

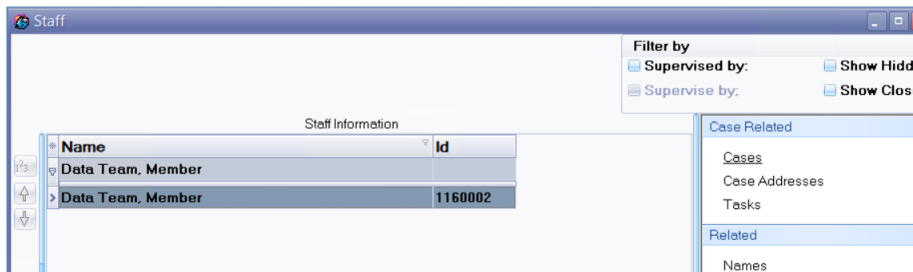
Quick Steps

- Open the Case List Screen (if you are not already in it)
- Click on the + Sign to the Left of the Case you are Adding a Client to
- Click the Register New Client Button
- Type in the Client Information (you can use the magnifying glass tool for drop down options)
- Click Save

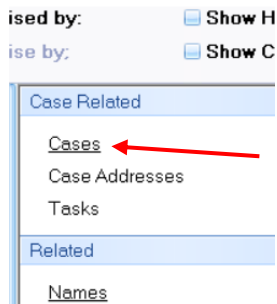
***If client already exists in the database under a Child Case, skip to Add Existing Client Tip Sheet**

Detailed Steps:

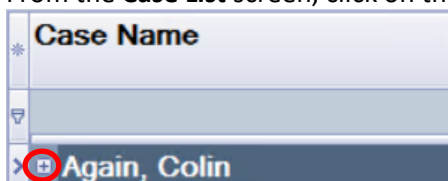
1. After logging into the database, the Staff window appears and the system identifies your name on the staff list.



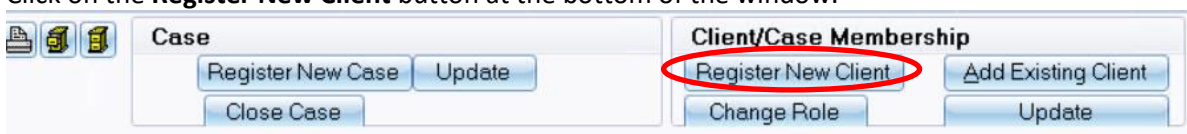
2. Click on the **Cases** link (on the side menu bar) to get to your open case list.



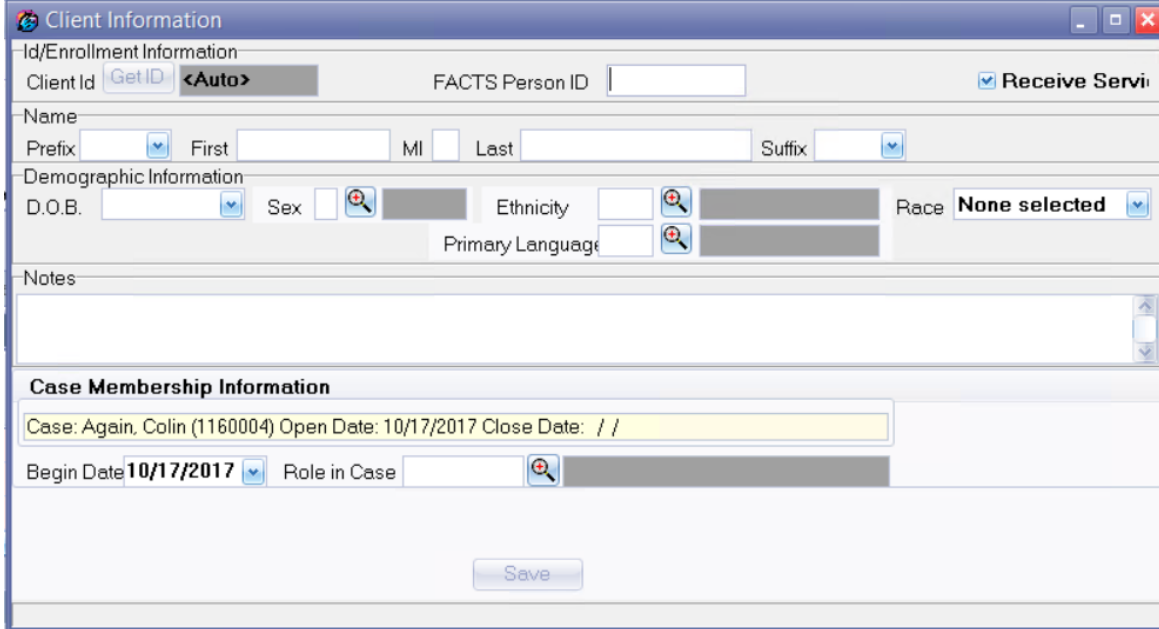
3. From the **Case List** screen, click on the + sign to the left of the case that you want to add clients to.



4. Click on the **Register New Client** button at the bottom of the window.

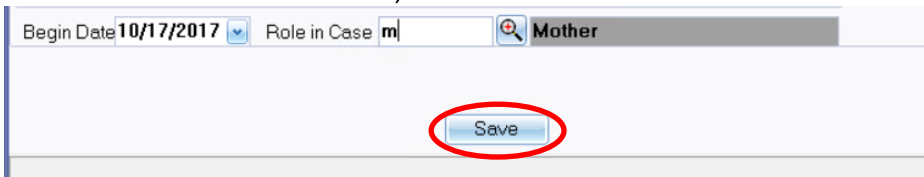


5. The **Client Information** form will open. Enter the client information for the fields indicated below.

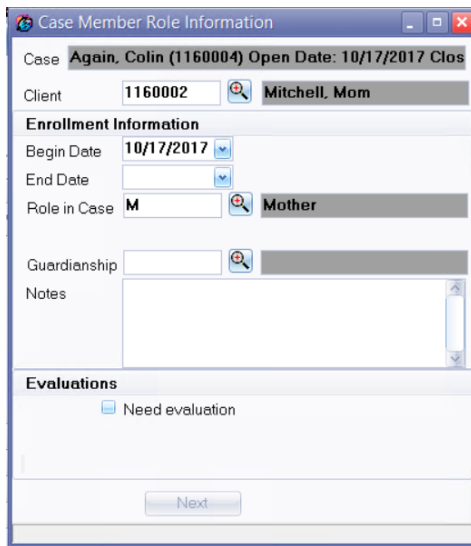


- FACTS Person ID** Enter the 7-digit FACTS Person ID that will be assigned to the client.
- Name** Type in the first name, middle initial and last name in the corresponding fields. (If a Prefix or Suffix are available, please use the drop down arrow for options).
- D.O.B** Type in the client's date of birth (ex: MM/DD/YY or MM/DD/YYYY) or use the dropdown tool to access calendar.
- Sex** Type in **Male** or **Female** or use the magnifying glass look up tool to select sex, select, and click **OK**.
- Race** Utilize the drop-down to select the client's race.
- Ethnicity** Use the magnifying glass look up tool to select the correct ethnicity option, select, and click **OK**.
- Primary Language** Use the magnifying glass look up tool to select the correct language option, select, and click **OK**.
- Begin Date** Enter the date the client became active in the case.
- Role in Case** Use the magnifying glass look up tool to select the role in the case, select, and click **OK**.

Once all of the fields are entered, click the **Save** button to save the new client.



The **Case Member Role information** window will open. Verify and then enter the case member information for the fields indicated below.



The screenshot shows a web form titled "Case Member Role Information". At the top, it displays "Case Again, Colin (1160004) Open Date: 10/17/2017 Clos". Below this, the "Client" field contains "1160002" and "Mitchell, Mom". The "Enrollment Information" section includes "Begin Date" set to "10/17/2017", an empty "End Date" field, and "Role in Case" set to "M" with "Mother" listed. There is also a "Guardianship" field with a search icon and a "Notes" text area. The "Evaluations" section has a checkbox labeled "Need evaluation" which is currently unchecked. A "Next" button is located at the bottom of the form.

- Begin Date** Verify this information.
- Role in Case** Verify this information.
- Guardianship** If the client is the guardian, select Guardian by using the magnifying look-up tool.

Click **Next**.

Note: If there is more than one client in the case, then add each new or existing client (e.g., father, grandparents, foster care, etc.) by following the detailed steps listed in each applicable tip sheet(s).

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

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