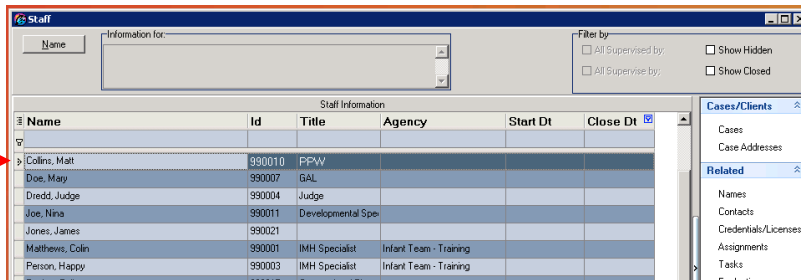


Quick Steps

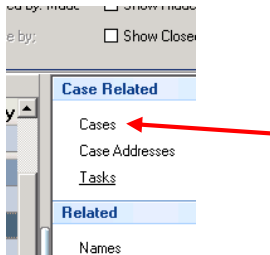
- Open the Case List Screen (if you are not already in it)
- Click on the + Sign to the Left of the Case you are Working on
- Double Click on the Pink Client Field you are Entering the Assessment for
- Select Rel. to Client by Using the Magnifying Glass Look up Tool
- Click OK
- Click Next

Detailed Steps:

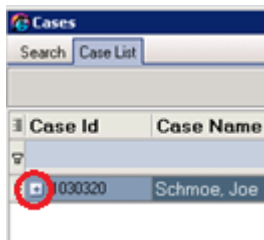
1. After logging into the database, the Staff window appears and the system identifies your name on the staff list.



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 work on.



- Under the case, double click on the client name you are wanting to add a guardianship onto.

Case Id	Case Name	Open Dt	Close Dt	Void Dt	Create Dt	Update Dt
1030320	Schmoe, Joe	9/15/2016			9/15/2016 12:00:00	

Client Id	Client	DOB	Svcs	Role Label	Relationship Label	Eff Dt	Exp Dt
1030320	Schmoe, Joe	1/1/1979	<input checked="" type="checkbox"/>	Mother		9/15/2016	

- This will open a **Case Member Role Information** screen. Click on the magnifying glass look up tool to the right of the **Rel. to Client**.

Case: [Text Box]

Client: [Text Box] [Magnifying Glass Icon]

Enrollment Information:

Begin Date: [Dropdown]

End Date: [Dropdown]

Role in Case: [Text Box] [Magnifying Glass Icon]

Rel. to Client: [Text Box] [Magnifying Glass Icon]

Select the most applicable relationship to the child and click **Ok**.

- Click **Next** to complete the process.

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

ecscdata@unm.edu

Local:

(505) 277-0469

Toll Free:

855-663-2821