

ASSIGNED STAFF

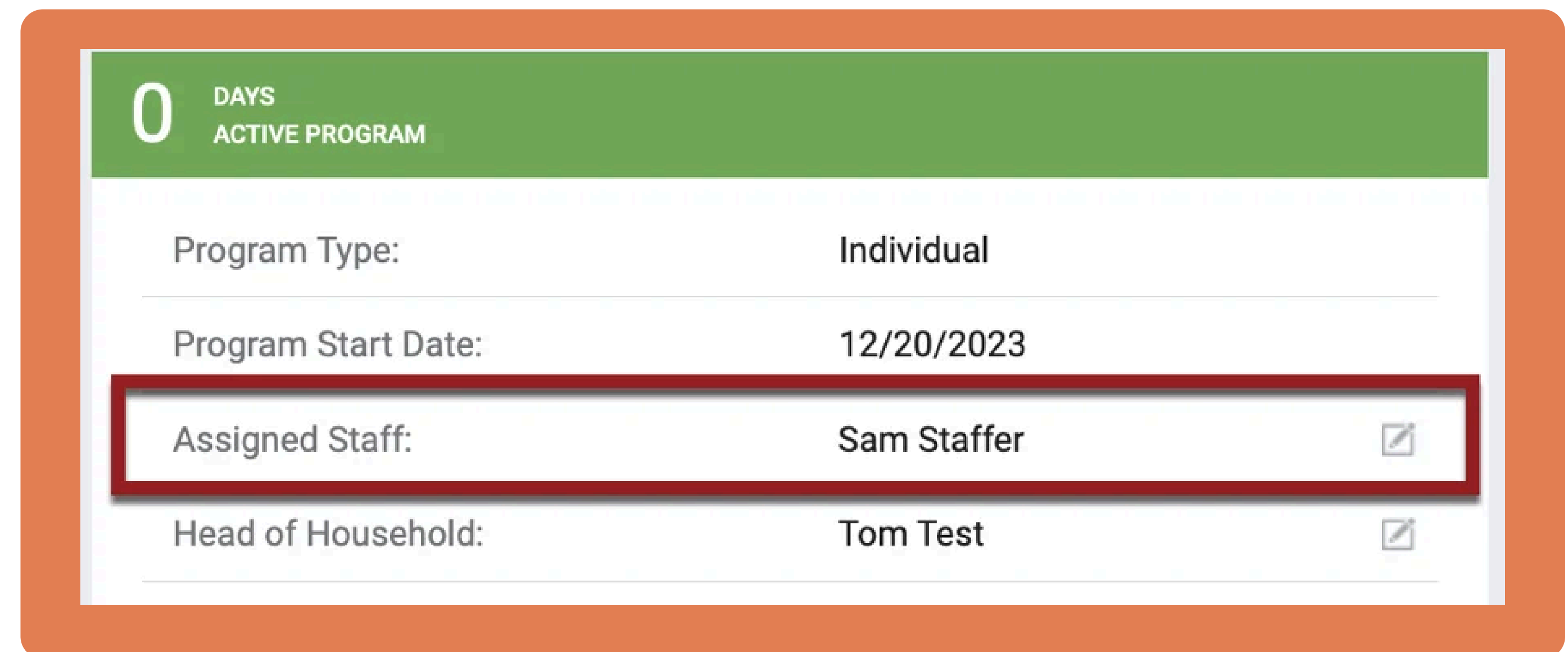
This guide explains how staff members are automatically and manually added to the Assigned Staff of a client's program enrollment. For further information, review the Help Desk Article: [Managing Program Enrollments](#)

HAVE QUESTIONS OR NEED ASSISTANCE PLEASE CONTACT THE HELP DESK OR EMAIL SUPPORT@BITFOCUS.COM

Need Assistance?

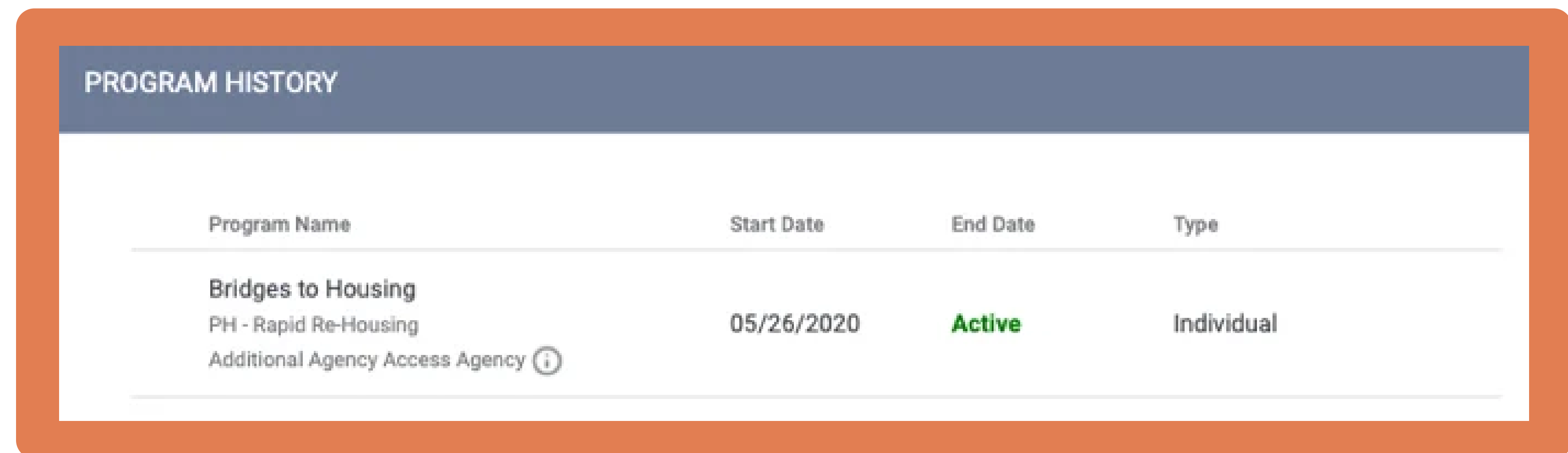
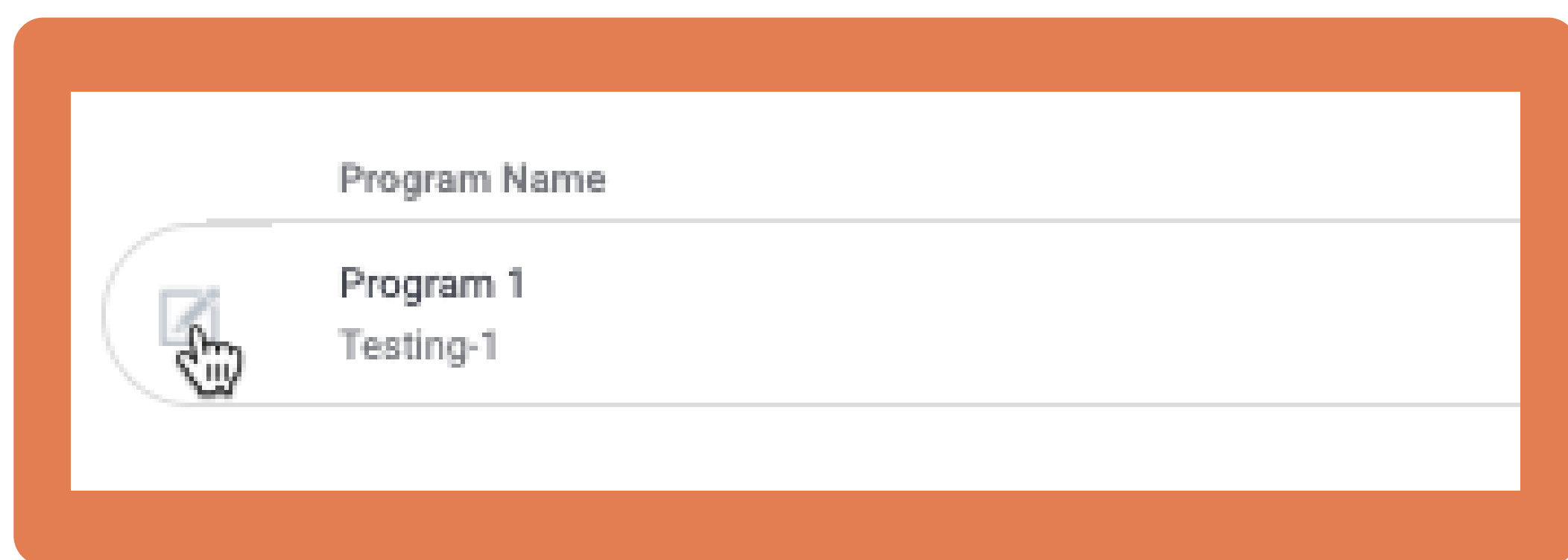
Step 1

When a staff member records a program enrollment in a client record, the system automatically adds the staff member to the Assigned Staff section of a client's enrollment.



Step 2

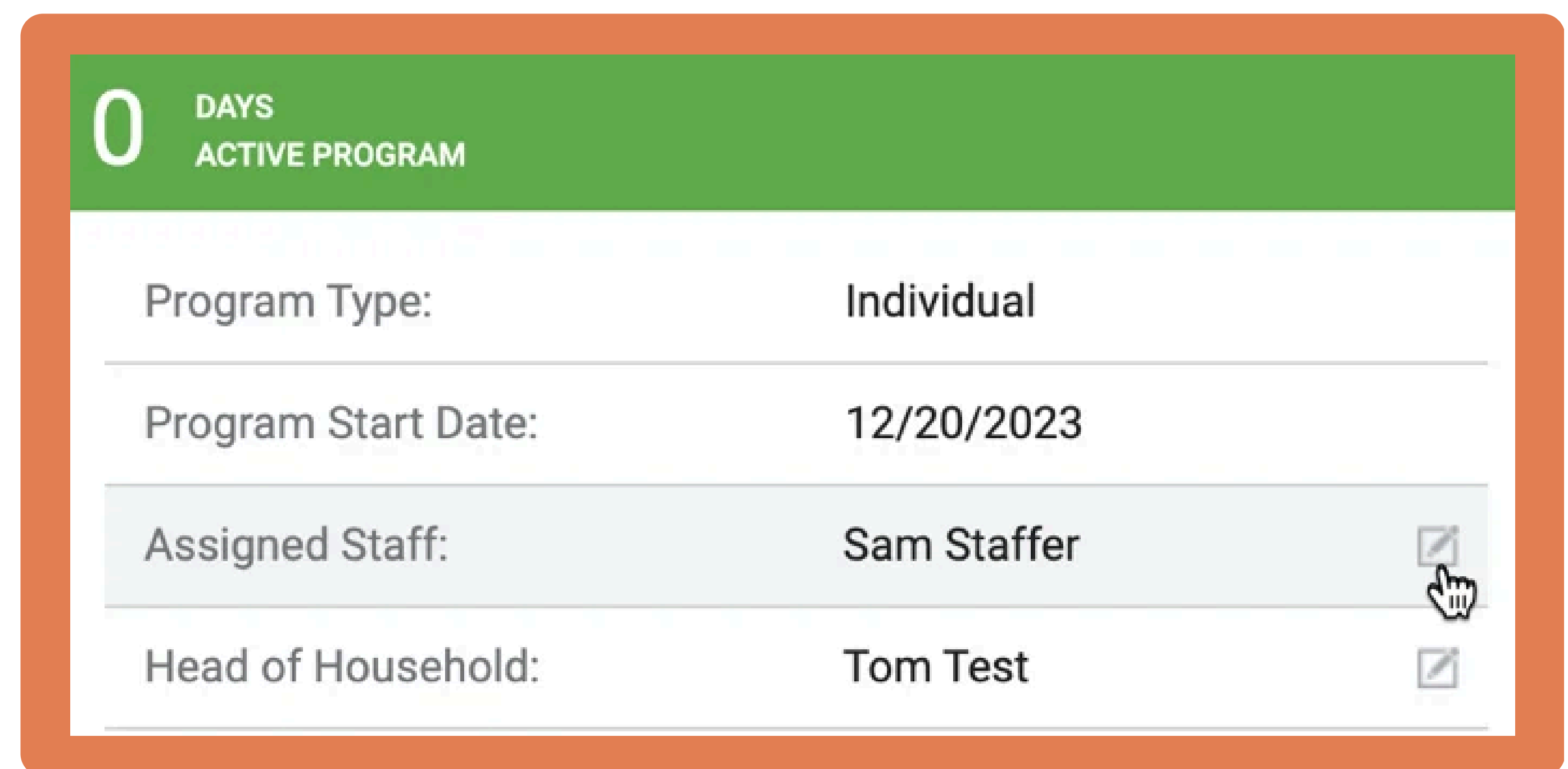
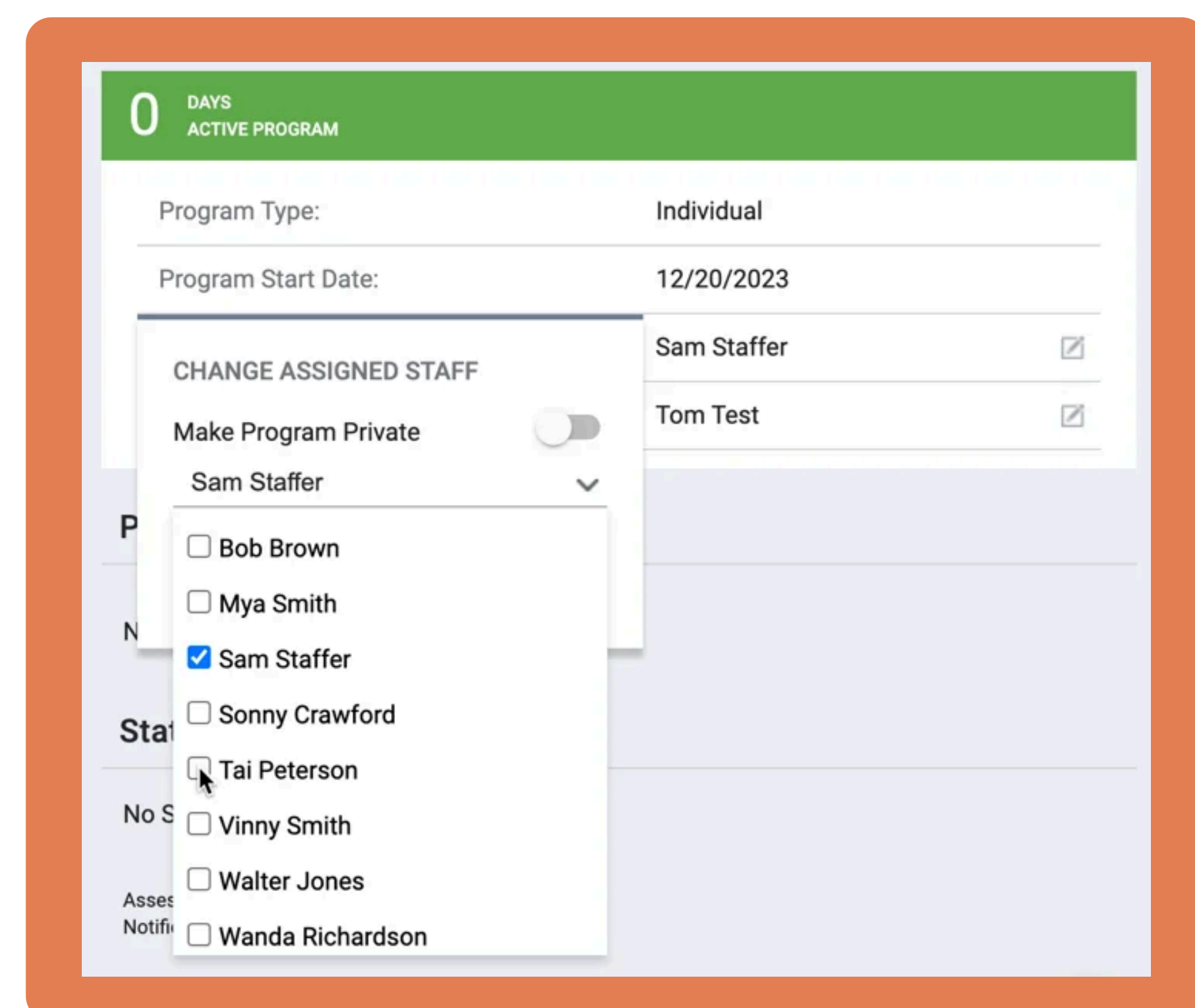
To assign a staff member to an enrollment, edit the enrollment history under the PROGRAMS tab of the client record.



Click the EDIT icon next to the enrollment to which you would like to add additional staff members.

Step 3

The panel to the enrollment's right displays the Assigned Staff, which you can edit by clicking the edit icon.



You can select multiple staff members by clicking the checkbox next to each name. You can also remove the staff member automatically assigned during enrollment.