



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.

SEARCH FOR A CLIENT ADD CLIENT

SEARCH

Use full name, partial name, date of birth or any combination.

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

Active Programs

Homeless Prevention

Program Name	Start Date	End Date	Type
Homeless Prevention Homelessness Prevention Training - Agency	06/06/2022	Active	Group

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**.

7

DAYS
ACTIVE PROGRAM

Program Type:	Group (2)
Program Start Date:	06/06/2022
Assigned Staff:	Training Man
Head of Household:	Cathy Smith

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

Care Team 1

TM

SEARCH

CASELOAD

Program: Homeless Prevention

Client	Start Date	Length of Stay	Household Members
Flavor Flav	05/25/2022	19 days	3
Cathy Smith	06/06/2022	7 days	1