Assign Staff/ Caseload

The end user enrolling a client into a program is defaulted as the "assigned staff" for that program enrollment. "Admin Admin" is the staff assigned to all migrated files. To change the assigned staff, do the following:

Make sure you are logged in as the correct agency, and access your client's program.
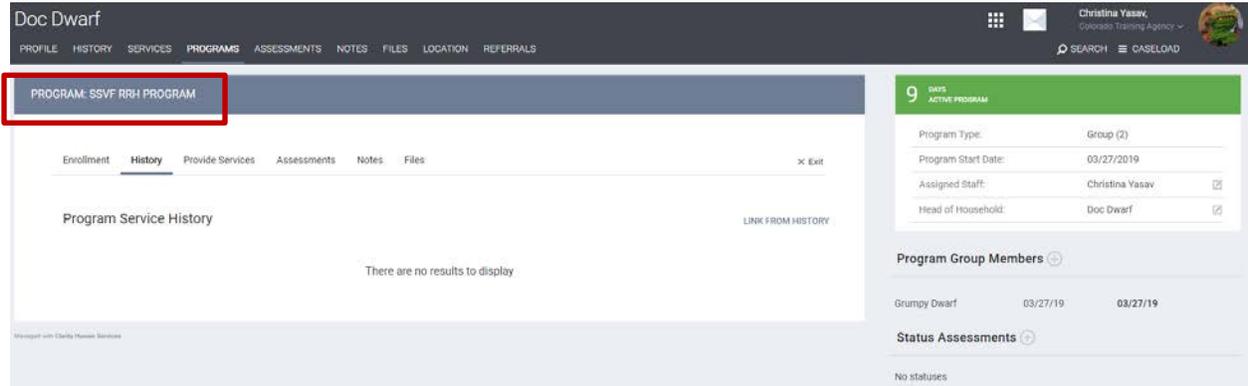
On the right side bar, click on the edit button next to the assigned staff member's name, then choose the appropriate staff member's name from the drop down list.
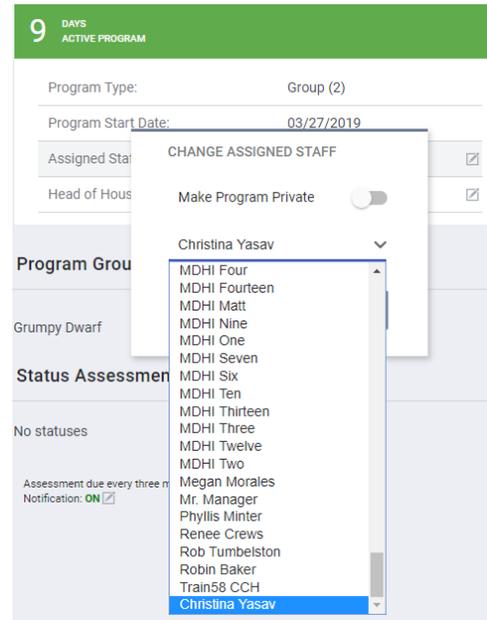
Reminder: if you see "Admin Admin" as assigned staff, the file was probably migrated from the previous database. Please reassign these if the client is still active to an actual staff member.

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Using your Caseload:

From the home screen, click on Caseload on the upper right side of the screen.
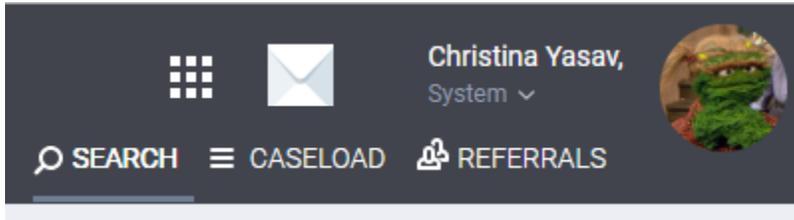
Your case load will be separated by program, if applicable. Only the HoH will show- click on the arrow next to the name to view the entire household.

You can also switch your view to show only your clients that are due for an assessment: