

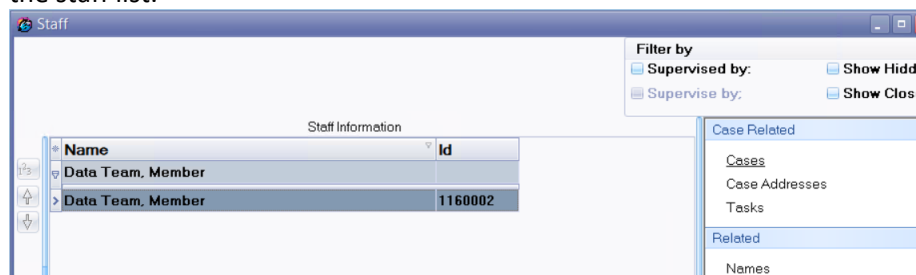
Quick Steps

- 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

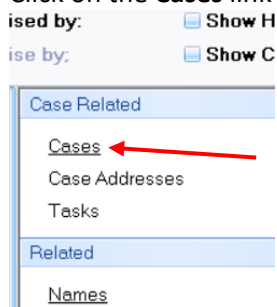
***Note: Case holder will be child client. Each child client will be a case.**

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.



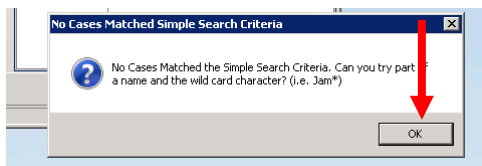
- Click on the **Register New Case** button at the bottom of the screen.

The screenshot shows the 'Cases' window with a table of case information. A red arrow points to the 'Register New Case' button at the bottom left of the window.

Case Name	Case Id	FACTS Case ID	Provider Name	Admit Dt	Staff Name	Discharge Dt
Again, Colin	1160004	465456	IMH CPP Team 10	10/17/2017	Data Team	
Another test, Colin	1160017		IMH CPP Team 10	9/24/2018	Data Team	
D, J	1160027		IMH CPP Team 10	1/18/2019	Data Team	
James, Bobby	1160021		IMH CPP Infant	12/1/2018	Data Team	
K, G	1160045		IMH CPP Team 10	11/3/2019	Data Team	
LN, Baby	1160028		IMH CPP Team 10	1/31/2019	Data Team	
Mitchell, Mom	1160002	123456	IMH CPP Team 10	11/10/2016	Data Team	
OHara test, Mary	1160049		IMH CPP Infant	7/15/2021	Data Team	
Sanchez, Brittany	1160018		IMH CPP Infant	9/1/2018	Data Team	
sgds, gsds	1160032		IMH CPP Team 10	3/26/2019	Data Team	
Test, Child	1160006		IMH CPP Team 10	11/29/2017	Data Team	
Test Infant	1160007		IMH CPP Team 10	11/29/2017	Data Team	4/25/2018
Test-Case, Baby	1160009		IMH CPP Team 10	11/29/2017	Data Team	

Buttons at the bottom: Case (Register New Case, Update, Close Case), Client/Case Membership (Register New Client, Add Existing Client, Change Role, Update), Print Reports, Close.

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 Registration

Registration | Provider Status/Staff Assignment | Evaluation

Registration Options

Open Date

Client Information

Search Client ☒ Client Receives Services

Id FACTS Case ID

First Name

M.I.

Last Name

D.O.B.

Sex

Ethnicity

Race

Membership Information

Role in Case

Case Information

County Zip

Previous Page

(6) Required Fields Remaining

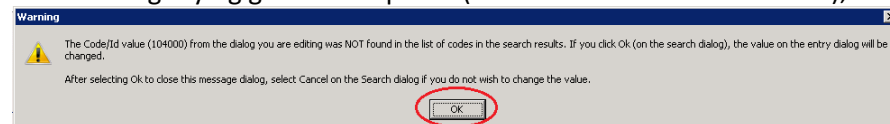
- Open Date** Type in the date the client started services.
- FACTS Case ID** Enter the 6-digit FACTS Case ID that will be assigned to the case holder.
- Name** Type in the first name, middle initial and last name in the corresponding fields.
- D.O.B** Type in the client's date of birth.
- Sex** Type 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

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



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

Action

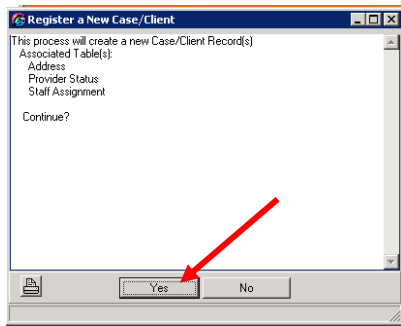
Admit will auto-populate.

Lead Clinician

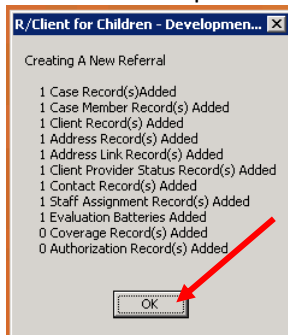
Use the magnifying glass look up tool to select a staff member, select, and click **OK**.

- 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.

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



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



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

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