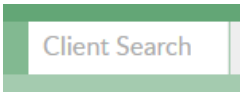
Creating a Staff Relationship (adding a member onto your caseload)

Step 1: Search for the member in the Client Search tab.



Step 2: Click the ECR button that corresponds to the member.



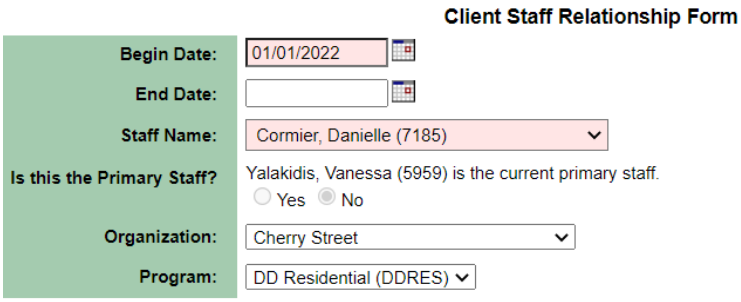
Step 3: The pathway is as follows - **Member>General Information>Staff Relationships.**



Step 4: Once there, click "**Add New Relationship**" in the upper right hand corner.



Step 5: Fill the "**Client Staff Relationship Form**" out. Directors should click "**Yes**" to "**Is this the primary staff**?"



The member is now on your caseload. To view your caseload, click on your "**Member**" tab located in the top row of tabs.