

Creating a Group Case Record

Group Cases involving multiple Clients can be used to represent a family or household.

A parent or head of household is generally the lead member for the Application and a Case Record is initiated on behalf of all family or household members.

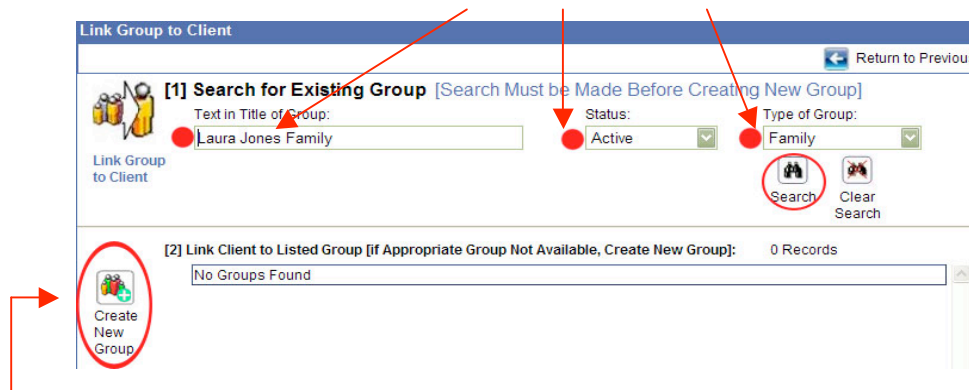
For example, a Case Record is created for the parent and then children are added.

After creating an Application/Case Record for the parent or head of household, click the **Group Case** button on the Case Record Master Screen.



You must first search for an existing group.

Search for an existing group by **title**, **status**, and **type**.



If an existing group is not found, select **"Create New Group"**.

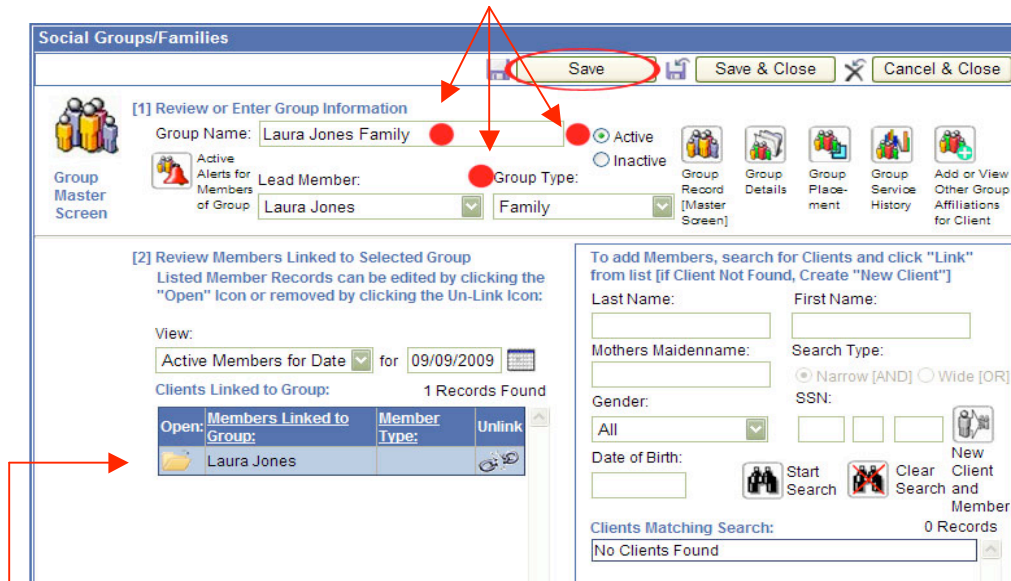
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Review or enter group information (name, status & type). Then click **Save**.



Social Groups/Families

[1] Review or Enter Group Information

Group Name: Active Inactive

Lead Member: Group Type:

[2] Review Members Linked to Selected Group

Listed Member Records can be edited by clicking the "Open" icon or removed by clicking the Un-Link icon:

View: for

Clients Linked to Group: 1 Records Found

Open	Members Linked to Group	Member Type	Unlink
	Laura Jones		

To add Members, search for Clients and click "Link" from list [if Client Not Found, Create "New Client"]

Last Name: First Name:

Mothers Maidenname: Search Type: Narrow [AND] Wide [OR]

Gender: SSN:

Date of Birth:

Clients Matching Search: 0 Records

After saving your group information, the current client will be listed as an active member. Open the member record for the current client to set the **Member Type** and **Status**.



Group Member Detail

Save & Close Cancel & Close

Type of Member:

Dates of Active Membership: Start Date: End Date:

Status: Yes No

Then click **Save & Close**.

To add Members, search for Clients that may already be in the system.

If the Client is found, click "Link".

If the Client is not found, click "New Client".



To add Members, search for Clients and click "Link" from list [if Client Not Found, Create "New Client"]

Last Name: First Name:

Mothers Maidenname: Search Type: Narrow [AND] Wide [OR]

Gender: SSN:

Date of Birth:

Clients Matching Search: 1 Records

Link	Open	Client Name	DOB
		Jones, Bob	01/01/1960

Once you have linked an existing Client or added a new Client to the family group, repeat the previous steps to set the Member type, status, and basic demographics.

Then click **Save & Close**.



When you have finished, the Family Group will be listed on the upper half of the Social Groups screen.



Select	Groups Linked to Client:	Group Type:	Head of Group:	Status:
<input type="checkbox"/>	Laura Jones Family	Family	Laura Jones	Active

All linked Family Group Members will be listed on the lower half of the Social Groups screen.



[2] Review Active Members of Selected Group and Create, Add or Edit Members:

View: Active Members for De [v] for 09/09/2009

Clients Linked to Group: 3 Records Found

Open:	Members Linked to Group:	Member Type:	Unlink
<input type="checkbox"/>	Bob Jones	Sibling [Brother or Sister of Heads]	
<input type="checkbox"/>	Laura Jones	Mother [Head of Household]	
<input type="checkbox"/>	Tommy Jones	Son [of Head]	

To link Members to the Case Record, select **Assign**.



Clients Linked to Group: 4 Records Found

In Case	View	Members Linked to Group:
<input type="checkbox"/>	Assign	Billy Jones
<input type="checkbox"/>	Assign	Bob Jones
<input checked="" type="checkbox"/>	Remove	Laura Jones
<input type="checkbox"/>	Assign	Tommy Jones