Santa Cruz County Mental Health
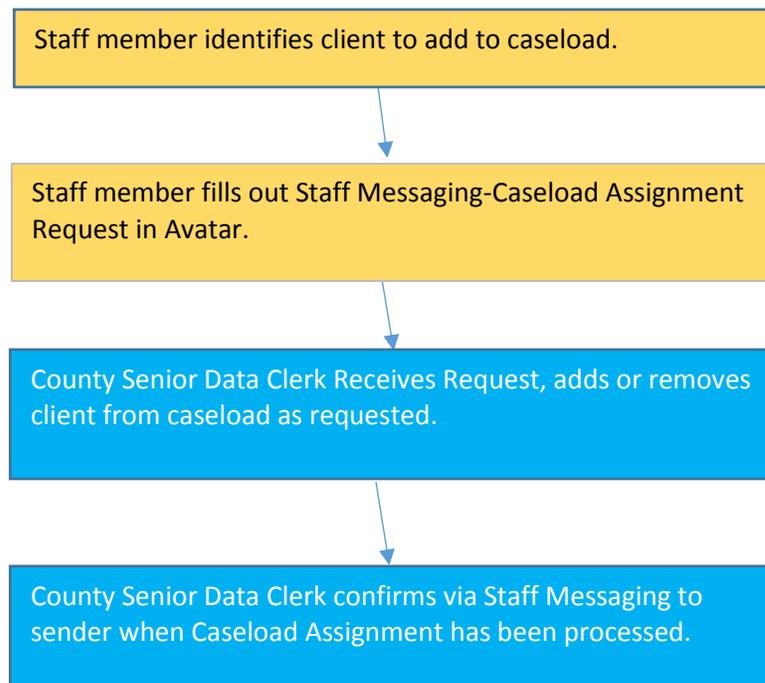
Staff Messaging—Caseload Assignment

(Temporary Solution)

Avatar Implementation

Staff Messaging-Caseload Assignment

Workflow

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┌─────────────────────────────────────────────────────┐
│ Staff member identifies client to add to caseload.  │
└─────────────────────────────────────────────────────┘
                          │
                          ▼
┌─────────────────────────────────────────────────────┐
│ Staff member fills out Staff Messaging-Caseload     │
│ Assignment Request in Avatar.                        │
└─────────────────────────────────────────────────────┘
                          │
                          ▼
┌─────────────────────────────────────────────────────┐
│ County Senior Data Clerk Receives Request, adds or  │
│ removes client from caseload as requested.           │
└─────────────────────────────────────────────────────┘
                          │
                          ▼
┌─────────────────────────────────────────────────────┐
│ County Senior Data Clerk confirms via Staff         │
│ Messaging to sender when Caseload Assignment has     │
│ been processed.                                       │
└─────────────────────────────────────────────────────┘
```
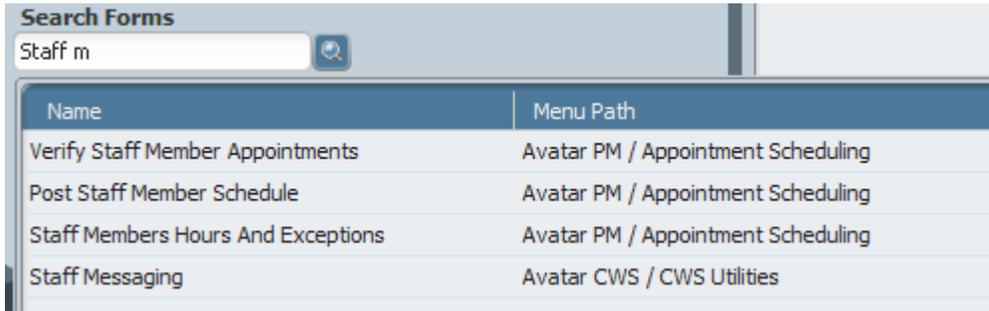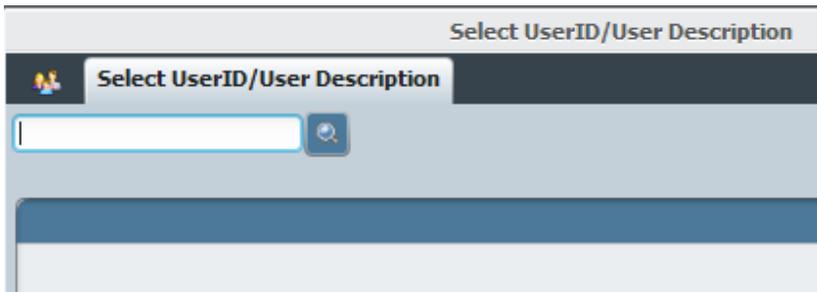
Menu Path

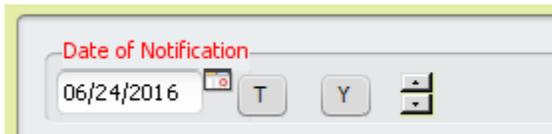Avatar CWS> CWS Utilities > Staff Messaging

Steps

1. In the **Search Forms** field, enter **Staff M**, and select Staff Messaging from the window.
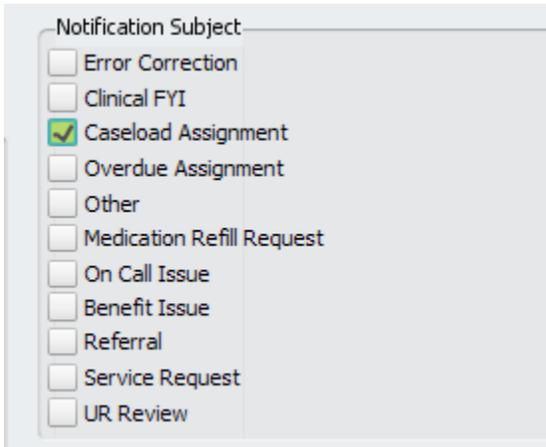

2. In the window, **Select UserID/User Description**, *enter your own last name and select appropriate client ID when it appears.*

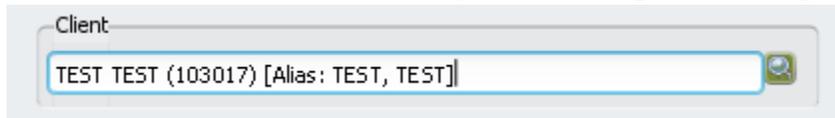3. For **Date of Notification**, Select on "T" for today's date.

4. In **Notification Subject** field, select the checkbox that is most appropriate for your action.

5. In Client ID, enter client for which you are adding or removing from caseload.

6. In **Detailed Comments**, enter any detailed comments, especially whether to add or remove client from caseload. Comments should be either Add or Remove, not both.
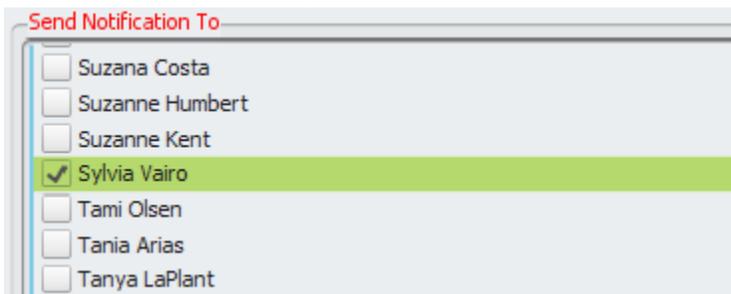

7. In **Send Notification To**, select Sylvia Vairo (and only Sylvia Vairo).

8. In **Subject** field, enter "Caseload."

9. Select **Submit** button.

Submit