

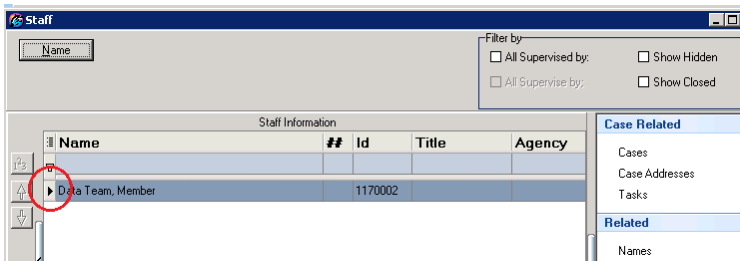
Quick Steps

- 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

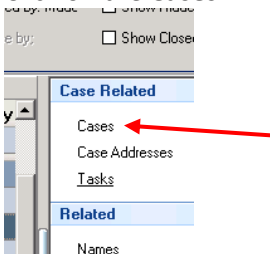
***Note: Case holder will be child client. Each child client will be a case.**

Detailed Steps:

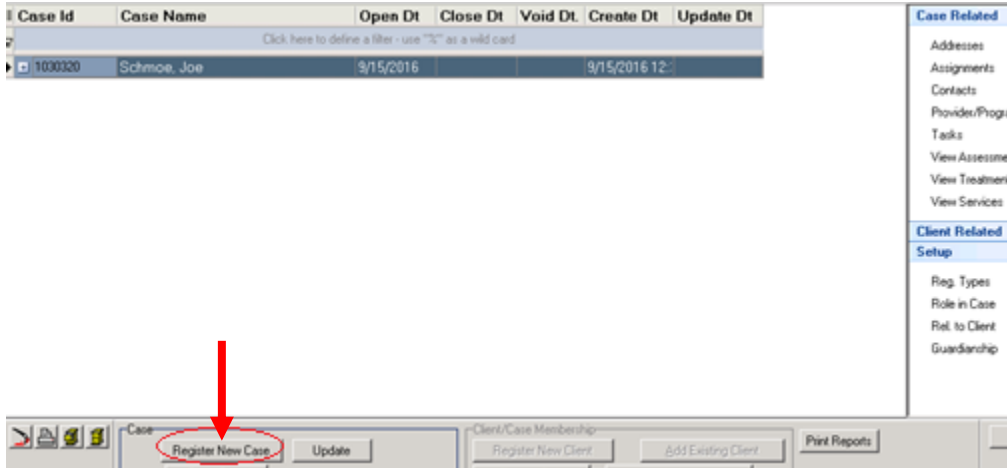
1. After logging into the database, the Staff window appears and the system identifies your name on the staff list.



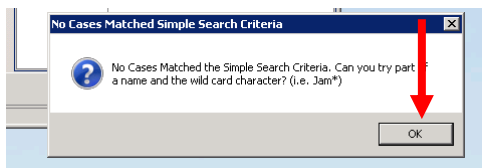
2. Click on the **Cases** link (on the side menu bar) to get to your open case list.



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



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 | Address | Provider Status/Staff Assignment

Registration Type: Case/Family Client Other

Open Date: 1/22/2018 | FACTS Case Id: []

Client Information: Search Client [] Client Receives Services

Id: <Auto> | Check Duplicate []

First Name: [] | M.I.: [] | Last Name: [] | D.O.B.: [] | Sex: [] | Ethnicity: []

Membership Information: Role in Case: c | Infant

Case Information: Id: <Auto> | Zip: [] | Name: []

Buttons: Previous Page, Register Case/Client, Next Page

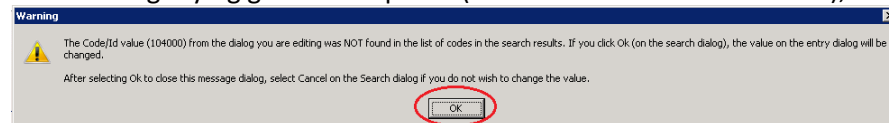
| | |
|----------------------|--|
| Open Date | Type in the date the client started services. |
| FACTS Case ID | Enter the 6-digit FACTS Case ID that will be assigned to the case holder. |
| Name | Type in the first name, middle initial and last name in the corresponding fields. |
| D.O.B | Type in 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 . |
| Role in Case | C will auto-populate, indicating the child client as the case holder. |
| 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.

Referral Source

Use the magnifying glass look to select the correct option, select, and click **OK**.

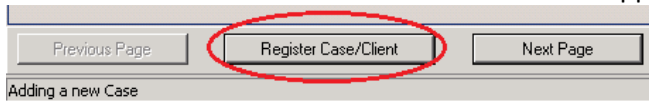
Lead Clinician

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

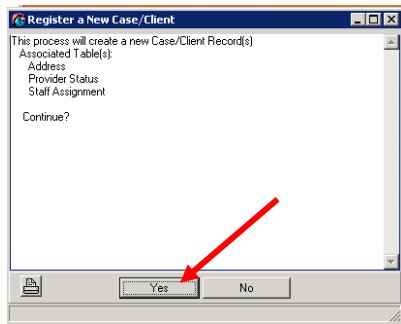
Role

Use the magnifying glass look up tool to select the correct option to specify the role the staff member will play in the case, select, and click **OK**.

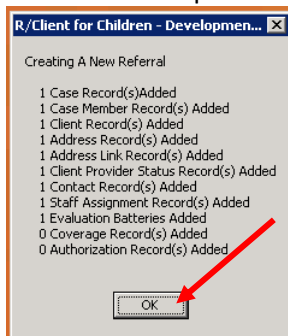
- When the required information has been completed, the **Register Case/Client** button will light up. Click on the button and a confirmation screen will appear.



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



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



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

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