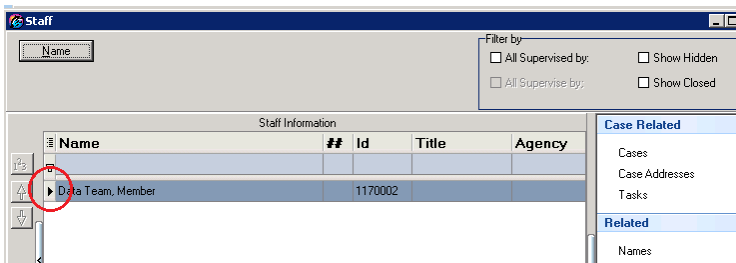


Quick Steps

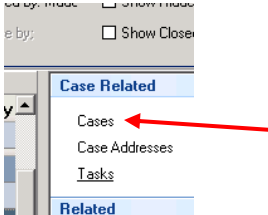
- Open the Case List Screen (if you are not already in it)
- Select the Case you Want to Discharge
- Click Discharge Case Button
- Enter the Discharge Date
- Select the Reason for Discharge under the drop down menu next to Reason Field
- Click the Discharge Case/Members & Member Clients Button
- Click Yes to Save Discharge
- Click OK

Detailed Steps:

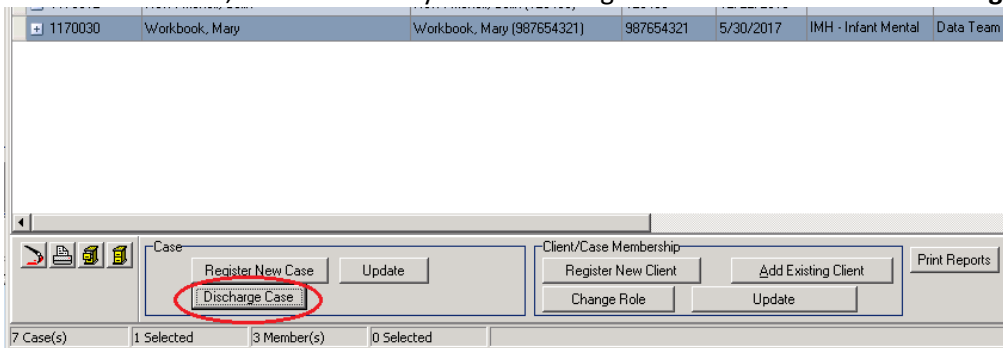
1. After logging into the database, the Staff window appears and the system identifies your name on the staff list.



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



3. Under the case list, select the case you are wanting to close. Then click the **Discharge Case** button.



- In this form, navigate to the **Close Date** field and enter the date the case was discharged by either typing the information or using the drop down menu tool to access calendar.

Close Case Information - Case: 1030320

Case Name	Case Id	Close Dt
Schmoe, Joe	1030320	

Client Name	Client Id	Role	Eff. Dt	Exp. Dt	Case related
Joe Schmoe	1030320	Mother	9/15/2016		Status

Close Options:
Close Information
Close Date (dropdown)
Close Action: Close Unclose

Check All UnCheck All Client Service
 Members Contacts
 Addresses Assignments
 Service Plans Delete Future Evaluations
 UnCheck Rcv. Svcs. Delete Future Items

- In the same form, navigate to the **Reason** field and use the magnifying glass tool to select the reason you are discharging the case, select, and click **OK**.

Client Demographic: Contacts, Addresses, Assignments, UnCheck Rcv. Svcs.

Case/Client Provider/Project Status: Provider, Service Plans, Delete Future Items

Reason (dropdown with magnifying glass)

Provider Status Discharge Notes

Discharge Case/Members & Member Clients Close

3 Client(s) 2 Case(s)

- Click the **Discharge Case/Members & Member Clients** button at the bottom of the screen.

Discharge Case/Members & Member Clients

3 Client(s) 2 Case(s)

- A confirmation screen will appear to discharge the case. Click **Yes** to save the discharge.
- Click **OK** on the final confirmation form.

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

ecscdata@unm.edu

Local: (505) 277-0469

Toll Free: (855) 663-2821