

Quick Steps

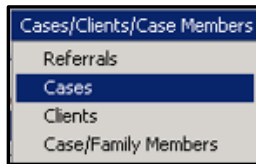
- From the top menu bar, click Cases/Clients/Case Members and select Cases
- Make sure the 'Show Closed' box in the Search Options section is checked
- Type in Case ID or a Portion of the Family's Last and/or First Name
- Press Enter or Click Search
- Select the case and Click Update
- Clear the Close Date field and Click Save
- From the Right-Hand Menu Bar, Click on the Program Status Link
- Select Admit from the Action dropdown
- Enter the Date the family returned to the program
- Click Save
- Close the Program Enrollment screen
- From the Right-Hand Menu Bar, Click on the Assignments link
- Click the Add button
- Use the magnifying glass to identify the staff member who will be assigned to the case
- Enter the date the home visitor was assigned to the case
- Click Save
- Click Close to Exit

Detailed Steps:

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

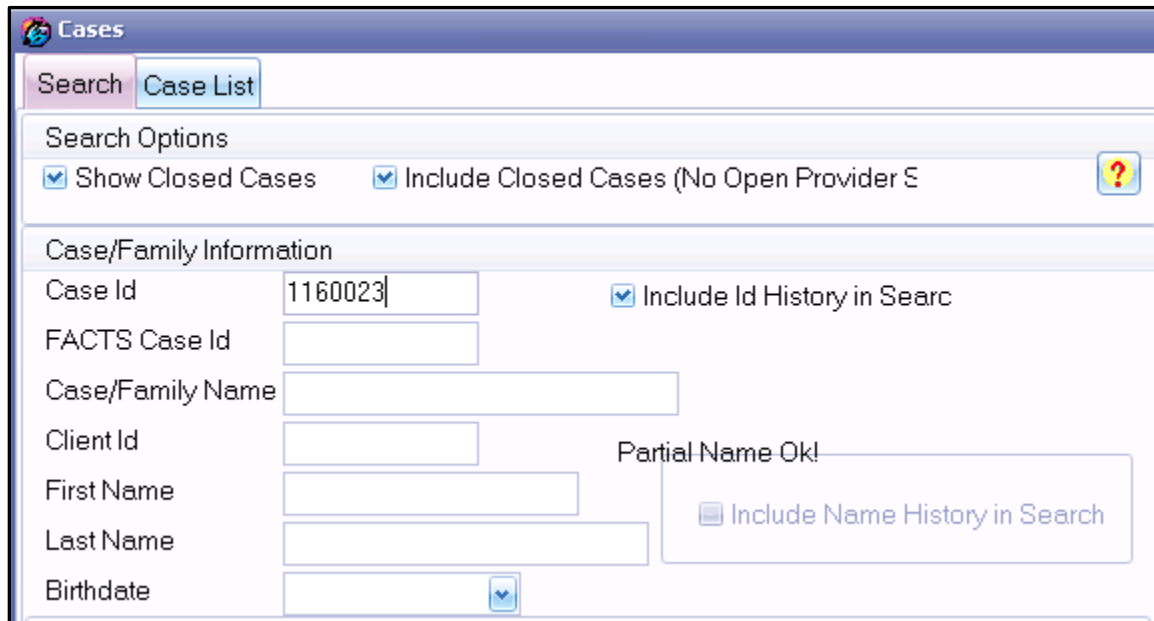


- From the top menu bar, click **Cases/Clients**, then select **Cases**.

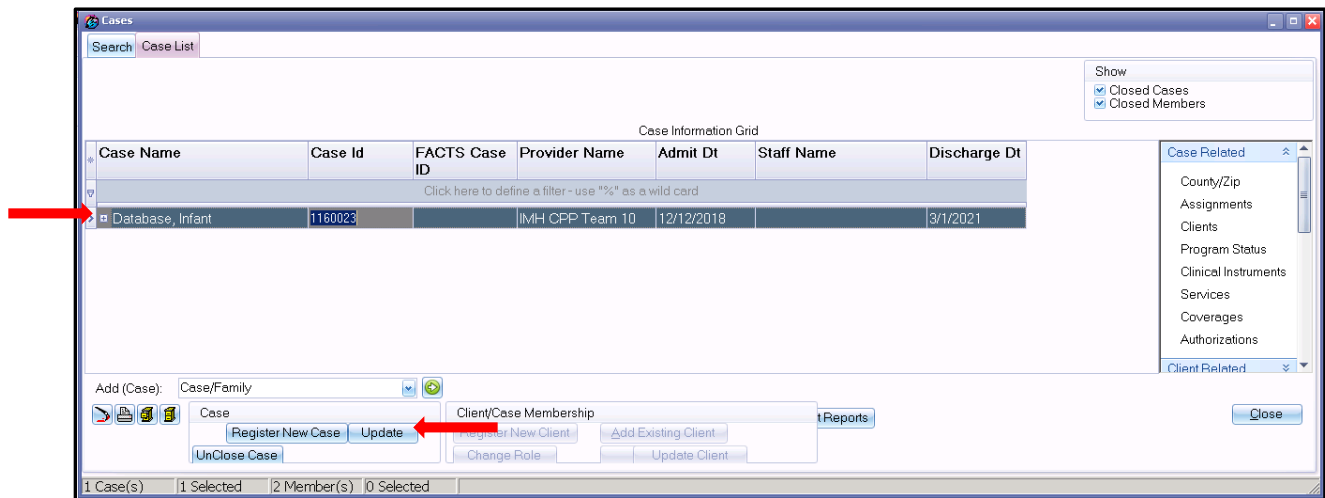


- Type in Case ID or a portion of the Family's Last and/or First Name. Press **Enter** or click **Search**.

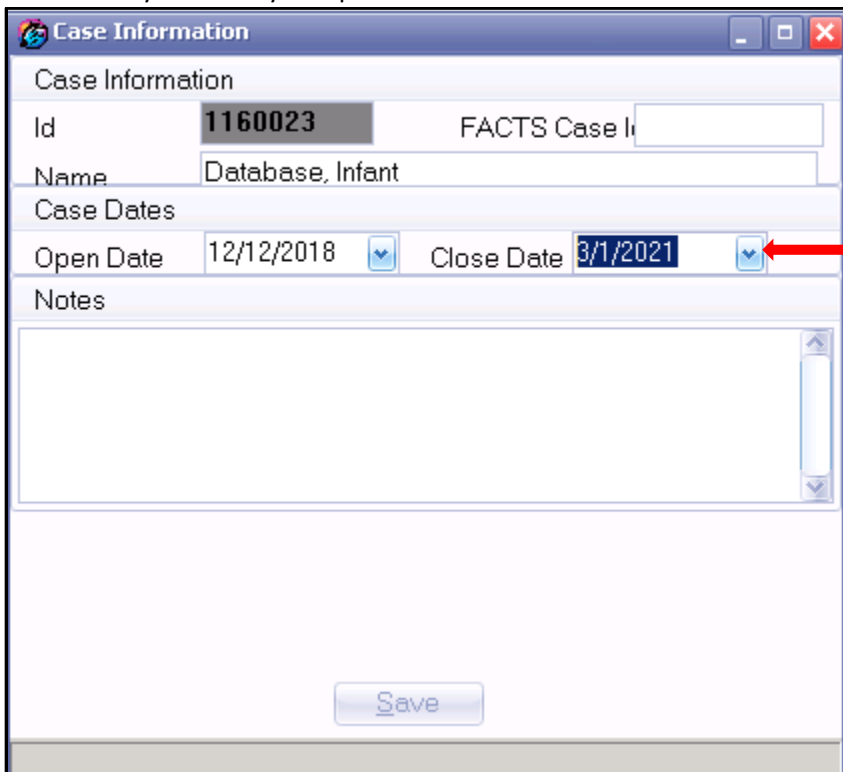
Note: If no matches were found, you will receive a message box indicating "No Cases Matched Simple Search Criteria". Click **OK**. Click **Clear Search Criteria** and modify the entered values.



- Select the appropriate case, click **Update**.

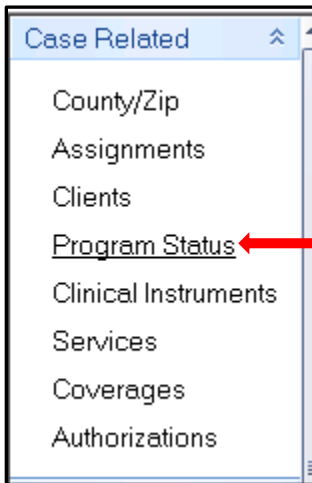


- The close date field needs to be cleared. Highlight the entry and press delete or backspace to clear it. Alternatively, you can also use the dropdown arrow and then click **Clear**. A note may be added to indicate why the family re-opened. Click **Save**.



The screenshot shows the 'Case Information' form. It has several fields: 'Id' (1160023), 'Name' (Database, Infant), 'Open Date' (12/12/2018), and 'Close Date' (3/1/2021). A red arrow points to the 'Close Date' field. Below these fields is a 'Notes' section with a text area. At the bottom, there is a 'Save' button.

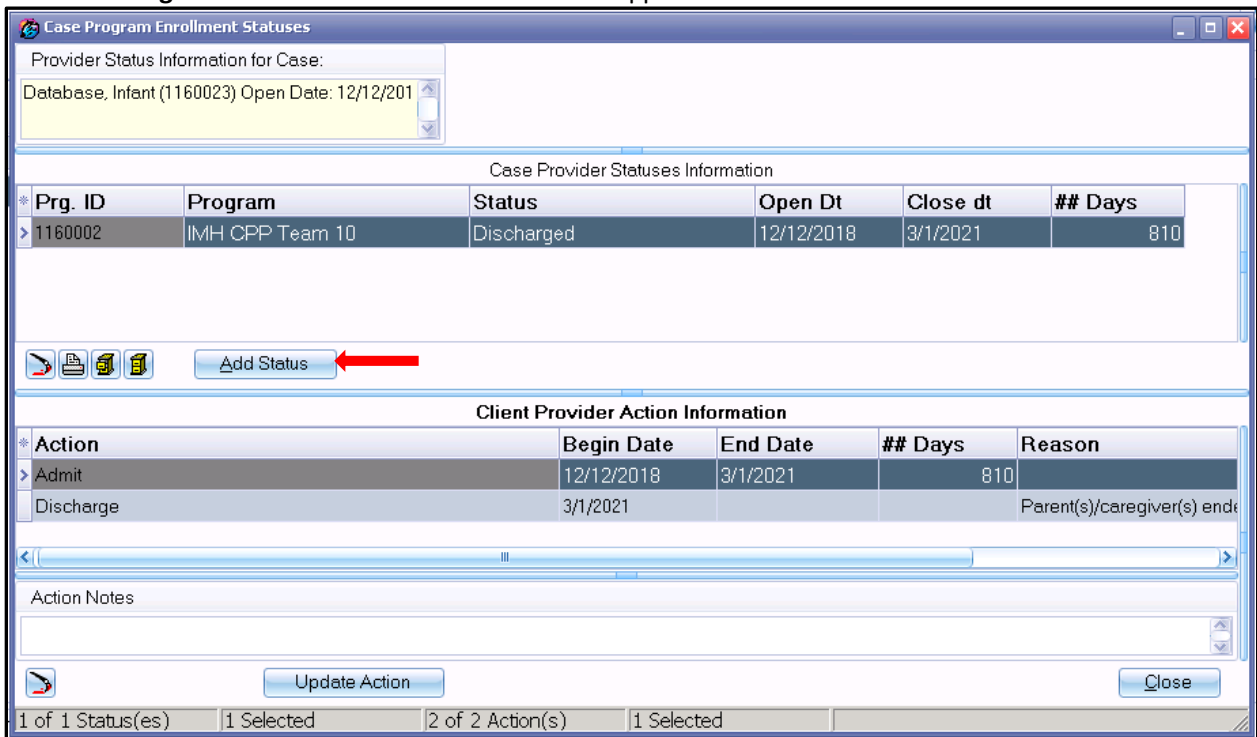
- To re-open the program status, click on the **Program Status** link from the right-hand menu bar.



Case Related

- County/Zip
- Assignments
- Clients
- Program Status**
- Clinical Instruments
- Services
- Coverages
- Authorizations

7. The **Case Program Enrollment Statuses** screen will appear. Click on **Add Status**.



Case Program Enrollment Statuses

Provider Status Information for Case:

Database, Infant (1160023) Open Date: 12/12/201

Case Provider Statuses Information					
* Prg. ID	Program	Status	Open Dt	Close dt	## Days
> 1160002	IMH CPP Team 10	Discharged	12/12/2018	3/1/2021	810


 Add Status

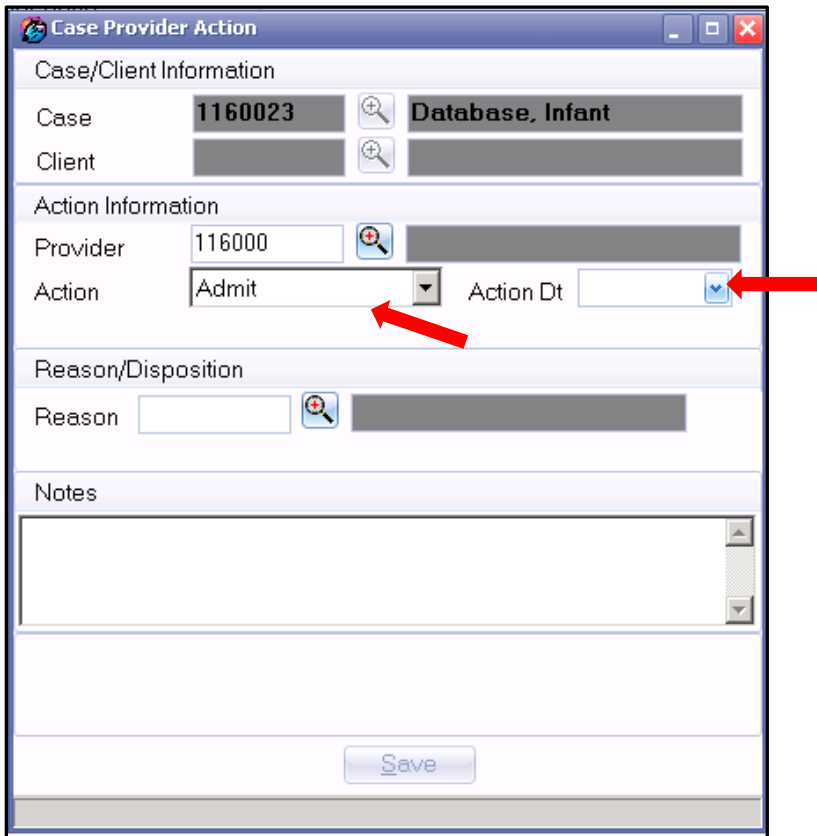
Client Provider Action Information				
* Action	Begin Date	End Date	## Days	Reason
> Admit	12/12/2018	3/1/2021	810	
Discharge	3/1/2021			Parent(s)/caregiver(s) end

Action Notes


 Update Action
 Close

1 of 1 Status(es) | 1 Selected | 2 of 2 Action(s) | 1 Selected

8. The **Case Provider Action** screen will appear. Select **Admit** from the **Action** dropdown menu. Enter the **Action Date** (date the family re-entered the program). Enter Reason (if applicable). Click **Save**.



Case Provider Action

Case/Client Information

Case: 1160023 Database, Infant

Client:

Action Information

Provider: 116000

Action: Admit Action Dt:

Reason/Disposition

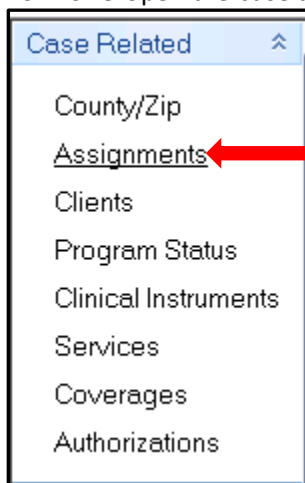
Reason:

Notes

Save

9. Click **Close** to exit the Case Program Enrollment Services screen.

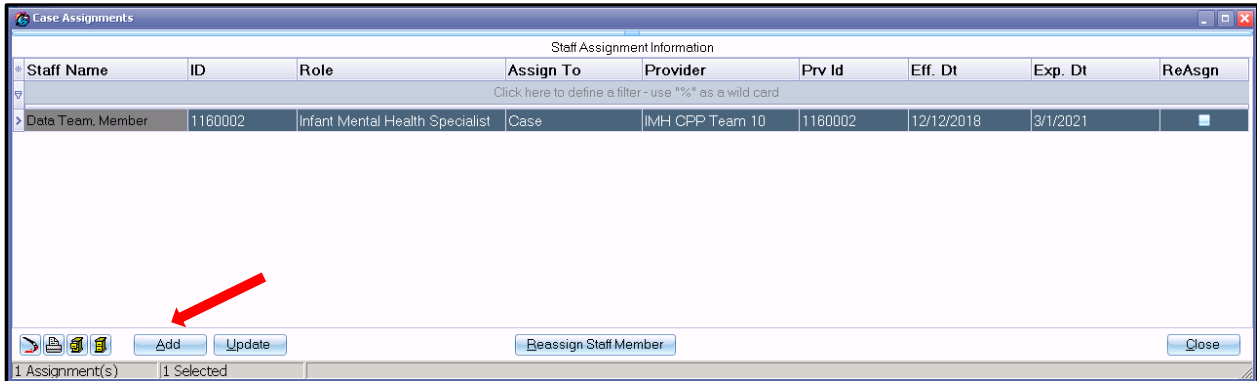
10. To re-open the case assignment, click on the **Assignments** link from the right-hand menu bar.



Case Related

- County/Zip
- Assignments
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- Services
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- Authorizations

11. The **Case Assignments** screen will appear. Click the **Add** button.

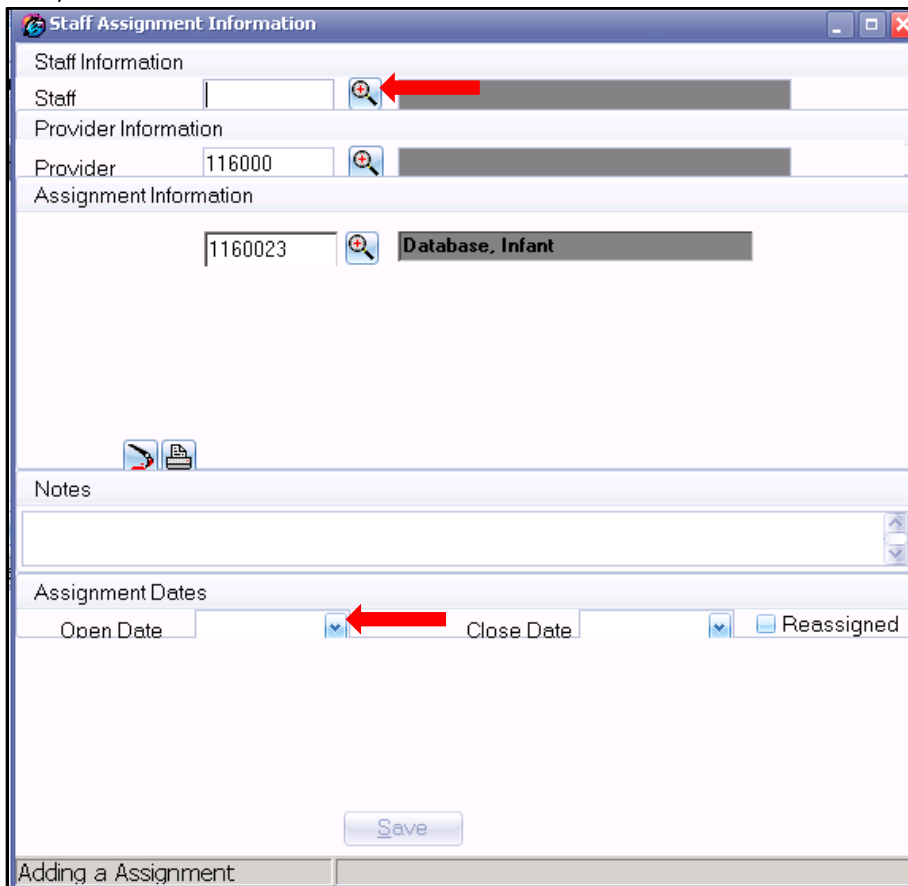


The screenshot shows the 'Case Assignments' window with a table of staff assignments. A red arrow points to the 'Add' button in the bottom toolbar.

Staff Name	ID	Role	Assign To	Provider	Prv Id	Eff. Dt	Exp. Dt	ReAsgn
Data Team, Member	1160002	Infant Mental Health Specialist	Case	IMH CPP Team 10	1160002	12/12/2018	3/1/2021	☐

Buttons at the bottom: Add, Update, Reassign Staff Member, Close.

12. The **Staff Assignment Information** screen will appear. Use the magnifying glass to select the staff member who will be assigned to the case. Enter the Open Date (date the home visitor is assigned to the case). Click **Save**.



The screenshot shows the 'Staff Assignment Information' window. Red arrows point to the magnifying glass icons for selecting staff and provider, and to the Open Date dropdown.

Staff Information: Staff [] [Magnifying Glass]

Provider Information: Provider 116000 [Magnifying Glass]

Assignment Information: 1160023 [Magnifying Glass] Database, Infant

Notes: [Text Area]

Assignment Dates: Open Date [] [Dropdown Arrow] Close Date [] [Dropdown Arrow] Reassigned ☐

Save

Adding a Assignment

13. Click **Close** to exit. The case will now show on the home visitor's Case List.

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

ecscdata@unm.edu