

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:

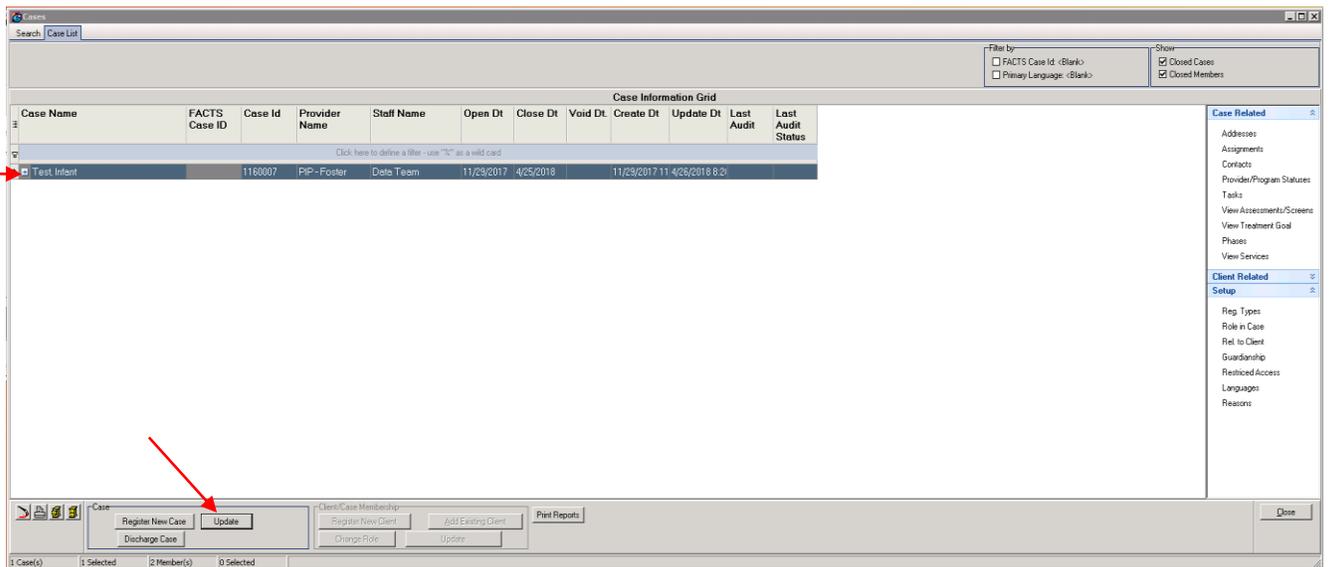
1. After logging into the database, the Staff window appears and the system identifies your name on the staff list.



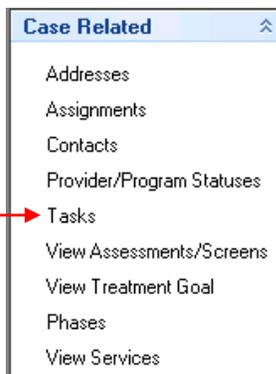
- From the top menu bar, click **Cases/Clients**, then select **Cases**.



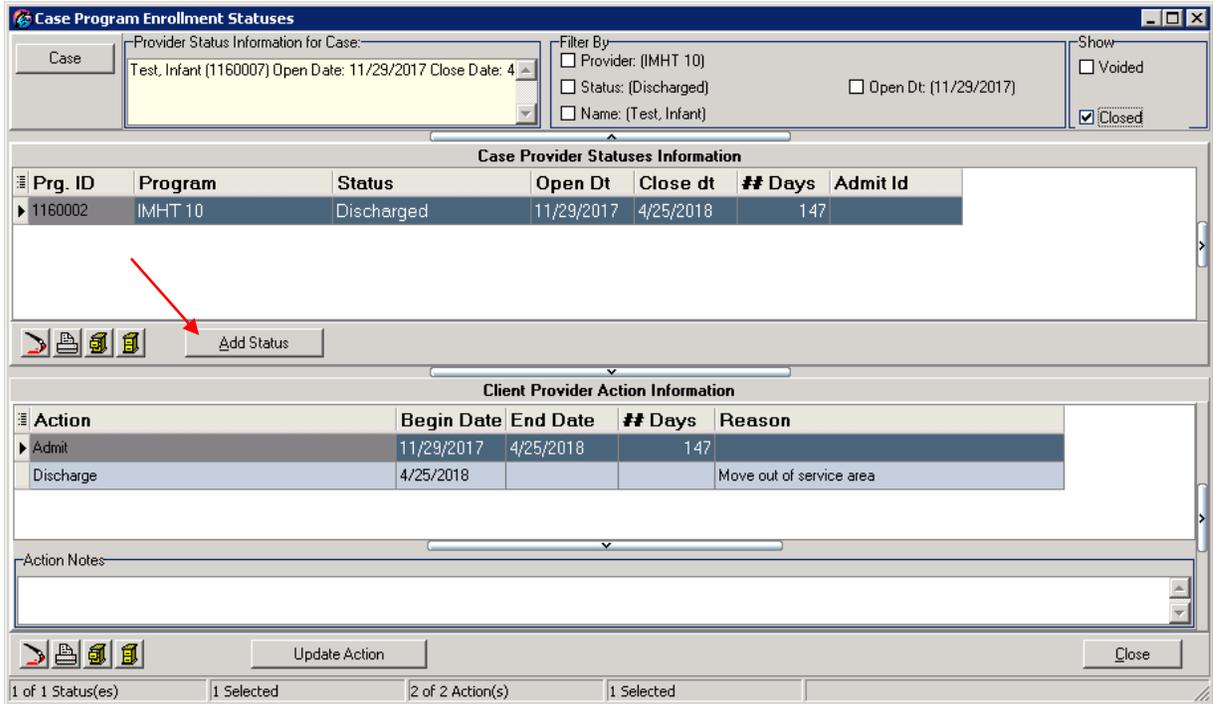
- Type in Case ID or a portion of the Family's Last and/or First Name. Press **Enter** or click **Search**.
- From the Cases screen, highlight the case and click **Update**.



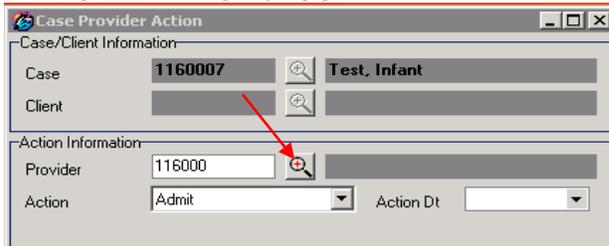
- The close date field needs to be cleared. Highlight the entry and press delete or backspace to clear it. Alternatively, you can also use the dropdown arrow and then click **Clear**. A note may be added to indicate why the family re-opened. Click **Save**.
- To re-open the program status, click on the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



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



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



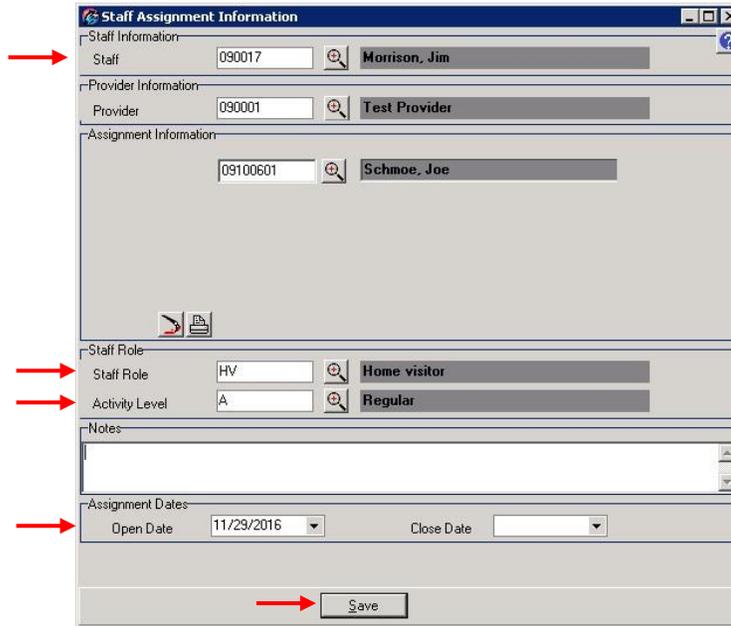
9. Next, enter the Action Date, Referral source and Reason. Click Save.

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**.



The screenshot shows a web form titled "Staff Assignment Information" with the following sections and fields:

- Staff Information:** Staff ID: 090017, Staff Name: Morrison, Jim. A red arrow points to the Staff ID field.
- Provider Information:** Provider ID: 090001, Provider Name: Test Provider.
- Assignment Information:** Assignment ID: 09100601, Assignment Name: Schmoee, Joe.
- Staff Role:** Staff Role: HV, Staff Role Name: Home visitor. A red arrow points to the Staff Role field.
- Activity Level:** Activity Level: A, Activity Level Name: Regular. A red arrow points to the Activity Level field.
- Notes:** An empty text area.
- Assignment Dates:** Open Date: 11/29/2016, Close Date: (empty). A red arrow points to the Open Date field.
- Buttons:** A "Save" button at the bottom. A red arrow points to the Save button.

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:

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