

## How to Reserve a Seat (slot) in a Class or Event

Keep in mind that CaseWorthy does not use the term **Seat**. It instead uses the term **Slots** to refer to openings. When you enroll your client into a class or event, you need to reserve a slot for them. This will put them on the roll list and will check them into the class or event.

Remember, we chose to auto-enroll when we configured the usage. When you reserve a slot for a client, that client is automatically checked into that class by default. If that client does not show up, you will need to record it as an absence.

The instructions for recording an absence are located [here](#).

When you need to reserve a slot for a client, you can choose one of two methods. We will go over each method.

### ##The Organization Tab

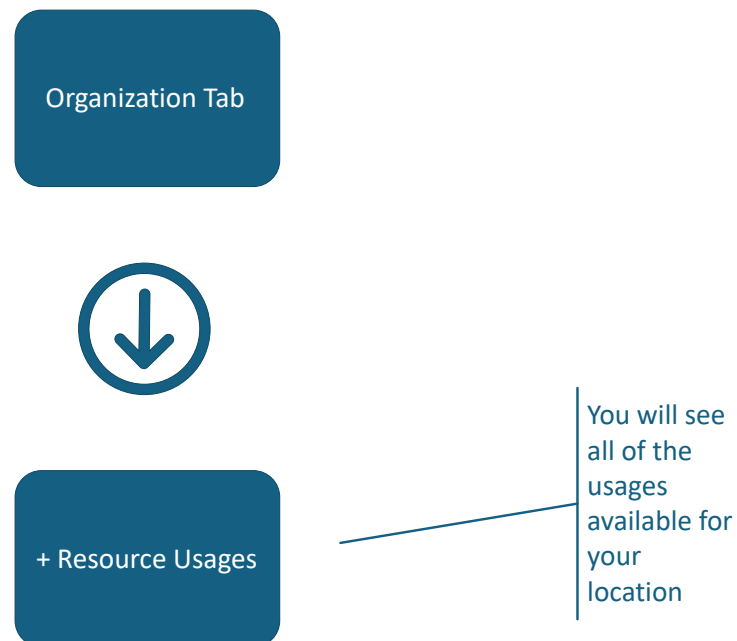
The first method occurs on the Organization tab.

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# How to Reserve a Seat

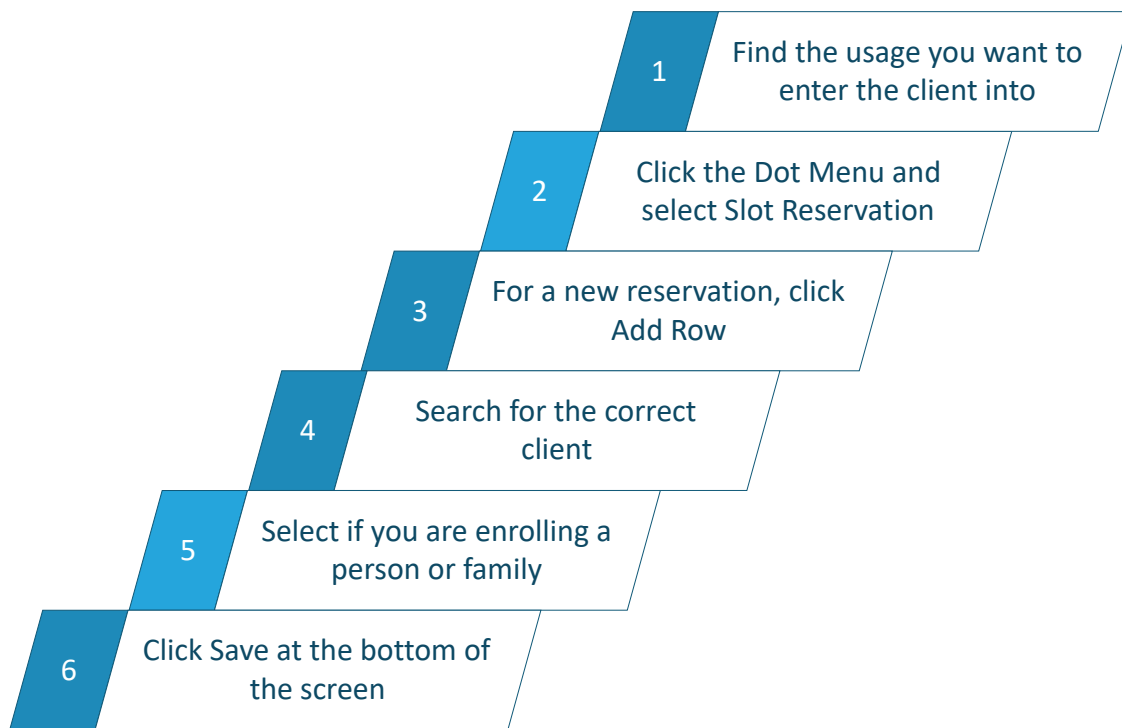
## Two Methods

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After you click the Resource Usages, you should see all of the usages that are available for your location. **If you do not see the correct usages or if you want to see usages for another site, contact the Data Team.**

Look over the list and choose the correct usage that you wish to enroll the client into.



Click the Dot Menu to the left of the correct usage and select **Slot Reservation**. This will bring up a new window. On this window you can add a new reservation as well as search for all current reservations.

Click the **Add Row** button at the top of the screen. Search for your client and then decide if you are enrolling that client as a family or as an individual. If you are enrolling the entire family, enter in the number of children and adults who will be attending. Lastly, click Save at the bottom of the screen.

When you choose Family, the number of attendees are all entered under the selected client. Family should only be selected for family events such as the Children's Museum, etc. If there is a case where multiple family members are enrolled in the same program (for instance, a husband and wife enrolled in Entrepreneurship), you should reserve slots for each client separately.

#### ##Class Calendar

The other option for reserving a slot is to do it through the class calendar located on the Case Management tab, Calendars.

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Two Methods

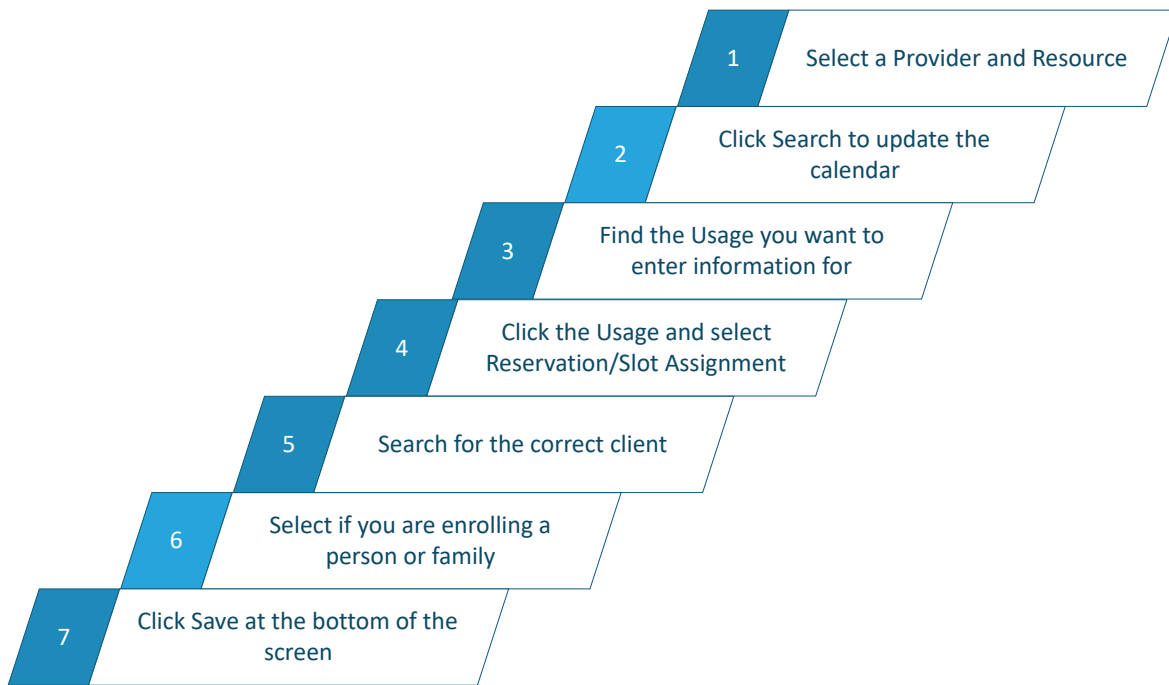
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Case Management  
Tab



Once you click the Calendars menu item, you are taken to a new dashboard containing multiple selections. You want to choose the **Class** calendar. This will bring up a search screen where you must select a Provider (site) and a Resource and then click Search.

As always, if you don't see what you need from the drop down boxes or if the correct calendar does not load, let the Data Team know immediately.



Find the usage you want to reserve a slot for, click it and select Reservation/Slot Assignment. Enter the information as you did above and click Save at the bottom of the screen.

Note - The start date for any usage will always default to the usage start date. If you are trying to reserve for a specific day or time frame, you must alter the Start Date and End Date on the Reservation screen.