



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.

Doc Dwarf Profile history services programs assessments notes files location referrals			Christina Yasav, Colorado Traliang Apency ~ O SEARCH	0
PROGRAM: SSVF RRH PROGRAM		9 Астиче рязовялы		
Enrollment History Provide Services Assessments Notes Files	× Exit	Program Type Program Start Date: Assigned Staff:	Group (2) 03/27/2019 Christina Yasav	2
Program Service History There are no results to display	LINK FROM HISTORY	Head of Household: Program Group Members	Doc Dwarf	Ø
Monageri sini Earlin Yannak Raminine		Grumpy Dwarf 03/27 Status Assessments 💮	7/19 03/27/19	

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.

9 days active program	
Program Type:	Group (2)
Program Start Date:	03/27/2019
Assigned Staff:	Christina Yasav 🛛 🖉
Head of Household:	Doc Dwarf 🛛

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.

Q DAYS		
ACTIVE PROGRAM		
Program Type:	Group (2)	
Program Star <u>t Date:</u>	03/27/2019	
Assigned Stat	CHANGE ASSIGNED STAFF	Z
Head of Hous	Make Program Private	Z
Program Grou	m Grou MDHI Four	
Grumpy Dwarf	MDHI Matt MDHI Nine MDHI One MDHI Seven	
Status Assessmen	tatus Assessmen MDHI Six MDHI Ten MDHI Thirteen MDHI Three MDHI Twelve	
Assessment due every three m Notification: ON 2	MDHI Two Megan Morales Mr. Manager Phylis Minter Renee Crews Rob Tumbelston Robin Baker	
	Christina Yasav	



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.

IVE C	VE CASELOAD				
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Ρ	rogram: Coordinated Entry Program				
	Client	Start Date	Length of Stay	Household Mer	
	Finklesprout Bananacheeks	03/02/2019	1 month 3 days	2	
	Ginger Bread	10/15/2018	5 months 21 days	2	
	Abraham Rudder	11/15/2018	4 months 21 days	2	
Ø	Buffy Summers	01/14/2019	2 months 22 days	2	
Ρ	Program: Emergency Shelter Night-by-Night Program				
	Client	Start Date	Length of Stay	Household Men	
	Candy Cane	09/27/2018	6 months 9 days	1	

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

ACTIVE CASELOAD	STATUS DUE	CASE MANAGER
ACTIVE CASELOAD		