



## Status History

Click on Status History to view a grid of a client's status history records

Client: TEST, JOE

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Face Sheet: \$0.00

Events

Appointment History

Address History

Contacts

**Status History**

Transactions

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Life Insurance

Tasks

Liabilities

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Release

The Status History grid default to All

Status History

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			Date	Status	Notes
<input type="checkbox"/>			01/14/2021	Referral	

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When a client is inserted Status History Record is automatically generated with the date the record is Inserted and a Status of Referral.

The Status data is view only on the Face Sheet.


View Edit

**Edit Client** Save Changes <-Save and Edit Prev All Save and Edit Next->

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**Return to Top** **Client Information**

Appointment	Financial	Medical Insurance
SSN: 123-45-6789 Veteran: VA Ref Num: Client ID: 119240		
This is a QIT Client: No QIT Client: - - - \$0.00		
Lastname: TEST Firstname: JOE		
Middlename: Suffix:		
Maiden Name: Preferred Name:		
Picture: Choose File No file chosen Crime Victim: In-Reach Referral Completed: Settlement Agreement Date:		
DOB: 04/06/1935 Age: 86 DOD: Fix DOD		
GSSW: Somofftest - Nick - GSSW REGION:		
Case Region: MIDWESTERN		
Status: Referral Status Date: 01/14/2021 Resignation Type:		
Type Of Referral: Medical Petitioning Source:		
Field Alert:		



To change a client's status on the face she you will click Insert on the Status History grid. It is important that you do not edit the existing record and edit the status, as that will overwrite the history of when the client's status. Inserting a record allows the application to accurately capture the changes in the client's status history.

Status History

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**Insert Status History**

Save Save and Re-Insert

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**Status History**

Date: 03/03/2021

Status:

Notes:

Save Save and Re-Insert

The Status dropdown contains the following values:


- ✓
- Active
- Archived
- Expired
- Inquiry
- Referral
- Resigned

Selecting Resigned from the Status dropdown will show a Resignation Type dropdown

### **Insert Status History**

Save

Save and Re-Insert

Date:  

Status:  ▼

Resignation Type:  ▼

with the following values:

- ✓
- Resigned-dismissed
- Resigned-rights restored
- Resigned-Successor appointed

The saved record will update the Face Sheet.

View

### View Status History

#### Status History

Date:

Status:

Notes:

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### Client Information

#### Appointment

#### Financial

#### Medical Insurance

SSN:  Veteran:  VA Ref Num:  Client ID:

This is a QIT Client:

QIT Client:

Lastname:

Firstname:

Middlename:

Suffix:

Maiden Name:

Preferred Name:

Crime Victim:  In-Reach Referral Completed:  Settlement Agreement Date:

DOB:  Age:  DOD:

GSSW:  GSSW REGION:

Case Region:

Status:

Status Date:  Resignation Type:

Type Of Referral:

Petitioning Source:

