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CEC GRANT-FUNDED SERVICES
GRANT MANAGEMENT GUIDE 2024-25

PLEASE NOTE, A REVISED VERSION OF THE GRANT MANAGEMENT GUIDE FOR 2025-26 WILL BE PRODUCED NEXT YEAR. PROVIDERS WILL HELP SHAPE ELEMENTS OF THIS, INCLUDING REVISED OUTCOME AND OUTPUTS DEFINITIONS AND EVIDENCE REQUIREMENTS.

1. Introduction

Capital City Partnership (CCP) manage funds on behalf of City of Edinburgh Council relating to employability support in Edinburgh. Council-funded employability support is delivered by a variety of Third-Sector organisations through several contracts and grants. This guide is intended to be used by all recipients of a grant from CCP and will cover the following areas:

- Reporting and Invoicing
- Audit and Compliance Monitoring
- Performance and Compliance Escalation Process
- Outcomes and Progressions Definitions and Evidence

CCP aims to be as open, transparent and approachable as possible, viewing the relationship with funded organisations as a partnership. As such, it is important that any issues which arise during this relationship are discussed as soon as possible so they can be rectified. The guide can be a first port of call for organisations who have questions relating to their delivery, but always approach your contract manager if there are any issues you would like to discuss.

2. Quarterly reporting and financial claims guidance

a. Submission of reports and invoices

Your quarterly progress report and invoices should be submitted to CCP (contracts@capitalcitypartnership.org) within 10 working days of the end of each quarter. Please send both documents in the same email. Normally, Capital City Partnership pays grants quarterly in advance in four equal instalments.

The first instalment can be claimed once the Funding Agreement has been signed by CEC and your own organisation. The remaining grant instalments will be paid within 28 working days of receipt of a satisfactory progress report at the end of each quarter. Please note that late or incorrect submission of reports will result in a delay of payment.

Report and invoice deadlines will be sent to all project managers via email and diary reminders at the start of the year and will be asked to cascade to all relevant staff. Date for 2024-25 are as follows:

- Q1 Report – Friday 12th July 2024
- Q2 Report – Friday 11th October 2024
- Q3 Report – Friday 10th January 2025
- Q4 Report – Friday 11th April 2025

This final report will be your summative report for the whole year and should include reflections on the whole year of delivery including case studies.

Progress reports and invoices should be submitted electronically by the deadlines given above. Your contract manager will check the information and will contact you if there are any issues to be resolved prior to payment.

IMPORTANT: Please rename documents before submitting them by adding the name of your project and quarter number to the beginning of the document title, e.g. *Citadel YC – Futureheads – Q1 24-25*.

b. Completing the quarterly narrative report

The narrative report is used to update your Contract Manager and allow them to report progress to the CCP board and CEC Business Growth and Inclusion. Please use this report to highlight any successes, issues and challenges that you'd like to highlight to these audiences.

The 'Progress on Targets' section (section 1) of the narrative report should indicate to what extent you are achieving the targets set out in your funding agreement. Please complete the targets table with both your agreed targets and your year-to-date figures as recorded on Helix, as well as the percentage achievement.

The 'Progress on Targets' table is broken down into three sections: clients; outcomes; and outputs. Within Helix, the web report template "Programme Outcomes Export" pulls the data for these three sections for you, based on the information you have input to the system over the chosen period. To view this report:

- Go to the "Web Reports" section of Helix.

- Use the "Programme Outcomes Export" report template.
- Select the dates you are interested in (01/04/22 – end of the chosen quarter).
- Select the programmes you wish to see.
- Run the report and it will provide you with all the information you require for your quarterly reports.

For more information on what outcomes and outputs are eligible for your project, please consult your funding agreement. Detailed information on outcome types and the associated evidence required are listed in the 'Outcomes and Progressions Definitions' section of this document (section 5). Your contract manager will check that the reported targets achievement matches figures captured in the Helix system. If they do not match (and you have not given a reason for this) your report will be returned for resubmission and your quarterly payment may be delayed.

If there is a discrepancy between what the report shows and what you think has been achieved, you may find it useful to check the Programme Outcomes Export Raw Data report, which shows progressions and outcomes whether verified or not. If you believe that you have outcomes which aren't showing in the Helix report, you can explain the reasons for this in your progress report.

Please note that you can only claim for your organisation's own work. So, if you refer a client to another provider e.g., for an employability or skills course, that provider should claim for that specific progression. When the client returns to your programme, you can claim for any pipeline progression and for any subsequent outcomes.

Locally funded employability services should not duplicate or displace other provision such as national programmes funded by DWP.

c. Invoicing

To claim for quarterly installments, please send an invoice along with your quarterly report to your contract manager. The invoice should include: your organisation's name; the project/funding stream you are looking to claim for; the quarter which you are claiming the funding for; and the project reference number listed in your funding agreement. Invoices submitted without this information will be sent back and could result in delayed payment. CCP aim to pay invoices within 28 days of submission, when accompanied by a satisfactory report.

Checklist

- File names have been changed to reflect project name, year and quarter.
- Reported figures match Helix.
- Targets match funding agreement.
- Evidence is held (as per Outcomes and Progressions Definitions section) for each outcome/output reported.
- Progressions are itemised (type and number achieved).
- Invoices contain all relevant information as stated above.

3. Audit and Compliance Monitoring

As part of Capital City Partnership's responsibilities for contract and grant management on behalf of City of Edinburgh Council, audit and monitoring visits for all funded providers will be carried out. This includes all contracted provision and grant holders.

The purpose of these visits is to ensure that providers of employability services are delivering their projects in accordance with the terms of their funding agreements and/or contracts. The audit team will compare records in Helix with evidence held in client files and ensure that appropriate evidence is held for any outcomes claimed. Visits will take place at providers' premises and will follow a five-stage process as follows:

Stage 1 – Audit Client Sample Preparation

The audit team from CCP will be responsible for preparing a client sample in advance of the visit. The number of client records sampled will be proportionate to the number of engagements/ outcomes stipulated in the provider's grant agreement/contract and the volumes visible on Helix. The sample will be selected from the data reported on Helix over the life of your project. Once completed, the client samples will be encrypted with passwords unique to each individual provider/project, which will be sent to you separately.

Stage 2 – Scheduling Visit

Providers will be given at least two weeks' notice of the visit, allowing time to prepare the client sample files for inspection. Providers must confirm via email that they are happy with the date/time suggested, as well as confirming that all selected files will be available for inspection on the day.

Stage 3 – Audit Visit

When visiting a provider, the audit team will discuss the audit on arrival with the named contact. This will include the reason for the visit, the process involved and any feedback which will be provided upon completion. No provider presence is required during the inspection process as the audit team will work autonomously and discretely, thus minimising disruption to the provider organisation/staff.

Visits should take between 1-3 hours depending on the client sample size. During this time, the audit team will check through the paper/digital files held by the provider for each client and make notes on the evidence held. The aim will be to ensure that the paperwork held meets compliance requirements and matches the support logged on Helix. Mandatory supporting documentation includes:

- Valid Data Protection Statement
- Evidence for reported outcomes (see Outcomes and Progressions Definitions)
- Evidence for reported progressions (see Outcomes and Progressions Definitions)
- Case notes/evidence of service provision on Helix

Other supporting documentation (dependent upon the service provision) could include:

- Activity evidence (phone/email/letter/SMS)
- Attendance sheets for group/course sessions

Stage 4 – Feedback Summary

Formal feedback will be provided in writing to the named contact and CCP contract manager within a given timescale. Written feedback should be provided no later than 30 days from site visit.

Following the visit, the audit team will prepare formal feedback for providers. This will include the client sample spreadsheet, showing what was found in both the Helix records and the hard copy records for each client, as well as some general notes. The client sample will be RAG rated, showing which files require urgent action (red), which need some work (amber) and which are suitable (green). A feedback summary sheet, which follows a template, will also be given to providers.

An email will be sent to the provider outlining the feedback from the visit. The email will contain two attachments:

- Client record feedback sheet – password protected. This provides comment on each file checked on the day. It is also RAG rated (green ok, amber needs attention, red is urgent action required)
- Monitoring visit sign off form – a sign off sheet for the provider's records, summarising the findings, making recommendations and noting further action required.

For example, should a file have no signed Data Protection Statement, feedback will state the provider will be required to gain one from the client retrospectively within an agreed time period. If a Data Protection statement cannot be produced within this period, the client record should be removed from Helix.

Stage 5 – Follow Up

Dependent upon the nature of the issues, remedial actions could include:

- Removal of clients from Helix
- Removal of outcomes from Helix
- Amended quarterly reports to reflect these changes

Where there are major issues with the client sample, the contract manager may decide to take appropriate action, as outlined in the Contract Management Escalation Process document (section 4). Providers will be given timescales to rectify concerns raised in the feedback and follow up visits could be scheduled to evidence that remedial actions have been taken.

The frequency of audits will be annual, commensurate with the stage of the funding/project. For example, during a three-year funding cycle, visits would be scheduled as follows:

- Year 1 – initial support visit for file management discussion.
- Year 2 & 3 – full audit visit as per five-step process.

4. Capital City Partnership: Contract Management – Performance and Compliance Escalation Process

1. Capital City Partnership manages contracts and grants on behalf of City of Edinburgh Council. It is CCP's responsibility to monitor performance and contract compliance and report this to CCP's board and CEC Officials.
2. CCP prefers a partnership approach to contract management; early notification of any issues which are impeding contract performance can be discussed and rectified. If necessary, funding agreements can be altered and contract variations applied to reflect changing conditions. Quarterly reports and yearly contract meetings are used to highlight any issues and to make sure they are dealt with timeously.
3. However, in a small number of cases, it is necessary to implement performance or compliance measures to ensure that best value for public money is achieved. The following is an outline of what providers of services which are contracted managed by CCP can expect in cases of under-performance and non-compliance.

Contract issue	**Notification**	**Process**	**Escalation 1**	**Escalation 2**
Under performance: fewer engagements or outcomes than agreed.	Provider notifies via either Helix or Quarterly report.	Contract manager requires meeting with project senior manager and/or report detailing how issue is being dealt with from provider. Issue is either closed or escalated.	Letter issued to provider highlighting issues and actions to be taken. Issue is either closed or escalated.	Provider is notified of reduction or termination of contract.

Contract issue	**Notification**	**Process**	**Escalation 1**	**Escalation 2**
Non-compliance found during CCP file audit. (Such as: evidence not collected for outcomes; data	CCP auditor reports non-compliance to Contract manager, deadline set for gathering of evidence or	Provider contacts Contract Manager to report on remedial action. Issue is either closed or follow up	If follow up visit shows that file compliance is still unsatisfactory then letter is issued to provider	Provider is notified of reduction or termination of contract.

protection agreement not held; insufficient evidence of service delivered.	removal of data from Helix.	visit is scheduled.	highlighting issues and actions to be taken. Issue is either closed or escalated.	

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5. Outcomes and Progressions Definitions

The information below is intended as a guide on best practice for collecting evidence. However, there is flexibility within the definitions and other forms of evidence may be accepted. If you are unsure whether the outcome or evidence you have is appropriate, please discuss this with your contract manager.

As per No One Left Behind (NOLB) guidance, all outcomes achieved by participants can be verified using a self-declaration form signed by a caseworker and the participant. This self-declaration form should be considered the minimum standard of evidence which would be accepted to verify an outcome for NOLB funded projects. Capital City Partnership's expectation is that further evidence, which meets the JUfJ evidence requirements as stated below, should also be collected by providers where possible.

Status	Definition	Evidence Requirements	Adding to Helix
Start/Engagement/ Assessment	First involvement with participant with view to engagement on project. Assessment and action plan completed. Placement of participant on applicable stage of pipeline.	Registration Form and Data Protection documentation to be signed and dated by client and caseworker. Helix updated with clients' details. Action plan signed and dated by both service provider and service user (can be done online on Helix). Progress reviews should take place quarterly and be kept on file.	In "Client" go to "New Client" and complete the wizard. This should add the activity "Started on Program" in the client record which will be counted in the reports. For all NOLB grant funded projects, you should be completing the "NOLB Post July 2022 – CCP" wizard. When completing the wizard, certain fields are mandatory, while all fields listed are included as part of NOLB reporting to Scottish Government.

Status	Definition	Evidence Requirements	Adding to Helix
			It is important to consider the fields which are most relevant to your project, ensuring these are completed. For example, if you are funded through Parental Employment Support Fund, all clients must be parents. Therefor the “Parental Status” question must be answered as “Parent in a couple” or “Single parent”. You should then also complete the “Family Information” question. For more sensitive information, clients have the option of “prefer not to say”.
Number of people supported	Number of clients supported over a given period.	Unique client IDs within Helix System to correspond to records of clients held by organisations (paper files and claim documentation).	Clients supported in the current financial year who have received support in previous years for this project will automatically pull through as individuals supported. Any activity linked to your program with the relevant date (i.e. in the reporting period) will pull through to the report.

Status	Definition	Evidence Requirements	Adding to Helix
Progression: Volunteering	Minimum 2 hours per week sustained for 13 weeks (stage 1 & 2 service users) or minimum 8 hours within a 4-week period (stage 3 & 4 service users). With a non-profit making organisation.	Email, or document signed and dated, from appropriate representative of placement provider confirming dates and hours of attendance.	In client's summary, go to Actions, then Actions and Outcomes. Click "Add" then click the three dots next to "Activity". Search for "Started Volunteering" and click to add. Complete other outcome details as per wizard, then click "Save". You have status options that can be changed related to the evidence you have so pending or awaiting verification is when you don't yet have the evidence. Verified is when you have the evidence. There is also a destination button which allows you to record the details of the Work Experience progression. Please complete this before verifying the outcome.
Training will no longer be split by employability training, vocational training and qualifications in applications. Applicants will be asked to detail the number of individuals supported to enter and complete training delivered by their project. How to log this on Helix will be agreed with providers and written into funding agreements. Amended training definitions will be added to future versions of the grant management guide.			
Progression: Employability Training	Completion of an employability skills course such as Certificate of Work Readiness, Employability Award etc (including certificated	Copy of certificate awarded, or printout from service user's SQA record showing certification or email, or document signed and dated from trainer confirming dates and hours of	In client's summary, go to Actions, then Actions and Outcomes. Click "Add" then click the three dots next to "Activity". Search for "Employability Training" and

Status	Definition	Evidence Requirements	Adding to Helix
	courses validated by e.g., SQA, FE College).	attendance.	click to add. Complete other outcome details as per wizard, then click "Save". You have status options that can be changed related to the evidence you have so pending or awaiting verification is when you don't yet have the evidence. Verified is when you have the evidence.
Progression: Certified Vocational Training	Successful completion of modules, units, or assessed training courses accredited by SQA or other national body. Training is specific to a sector or job role (CSCS, Food Hygiene etc.)	Copy of certificate awarded, or printout from service user's SQA record showing certification.	In client's summary, go to Actions, then Actions and Outcomes. Click "Add" then click the three dots next to "Activity". Search for "Progression: Vocational Training" and click to add. Complete other outcome details as per wizard, then click "Save". You have status options that can be changed related to the evidence you have so pending or awaiting verification is when you don't yet have the evidence. Verified is when you have the evidence.
Outcome:	Qualification accredited by an	Copy of certificate awarded.	In client's summary, go to Actions, then

Status	Definition	Evidence Requirements	Adding to Helix
Qualification	awarding body such as SQA and non-certificated vocational training courses. Includes short courses at college or university.		Actions and Outcomes. Click “Add” then click the three dots next to “Activity”. Search for “Qualification Gained” and click to add. Complete other outcome details as per wizard, including using drop down menu to specify qualification title/level etc, then click “Save”. You have status options that can be changed related to the evidence you have so pending or awaiting verification is when you don’t yet have the evidence. Verified is when you have the evidence.
Progression to onward provision	Service user progresses from one service to another which is further along the pipeline: stage 1/stage 2 provision to stage 3 and 4 services etc.	A formal statement should be completed as evidence by the stage 1/2 provision, the stage 3/4 provision and the participant acknowledging the progress onto the stage 3 or 4 services (via Helix).	In client’s summary, go to Actions, then Actions and Outcomes. Click “Add” then click the three dots next to “Activity”. Search for “Referral” and click to add. Complete other outcome details as per wizard, then click “Save”.
Progression: Further or Higher Education	Higher or further education course start counts as outcome, with NOLB sustainment	Confirmation from Educational Establishment as to enrolment on course, course title, start and end date. Copy of matriculation or student	In client’s summary, go to Actions, then Actions and Outcomes. Click “Add” then click the three dots next to “Activity”.

Status	Definition	Evidence Requirements	Adding to Helix
	monitoring required (4/13/26/52 weeks).	ID card. Evidence of attendance obtained by service user from institution.	Search for “Progression: Education Full-Time” or “Progression: Education Part-Time” and click to add. Complete other outcome details as per wizard, then click “Save”. Click “Add follow on template” and complete details to ensure 4/13/26/52 week sustainment notifications come through. You have status options that can be changed related to the evidence you have, so pending or awaiting verification is when you don’t yet have the evidence. Verified is when you have the evidence. There is also a destination button which allows you to record the details of the education. Please complete this before verifying the outcome.
Progression: work placement	A work placement is a formal, set period placement with an employer to enable a participant to gain practical training and experience in a relevant and	Email from appropriate representative of placement provider confirming dates, placement activity and hours of attendance or document signed and dated by the placement provider.	In client’s summary, go to Actions, then Actions and Outcomes. Click “Add” then click the three dots next to “Activity”. Search for “Started Work Placement/Experience” and click to add.

Status	Definition	Evidence Requirements	Adding to Helix
	challenging workplace environment with a view to providing the participant with the necessary skills, confidence and references to enhance their employment prospects.		Complete other outcome details as per wizard, then click "Save". You have status options that can be changed related to the evidence you have so pending or awaiting verification is when you don't yet have the evidence. Verified is when you have the evidence. There is also a destination button which allows you to record the details of the Work Experience progression. Please complete this before verifying the outcome. When client has completed placement, in client's summary, go to Actions, then Actions and Outcomes. Click "Add" then click the three dots next to "Activity". Search for "Ended Work Placement/Experience" and click to add. Complete other outcome details as per wizard, then click "Save".
Outcome: job f/t	At least 16 hours per week. Job entry must be within 26 weeks of	Contract of Employment/Letter of employment plus wage slip to evidence actual	Job outcomes should be added as the date the client started in the job to allow the

Status	Definition	Evidence Requirements	Adding to Helix
	last active engagement. Job claim is valid after 4 weeks but also continue to monitor 13/26/52 week sustainments.	remuneration for a period of employment. Job must be sustained for minimum of four weeks before being claimed and associated evidence must evidence this. Any future sustainment (13/26/52 weeks) can be self-evidenced by a client via email/phone call/text message etc.	correct sustainment cycle dates to be automatically generated. In client's summary, go to "Actions", then "Actions and Outcomes". Click "Add" then click the three dots next to "Activity". Search for "Started Job FT" and click to add. Complete other outcome details as per wizard, including changing the status to successful, then click "Save". Click "Add follow on template" and complete details to ensure 4/13/26/52 week sustainment notifications come through. You have status options that can be changed related to the evidence you have, so pending or awaiting verification is when you don't yet have the evidence. Verified is when you have the evidence. There is also a destination button which allows you to record the details of the Employment or MA. Please complete this before verifying the outcome.

Status	Definition	Evidence Requirements	Adding to Helix
Outcome: job p/t	Less than 16 hours per week. Job entry must be within 26 weeks of last active engagement. Job claim is valid after 4 weeks but also continue to monitor 13/26/52 week sustainments.	Contract of Employment/Letter of employment plus wage slip to evidence actual remuneration for a period of employment. Job must be sustained for minimum of four weeks before being claimed and associated evidence must evidence this. Any future sustainment (13/26/52 weeks) can be self-evidenced by a client via email/phone call/text message etc.	Job outcomes should be added as the date the client started in the job to allow the correct sustainment cycle dates to be automatically generated. Job outcomes should be added as the date the client started in the job to allow the correct sustainment cycle dates to be automatically generated. In client's summary, go to "Actions", then "Actions and Outcomes". Click "Add" then click the three dots next to "Activity". Search for "Started Job PT" and click to add. Complete other outcome details as per wizard, including changing the status to successful, then click "Save". Click "Add follow on template" and complete details to ensure 4/13/26/52 week sustainment notifications come through. You have status options that can be changed related to the evidence you have, so pending or awaiting verification is when you don't yet have the evidence.

Status	Definition	Evidence Requirements	Adding to Helix
			Verified is when you have the evidence. There is also a destination button which allows you to record the details of the Employment or MA. Please complete this before verifying the outcome.
Outcome: self-employment	As job entry outcomes. Runs own business, not contractually bound to a specific employer as an employee.	Self-employment declaration completed stating number of hours worked in the business per week and date started self-employment, including name and address of company plus proof of trading in form of HMRC letter evidencing registration or Bank statement for a business account. Job must be sustained for minimum of four weeks before being claimed and associated evidence must evidence this. Any future sustainment (13/26/52 weeks) can be self-evidenced by a client via email/phone call/text message etc.	Job outcomes should be added as the date the client started in the job to allow the correct sustainment cycle dates to be automatically generated. In client's summary, go to "Actions", then "Actions and Outcomes". Click "Add" then click the three dots next to "Activity". Search for "Started Self Employment" and click to add. Complete other outcome details as per wizard, including changing the status to successful, then click "Save". Click "Add follow on template" and complete details to ensure 4/13/26/52 week sustainment notifications come through. You have status options that can be changed related to the evidence you

Status	Definition	Evidence Requirements	Adding to Helix
			have, so pending or awaiting verification is when you don't yet have the evidence. Verified is when you have the evidence. There is also a destination button which allows you to record the details of the Employment or MA. Please complete this before verifying the outcome.
Outcome: in work progression	Applies only to participants ***who were already employed on engagement with service***. It is considered that participants have in work progression when they have either taken a job with a new employer or progressed to a higher skilled job with their current employer. The change must fulfil one of the criteria below: ○ requires higher competences, skills or qualifications	Auditable signed evidence (as agreed with contract manager) kept with service user's file. Need to include entry position, action undertaken and resolution of situation with discernible improvement in service user's situation with attached evidence (e.g. payslip, new contract or description of new work skills obtained) signed and dated by service user, caseworker and their line manager. An example of acceptable evidence would be: • Entry position evidence (payslip/contract) pre-intervention. • Outcome form detailing improvement in situation (higher pay, more hours,	In client's summary, go to Actions, then Actions and Outcomes. Click "Add" then click the three dots next to "Activity". Search for "In Work Progression" and click to add. Complete other outcome details as per wizard, then click "Save". You have status options that can be changed related to the evidence you have, so pending or awaiting verification is when you don't yet have the evidence. Verified is when you have the evidence. There is also a destination button which allows you to record the details of the In Work Progression. Please complete this before verifying the outcome

Status	Definition	Evidence Requirements	Adding to Helix
	○ entails more responsibilities ○ promotion ○ move from precarious to stable employment (e.g., fixed term to permanent contract) ○ move from underemployment (i.e., involuntary part-time work) to full employment. ○ Other as agreed in advance by contract manager	more skills/ competences/ responsibilities, promotion, moving to stable employment, move from underemployment). • New position evidence (payslip/contract).	
Outcome: retained employment	Applies only to participants ***who were already employed on engagement with service***. It is considered that participants have retained their employment when they have been supported to maintain their current role and without the support, may have become unemployed. In this case, the change must fulfil one or	Auditable signed evidence (as agreed with contract manager) kept with service user's file. Need to include entry position, action undertaken and resolution of situation with discernible improvement in service users' situation with evidence thereof - signed and dated by service user, caseworker and their line manager. Alternatively, an official letter detailing the outcome of any intervention from the employer.	In client's summary, go to Actions, then Actions and Outcomes. Click "Add" then click the three dots next to "Activity". Search for "Retained Employment" and click to add. Complete other outcome details as per wizard, then click "Save". You have status options that can be changed related to the evidence you have so pending or awaiting verification is when you don't yet have the evidence. Verified is

Status	Definition	Evidence Requirements	Adding to Helix
	more of the characteristics below: ○ Client's job was at threat of redundancy ○ Client's circumstances changed and felt they could no longer sustain employment ○ Other as agreed in advance by contract manager	An example of acceptable evidence would be: • Entry position evidence (payslip/contract) pre-intervention. • Outcome form detailing resolution to issues in the workplace. • Evidence client retained role (payslip/contract)	when you have the evidence.
Client exits programme	Client exits a programme, either progressing to employment/education/further training or has disengaged from programme.	If client has progressed in to employment/education/further training, this outcome should be added prior to exiting the client from the programme, with associated evidence collected. If client has disengaged, details of disengagement should be added to noted on Helix activity.	In client's summary, go to Actions, then Actions and Outcomes. Click "Add" then click the three dots next to "Activity". Search for "Exited Programme" and click to add. Complete other outcome details as per wizard, then click "Save". Also ensure that your caseworkers are no longer linked as active with the client in the details section or this client will continue to appear in the caseload list. Final look at program and change the end date for the

Status	Definition	Evidence Requirements	Adding to Helix
			program that the client has now left.