

How to Switch the Current Client to Another Household Member

This top part of the screen indicates the client which you are working with – the 'current' client

Note that the green dot next to the household member name also indicates the current client

Click on the gray dot next to the household member you *want* to make current

Name	SS	Birthdate	Income
Kantharaj, Brianna	999-11-1100	09/08/2002	\$3663.18
Kantharaj, Devaprasad	899-99-1111	03/31/1970	\$9279.00
Kantharaj, Kimberly	899-99-1112	01/13/1971	\$1440.00

The screen will change to the 'Client View' screen of the household member you chose.

You can now add client goals, services, etc., to capture your activity with the client appropriately

General Data:	First Name:	Devaprasad	Social Security:	899-99-1111
Last Name:	Kantharaj	Birthdate:	March 31, 1970	
Address Line 1:	20 Blissville Road	Case Managed:	active	
Address Line 2:	3rd Floor	Case Manager:	L. Carezza	
Town:	Norwich	Intake Date:	September 5, 2001	
Phone Number:	(860) 889-1364			

Assessment:	Assessment Date:	April 23, 2008	Score:	7.00
Note:	Client cannot climb stairs, make appts. for first floor. TEST.			