

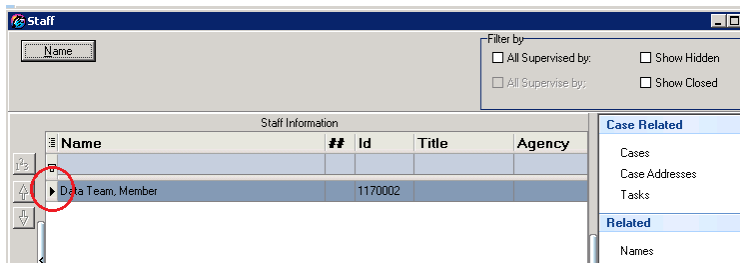
Quick Steps

- 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 an Existing Client to
- Click the Add Existing Client Button
- Type in the Existing Client ID Information (you can use the magnifying glass tool for search options)
- Type in the Additional Client Information (you can use the magnifying glass tool for drop down options)
- Click Save

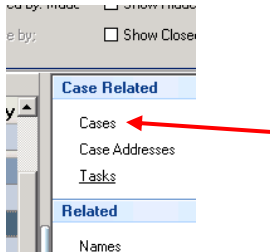
***Use this tip sheet for when a client already exists in the database under another Child Case**

Detailed Steps:

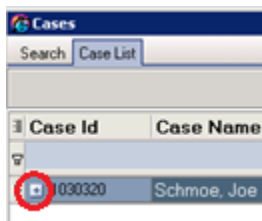
1. After logging into the database, the Staff window appears and the system identifies your name on the staff list.



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



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 **Add Existing Client** button at the bottom of the window.

The screenshot shows a software window with two main sections: 'Case' and 'Client/Case Membership'. The 'Case' section contains buttons for 'Register New Case', 'Update', and 'Discharge Case'. The 'Client/Case Membership' section contains buttons for 'Register New Client', 'Add Existing Client' (circled in red), 'Change Role', and 'Update'. Below these sections, there are status indicators: '1 Case(s)', '1 Selected', '2 Member(s)', and '0 Selected'.

5. The **Case Member Role information** window appears.

The screenshot shows the 'Case Member Role Information' window. It has a title bar with standard window controls. Below the title bar, there are fields for 'Case' (1170056) and 'Client' (1170035), each with a magnifying glass icon and a search tip. The 'Enrollment Information' section includes 'Begin Date' (11/28/2017) and 'End Date' (empty). The 'Role in Case' section has three rows: 'Role in Case' (F), 'Rel.to Client' (BF), and 'Guardianship' (G), each with a magnifying glass icon and a search tip. The 'Notes' section is empty. At the bottom, there is a 'Next' button circled in red.

- Client** Type in the Existing Client ID Information or use the magnifying glass look up tool to do a client search. Select **OK** when you have identified the existing client.
- Begin Date** Verify this information.
- Role in Case** Use the magnifying glass look up tool to select the role in the case, select, and click **OK**.
- Rel. to Client** Use the magnifying glass look up tool to select the relationship to the client, select, and click **OK**.
- 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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