



#### **Quick Steps**

- Log into the Database
- From the Staff Screen, Click on the Cases Link
- Click on the Register New Case Button to Register Child Client
- In Case/ Client Registration Window, Complete all Registration Fields, Click Next Button
- In Case/ Client Registration Window, Complete Provider/Staff Assignment Fields
- If Case File is Complete, Click Register Case/ Client Button
- Click Yes to Create the Case
- Click OK to Complete Registration

\*Note: Case holder will be child client. Each child client will be a case.

## **Detailed Steps:**

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

<b>6</b> S	itaff			_ 0	
			Filter by		
		Superv	vised by: 📃 Show Hidd		
			Superv	vise by; 📃 Show Clos	
	Staff In		Case Related		
	* Name	<sup>∀</sup> Id		Cacac	
123	∂ Data Team, Member				
4	Data Toam Mombor	1160002		Case Addresses	
	Data reall, Melliber	1100002		Tasks	
1				Related	
				Names	

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





# 3. Click on the Register New Case button at the bottom of the screen.

🍘 Cases							_ 🗆 🔀
Search Case List							
	Show ♥ Clos ♥ Clos					ed Cases ed Members	
* Case Name	Case Id	FACTS Case	Provider Name	Admit Dt	Staff Name	Discharge Dt	Case Related *
<b>7</b>	ID Click here to define a filter - use "%" as a wild card						County/Zip Assignments
Again, Colin	1160004	465456	IMH CPP Team 10	10/17/2017	Data Team		Program Status
Another test, Colin	1160017		IMH CPP Team 10	9/24/2018	Data Team		Clinical Instruments
• D, J	1160027		IMH CPP Team 10	1/18/2019	Data Team		Services
James, Bobby	1160021	_	IMH CPP Infant	12/1/2018	Data Team	_	Client Belated ×
	1160045		IMH CPP Team 10	1/21/2019	Data Team		Setup *
Mitchell Mom	11600020	123456	IMH CPP Team 10	11/10/2016	Data Team		Pog Turpos
OHara test, Mary	1160049	120100	IMH CPP Infant	7/15/2021	Data Team		Reg. Types Bole in Case
Sanchez, Brittany	1160018		IMH CPP Infant	9/1/2018	Data Team		Bel to Client
⊕ sgds, gsds	1160032		IMH CPP Team 10	3/26/2019	Data Team		Guardianship
	1160006		IMH CPP Team 10	11/29/2017	Data Team		Bestriced Access
	1160007		IMH CPP Team 10	11/29/2017	Data Team	4/25/2018	Languages
■ Test-Case, Baby	1160009		IMH CPP Team 10	11/29/2017	Data Team		Reasons
	w Case ↓ Undate	C	Client/Case Membersh	ip Add Existing Cli	Print Reports		Close
Close Cas	e		Change Role	Update			
13 Case(s) 1 Selected 3 Me	ember(s) 0 Selec	ted					

Note: If you do not have any open cases, you will get a screen like this. Click OK.



Then, click Register New Case button on this screen.

 The Case/Client Registration window launches. Complete the information on both of the tabs for each child client (Infant) receiving services within a household: Registration and Provider Status/Staff Assignment.





# 5. Registration Tab

🕲 Case/Client Registra	tion			
Registration Provider	Status/Staff Assignment Evaluation			
Registration Options				
Open Date				
Client Information				
Search Client	Client Receives Services			
ld <auto></auto>	FACTS Case ID	D		
First Name	Check Duplicate			
M.I.				
Last Name				
D.O.B.				
Sex***	•			
Ethnicity	<b>e</b>			
Race None s	elected			
Membership Informa Role in Case	tion Q			
Case Information				
County 35001	Bernalillo County 21p 123	145		
Previous Page 🔞	Register Case/Client	Next Page		
(6) Required Fields Re	maining			
pen Date	Type in the date the client started s	services.		
ACTS Case ID	Enter the 6-digit FACTS Case ID that	t will be assigned to the case holder.		
lame	Type in the first name, middle initia	al and last name in the corresponding fiel		
.О.В	Type in the client's date of birth.			
ex	Type in Male or Female or use the magnifying glass look up tool to select sex,			
	select, and click OK.			
thnicity	Use the magnifying glass look up to	ool to view the ethnicity options, select, a		
•	click <b>OK.</b>	, , , , ,		
ace	Utilize the drop-down to select the	client's race.		
ole in Case	<b>C</b> will auto-populate, indicating the	child client as the case holder.		
ounty	Enter the information into the <b>Com</b>	ntv field		
in	Enter the information into the <b>Zin</b> f	field		
<b>'</b> P'		nciu.		

6. Select the **Provider Status/Staff Assignment** tab.





## Provider Status/Staff Assignment tab

🙆 Case/Client Regis	tration		_ 🔀
Registration Provide	er Status/Staff Assignment	Evaluation	0
Provider Status In	formation		
Provider	•		
Action**** Adm	it 💌		
Staff Assignment I	ntormation		
Lead Clinician"			
l			
Previous Page 💡	Register Case/Client		Next Page
(6) Required Fields	Remaining		

#### Provider

Action

Use the magnifying glass look up tool (click OK on the error box form),



7. When the required information has been completed, the **Register Case/Client** button will light up. Click on the button and a confirmation screen will appear.

Previous Page 💡	Register Case/Client	Next Page
Adding a new Case		

8. Click Yes to create the case.







9. Click **OK** to complete the registration.



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

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