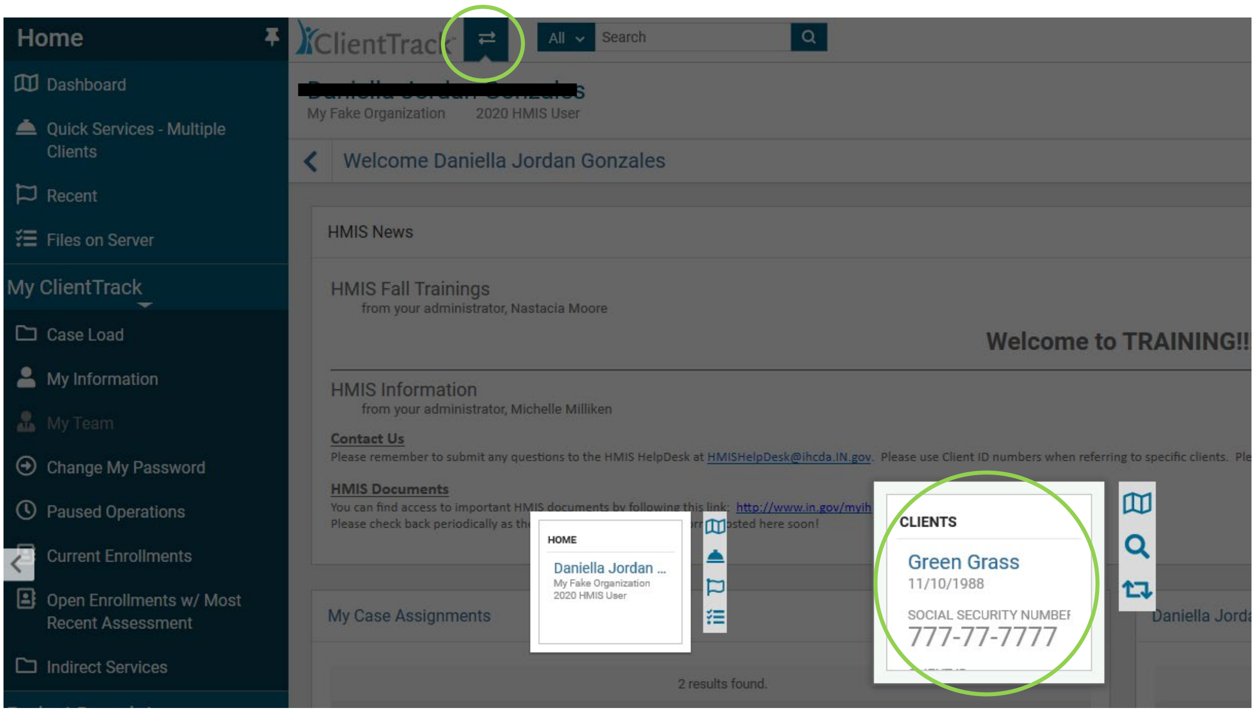
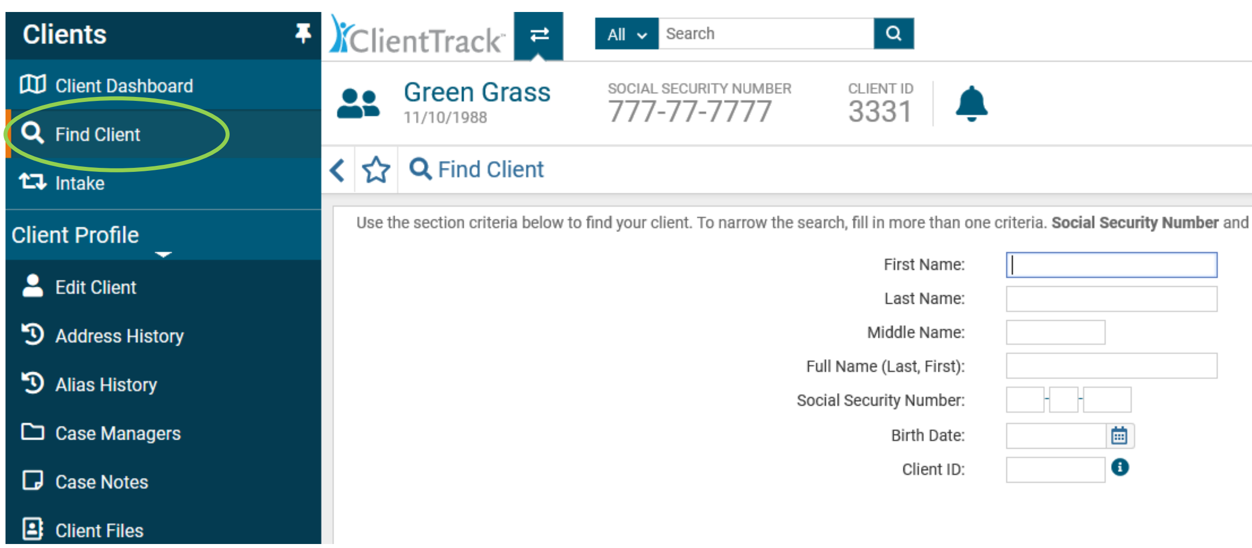
How to Change the Case Manager Assignment

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.

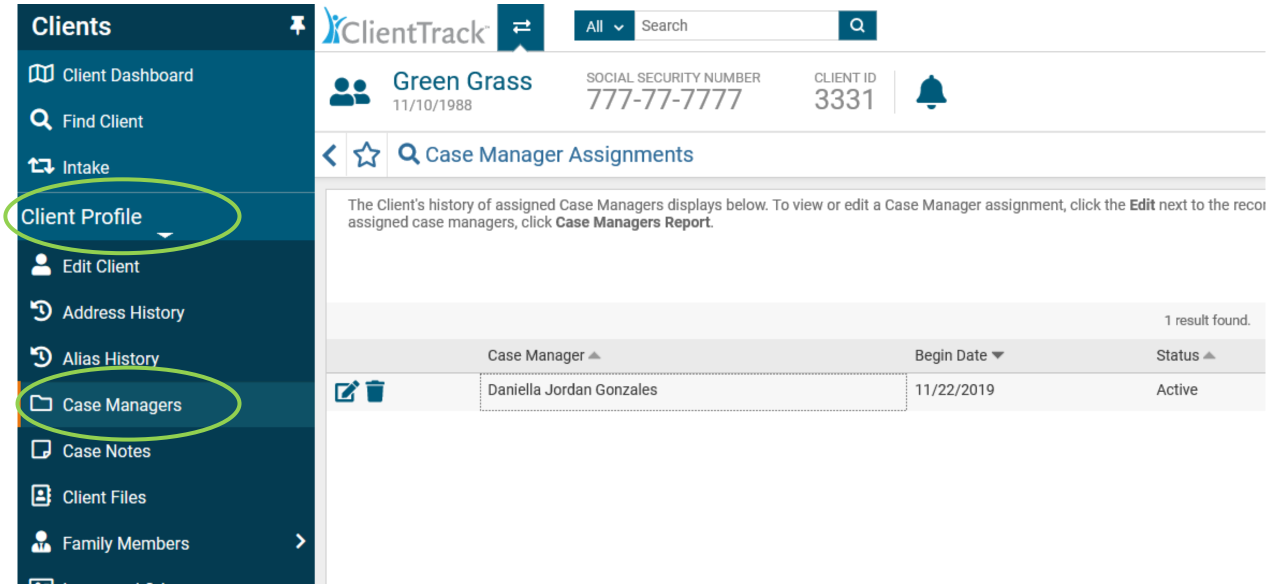
1. Log into ClienTrack and go to the "Clients" workspace by clicking on the two inverted arrows icon at the top of your screen as shown in the image below. Then select the "Clients" pop-up window.



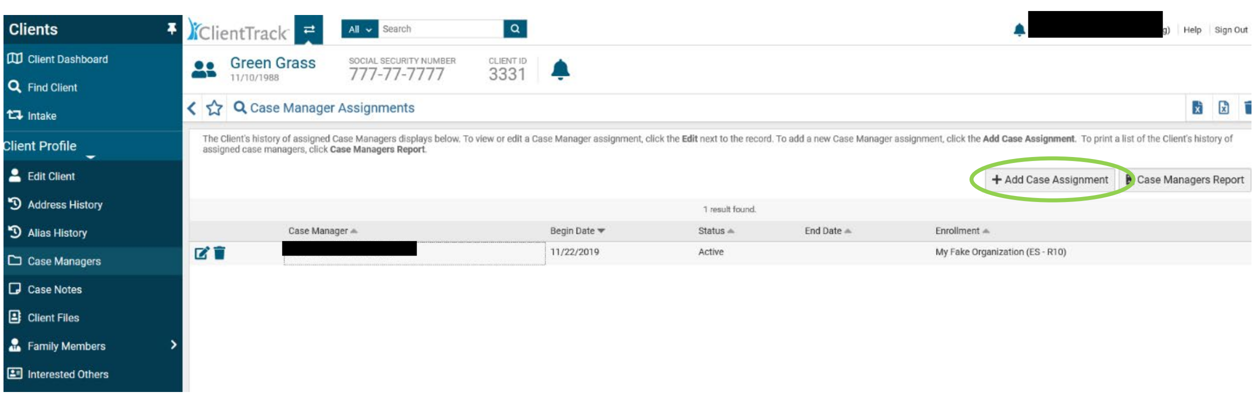
2. Once in the Clients Workspace, click on "Find Client" to find the client for whom you want to change the case manager.



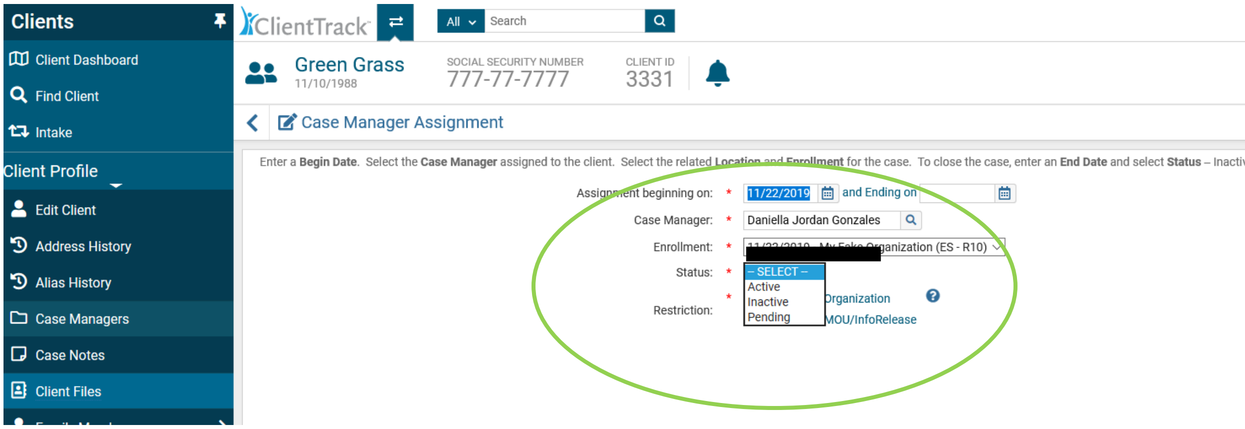
3. Once you have found your client, go to the head of Household's client record and click on the "Client Profile" option on the left-hand menu as shown in the image below. Next, click on "Case Managers".



4. 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.



5. 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).



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.