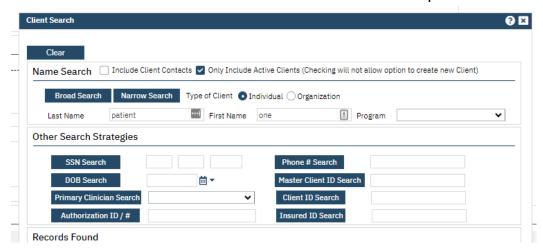
Assigning to a Program

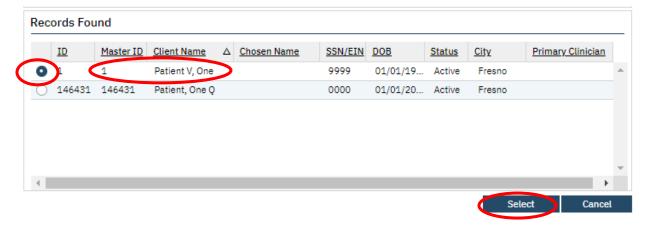
- 1. Click on "Search" icon. Type "Program Assignments"
- 2. Select "Program Assignments Client" from the drop-down menu. Continue to step 4 below.
 - a. If you don't have a client selected, you will need to use the client search option.



- i. The "Client Search" screen will pop-up. Type in the clients name you want to add the program to. Click the "Broad Search" button.
- ii. You can also utilize the other search options such as DoB.

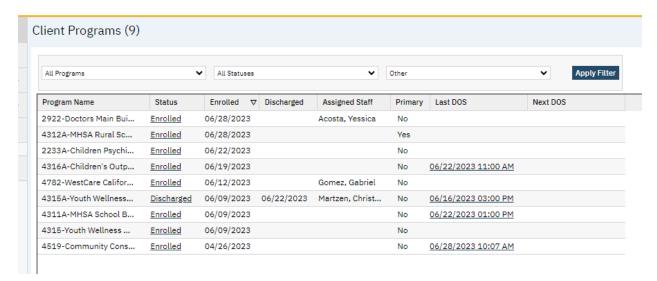


iii. The client should pop up in the "Records Found" area. Click the circle button for the person you want and click the select button.

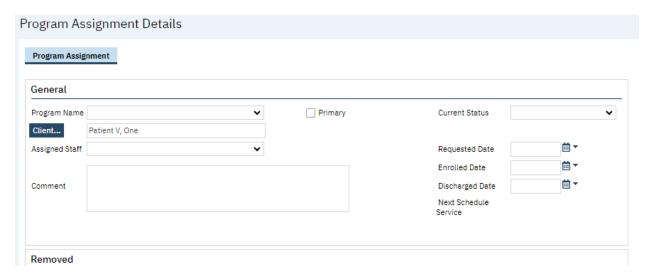


Assigning to a Program

3. This will bring up the "Client Programs" screen.



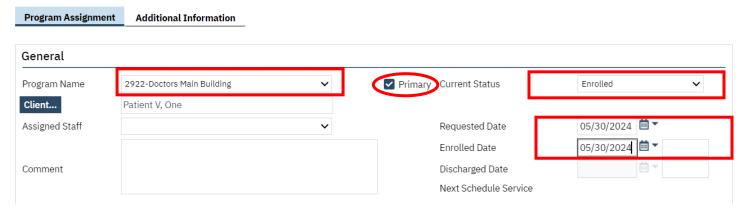
4. Click the "New" icon in the top left corner . This will open the program Details window.



- 5. Enter the following information:
 - a. Select the program name the person is being referred to from the drop down.
 - b. Use the drop down to mark "Current Status" as "enrolled".
 - c. Put the date the request was made in the request date box.
 - d. Enter the same date as the enrollment date if the enrollment is being done the same day as the request.
 - e. In the comment section put the name of the person who asked you to enroll the client.
 - f. <u>Leave assigned staff box blank</u>. You will assign a provider on the Treatment Team screen refer to Treatment Team how to guide.

Assigning to a Program

g. Make sure the check box next to "Primary" at the top is checked.



6. Click the "Save" icon in the top right corner.



7. Once you assign a program, you will need to schedule an appointment. You can follow the steps below to utilize the Appointment Search option. You can also use the Staff Calendar to schedule.

Accessing the program assignment page for an existing client:

- 1. Have the client profile open
- 2. Using the search option in the top right, type in "programs" and select "Client Programs (Client)".
 - a. You can also use the menu on the left-hand side by navigating to "Client" and then selecting "Client Programs" near the bottom of the list.
- 3. This will bring you to the Client Programs page where you will be able to discharge the client from a specific program or enroll them into a new program.
 - a. Follow steps above for enrollment.
 - b. See additional how to guides for discharge.