

How to Guide

Changing/Editing the Case Manager Assignment

To change/edit the CM assignment, go to the Client's Dashboard. In the Case Manager section of the Client's Dashboard, click on the little blue pencil to the left of the Case Manager's name you wish to edit.

The screenshot displays the Client Dashboard for Luke Skywalker (Client ID: 1048334). The left sidebar contains navigation options, with 'Client Enrollment and Client Services' highlighted by a red arrow. The main content area shows a table of Case Manager Assignments with 2 results found. A second red arrow points to the 'Case Manager Assignments' section header.

Case Manager	Begin Date	Status	End Date	Enrollment	All Associated Enrollments
David Boltz	11/07/2022	Active		My Fake Organization CoC RRH (RRH-R8)	🔍
David Boltz	11/07/2022	Inactive	11/07/2022	Coordinated Entry (R1)	🔍

Type in a date in the **“and Ending on”** field to end the Case Manager's assignment.

Next, click on the **“Status”** dropdown and select **“Inactive”**

Click **“Save”** in the bottom right corner of the screen.

Client Dashboard

Client Profile

Common Client Assessments

Other Assessments

Client Enrollment and Client Services

Case Manager Assignment

Enter a **Begin Date**. Select the **Case Manager** assigned to the client. Select the related **Location** and **Enrollment** for the case. To close the case, enter an **End Date** and select **Status - Inactive**.

Assignment beginning on: 11/07/2022 and Ending on: 11/09/2022

Case Manager: David Boltz

Enrollment: 11/07/2022 - My Fake Organization CoC RRH (RRH-R8)

Status: Inactive

Save Cancel

Next – to add a new Case Manager to the open enrollment click **“Add Case Assignment”**

Client Dashboard

Client Profile

Common Client Assessments

Other Assessments

Client Enrollment and Client Services

Case Manager Assignments

The Client's history of assigned Case Managers displays below. To view or edit a Case Manager assignment, click the **Edit** next to the record. To add a new Case Manager assignment, click the **Add Case Assignment**. To print a list of the Client's history of assigned case managers, click **Case Managers Report**.

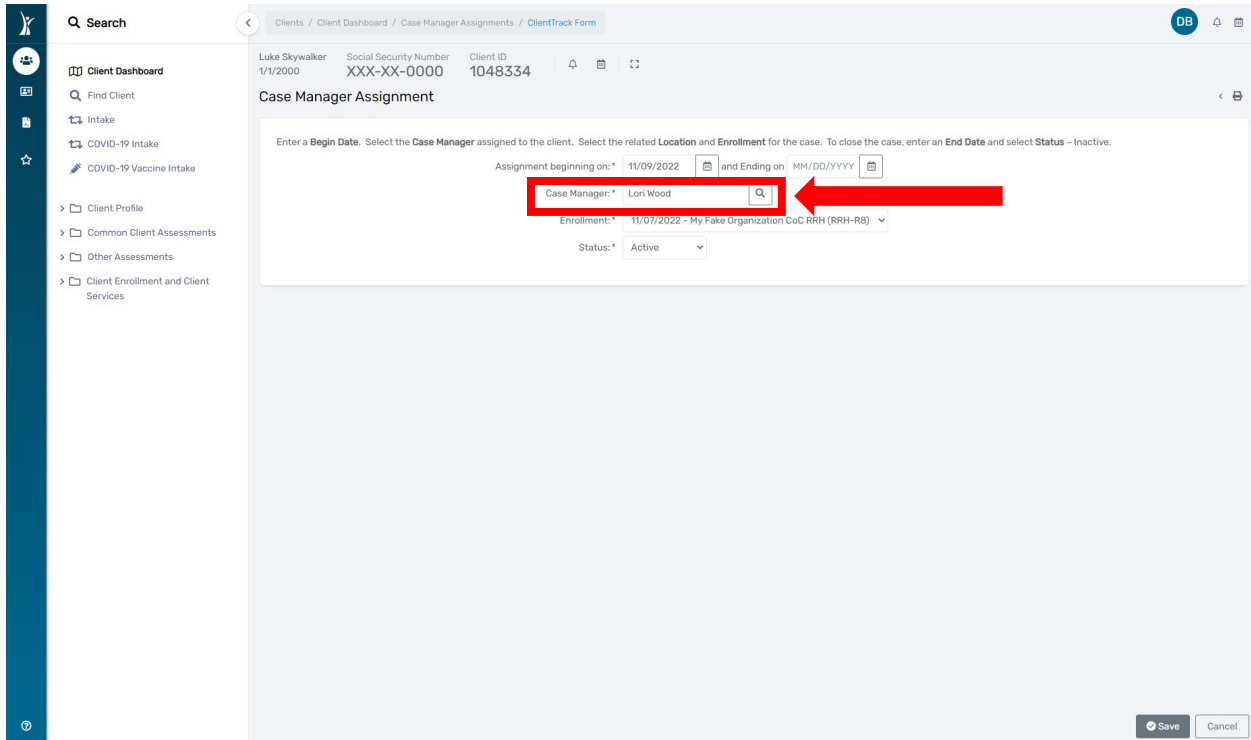
+ Add Case Assignment Case Managers Report

2 results found.

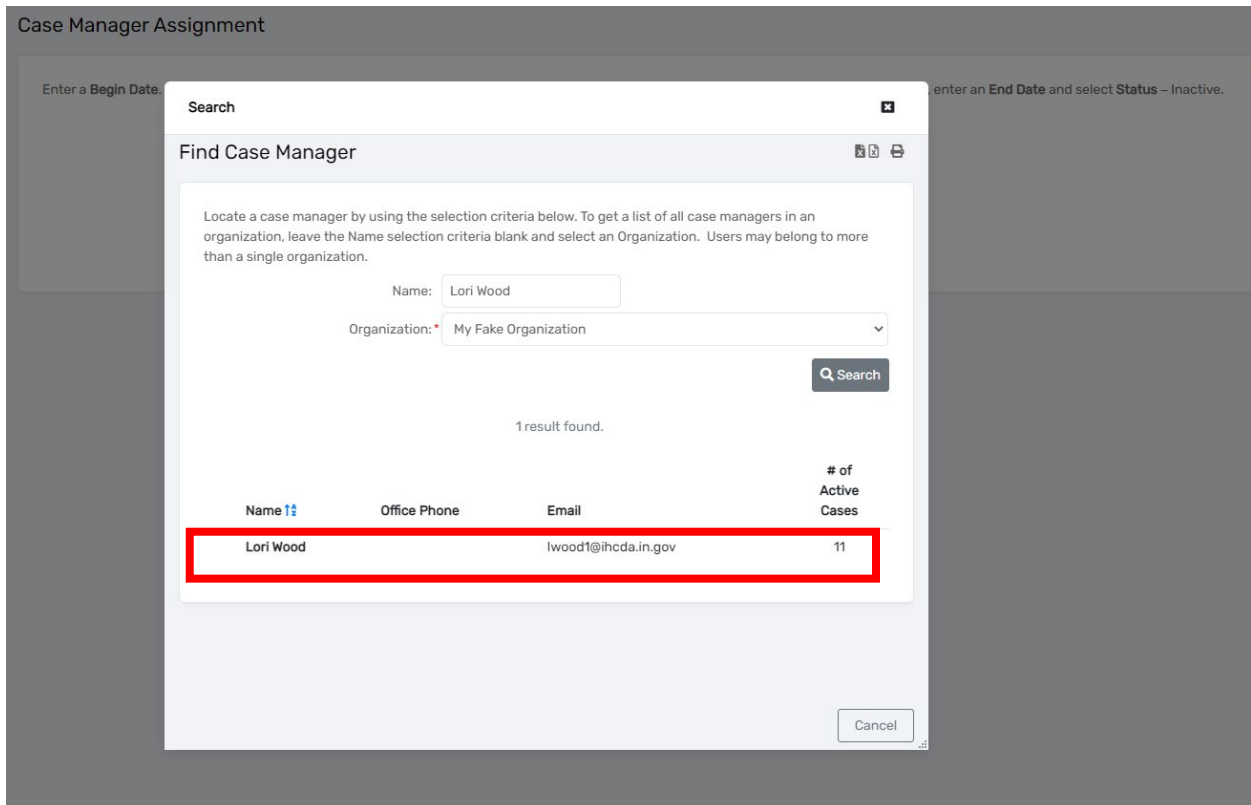
Case Manager	Begin Date	Status	End Date	Enrollment	All Associated Enrollments
David Boltz	11/07/2022	Active		My Fake Organization CoC RRH (RRH-R8)	
David Boltz	11/07/2022	Inactive	11/07/2022	Coordinated Entry (R1)	

In the **“Case Manager”** field, type in the name of the new Case Manager

Next, click on the magnifying glass in the Case Manager field.



The Case Manager's name will appear in a pop-up window. Click on the Case Manager's name.



Click on the **“Enrollment”** dropdown and choose the enrollment for the Case Manager assignment.

The screenshot shows the 'Case Manager Assignment' form in a web application. The form includes fields for 'Assignment beginning on:' (11/09/2022), 'Ending on:' (MM/DD/YYYY), 'Case Manager:' (Lori Wood), 'Enrollment:' (11/07/2022 - My Fake Organization CoC RRH (RRH-R8)), and 'Status:' (11/07/2022 - My Fake Organization CoC RRH (RRH-R8)). A red arrow points to the 'Enrollment:' dropdown menu, which is open, showing the selected option. The 'Save' button is visible in the bottom right corner.

Make sure the **“Status”** box displays **“Active”** then click **“Save”** in the bottom right corner.

The screenshot shows the 'Case Manager Assignment' form in a web application. The form includes fields for 'Assignment beginning on:' (11/09/2022), 'Ending on:' (MM/DD/YYYY), 'Case Manager:' (Lori Wood), 'Enrollment:' (11/07/2022 - My Fake Organization CoC RRH (RRH-R8)), and 'Status:' (Active). A red arrow points to the 'Status:' dropdown menu, which is set to 'Active'. The 'Save' button is highlighted with a red box in the bottom right corner.

The Case Manager assignment has now been changed.

The screenshot shows the ClientTrack Form interface for a client named Luke Skywalker. The page title is "Case Manager Assignments". Below the title, there is a table with 2 results found. The table has columns for Case Manager, Begin Date, Status, End Date, and Enrollment. The first row is highlighted with a red box, showing an assignment to Lori Wood, who is Active, starting on 11/09/2022. The second row shows an assignment to David Boltz, who is Inactive, starting on 11/07/2022. The enrollment for both is "My Fake Organization CoC RRH (RRH-R8)".

Case Manager	Begin Date	Status	End Date	Enrollment	All Associated Enrollments
<input checked="" type="checkbox"/> Lori Wood	11/09/2022	Active		My Fake Organization CoC RRH (RRH-R8)	
<input checked="" type="checkbox"/> David Boltz	11/07/2022	Inactive	11/08/2022	My Fake Organization CoC RRH (RRH-R8)	

Please email the HMISHelpDesk@ihcda.IN.gov for HMIS system questions or the DVHelpDesk@ihcda.IN.gov for DV ClientTrack questions.