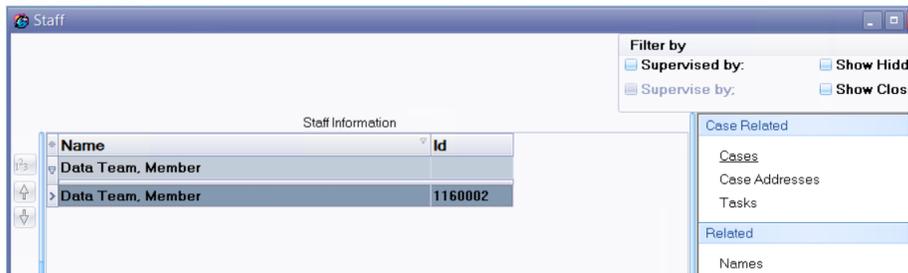


Quick Steps

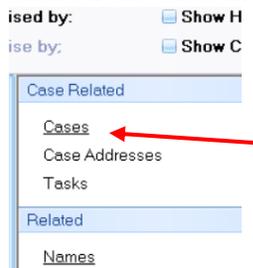
- Open the Case List Screen (if you are not already in it)
- Select the Case you Want to Discharge
- Click Close Case Button
- Enter the Discharge Date
- Select the Reason for Discharge under the drop down menu next to Reason Field
- Click the Discharge Case/Members & Member Clients Button
- Click Yes to Save Discharge
- Click OK

Detailed Steps:

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



2. Click on the **Cases** link (on the side menu bar) to get to your open case list.



3. Under the case list, select the case you are wanting to close. Then click the **Close Case** button.

The screenshot shows the 'Cases' application window with a search bar and a table of cases. The table has columns for Case Name, Case Id, FACTS Case ID, and Provider Name. Below the table, there are buttons for 'Register New Case', 'Update', and 'Close Case' (circled in red). There are also buttons for 'Client/Case Members', 'Register New Client', and 'Change Role'.

Case Name	Case Id	FACTS Case ID	Provider Name
Again, Colin	1160004	465456	IMH CPP Team 10
Another test, Colin	1160017		IMH CPP Team 10
D, J	1160027		IMH CPP Team 10
James, Bobby	1160021		IMH CPP Infant
K, G	1160045		IMH CPP Team 10
LN, Baby	1160028		IMH CPP Team 10
Mitchell, Mom	1160002	123456	IMH CPP Team 10
OHara test, Mary	1160049		IMH CPP Infant
Sanchez, Brittany	1160018		IMH CPP Infant

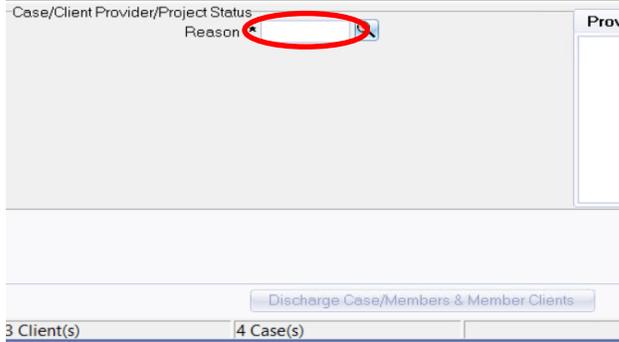
- In this form, navigate to the **Close Date** field and enter the date the case was discharged by either typing the information or using the drop down menu tool to access calendar.

The screenshot shows the 'Close Case Information' form for Case 1160004. It includes a table of 'Case(s) in Which Client is a Member' and a 'Case Members (Clients)' table. The 'Close Options' section has a 'Close Date' field circled in red. There is also a 'Reason' field with a magnifying glass icon and a 'Provider Status Discharge Notes' text area.

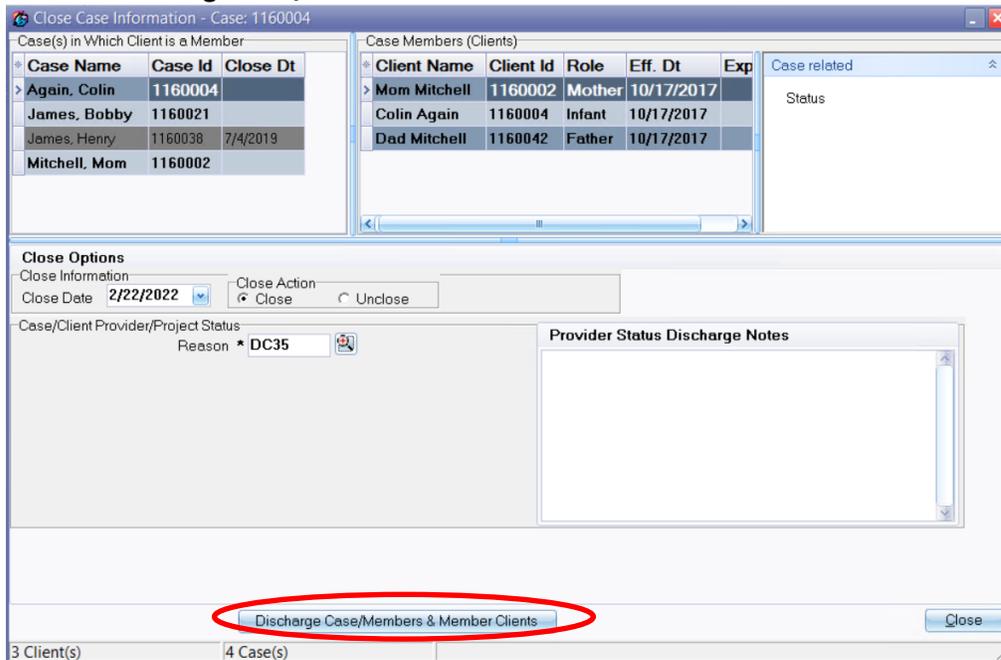
Case Name	Case Id	Close Dt
Again, Colin	1160004	
James, Bobby	1160021	
James, Henry	1160038	7/4/2019
Mitchell, Mom	1160002	

Client Name	Client Id	Role	Eff. Dt	Exp
Mom Mitchell	1160002	Mother	10/17/2017	
Colin Again	1160004	Infant	10/17/2017	
Dad Mitchell	1160042	Father	10/17/2017	

- In the same form, navigate to the **Reason** field and use the magnifying glass tool to select the reason you are discharging the case, select, and click **OK**.



6. Click the **Discharge Case/Members & Member Clients** button at the bottom of the screen.



7. A confirmation screen will appear to discharge the case. Click **Yes** to save the discharge.

8. Click **OK** on the final confirmation form.

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

ecscdata@unm.edu

Local: (505) 277-0469

Toll Free: (855) 663-2821