Registering a New Case

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.

2. Click on the Cases link (on the side menu bar) to get to your open case list.
3. Click on the **Register New Case** button at the bottom of the screen.

![Image of the register new case button](image_url)

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

![Image of the case search results](image_url)

Then, click **Register New Case** button on this screen.

4. 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**.

![Image of the case registration window](image_url)
5. **Registration Tab**

![Registration Tab Image]

- **Open Date**: Type in the date the client started services.
- **FACTS Case ID**: Enter the 6-digit FACTS Case ID that will be assigned to the case holder.
- **Name**: Type in the first name, middle initial and last name in the corresponding fields.
- **D.O.B**: Type in the client’s date of birth.
- **Sex**: Type in Male or Female or use the magnifying glass look up tool to select sex, select, and click **OK**.
- **Ethnicity**: Use the magnifying glass look up tool to view the ethnicity options, select, and click **OK**.
- **Race**: Utilize the drop-down to select the client’s race.
- **Role in Case**: **C** will auto-populate, indicating the child client as the case holder.
- **County**: Enter the information into the **County** field.
- **Zip**: Enter the information into the **Zip** field.

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

Provider Status Information

Provider

Action

Lead Clinician

Provider

Use the magnifying glass look up tool (click OK on the error box form), select the correct provider option, and click OK.

Action

Admit will auto-populate.

Lead Clinician

Use the magnifying glass look up tool to select a staff member, select, and click OK.

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.

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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