How to Assign Yourself as a Staff Member for a Client

In order to utilize the Caseload function of the Clarity system, you must be assigned as a staff member for the client's program enrollment. Please follow the following steps to manually assign yourself as a staff member. Remember, if you create the client's program enrollment in Clarity, you will automatically be assigned as a staff member.

1. Login to CSIS
2. Search for client you need to assign yourself as staff/care team member for.

3. Locate the **active program** you want to **assign yourself as staff**. Select **Edit**.

4. Over to the right you will see information regarding the client's enrollment. **Edit** the "**Assigned Staff**" to name yourself as assigned staff/care team member. **Save Changes**.

5. You will now be listed as a Care Team Member, and you will see the client listed under your Caseload.