Client Eligibility Assessment Screen

Updated on August 2016

Home > Client Management (Search Client) > Eligibility Assessment

Business Purpose:

The **Eligibility** page displays a tabular listing of the client's eligibility assessment records for all programs the user has access to, in three different tabs: Eligibility, Deleted Eligibility and Merged.

How to:

1. A search can be performed by filtering the client's eligibility assessment records by **Program** and **Type** by clicking on their respective dropdown arrows.
2. For each eligibility assessment record, the **Program**, **Type**, **Start Date**, **End Date, Eligible** flag, **Created By** and **Created Date** are displayed. The left most columns without header contains the delete action button to delete the eligibility record if required.
3. To view the details of each eligibility assessment record, simply click on the **Program** name of the record.
4. Each of the column headings are clickable and will execute a sort alternating between ascending and descending based upon the column heading. (For example, when you click on the **Start Date**, the eligibility assessment records are then sorted in ascending order, with the oldest **Start Date** first.)

Important Notes:

1. The total number of records is shown at the bottom of every page.
2. The New Eligibility action button can be used to create new eligibility assessment records.
3. Only records that have no financial transactions associated with it can be deleted.
4. Deleted eligibility records can be seen within the Deleted Eligibility tab.
5. Merged eligibility records are records from the original merged client that was merged into the current client.