

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.

(Staff			
			Filter by	
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			Supervi	se by; 📃 Show Clos
	s	Staff Information		Case Related
	* Name	V Id		Cacoo
123	🛛 Data Team, Member			
4	> Data Team, Member	1160002		Case Addresses
步				Tasks
				Related
				Names

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.



C	C	ases									
5	iea	arch Case Lis	t								
	_								Ca		
*	C	ase Name			Case lo	1	FACTS Case ID	Provider	Name		
₽						CI	ick here to defi	ne a filter -	use "%" as		
	•	Again, Colin			1160004	I	465456	IMH CPP Team 10			
		Client Id	Role Label	DO	B	Client		Start Dt	End Dt		
		*									
>		1160004	Infant	9/2	6/2017	Again, (Colin	10/17/2017	1		
		> 1160042	Father	1/	1/1980	Mitche	II. Dad	10/17/201			
		1160002	Mother	5/1	1/1982	Mitchel	, Mom	10/17/2017	,		
		<(•						
	ŧ	Another test	, Colin		1160017	,		IMH CPP	Team 10		
		D, J			1160027	,		IMH CPP	Team 10		
	ŧ	James, Bob	by		1160021			IMH CPP	Infant		
	Ð	K, G			1160045	5		IMH CPP	Team 10		
	ŧ	LN, Baby			1160028	3		IMH CPP	Team 10		
	Ð	Mitchell, Mo	m		1160002		123456	IMH CPP Team 10			
	Ð	OHara test,	Mary		1160049			IMH CPP Infant			
	÷	Sanchez Br	ittanv		1160018			IMH CPP Infant			
	>	a 4 1	Case					Client/Case	Membersh		
			Register	New	Case	Update		Register Nev	w Client		
			Close (Case				Change Ro	le		

4. 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.

😨 Close Case Info	rmation - C	.ase: 1160004							- 🗳
Case(s) in Which Cli	ient is a Men	nber	Case Merr	bers (Clients)					
* Case Name	Case Id	Close Dt	* Client I	Name Client Id	Role	Eff. Dt	Exp	Case related	*
> Again, Colin	1160004		> Mom Mi	tchell 1160002	Mother	10/17/201	7	Status	
James, Bobby	1160021		Colin Ag	gain 1160004	Infant	10/17/2017		0.0.00	
James, Henry	1160038	7/4/2019	Dad Mit	chell 1160042	Father	10/17/2017			
Mitchell, Mom	1160002								
			<))>]		
Close Options									
Close Information		Close Action							
Close Date	~	Close	O Unclose						
-Case/Client Provide	er/Project Sta	atus	_	B	rouidor 9	tetus Disch	arao Ne	ataa	1
	Reaso	on *	Q	-	iovider 3	alus Disch	argena	Jies	(20)
									<u>a</u>
									2
									01
		Discharge C	ase/Members 8	Member Clients					Ulose
3 Client(s)		4 Case(s)							

5. 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.

Case Name Ca Again, Colin 11 James, Bobby 11 James, Henry 111 Mitchell, Mom 11 Close Options Close Information Close Date 2/22/202 Case/Client Provider/Pr	Case Id 160004 160021 160038 160002 122 • Project Stat Reason	Close Dt 7/4/2019 Close Action Close		Client Name Mom Mitchell Colin Again Dad Mitchell ((Unclose	Client Id 1160002 1160004 1160042	Role Mother Infant Father	Eff. Dt 10/17/2017 10/17/2017 10/17/2017	Exp 7	Case related Status	
Again, Colin 11 James, Bobby 11 James, Henry 111 Mitchell, Mom 11 Close Options Close Information Close Date 2/22/202 Case/Client Provider/Pr	160004 160021 160038 160002	Close Action Close Action Close tus tus to DC35		 Mom Mitchell Colin Again Dad Mitchell Cal Mitchell Cal Mitchell Cal Mitchell Unclose 	1160002 1160004 1160042	Mother Infant Father	10/17/201 10/17/2017 10/17/2017	7	Status	
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		Discharge	e Case,	/Members & Memb	er Clients	>				Close

- 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:

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