



HOW TO **COMPLETE A CLIENT** AND EXIT THEM FROM YOUR PROGRAMME

How to Complete a Client and Exit them from your program.

This guide provides step-by-step instructions on how to complete a client and exit them from a program. It covers actions such as marking the client as exited, updating the end date, and removing them from the caseload list. Following these steps will ensure that the client's status is accurately reflected in the program.

Chris Nicol | 18 steps | 2 minutes

1

Click "Action"

The screenshot shows a web application interface for client management. At the top, there is a green header bar with the text 'nt'. Below this is a breadcrumb trail: 'Dashboard / Clients / Client / Details'. A navigation menu contains four items: 'Summary', 'Detail', 'Profile', and 'Action'. The 'Action' item is circled in orange. Below the menu, the page title is 'Client Detail' with the subtitle 'Manage client details'. The main content area displays 'Client: Tweety Pie (Pie88886)'. Below this is a section titled 'Personal Details' with a form field for 'Forename:' containing the value 'Tweety'. At the bottom left, the text 'at Booking' is partially visible.

2

Click "Activities and Outcomes"

Dashboard / Clients / Client / Details

Summary ▾ Detail ▾ Profile ▾ Action ▾

Client Detail

Manage client details

Client: Tweety Pie (Pie88

Personal Details

Forename: Tweety

- Activities and Outcomes
- Action Plans
- Appointment Bookings
- Data Forms
- Documents
- Documents (External)
- Emails
- Extended Matching
- Online Meetings

3

Click "Add"

16/03/2023 One to one meeting Chris Nicol - AMUFT

16/03/2023 One to one meeting Chris Nicol - AMUFT

06/03/2023 One to one meeting Chris Nicol - AMUFT

02/02/2023 Started on Programme Julian Burton

Display records per page: 5, 10, 15, 25, 50

Add Add Schedule Add Template Activity Costs Report Export Delete

Client Contact Report

Last ran: Never

New Contact Report

4

Click this dropdown and choose the program that you want the client to exit.



Client Activity

Manage client activity

Client: Tweety Pie (Pie88886)

Associated Programme:

Activity *:

Activity Date *: 07/06/2024

Activity Time *: Acme Training

Duration: 0.00

Enterprise

Enquiries

Programme

Training

Appointment Booking

Events

5

Click "Exited Programme"



Client Activity

Manage client activity

Client: Tweety Pie (Pie88886)

Associated Programme: Acme Training

Activity *: exited

Activity Date *: Exited Programme

Activity Time *: 11:29

Duration: 0.00

Status *: Successful

Caseload:

Limit By Site:

Enterprise

Enquiries

Programme

Training

Appointment Booking


Events

Reception

CLD


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Click the date field with the date they exited the program.

Enterprise	Manage client activity
Enquiries	Client: Tweety Pie (Pie88886)
Programme	Associated Programme *: Acme Training
Training	Programmes are currently filtered by programmes available to the selected a To select programmes that are disabled, clear the selected activity.
Appointment Booking	Activity *: Exited Programme - Exit
Events	Activity Date *: 07/06/2024 
Reception	Activity Time *: 11:29
CLD	Duration: 0.00
Web Reports	Status *: Successful
	Caseload: <input type="text"/> <input checked="" type="checkbox"/> Limit By Site: <input checked="" type="checkbox"/>

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Click this dropdown and choose the caseworker who is exiting the client from the program.

Appointment Booking	Activity Date *: 14/5/2024 
Events	Activity Time *: 11:29
Reception	Duration: 0.00
CLD	Status *: Successful
Web Reports	Caseload: Chris Nicol - AMUFT <input type="text"/> <input checked="" type="checkbox"/> Limit By Site: <input checked="" type="checkbox"/>
Settings	Client Beneficiary Hours: 0.00
	Activity Cost (£): 0.00
	Reminder Alert: <input type="checkbox"/> Set Reminder Alert

8

Click "Save"



Course --- Select ---

Module Enrolment

--- Select Course First ---

Session

--- Select Module First ---

Client Action Plan: --- Select ---

Save **Cancel**

9

Click "Action"

Summary ▾ Detail ▾ Profile ▾ **Action ▾**

Client Activity

Manage client activity

Client: Tweety Pie (Pie88886)

[Send caseload message](#)

Details

Activity:	Exited Programme
Activity Date:	14/05/2024
Activity Time:	11:29
Duration:	0.00

10 Click "Programmes"

manage client activity

Client: **Tweety Pie (Pie88)**

[Send caseload message](#)

Details

Activity:
Activity Date:
Activity Time:
Duration:
Client Beneficiary Hours:
Activity Cost:
Status:
Caseload:

- Appointment Bookings
- Data Forms
- Documents
- Documents (External)
- Emails
- Extended Matching
- Online Meetings
- Programmes**
- Referrals
- Share
- Snapshots
- Training
- Wizards

Successful

Chris Nicol - AMUFT

11 You will now see that it has been marked "Completed". If the end date is incorrect then click the green edit on the right hand side and change the end date to when your client left the program.

End Date	Client Status	Edit
14/05/2024	Completed	Edit

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Now to take them off of your caseload list as no longer being an active client.
Click "Detail"

Hanlon Client

Dashboard / Clients / Client / Programmes

Summary ▾ **Detail ▾** Profile ▾ Action ▾

Client Programmes

Manage programmes registered against client

Client: Tweety Pie (Pie88886)

Programmes

Programme Name	Start Date	End

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Click "Details"



Hanlon Client

Dashboard / Clients / Client / Programmes

Summary ▾ **Detail ▾** Profile ▾ Action ▾

Client P **Details**
Addresses
Address History

Manage progr... nst client

Client: Tweety Pie (Pie88886)

Programmes

Programme Name	Start Date	End

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Scroll down till you see caseload list and if you see your name or a colleagues name with a Yes saying they are active or main caseload click "Edit"

Caseload Name	Start Date
Administrator	
Gordon Kilgour - ACME	
Gordon Kilgour - ACME	
Chris Nicol - AMUFT	09/01/2023

[Add](#) [Edit](#) [Set Main Caseload](#)

Notes

[Edit](#)

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Add an end date and remove the tick from the box under Active on the far right.

		<input type="checkbox"/>
		<input type="checkbox"/>
09/01/2023		<input checked="" type="checkbox"/>

16 Click "Save"

Events

Reception

CLD

Web Reports

Settings

<input type="checkbox"/>	Gordon Kilgour - ACME	
<input type="checkbox"/>	Gordon Kilgour - ACME	
<input type="checkbox"/>	Chris Nicol - AMUFT	09/01/2023

Save Cancel

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17 Click this button field.

Caseloads

Caseload Name	Start Date
Administrator	
Gordon Kilgour - ACME	
Gordon Kilgour - ACME	
Chris Nicol - AMUFT	09/01/2023

Add Edit Set Main Caseload

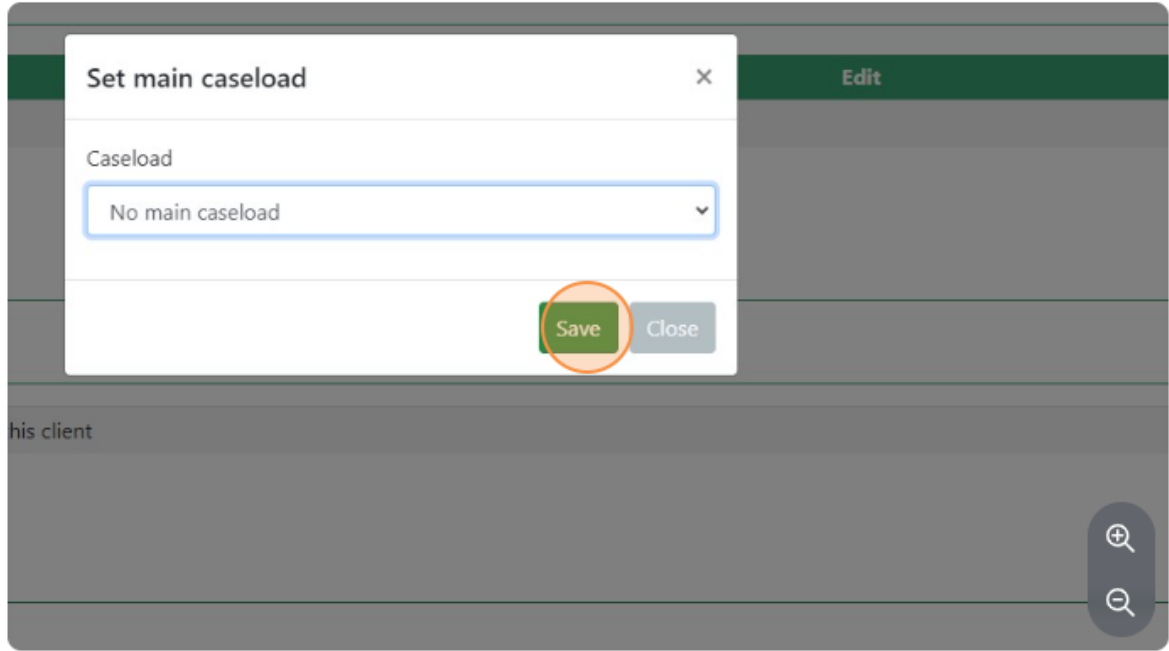
Notes

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and change it from your name to No Main Caseload. If the name isn't one of your team then just leave it as this means the client is working with another program and it is their worker who is the Main Caseload



Other Sections?

Change a Programme Start date in the Client Record???