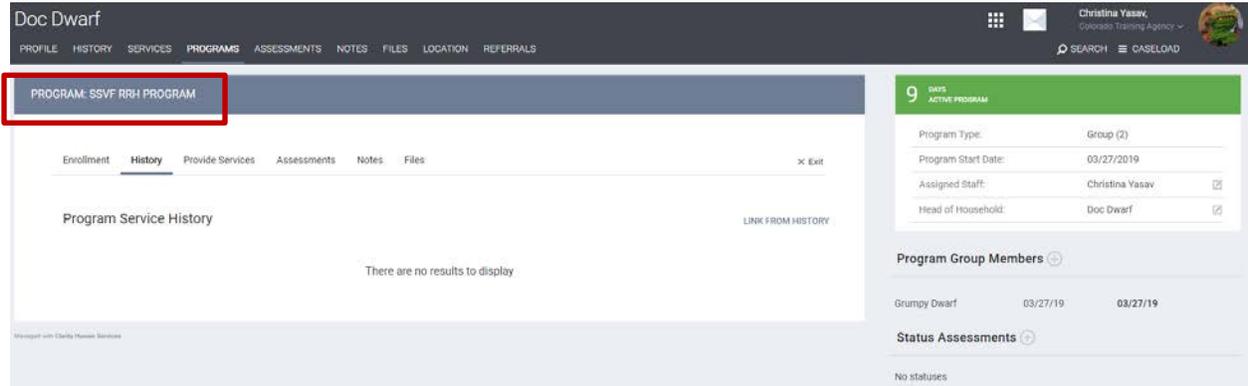




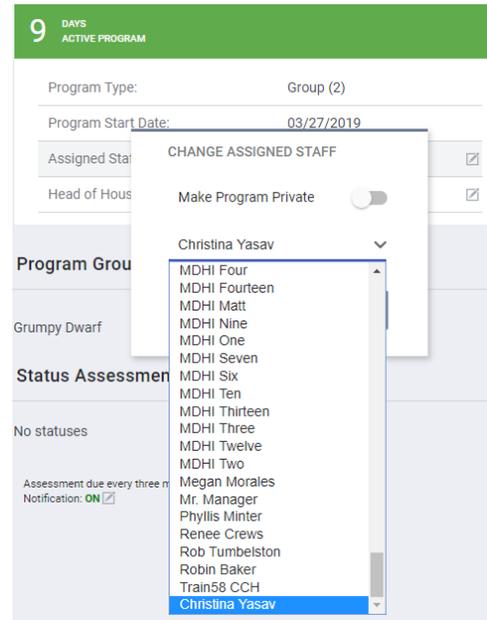
Assign Staff/ Caseload

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.

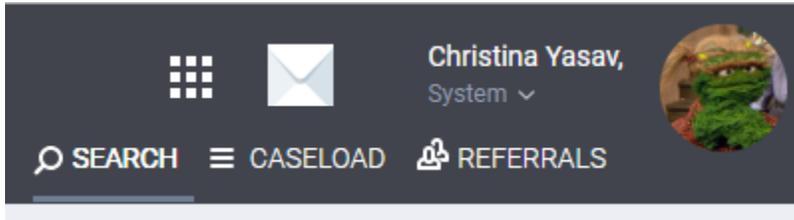


Reminder: if you see “Admin Admin” as assigned staff, the file was probably migrated from the previous database. Please reassign these if the client is still active to an actual staff member.



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.

ACTIVE CASELOAD

SEARCH

Program: Coordinated Entry Program

Client	Start Date	Length of Stay	Household Members
▼ 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
▼ Buffy Summers	01/14/2019	2 months 22 days	2

Program: Emergency Shelter Night-by-Night Program

Client	Start Date	Length of Stay	Household Members
Candy Cane	09/27/2018	6 months 9 days	1
▼ Adam Sapple	11/15/2018	4 months 21 days	2

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

