

# Assigned Staff

## Overview

Staff members appear in the *Assigned Staff* section in three ways: through a program enrollment, being assigned as *Case Manager* in a referral, and being assigned as *Navigator* in a *Community Queue* referral.

The Care Team and Assigned Staff work very closely. For more information about the Care Team, please refer to our [Care Team](#) article.

**Note:** When adding an Assigned Staff member to an enrollment or referral, only the names of staff members with Clarity Human Services accounts set up at your agency (or the agency you're switched into) will display as options.

## Assigning Staff Members to an Enrollment

When a staff member records a program enrollment in a client record, the system automatically adds the staff member to the *Assigned Staff*/[Care Team](#) section. These staff members remain in the *Assigned Staff* section until the enrollment is exited. When a user is set as an *Assigned Staff* member for enrollment, any clients associated with the enrollment will display in the Caseload tab's *Active Caseload* section. Multiple staff members can be assigned to an enrollment.

A user can assign any staff member within their agency (or the agency they're switched into) to an enrollment. All of the conditions that apply to the initial *Assigned Staff* member will apply to additional staff members. These conditions include the client displaying in their *Active Caseload* and *Status Due* tab and receiving [Program Auto-Exit](#) and [Assessment Due Warning](#) notifications. There is no limit to the number of *Assigned Staff* members for enrollment.

To assign a staff member to an enrollment, edit the enrollment history, either from the *History* tab or the *Programs* tab of the client record. Click the edit icon next to the enrollment to which you would like to add additional staff members.

## HISTORY

### Advanced Search Options [View](#) ▼

Service Name	Start Date	End Date
<b>Referral: test</b> Training Agency referral to 1	 01/06/2020	01/06/2020
  <b>Transitional Housing Program</b> Training Agency	01/06/2020	<b>Active</b>

The panel to the enrollment's right displays the *Assigned Staff*, which you can edit by clicking the edit icon.

**0** DAYS  
ACTIVE PROGRAM

Program Type: Individual

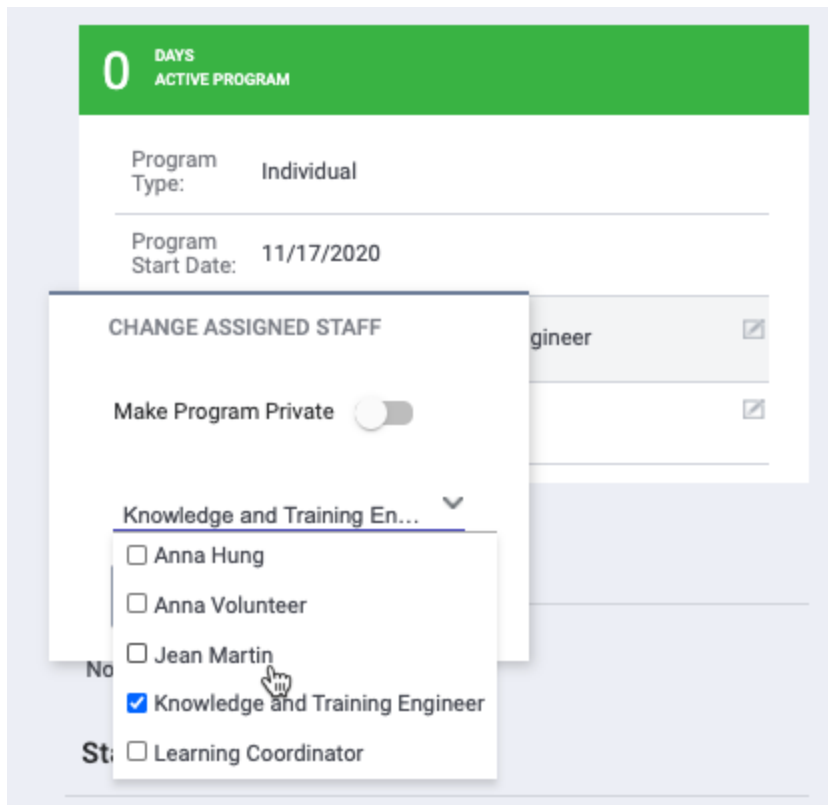
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Program Start Date: 01/06/2020

Assigned Staff: Knowledge and Training Engineer 

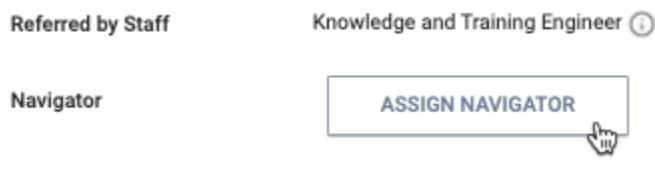
Head of Household: Candy Shell 

You can select multiple staff members by clicking the checkbox next to each name. You can also remove the staff member automatically assigned during enrollment.



When a staff member is selected as the *Navigator* in a *Community Queue* referral, the system automatically adds that staff member to the *Assigned Staff* section. These staff members remain in the *Assigned Staff* section until the referral is re-assigned, and the *Status* is changed to *Denied*, *Expired*, or *Completed*.

To assign a staff member as a *Navigator*, edit the *Community Queue* referral and click *Assign Navigator* within the referral.




Changes to Assigned Staff will be tracked in the program enrollment Audit Log.

## Assigning a Case Manager

When a user assigns a staff member as the *Case Manager* in a program referral, the system adds that staff member to the *Assigned Staff* section. These staff members remain in the *Assigned Staff* section until the referral *Status* is changed to *Denied*, *Expired*, or *Completed*. These clients will also display in the *Case Manager* section of the *Caseload* tab.

To assign a staff member as a *Case Manager*, edit the program referral, and select the appropriate staff member.

<b>Case Manager</b>	Select	
<b>Last Activity</b>	12/09/2020	<a href="#">CHECK-IN</a>