

TUTORIAL - Deactivate and replace a home visitor

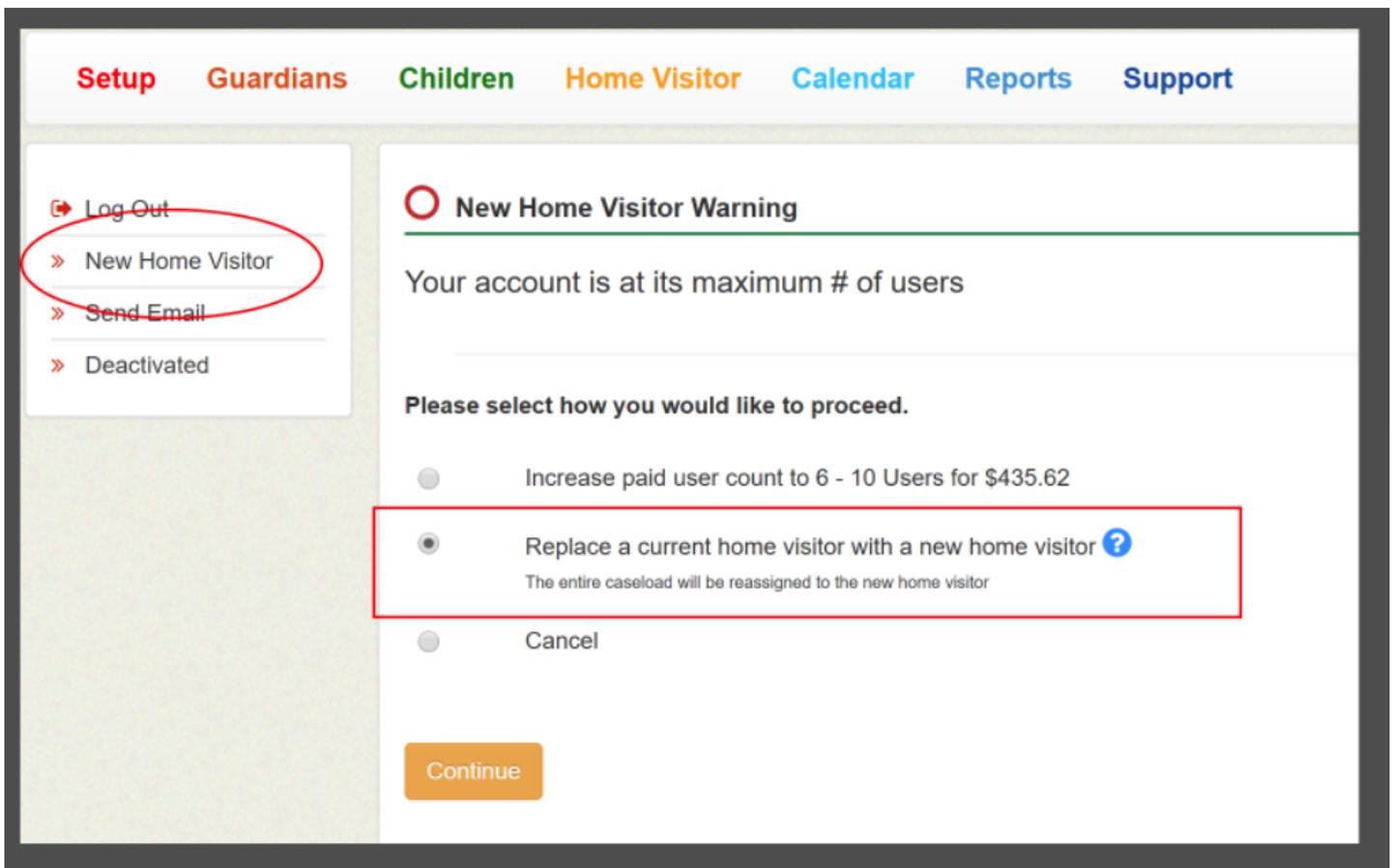
When deactivating a home visitor that has a current caseload of families, you must first reassign all children to another home visitor. In this tutorial, we'll show you how you can both deactivate, create a new home visitor and reassign all children to the new home visitor in 1 process.

2 scenarios where you will have to make a choice to deactivate and reassign the caseload:

1. Your account is at max users when clicking "New Home Visitor"
2. When deactivating a home visitor that has a current caseload

YOUR ACCOUNT IS AT MAX USERS

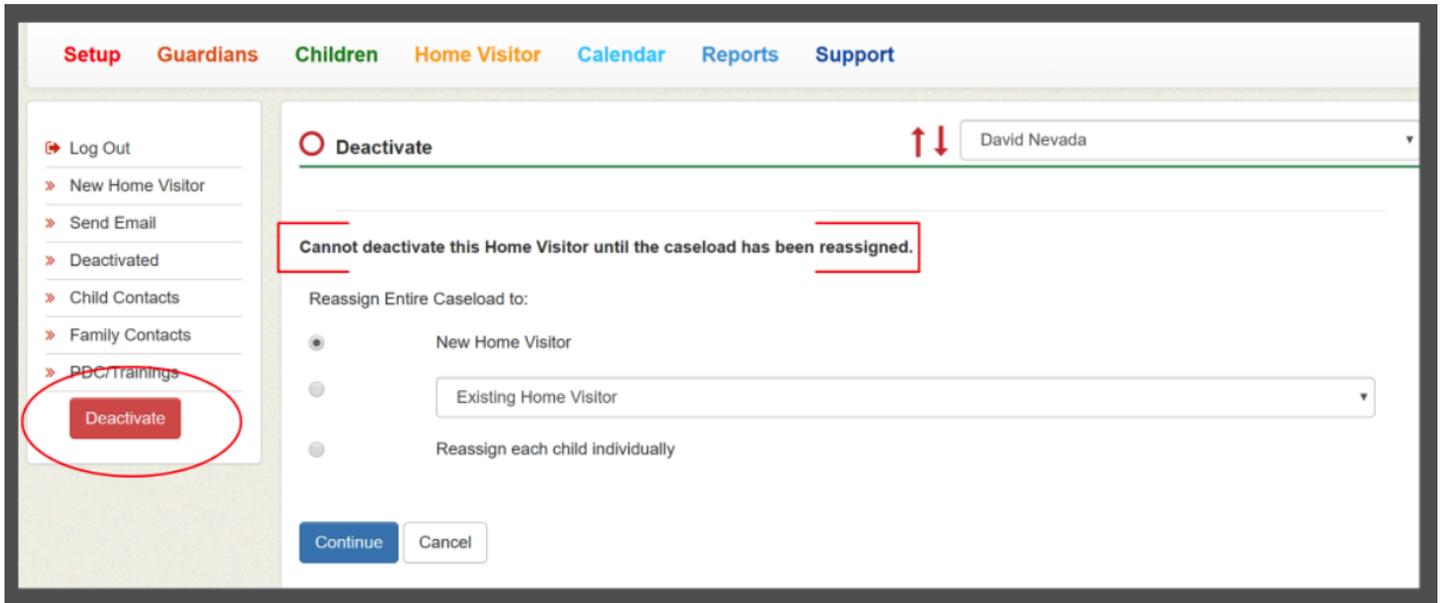
When clicking on "New Home Visitor", a warning will show giving you a couple of options. Select "Replace a current home visitor with a new home visitor" and Continue



DEACTIVATING A HOME VISITOR WITH A CASELOAD

For any of your active home visitors, you can click the Deactivate button at any point even if the home visitor has an active caseload. If that is the case, you will be prompted to choose 1 of 3 options

- **New Home Visitor** - Will allow you to continue to the page where you will enter a new home visitor
- **Existing Home Visitor** - select from the drop-down of active home visitors to assign the deactivating home visitor's entire caseload
- **Reassign each child individually** - will open a page listing each child and allow you to select a current home visitor for each child



So now that you've made your choice to replace a current home visitor with a new home visitor, let's look at the New Home Visitor entry page.

ENTERING A NEW HOME VISITOR

If you are choosing to deactivate a home visitor with a caseload, that is the only home visitor that will display in the drop-down.

If you are at maximum users and choosing to replace a current user with a new user, then you will select which of your home visitors to deactivate from the drop-down selection.

Enter New Home Visitor ↑↓ Select Home Visitor

Deactivate a current home visitor and reassign the caseload to this new home visitor? Yes No

David Nevada

Here's the home visitor selected to be deactivated.
Note: If you are at max and choose to deactivate and replace with a new home visitor, here is where you would select which home visitor to deactivate.

ID: 0

Name: First: First Name, Last: Last Name

Program Login: Program Login

Nickname/ID: Nickname/ID

Enter the new home visitor's information and click Create.

Languages Spoken

Create Cancel

Your new home visitor has been created and the deactivated home visitor can be seen in the Deactivated section.

Home Visitor Information ↑↓ replace03 user03

Your information was **successfully saved.**

ID: 27069

Name: First: replace03, Last: user03

Program Login: replaceuser03, Login: Enabled Disabled

Nickname/ID: Nickname/ID, Current Case Load Weight = 1.00

Sex: F M supervisor role also