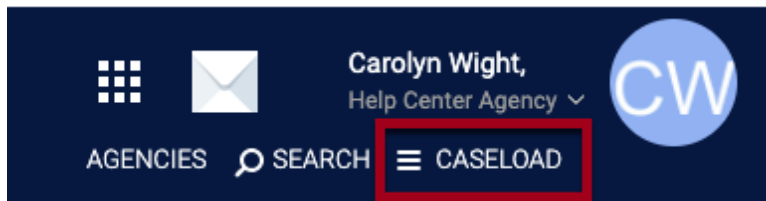


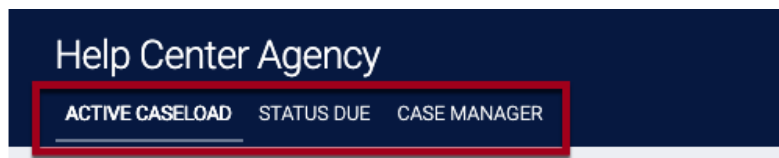
The Caseload Tab

The CASELOAD tab provides a convenient way for you to view your active caseload within a specific agency.

To access the Caseload tab, click *CASELOAD* in the upper right corner of the screen.



Three tabs will appear across the top of the screen: ACTIVE CASELOAD, STATUS DUE, and CASE MANAGER. If you have been assigned as a Navigator for a referral, you will also see a NAVIGATOR tab.



The ACTIVE CASELOAD tab is selected by default.

Active Caseload

In the ACTIVE CASELOAD tab, you will see a list of active client enrollments you have created (or were assigned to), grouped by Program. The client's *Start Date* in the Program, the client's *Length of Stay* in the Program, and the number of *Household Members* in the Program are displayed.

Note: *Active Caseload management is different from [Care Team](#) management. Caseload assignments happen at the Program level (during an enrollment or manually after the enrollment), while Care Team assignments happen on the Client Profile page.*

Help Center Agency

ACTIVE CASELOAD STATUS DUE CASE MANAGER

ACTIVE CASELOAD

SEARCH

Program: Sample Housing Project

Client	Start Date	Length of Stay	Household Members
▼ Ed Example	12/14/2021	1 month 14 days	2

Program: Eastside Emergency Shelter

Client	Start Date	Length of Stay	Household Members
▼ Sue Sample	01/05/2022	23 days	3
Tracey Test	01/25/2022	3 days	1

Program: Community Clothing Assistance

Client	Start Date	Length of Stay	Household Members
Tracey Test	04/30/2021	8 months 29 days	1

If the enrollment includes more than one member of a household, the name of the [Head of Household](#) will be displayed with a down arrow next to it. Click on the arrow to expand the display to show the names of the other household members in the enrollment.

Program: Eastside Emergency Shelter

Client	Start Date	Length of Stay	Household Members
▼ Sue Sample	01/05/2022	23 days	3
Tracey Test	01/25/2022	3 days	1

To filter the display so that it only shows enrollments for a particular client, type the client's name into the field at the top of the screen and click SEARCH.

ACTIVE CASELOAD

Steven Sample

SEARCH

If the client is part of a household enrollment, the search result will display the name of the Head of Household.

The screenshot shows the 'ACTIVE CASELOAD' tab. At the top, there is a search bar with the text 'Steven Sample' and a 'SEARCH' button. Below the search bar, the program is identified as 'Program: Eastside Emergency Shelter'. A table below displays the search results with the following columns: Client, Start Date, Length of Stay, and Household Members. One result is shown for 'Sue Sample' with a start date of '01/05/2022', a length of stay of '23 days', and '3' household members.

Client	Start Date	Length of Stay	Household Members
☑ Sue Sample	01/05/2022	23 days	3

Keep in mind that this tab only displays your caseload within a specific agency. If you have [additional agency access](#) and don't see the enrollments you are expecting, make sure you are [switched into the correct agency](#). You may also search for clients in any agency using the [SEARCH page](#).

Status Due


Click the STATUS DUE tab to see a list of enrollments in your caseload, grouped by Program, for which assessments will be required. The Program *Start Date*, the *Last Status Date*, the *Assessment Due* date, and the number of *Household Members* are displayed. You may use the SEARCH field to filter the list as described above.

The screenshot shows the 'STATUS DUE' tab. At the top, there are three tabs: 'ACTIVE CASELOAD', 'STATUS DUE' (highlighted with a red box), and 'CASE MANAGER'. Below the tabs, there is a search bar with the text 'Program: Sample Program' and a 'SEARCH' button. A table below displays the list of enrollments with the following columns: Client, Start Date, Last Status Date, Assessment Due, and Household Members. One result is shown for 'Tracey Test' with a start date of '01/07/2022', a last status date of '01/07/2022', an assessment due date of '04/07/2022', and '1' household member.

Client	Start Date	Last Status Date	Assessment Due	Household Members
Tracey Test	01/07/2022	01/07/2022	04/07/2022	1



Case Manager

Click the CASE MANAGER tab to see a list of Program referrals for whom you have been assigned as the [Case Manager](#). If your [access role permissions](#) allow, you can click on a client's name to view the referral.

ACTIVE CASELOAD STATUS DUE CASE MANAGER		
CASE MANAGER		
Client	Referral Date	Days Pending
Tom Test Program: PSH Referred by: Training Agency	 01/28/2022	

Navigator

if you have been assigned as a Navigator for any Community Queue referrals, you can click the NAVIGATOR tab to see a list of those referrals. Click on a client's name to view the referral.

ACTIVE CASELOAD STATUS DUE NAVIGATOR CASE MANAGER			
NAVIGATOR			
Advanced search options Show 			
Search <input type="text"/> SEARCH			
Client	Community Queue	Referral Date	Days Pending
Tracey Test	Community Queue	 02/25/2022	