



Quick Steps

- From the top menu bar, click Cases/Clients and select Cases
- Make sure the 'Show Closed' box in the Search Options section is checked
- Type in Case ID or a Portion of the Family's Last and/or First Name
- Press Enter or Click Search
- Select the case and Click Update
- Clear the Close Date field and Click Save
- From the Right Hand Menu Bar, Click on the Provider/Program Statuses link
- Select Add Status
- Case Provider Action:
 - Select a Provider
 - Enter Action Dt
 - Enter Referral Source
 - Enter Reason
- Click Save
- Close the Program Enrollment screen
- From the Right Hand Menu Bar, Click on the Assignments link
- Click the Add button
- Use the magnifying glass to identify the staff member who will be assigned to the case
- Enter the staff role, activity level, and date the home visitor was assigned to the case
- Click Save

Click Close to Exit

Detailed Steps:

1. After logging into the database, the Staff window appears and the system identifies your name on the staff list.

🍘 Staff Inf	ormation Dialog					
·····	-Information for:					
<u>Name</u>	Data Team, Member (090025) As of (1/21/2018) No New Tas There are No Open Tasks	ks have been Added	×			
			Staff Information			
∎ OI Ta	oen Name asks	ld	Supervisor's Name	Supervises	End Dt	2
8						
(\mathbf{n})	Data Team, Member	090025			1	Ē





2. From the top menu bar, click Cases/Clients, then select Cases.



- 3. Type in Case ID or a portion of the Family's Last and/or First Name. Press Enter or click Search.
- 4. From the Cases screen, highlight the case and click **Update**.

👸 Cases														
Search Case List														
												Filter by FACTS Case Id: (Blank) Primary Language: (Blank)	Show Closed Ca Closed Me	ses mbers
							Case Inform	nation Grid						
Case Name	FACTS Case I	d Provider	Staff Name	Open Dt	Close Dt	Void Dt.	Create Dt	Update Dt	Last	Last				Case Related
1	Case ID	Name							Audit	Status				Addresses
8		Click her	e to define a filter - use "%" a	as a wild card							1			Assignments
Test Infant	1160007	PIP - Foster	Data Team	11/29/2017	4/25/2018		11/29/2017 11	1 4/26/2018 8:2	1					Contacts
														Provider/Progr
														View Arrenne
														View Treatmen
														Phases
														View Services
														Client Related
														Setup
														Reg. Types
														Role in Case
														Rel. to Client
														Guardianship
														L NORTHONN
														Reasons
	\mathbf{N}													
	X	Client/Case M	embership			. 1								,
Register New C	ase Update	Begister N	ew Dient Add	Existing Client	Print Rep	orts								-
Discharge Case	8	Change F	Role Upda	te										
	unita benturand													

- 5. The close date field needs to be cleared. Highlight the entry and press delete or backspace to clear it. Alternatively, you can also use the dropdown arrow and then click **Clear.** A note may be added to indicate why the family re-opened. Click **Save**.
- 6. To re-open the program status, click on the **Provider/Program Status** link from the right hand menu bar.







7. The Case Program Enrollment Statuses screen will appear. Click on Add Status.

🙆 Case Progra	m Enrollment Statuses						
Case	Provider Status Information for Test, Infant (1160007) Open D	Case: ate: 11/29/2017 Close Date:	4 Filter By Provide Status: Name:	er: (IMHT 10) : (Discharged) (Test, Infant)		🗌 Open Dt. (11/	/29/2017)
	<u>C</u>	()	A Provider State	uses Informatio			
🗉 Pra. ID	Program	Status	Open Dt	Close dt	## Davs	Admit Id	
▶ 1160002	IMHT 10	Discharged	11/29/2017	4/25/2018	147		
	Add Status						
		(v				
		Cli	ent Provider Act	ion Informatio	n		
Action		Begin Date	End Date	# Days	Reason		
Admit		11/29/2017	4/25/2018	147			
Discharge		4/25/2018		N	Nove out of serv	ice area	
-Action Notes-		(v				
							A
<u>>bø</u> :	J Upd	ate Action					
1 of 1 Status(es)	1 Selected	2 of 2 Action(s) 1:	5elected			

8. The Case Provider Action screen will appear. Select the Provider (i.e. IMH, PIP, PIP Foster) by clicking on the magnifying glass.

🙆 Case Provider	Action				_ 🗆 ×
-Case/Client Inform	ation				
Case	1160007	Ð	Test	, Infant	
Client		Ð			
Action Information					
Provider	116000	Ð			
Action	Admit		•	Action Dt	•

9. Next, enter the Action Date, Referral source and Reason. Click Save.



Case re-enrollment/transition



🍘 Case Provider	Action	
Case/Client Inform	ation	
Case	1160007	🔍 Test, Infant
Client		
Action Information-		
Provider	1160002	🕀 IMHT 10
Action	Admit	Action Dt 2/13/2019 -
	×	
-Referral Information	n	
Ref. Src. Id	CPS	Child Protective Services
	× 1	<u> </u>
-Reason (Dispositio		
	n (A)	Infant montal health assessment
Reason ADS		
Notes		
1		<u> </u>
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L		
Transfer 'FROI	M' an External Age	ency
	🔍 < Cli	lick Here to Enter an External Agency Name
		Save

- 10. Click Close to exit the Case Program Enrollment Services screen.
- 11. To re-open the case assignment, click on the Assignments link from the right hand menu bar.



12. The **Staff Assignments** screen will appear. Click the **Add** button.







13. The **Staff Assignment Information** screen will appear. Use the magnifying glass to select the staff member who will be assigned to the case. Select the provider, staff role and activity level. Enter the Open Date (date the home visitor is assigned to the case). Click **Save**.

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Staff	090017	€	Morrison, Jim	
Provider Informatio	on			_
Provider	090001	e,	Test Provider	
Assignment Inform	ation			_
	09100601	Đ,	Schmoe, Joe	
	A			
Staff Pala	<u>a</u>			
Staff Role			U	_
Staff Role	₽ HV	Ð	Home visitor	
Staff Role Staff Role Activity Level	B HV A	€	Home visitor Regular	
Staff Role Staff Role Activity Level	HV A	⊕ ⊕	Home visitor Regular	
Staff Role Staff Role Activity Level	HV A	e e	Home visitor Regular	
Staff Role Staff Role Activity Level	HV A	• •	Home visitor Regular	
Staff Role Staff Role Activity Level	HV A	Ð Ð	Home visitor Regular	
Staff Role Staff Role Activity Level Notes	HV A	Ð Ð	Home visitor Regular	
Staff Role Staff Role Activity Level Notes	HV A		Home visitor Regular	
Staff Role Staff Role Activity Level Notes – Assignment Dates Open Date	HV A 11/29/2016	•	Home visitor Regular Close Date	
Staff Role Staff Role Activity Level Notes -Assignment Dates Open Date	HV A [11/29/2016		Home visitor Regular Close Date	
Staff Role Staff Role Activity Level Notes Acssignment Dates Open Date	HV A 11/29/2016		Home visitor Regular Close Date	

14. Click **Close** to exit. The case will now show on the home visitor's case list.

If you need further assistance please contact the ECSC Database Services Team:

<u>ecscdata@unm.edu</u> Local: 505-277-0469 Toll Free: 855-663-2821