HELIX

FREQUENTLY ASKED QUESTIONS

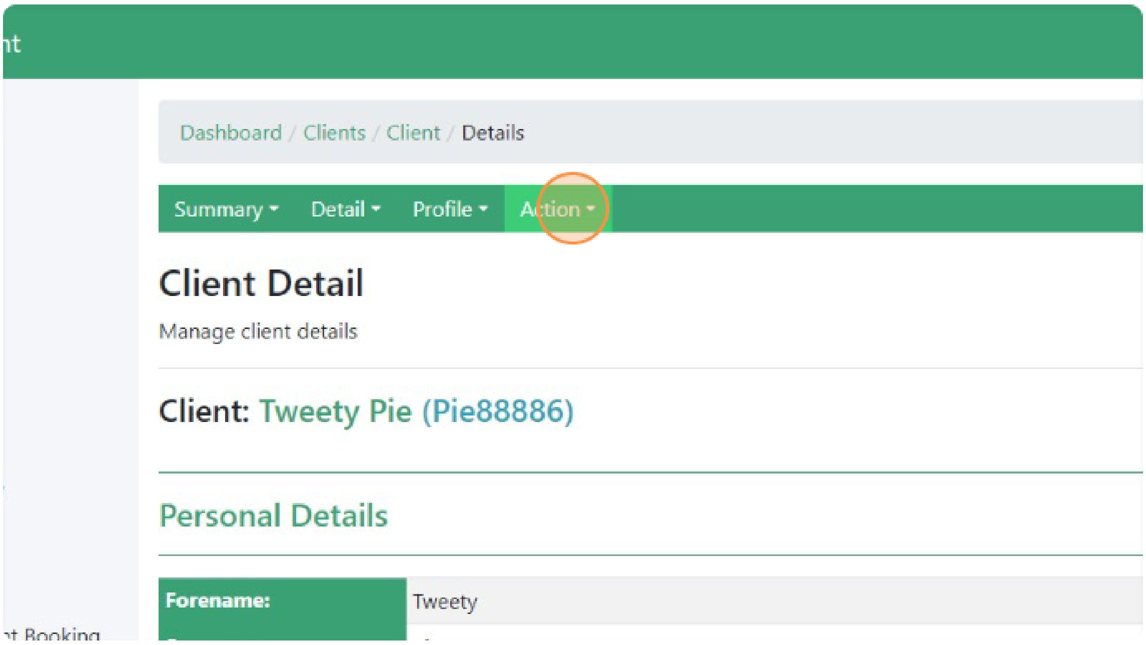
HOW TO **COMPLETE A CLIENT** AND EXIT THEM FROM YOUR PROGRAMME

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

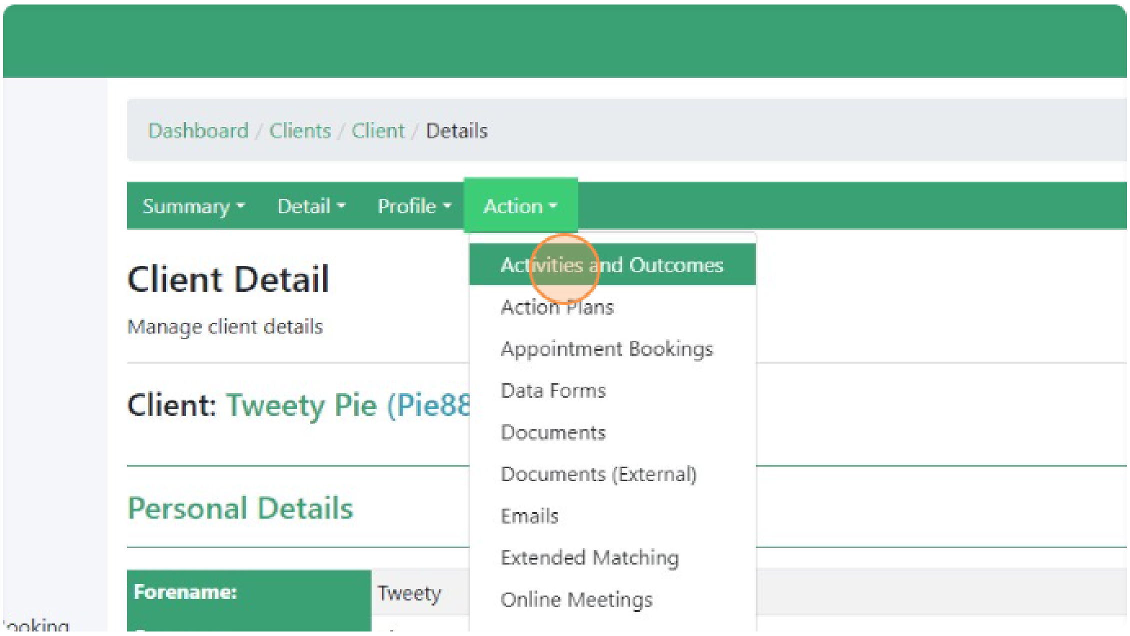
This guide provides step-by-step instructions on how to complete a client and exit them from a program. It covers actions such as marking the client as exited, updating the end date, and removing them from the caseload list. Following these steps will ensure that the client's status is accurately reflected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

Chris Nicol | 18 steps | 2 minutes

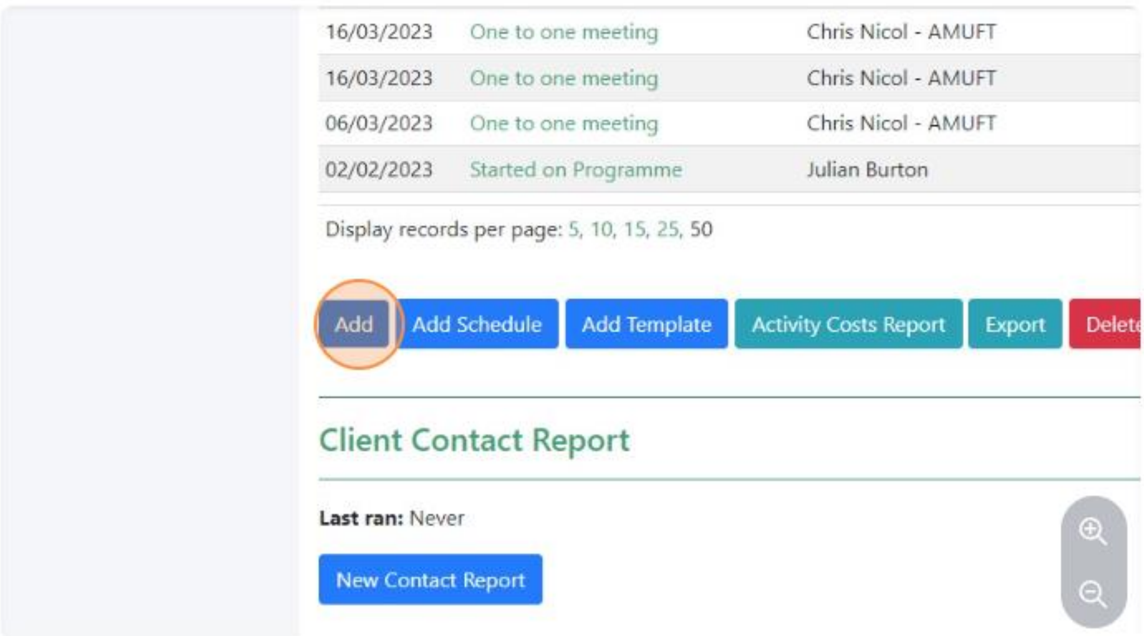
1 Click "Action"



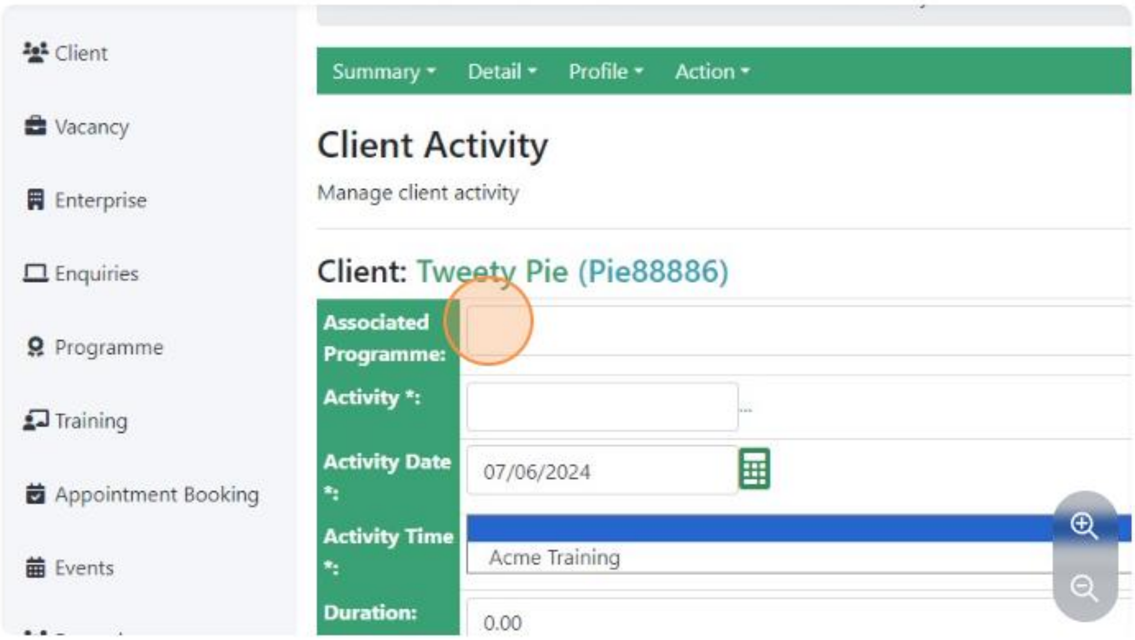
2 Click "Activities and Outcomes"



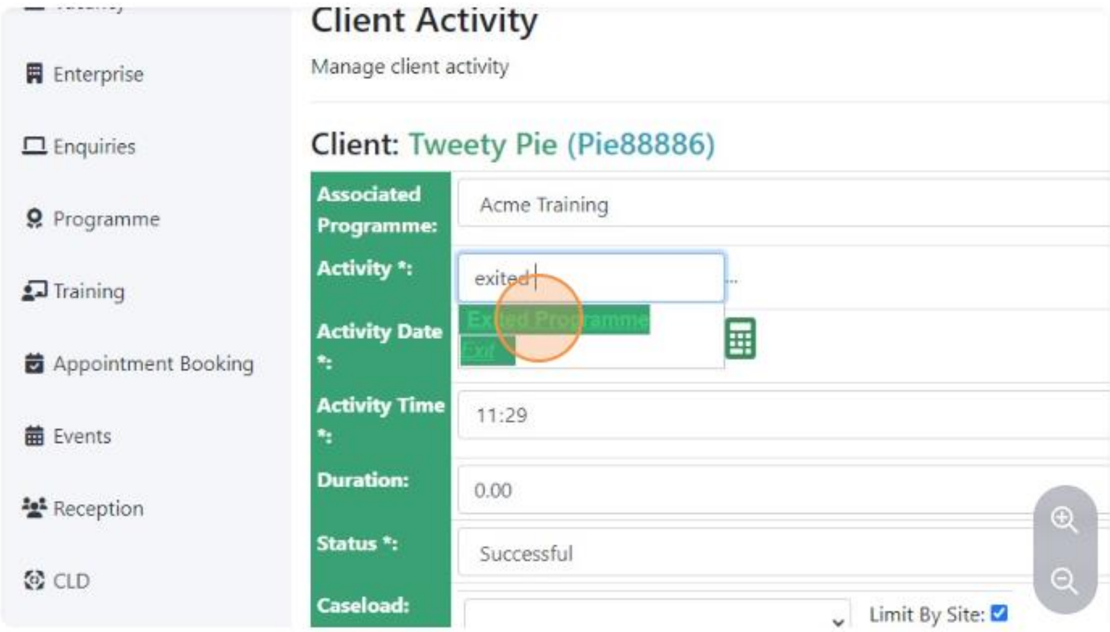
3 Click "Add"



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

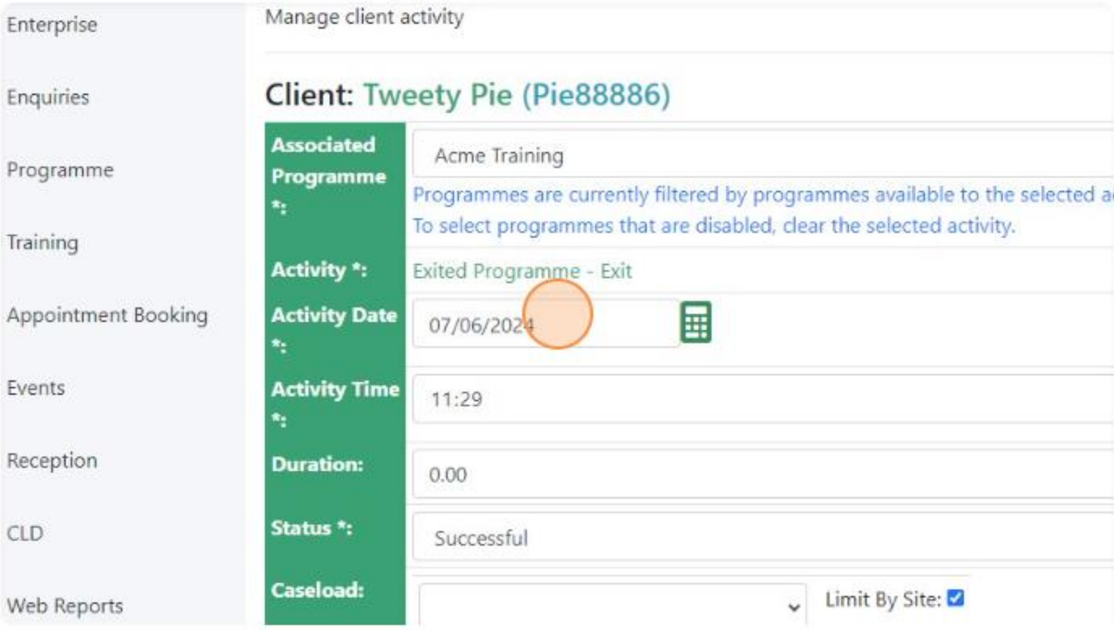


5 Click "Exited Programme"



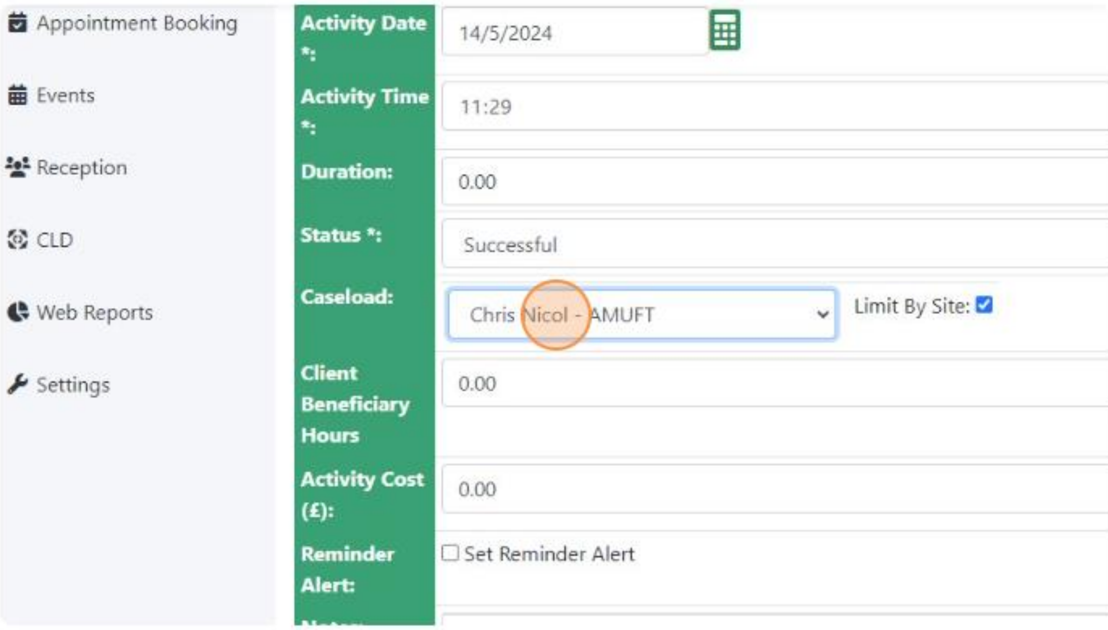
6

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

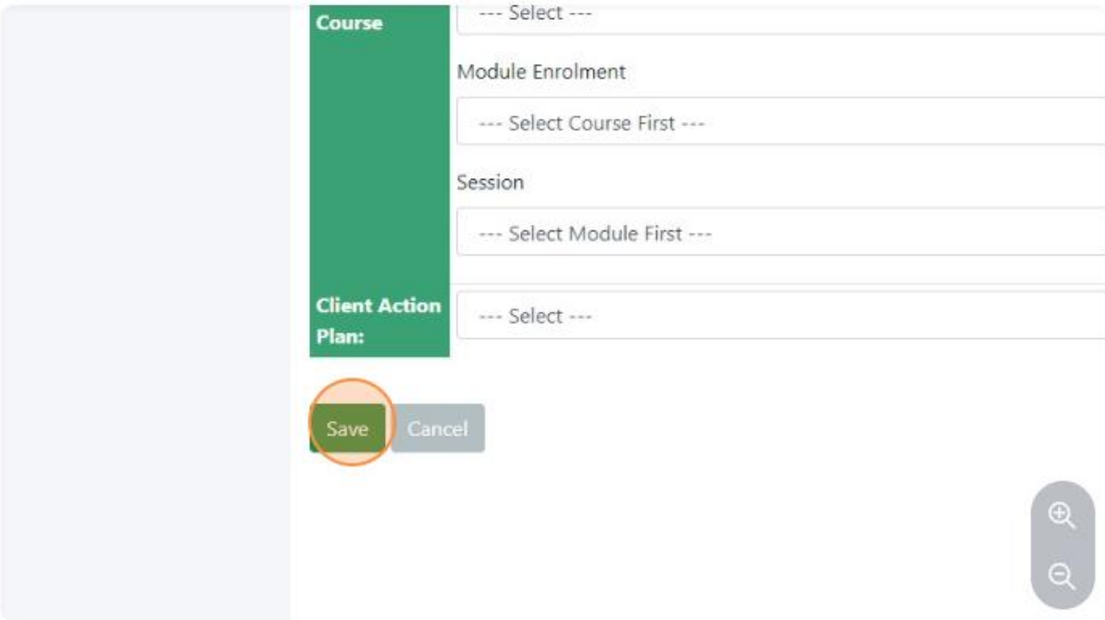


7

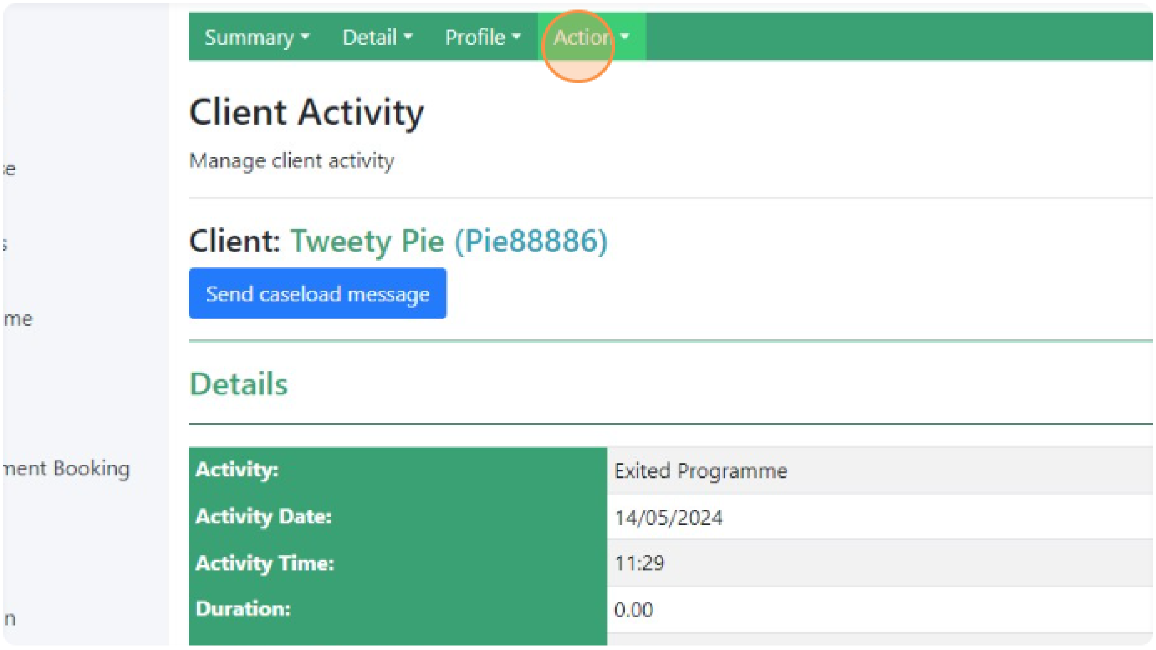
Click this dropdown and choose the caseworker who is exiting the client from the program.



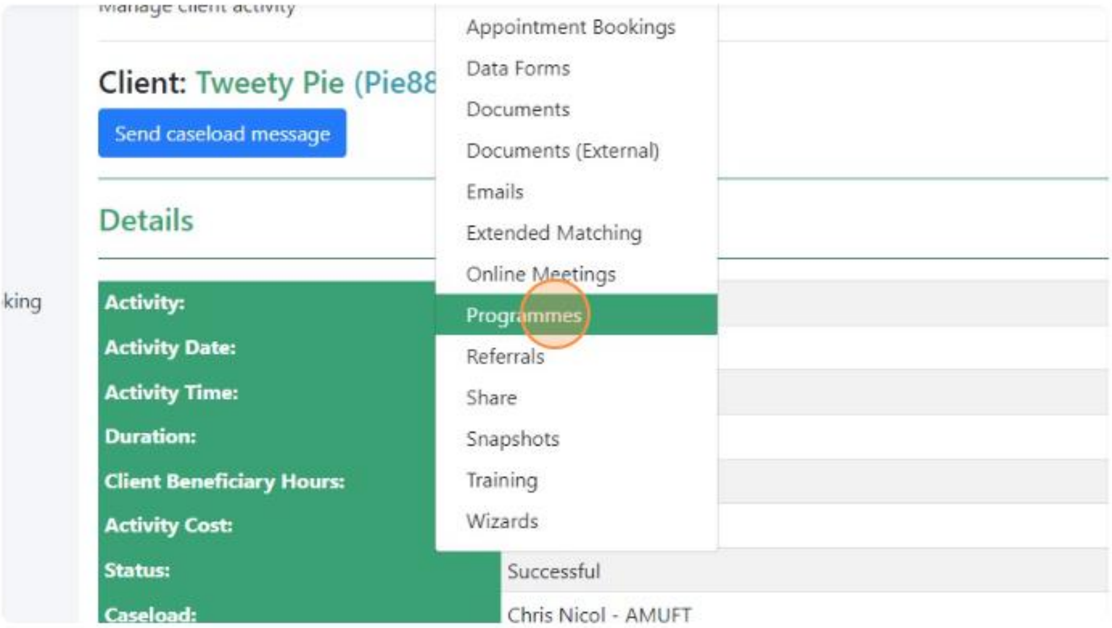
8 Click "Save"



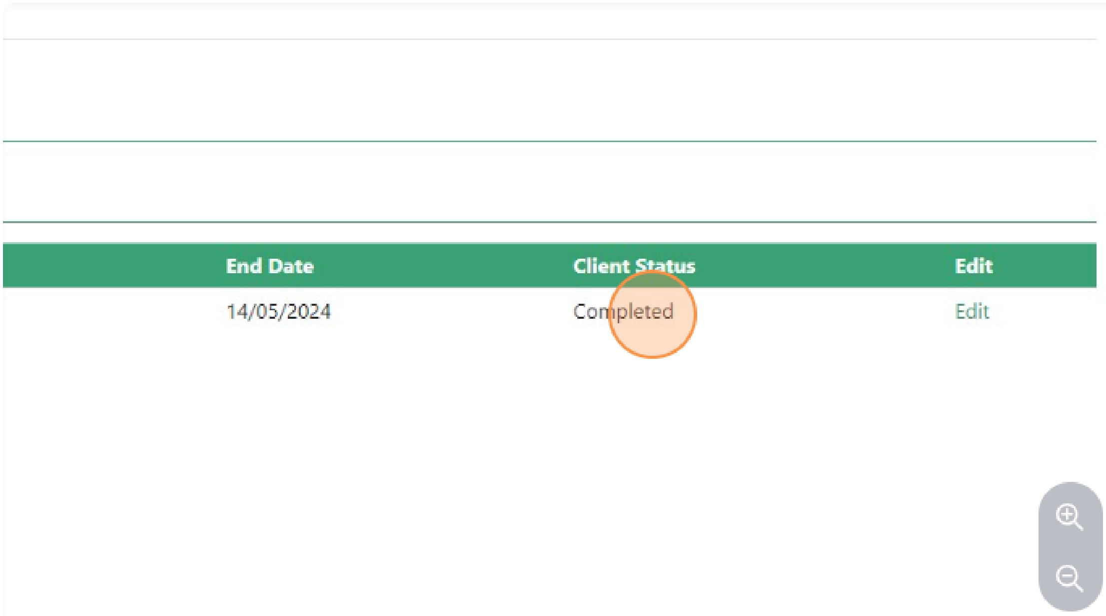
9 Click "Action"



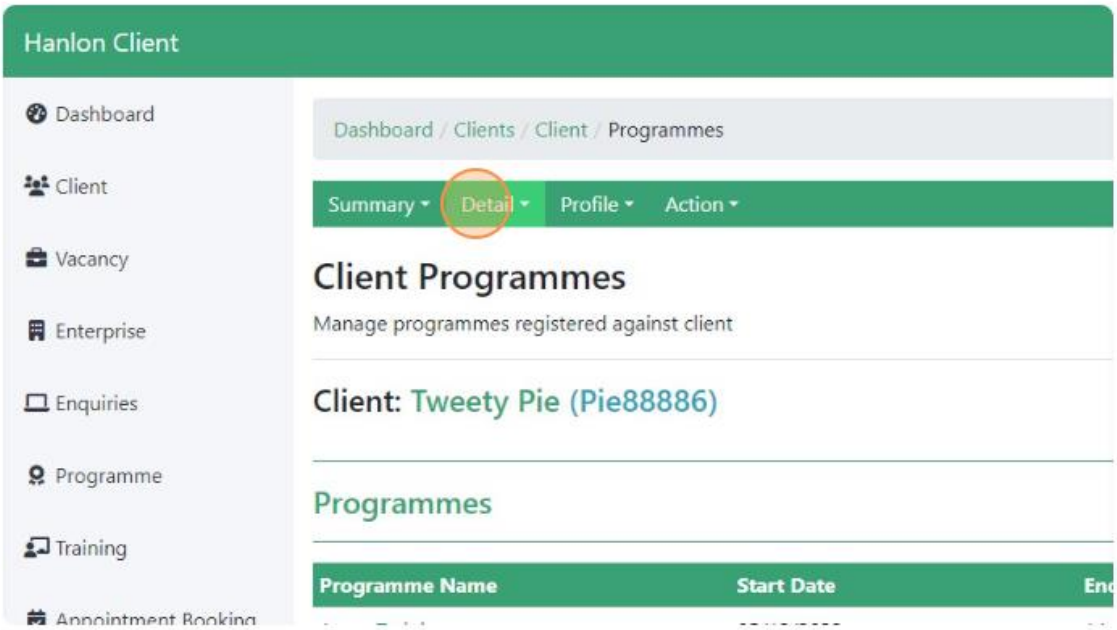
10 Click "Programmes"



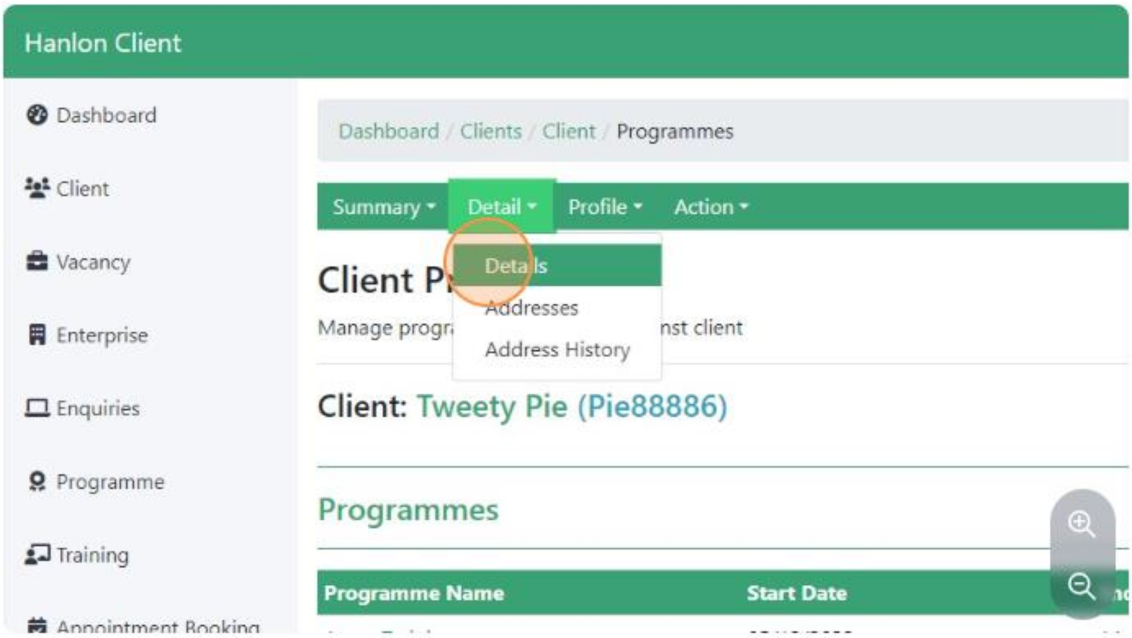
11 You will now see that it has been marked "Completed". If the end date is incorrect then click the green edit on the right hand side and change the end date to when your client left the program.



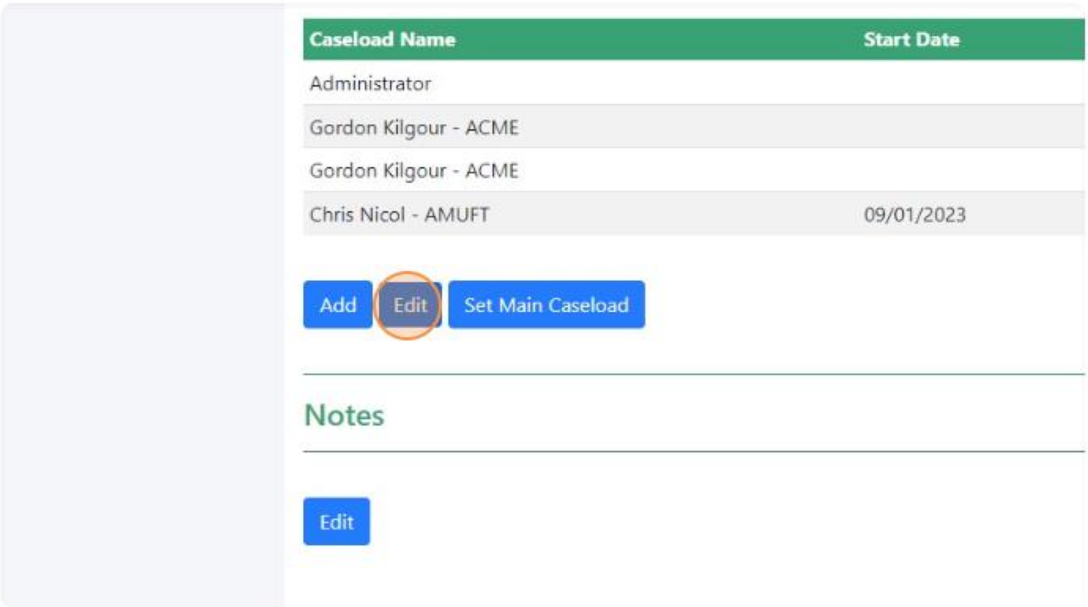
12 Now to take them off of your caseload list as no longer being an active client. Click "Detail"



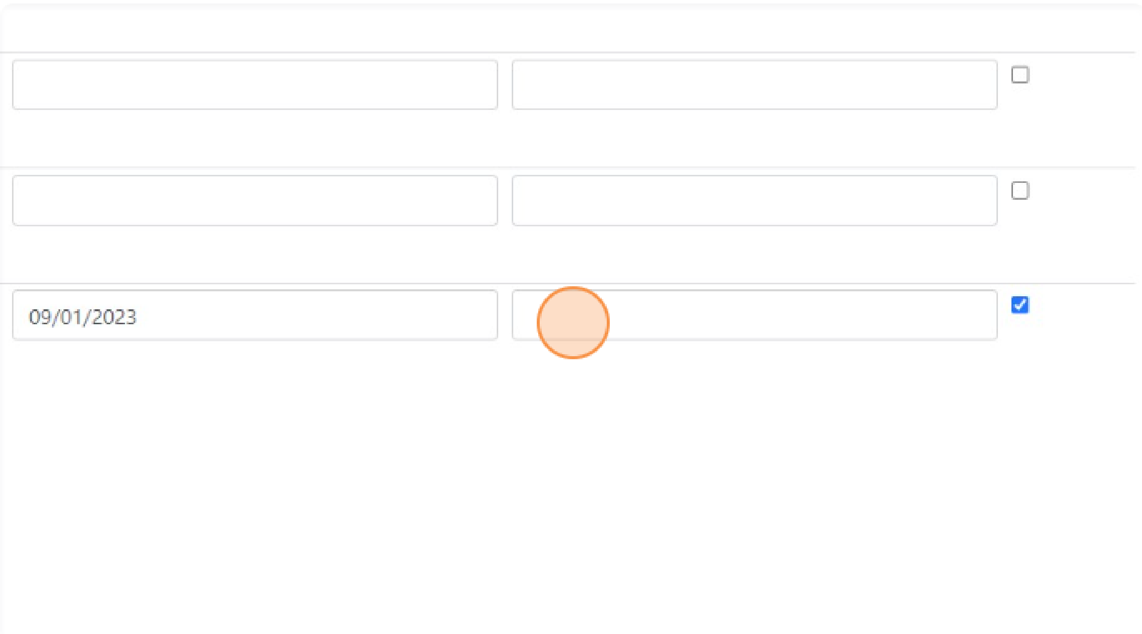
13 Click "Details"



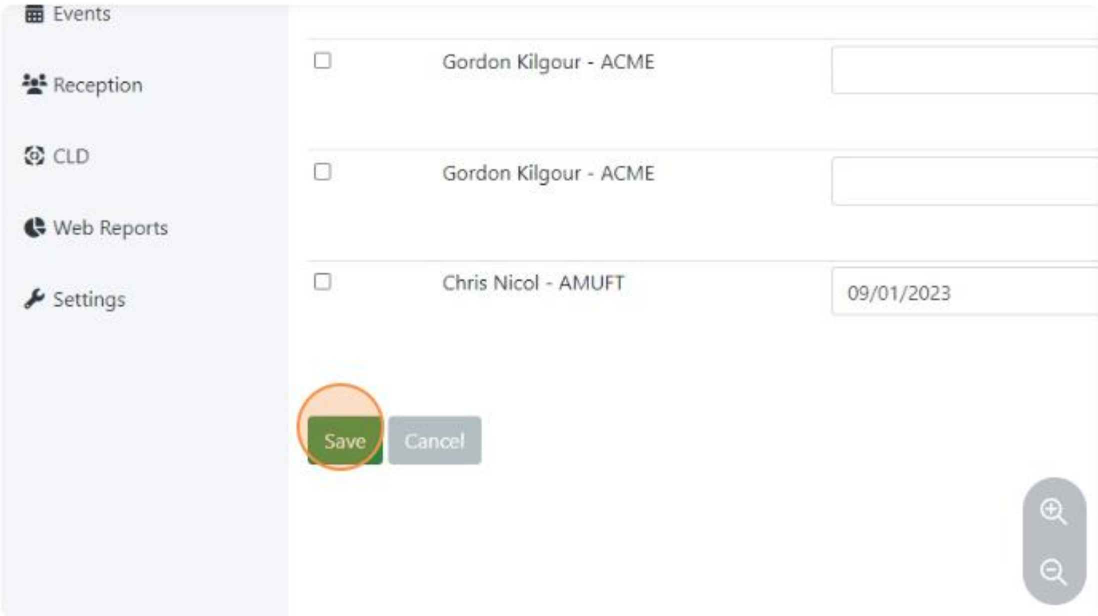
14 Scroll down till you see caseload list and if you see your name or a colleagues name with a Yes saying they are active or main caseload click "Edit"



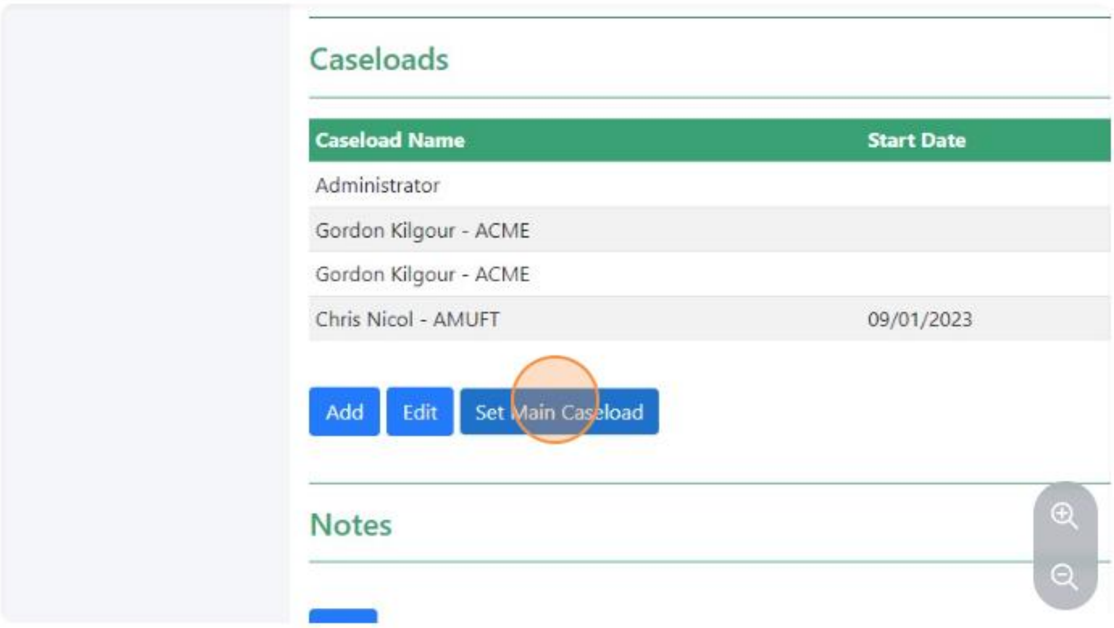
15 Add an end date and remove the tick from the box under Active on the far right.



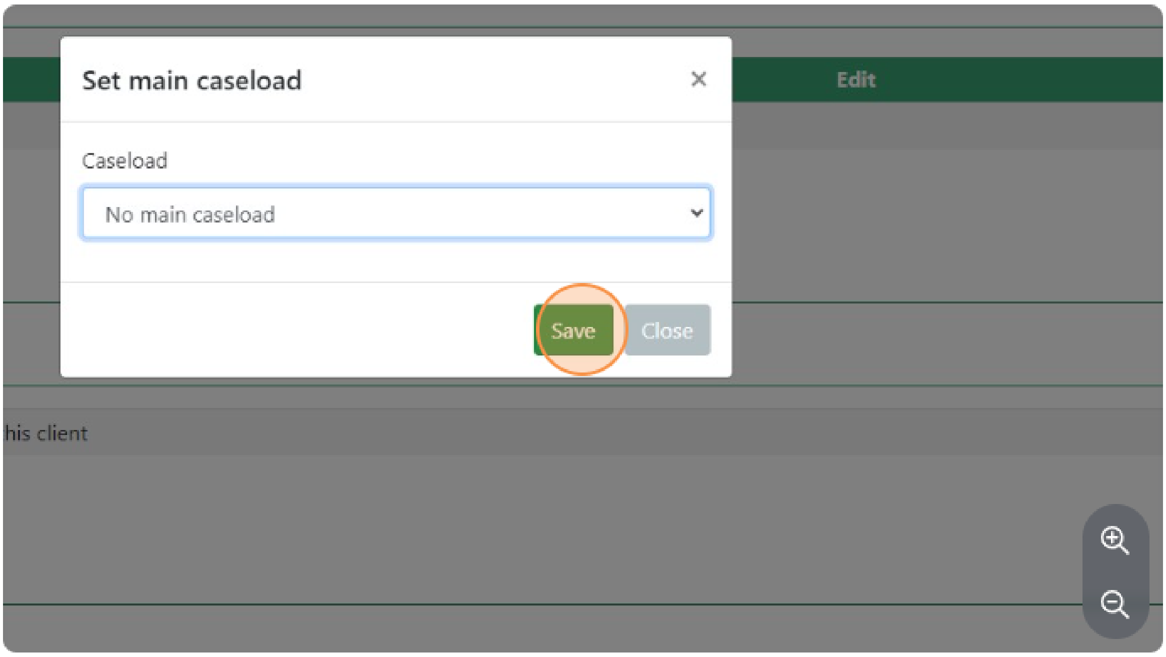
16 Click "Save"



17 Click this button field.



18 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



<u>Other Sections?</u>

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