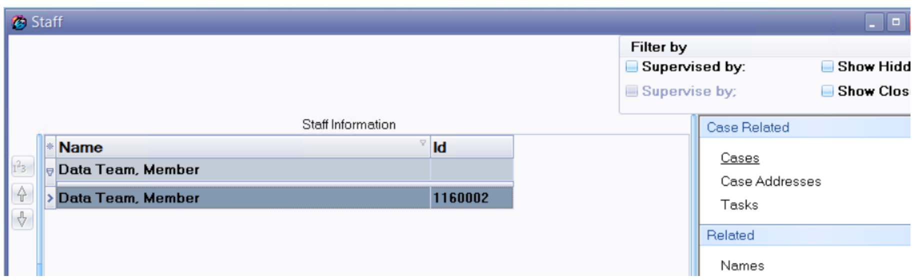
Quick Steps

- 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

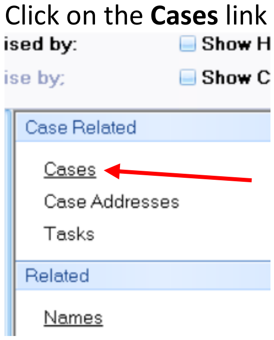
***Note: Case holder will be child client. Each child client will be a case.**

Detailed Steps:

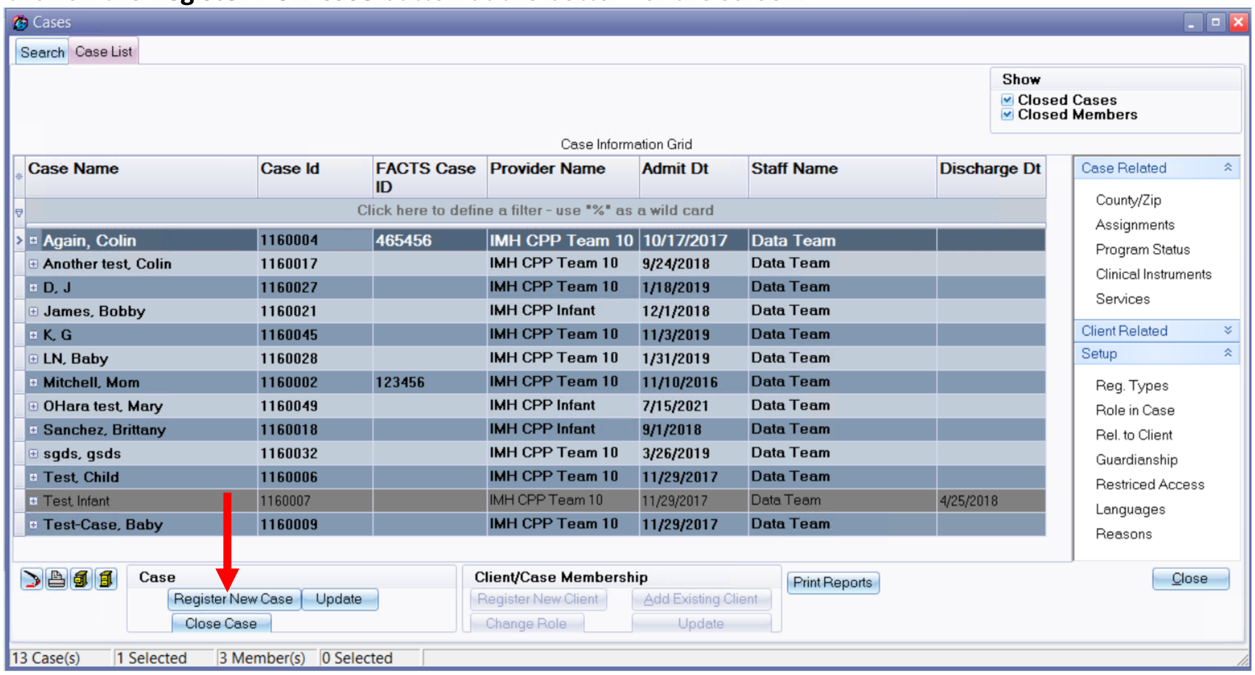
1. After logging into the database, the Staff window appears and the system identifies your name on the staff list.



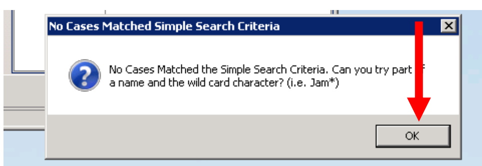
2. Click on the **Cases** link (on the side menu bar) to get to your open case list.



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



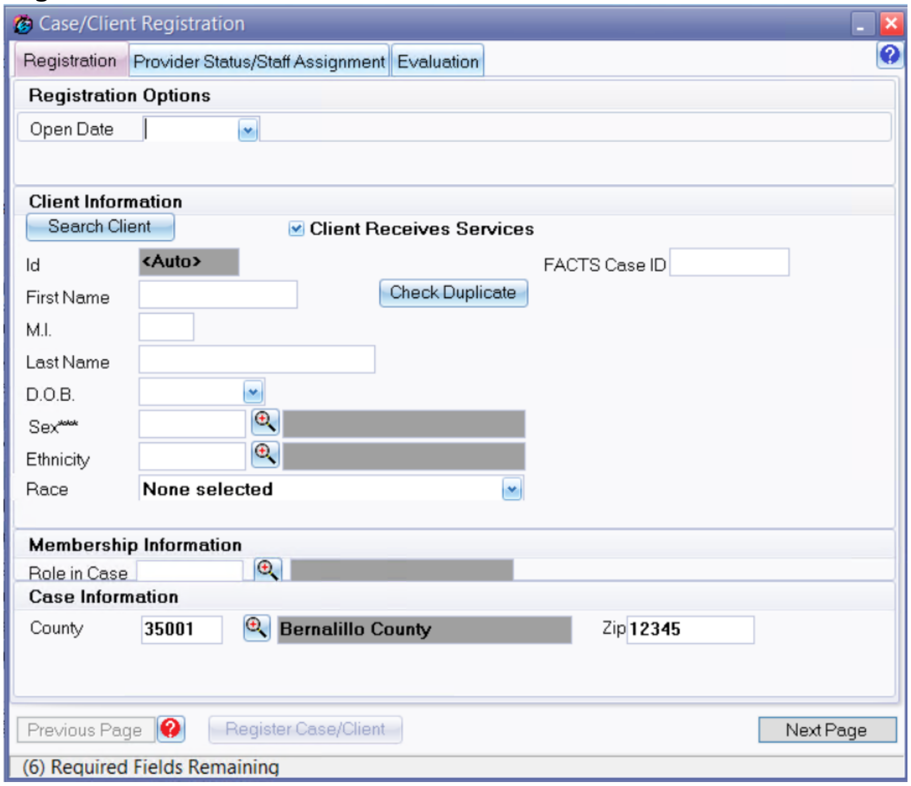
Note: If you do not have any open cases, you will get a screen like this. Click **OK**.



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

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**.

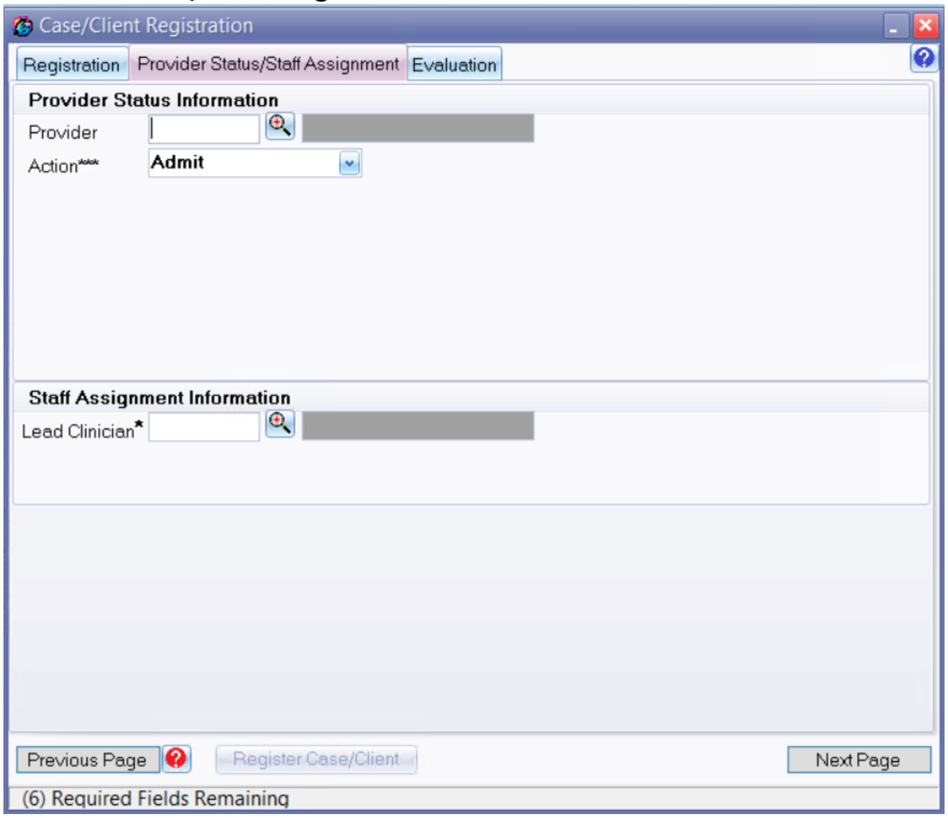
5. **Registration Tab**



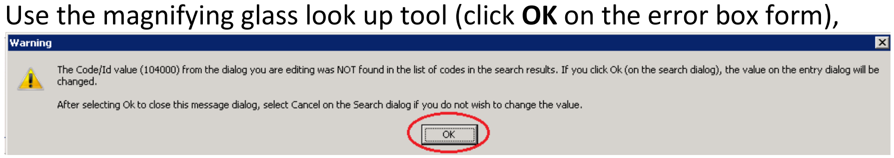
Open Date	Type in the date the client started services.
FACTS Case ID	Enter the 6-digit FACTS Case ID that will be assigned to the case holder.
Name	Type in the first name, middle initial and last name in the corresponding fields.
D.O.B	Type in the client's date of birth.
Sex	Type in **M**ale or **F**emale 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 Use the magnifying glass look up tool (click **OK** on the error box form),

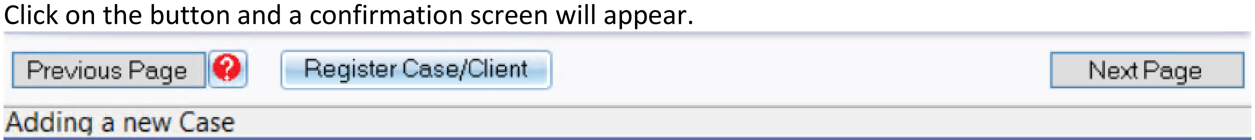


select the correct provider option, and click **OK.**

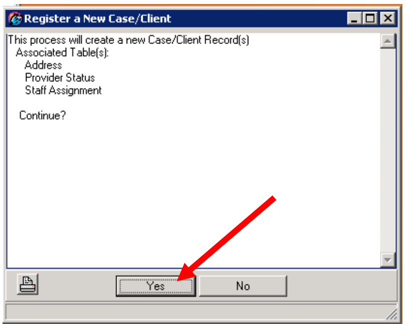
Action Admit will auto-populate.

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

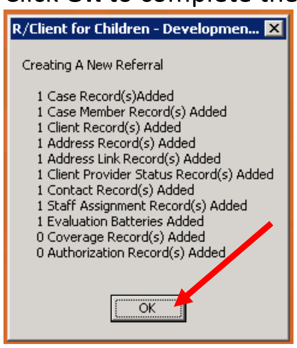
7. When the required information has been completed, the **Register Case/Client** button will light up. Click on the button and a confirmation screen will appear.



8. Click **Yes** to create the case.



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



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