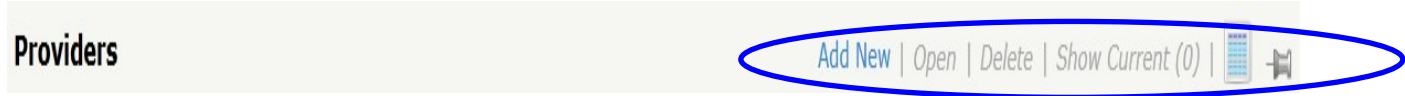
Click OK.

12. Then click “Close” in the top righthand corner of the Status Wizard box.



NOTE:

There is an exception when there is more than one provider listed in the Provider box. IF a consumer record shows more than ONE provider in the Detail Screen, the Status Wizard CANNOT be used unless the consumer is deceased. Look for “show current or show list” in the Provider box to see what other providers have served this consumer.



IF a consumer close reason is DECEASED, deactivating a consumer with more than one provider is admissible using the Status Wizard. Deactivation date should be the last day of the month of last service OR the first day of the month AFTER the last date of service.

IF the OTHER provider’s last day of service is AFTER your last service date, do not deactivate the consumer using the Status Wizard. (See special note at the end of this document.)

PLEASE place a courtesy note in the “Note” section of the Detail screen stating the consumer is deceased. Indicate consumer is deceased with the date and name of the person deactivating the consumer.

More detailed instructions on how to use the Status Wizard can be found in the “Application Support Resource” section of the Home-Production Site screen. The manual title is: Consumer Status Wizard Companion Guide.

SPECIAL NOTE:

If, after selecting “Commit” an “unsuccessful” message appears, this means there is more than one provider serving this consumer and verification can be found in the Service Delivery or Assessment screens.

This error message also means:

- A. You may no longer be able to use the Status Wizard to deactivate the consumer because there is more than one provider. (See above.)
- B. The Status Wizard must be closed out and [the Care Enrollment must be changed back to “Active” status.](#)
- C. [The Active box must be re-checked](#) in the “Basic Information” section (located on the left side of the detail screen).
- D. You are able to only deactivate yourself as provider if the consumer is not deceased.

[ALSO.....there must be a provider selected as the Default Provider even if the provider is deactivated. \(If no Default Provider selected, all reports and lists will show that consumer without a provider.\)](#)

[A Default Provider is shown in the Provider box in BOLD type.](#)

