How to Change the Case Manager Assignment

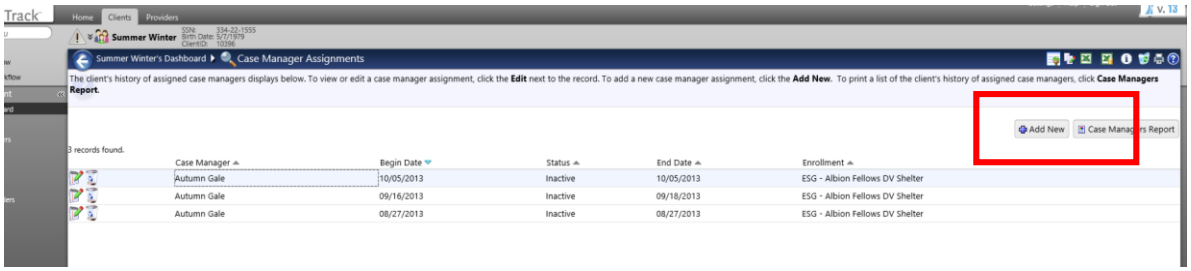
Case manager assignments change and ClientTrack™ provides a tool to manage case assignments. Follow the instructions below to change the case manager assignment.

<u>To End a Case Manager Assignment:</u>

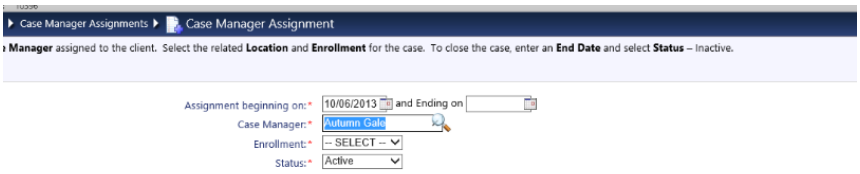
- Go to the head of household's client record.
- Click on the notepad beside the case manager assignment you want to edit under "[Client Name]'s Case Manager Assignments" located at the bottom section of the client dashboard.
- Change the end date to the appropriate date in the "Ending On" box.
- Change the "Status" to "Inactive" to end a case manager assignment.
- Click "Save."

<u>To Add a Case Manager Assignment:</u>

- Go to the head of household's client record.
- Click on "[Client Name]'s Case Manager Assignments" located at the bottom section of the client dashboard. If you hover over the words, you should see the cursor change to a hand to indicate that you can click on a link – the title of this section is a link on which you can click.
- Click on the "Add New" button found on the upper right-hand corner of the new screen where the case managers are listed.



- Complete the required information and save. When completing the "Case Manager" assignment, you can type the new case manager's name and it will automatically search for the case manager.



Please contact the HMIS Help Desk by emailing HMISHelpDesk@ihcdaonline.com if you need any assistance with the case manager assignment.