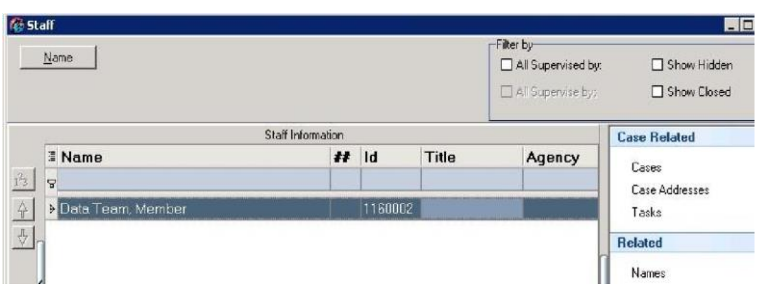
Quick Steps

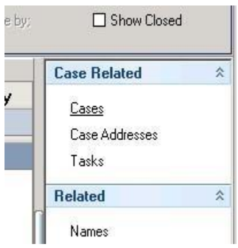
- From the Staff window, select the staff member and click Cases off to the right
- Highlight the case you are completing the case audit on and click the Tasks link off to the right-hand side
- Click the Add button
  - Case – The Case Id should automatically be filled in with the case Id you were highlighted on
  - Provider – Select the Provider Id with the magnifying glass (i.e. IMH, PIP, PIP Foster)
  - Section – Select (AUD) Case Audit by clicking on the magnifying glass
  - Staff – Select yourself from the list of staff members
  - Status – Select Done to indicate that the case was completed
  - Task Date – Enter the date the audit was started
  - Close Date – Enter the date the audit was completed
  - Click Save
- To Update a Task, Select the Task and Click the Update button
  - Update information as needed
  - Click Save
- Click Close to Exit this Screen

Detailed Steps:

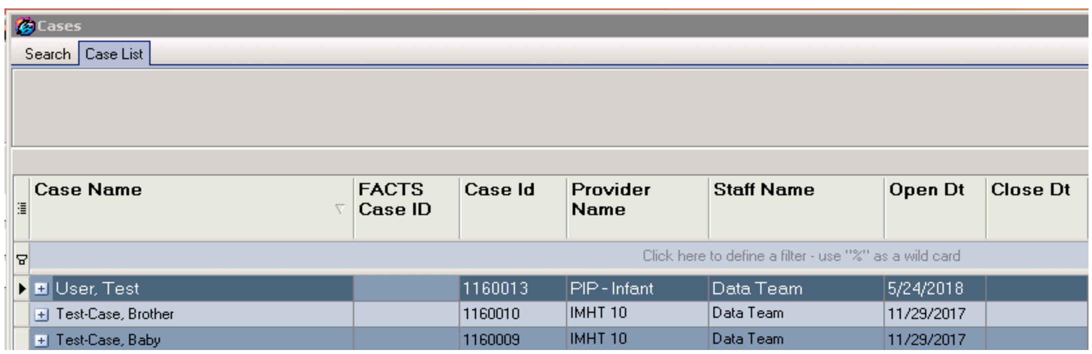
1. After logging into the database, the Staff window appears and the system identifies your name on the staff list.



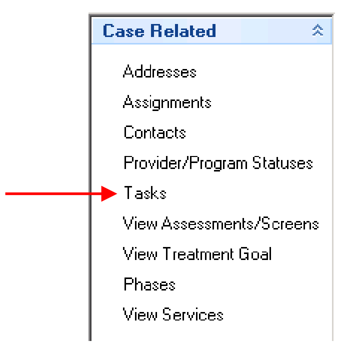
2. Click on the **Cases** link (on the side menu bar) to get to your open case list.



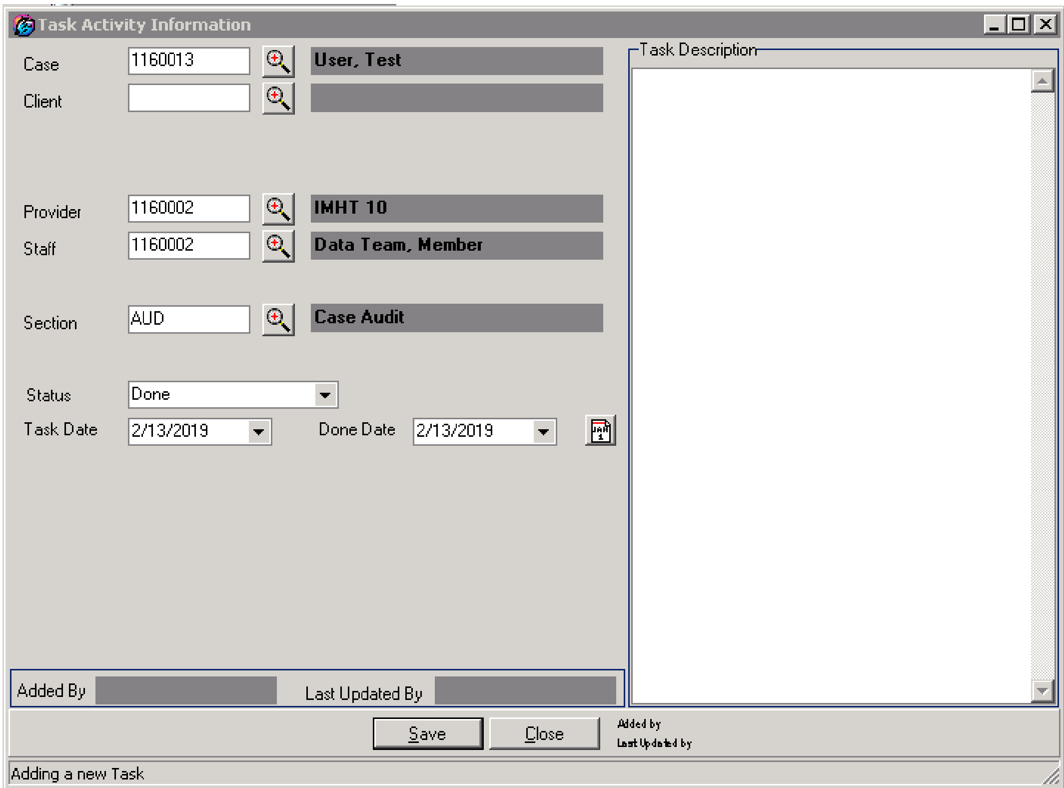
3. From the Cases screen, click on the case you are wanting to complete an audit on.



4. Click Tasks on the right menu bar.

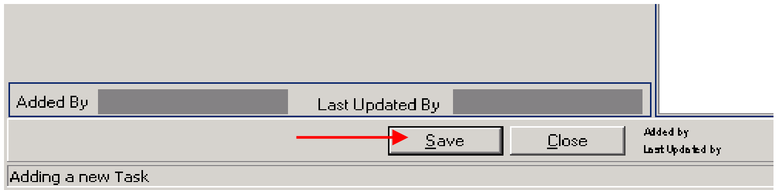


5. To **Add** a task and begin the case audit, Click the **Add** button. The **Task Activity Information** screen will appear.



- Case – The Case Id should automatically be filled in with the case Id you were highlighted on
- Provider – Select the Provider Id with the magnifying glass (i.e. IMH, PIP, PIP Foster)
- Staff – Select yourself from the list of staff members
- Section – Select (AUD) Case Audit by clicking on the magnifying glass
- Status – Select Done to indicate that the case was completed
- Task Date – Enter the date the audit was started
- Close Date – Enter the date the audit was completed .

6. Click Save when finished.



7. To **Update** a task, select the task from the **Tasks** screen. Click on the **Update** button. Update the task information as needed. Click **Save.**

If you need further assistance please contact the ECSC Database Services Team:

ecscdata@unm.edu Local:
505-277-0469
Toll Free: 855-663-2821