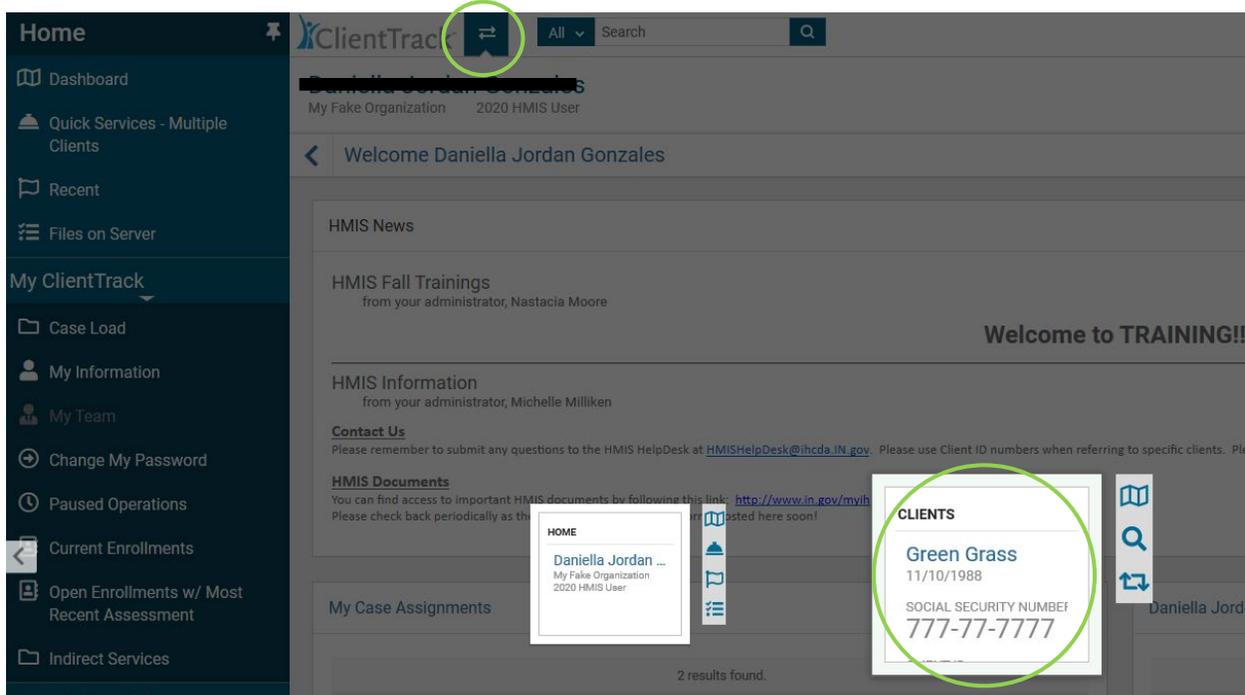


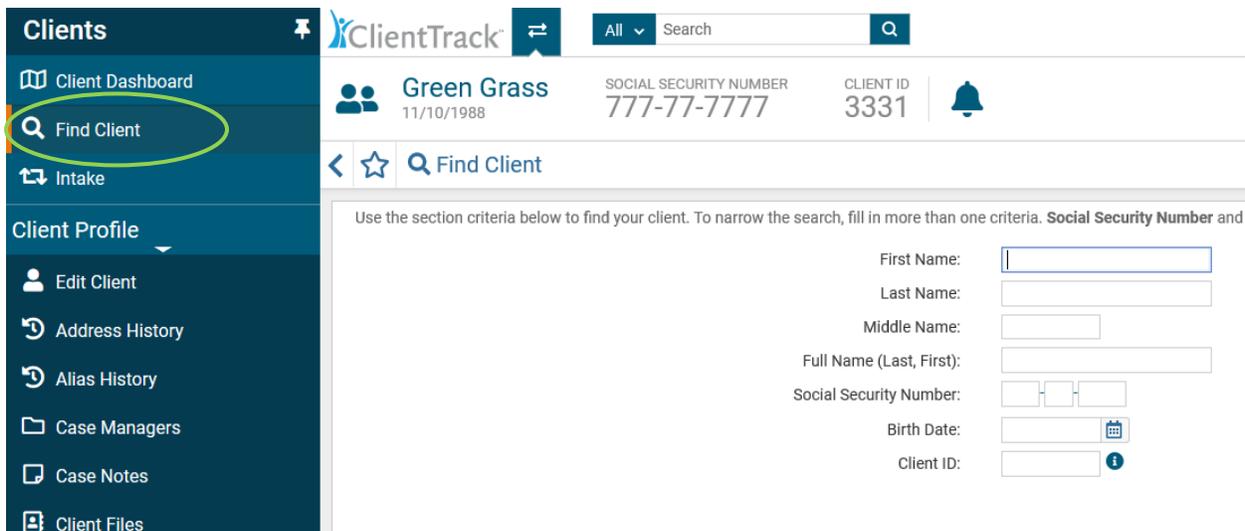
How to Change the Case Manager Assignment

Case manager assignments can change and ClientTrack™ provides a tool to manage case assignments. Here are steps on how to change the case manager assignment for clients.

1. Log into ClientTrack and go to the “Clients” workspace by clicking on the two inverted arrows icon at the top of your screen as shown in the image below. Then select the “Clients” pop-up window.



2. Once in the Clients Workspace, click on “Find Client” to find the client for whom you want to change the case manager.



- Once you have found your client, go to the head of Household's client record and click on the "Client Profile" option on the left-hand menu as shown in the image below. Next, click on "Case Managers".

The screenshot shows the ClientTrack interface for a client named Green Grass. The left-hand menu is visible, with 'Client Profile' and 'Case Managers' highlighted with green circles. The main content area shows the 'Case Manager Assignments' section, which displays a table with one entry: Daniella Jordan Gonzales, assigned on 11/22/2019, with a status of Active.

Case Manager	Begin Date	Status
Daniella Jordan Gonzales	11/22/2019	Active

- Click on the "+ Add Case Assignment" button found in the upper right-hand corner of the new screen where the case managers are listed (see image below). Note the client on the image below has a current Case Manager (name covered by a black box), but we want to reassign this case to another Case Manager.

The screenshot shows the ClientTrack interface for the same client, Green Grass. The 'Case Manager Assignments' section is visible, and the '+ Add Case Assignment' button is highlighted with a green circle. The table below shows one entry with a redacted Case Manager name, assigned on 11/22/2019, with a status of Active.

Case Manager	Begin Date	Status	End Date	Enrollment
[Redacted]	11/22/2019	Active		My Fake Organization (ES - R10)

- Complete the required information and click on the drop-down arrow for "Status." A drop-down menu will appear with three options:
 - Active: Choose this option if you want to make someone the new case manager for the client.
 - Inactive: Choose this option to end a case manager assignment. Make sure you change the end date to the appropriate date in the "Ending on" box.
 - Pending: Choose this option if you know the current case manager will be leaving/ending on a specific date (see "Ending on" box at the top of the screen).

Clients ClientTrack

Client Dashboard
Find Client
Intake

Client Profile
Edit Client
Address History
Alias History
Case Managers
Case Notes
Client Files

Green Grass
11/10/1988
SOCIAL SECURITY NUMBER
777-77-7777
CLIENT ID
3331

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: 11/22/2019 and Ending on: [calendar icon]

Case Manager: Daniella Jordan Gonzales

Enrollment: 11/22/2019 - My State Organization (ES - R10)

Status: [dropdown menu open]
Active
Inactive
Pending

Restriction: Organization MOU/InfoRelease

6. Save by clicking the “Save” button at the bottom right-hand corner of your screen.
When completing “Case Manager” assignment, you can type the new Case Manager’s name and it will automatically search for the new Case Manager or click on the spy glass to search by name.