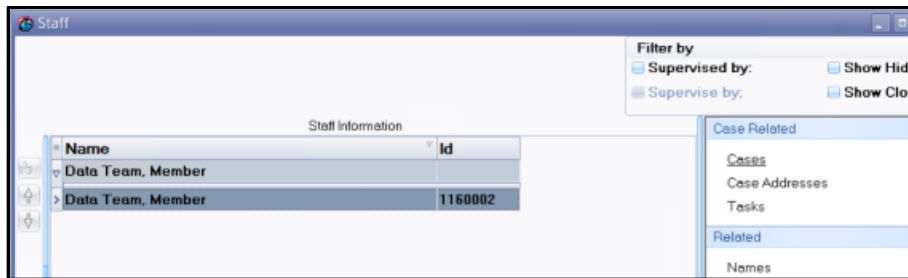


Quick Steps

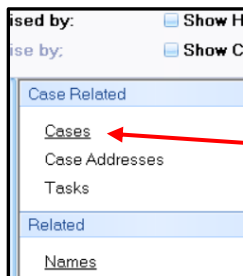
- Open the Case List Screen (if you are not already in it)
- Select the Case you Want to Discharge
- Click Close Case Button
- Enter the Discharge Date
- Select the Reason for Discharge under the drop down menu next to Reason Field
- Click the Discharge Case/Members & Member Clients Button
- Click Yes 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. At the top, there is a 'Search' button and a 'Case List' tab. Below this is a table with columns: Case Name, Case Id, FACTS Case ID, and Provider Name. A link 'Click here to define a filter - use "*" as' is present. The table lists several cases, including 'Again, Colin' (Case Id: 1160004, FACTS Case ID: 465456, Provider Name: IMH CPP Team 10). Below the table, there are buttons for 'Register New Case', 'Update', and 'Close Case' (which is circled in red). To the right of these buttons are buttons for 'Client/Case Members', 'Register New Client', and 'Change Role'.

- 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. The form has two main sections: 'Case(s) in Which Client is a Member' and 'Case Members (Clients)'. The 'Case(s) in Which Client is a Member' section lists cases with columns: Case Name, Case Id, and Close Dt. The 'Case Members (Clients)' section lists clients with columns: Client Name, Client Id, Role, Eff. Dt, and Exp. Below these sections is the 'Close Options' section, which includes a 'Close Date' field (circled in red) and a 'Close Action' dropdown menu. The 'Close Date' field is currently empty. To the right of the 'Close Date' field is a 'Reason' field with a magnifying glass icon. Below the 'Close Options' section is a 'Provider Status Discharge Notes' text area. At the bottom of the form are buttons for 'Discharge Case/Member & Member Clients' and 'Close'.

- 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**.

Case/Client Provider/Project Status Reason

Discharge Case/Members & Member Clients

3 Client(s) 4 Case(s)

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

Close Case Information - Case: 1160004

Case(s) in Which Client is a Member

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

Case Members (Clients)

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

Close Options

Close Information

Close Date 2/22/2022

Close Action ☒ Close ☐ Unclose

Case/Client Provider/Project Status Reason * DC35

Provider Status Discharge Notes

Discharge Case/Members & Member Clients

Close

3 Client(s) 4 Case(s)

- A confirmation screen will appear to discharge the case. Click **Yes** to save the discharge.
- Click **OK** on the final confirmation form.

If you need further assistance please contact ECSC Data & Web Services:

ecscdata@unm.edu