

## Quick Steps

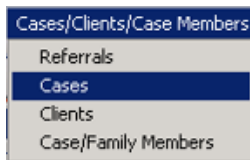
- From the top menu bar, click Cases/Clients/Case Members and select Cases
- Make sure the 'Show Closed' box in the Search Options section is checked
- Type in Case ID or a Portion of the Family's Last and/or First Name
- Press Enter or Click Search
- Select the case and Click Update
- Clear the Close 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.

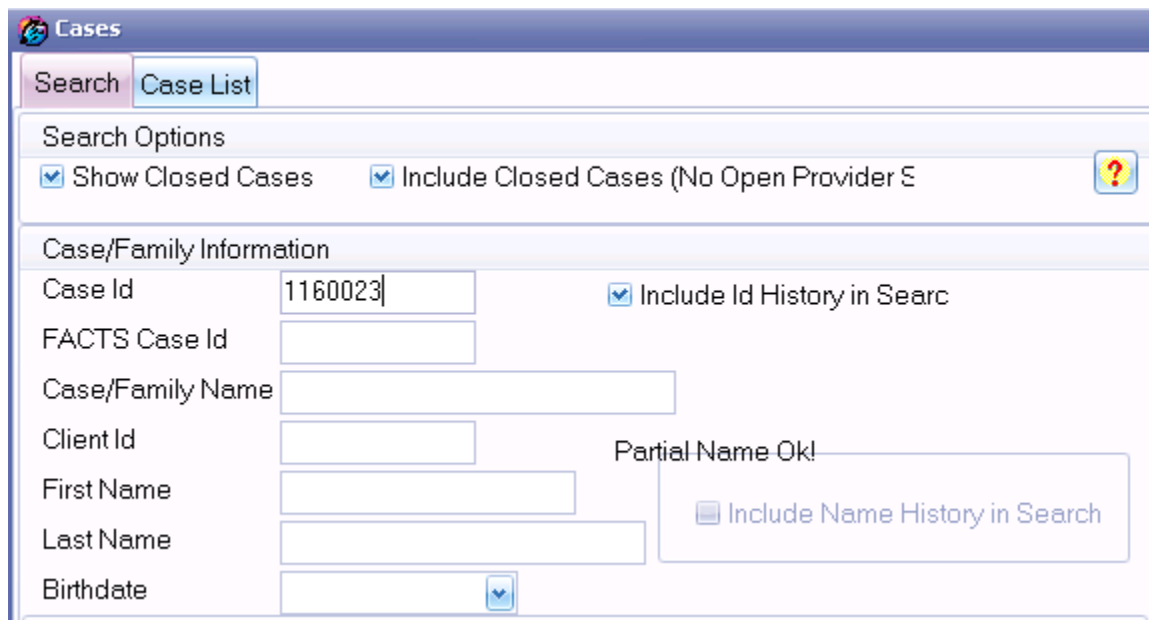


- From the top menu bar, click **Cases/Clients**, then select **Cases**.

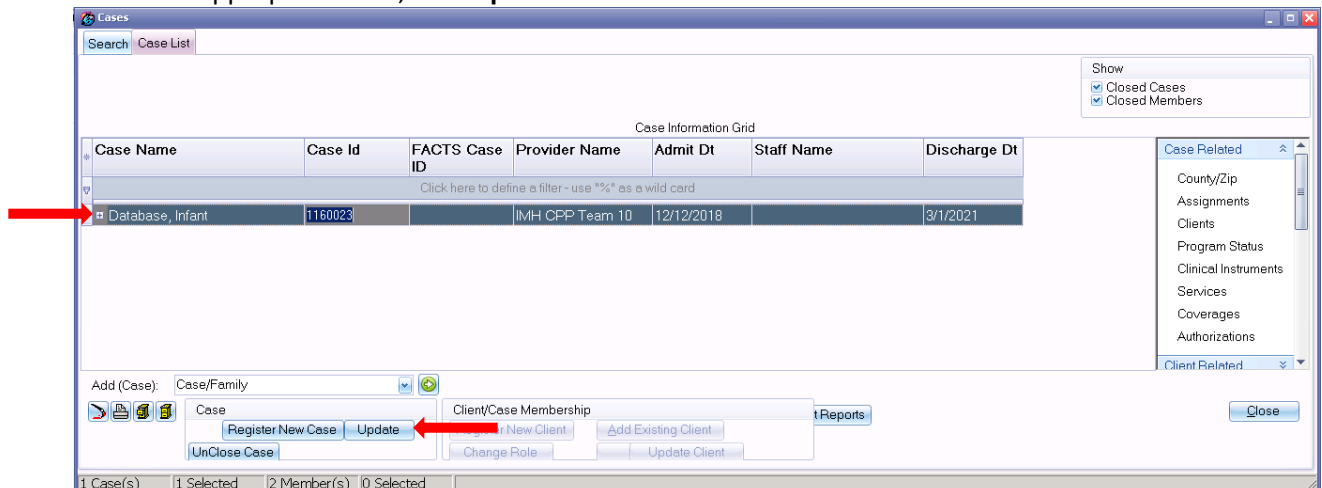


- Type in Case ID or a portion of the Family's Last and/or First Name. Press **Enter** or click **Search**.

**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.

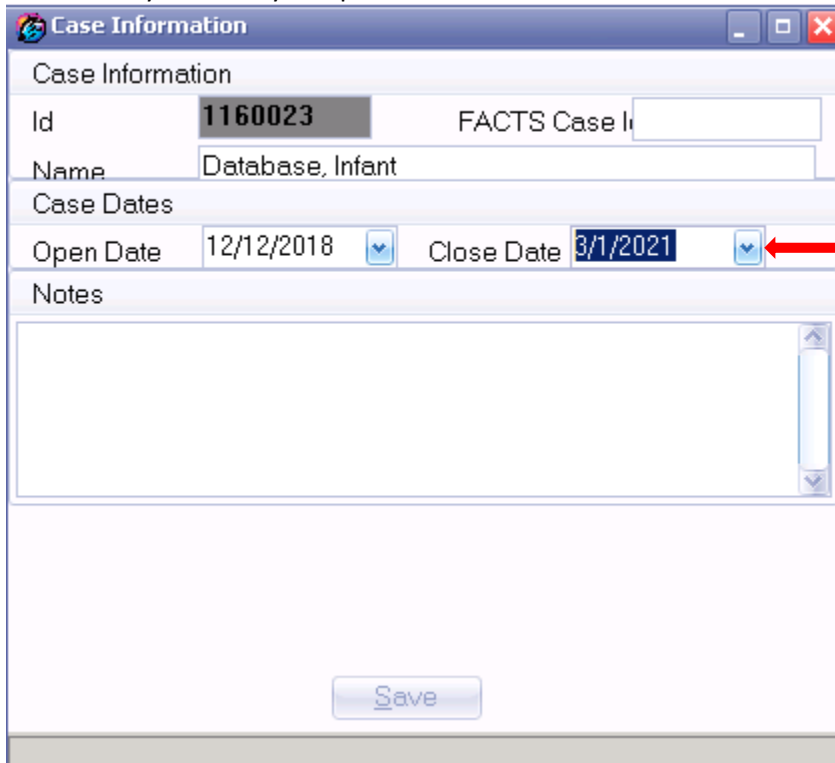


- Select the appropriate case, click **Update**.



Case Name	Case Id	FACTS Case ID	Provider Name	Admit Dt	Staff Name	Discharge Dt
Database, Infant	1160023		IMH CPP Team 10	12/12/2018		3/1/2021

- 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**.

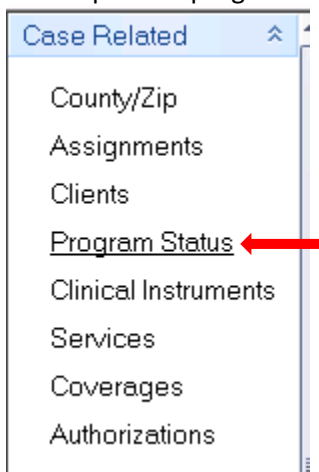


The screenshot shows a 'Case Information' window with the following fields:

- Id:** 1160023
- Name:** Database, Infant
- Open Date:** 12/12/2018
- Close Date:** 3/1/2021 (highlighted with a red arrow pointing to the dropdown arrow)

There is a 'Save' button at the bottom of the window.

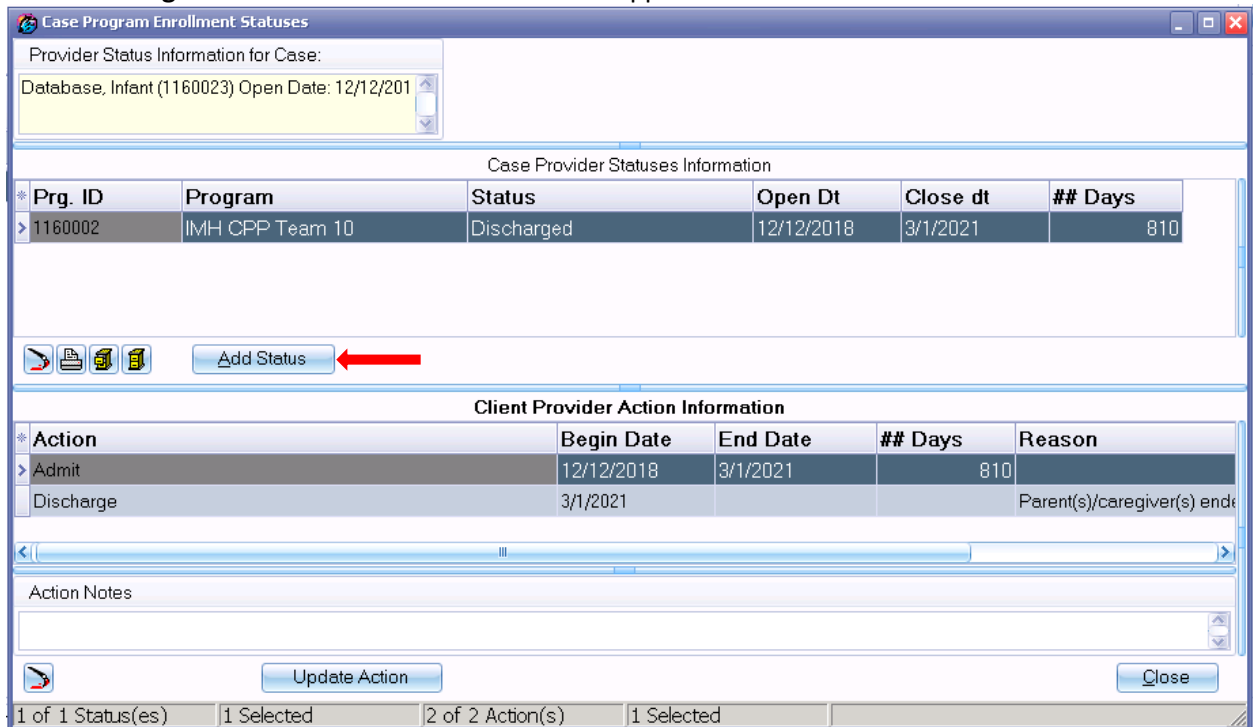
- To re-open the program status, click on the **Program Status** link from the right-hand menu bar.



The screenshot shows a 'Case Related' menu bar with the following items:

- County/Zip
- Assignments
- Clients
- Program Status** (highlighted with a red arrow)
- Clinical Instruments
- Services
- Coverages
- Authorizations

- 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

- 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/Client Information

Case 1160023 Database, Infant

Client [Redacted]

Action Information

Provider 116000 [Redacted]

Action Admit Action Dt [Redacted]

Reason/Disposition

Reason [Redacted]

Notes

Save

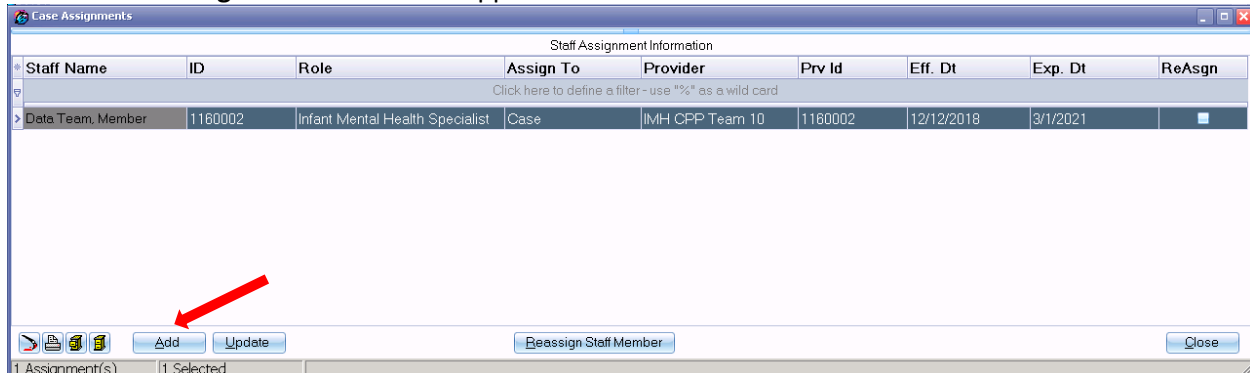
9. Click **Close** to exit the Case Program Enrollment Services screen.

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

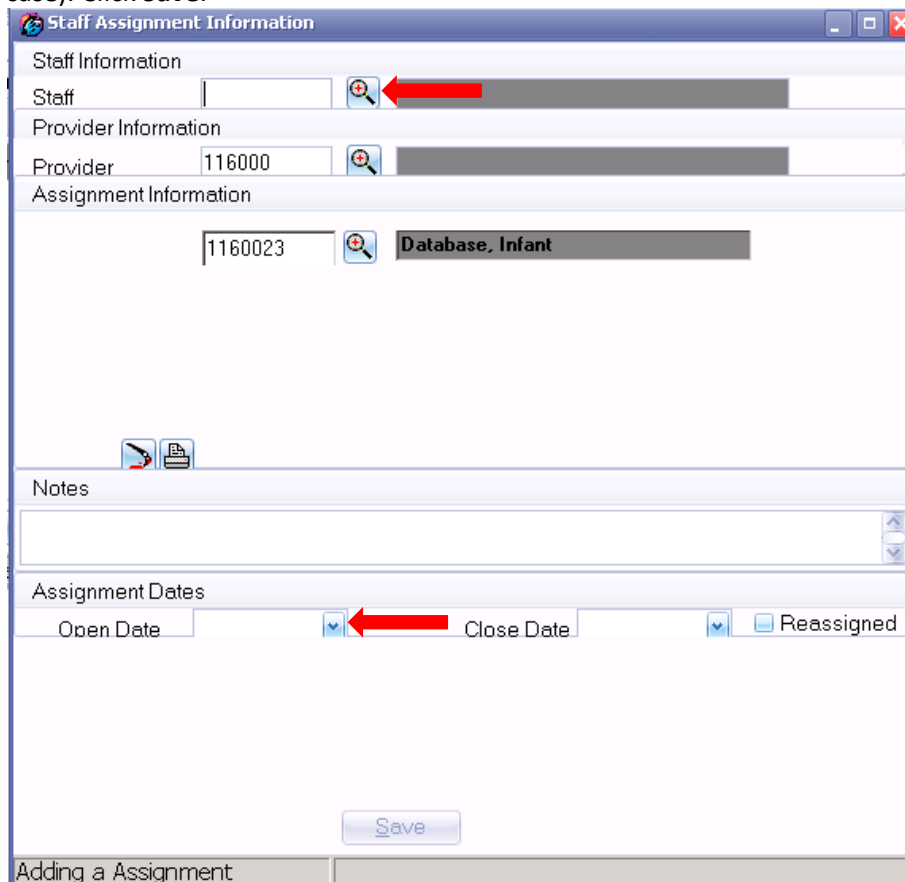
Case Related

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

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



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**.



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

If you need further assistance please contact the ECSC Database Services Team:

[ecscdata@unm.edu](mailto:ecscdata@unm.edu)

Local: 505-277-0469

Toll Free: 855-663-2821