

Step-by-Step: Status Update

1. Login to CSIS.
2. Search for the client or utilize your caseload screen to find your client.
3. Click on the **“PROGRAM”** text along the top of the screen.
4. Client’s Program History screen will appear. In the Program History selection, select the active program you wish to update client status/information in by hovering mouse on program and clicking the pencil to the left of the program.

PROGRAM HISTORY			
Program Name	Start Date	End Date	Type
Emergency Shelter - Night By Night Emergency Shelter: Night-by-Night Training - Agency ⓘ	05/24/2022	Active	Individual
Diversion & Early Intervention Other Program Type Training - Agency ⓘ	05/17/2022	05/18/2022	Individual
Basic Training Program Other Program Type Training - Agency ⓘ	05/10/2022	Active	Individual

5. The programs service history screen will appear. Click on the **“Assessments”** text along the top of the screen.

Betty Smith

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM: BASIC TRAINING PROGRAM

Enrollment **History** Provide Services **Assessments** Goals Notes Files Chart × Exit

Program Service History LINK FROM HISTORY

6. Select the Status Update Assessment by clicking on the **“Start”** button to the right of assessment and click **“Add Program Assessment.”**

PROGRAM: BASIC TRAINING PROGRAM

Enrollment History Provide Services **Assessments** Goals Notes Files Chart × Exit

Assessments LINK FROM ASSESSMENTS

Status Update Assessment	<div style="border: 1px solid gray; padding: 5px;"> <p>ADD PROGRAM ASSESSMENT</p> <p>Betty Smith Not Set</p> <p>ADD STATUS ASSESSMENT</p> </div>	START
Annual Assessment		START


7. Update information that may have changed and **“Save & Close.”**

Betty Smith

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

Enrollment History Provide Services **Assessments** Goals Notes Files Chart × Exit

Add Status Update for client Betty Smith

Project Status Date 05/12/2022 

DISABLING CONDITIONS AND BARRIERS

Physical Disability	No	▼
Developmental Disability	No	▼
Chronic Health Condition	No	▼
HIV - AIDS	No	▼
Mental Health Disorder	No	▼
Substance Use Disorder	No	▼
Domestic Violence Victim/Survivor	No	▼

MONTHLY INCOME AND SOURCES

Income from Any Source	No	▼
Receiving Non-Cash Benefits	No	▼

HEALTH INSURANCE

Covered by Health Insurance	No	▼
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