

## 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 shows the ClientTrack interface for a client named "Test Test" (DOB: 2/2/1989, SSN: XXX-XX-4444, Client ID: 1048309). The left sidebar contains a "Clients" menu with various options. The main content area shows the "Case Manager Assignments" section with a table of 9 results. Two red arrows highlight the "Case Managers" menu item and the edit icon (pencil) in the first row of the table.

Case Manager	Begin Date	Status	End Date	Enrollment
Grant Peters	03/16/2022	Active		My Fake Organization ES (ES-R8)
Lori Wood	03/16/2022	Active		My Fake Organization ES (ES-R8)
Lori Wood	03/03/2022	Inactive	03/16/2022	My Fake Organization PATH (SO-R8)
Lori Wood	02/22/2022	Inactive	03/03/2022	My Fake Organization CoC RRH (RRH-R8)
Lori Wood	01/10/2022	Inactive	01/10/2022	My Fake Organization PATH (SO-R8)
Lori Wood	01/10/2022	Inactive	01/10/2022	My Fake Organization HOPWA(PSH-R8)
Lori Wood	01/10/2022	Inactive	01/10/2022	My Fake Organization SSVF HP (HP-R8)
Lori Wood	01/06/2022	Inactive	01/06/2022	My Fake Organization CoC RRH (RRH-R8)
Lori Wood	01/06/2022	Inactive	01/06/2022	My Fake Organization ES (ES-R8)

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.

The screenshot displays the 'Case Manager Assignment' form in the ClientTrack system. The form includes the following fields and actions:

- Assignment beginning on:** 03/16/2022
- and Ending on:** 04/06/2022 (highlighted with a red box)
- Case Manager:** Grant Peters
- Enrollment:** 03/16/2022 - My Fake Organization ES (ES-R8)
- Status:** A dropdown menu is open, showing options: Active, -SELECT--, Inactive (highlighted with a red arrow), and Pending.

At the bottom right of the form, there are two buttons: **Save** (highlighted with a red box) and **Cancel**.

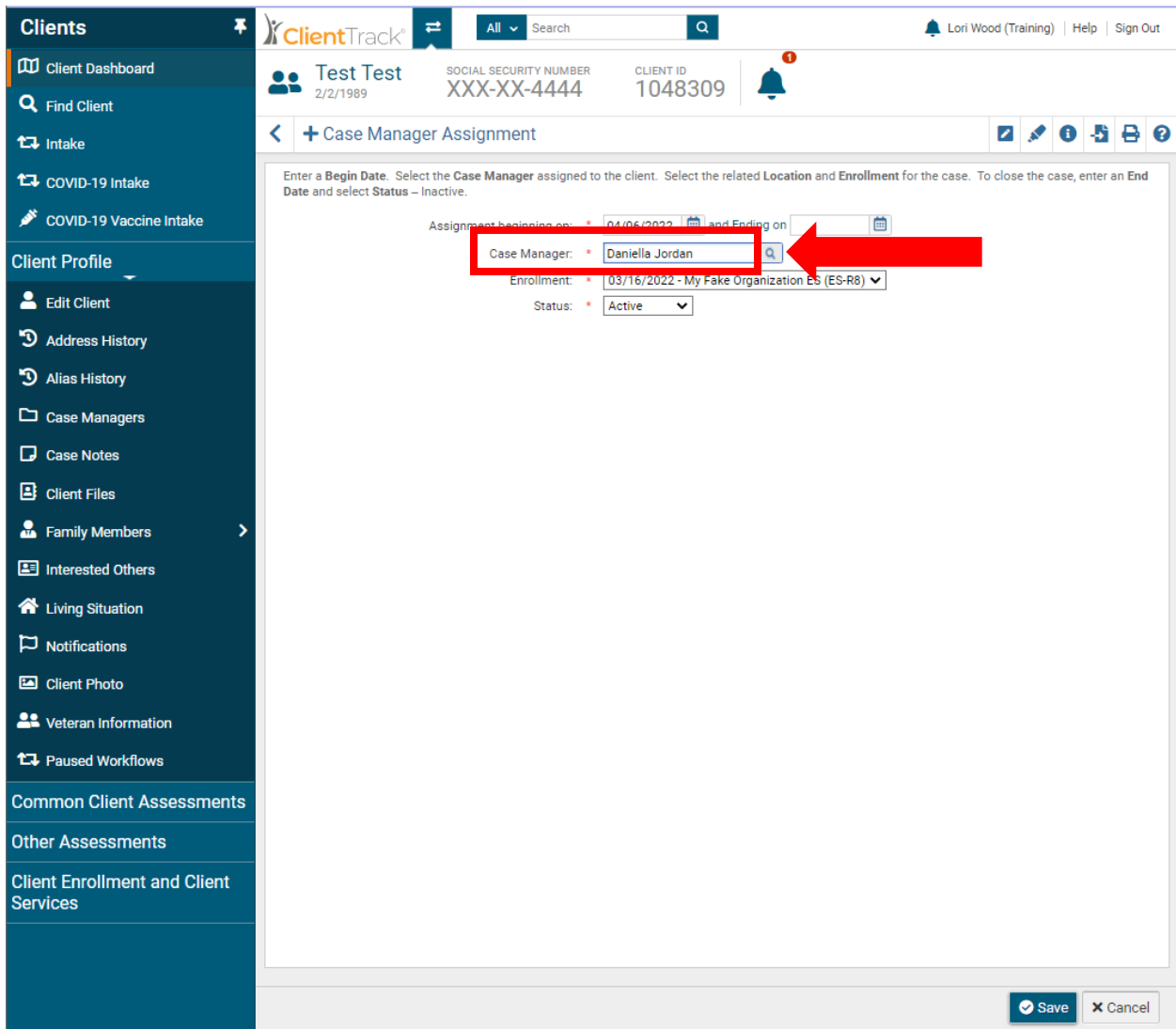
Next – to add a new Case Manager to the open enrollment click “Add Case Assignment”

The screenshot displays the ClientTrack interface for a client named "Test Test" (DOB: 2/2/1989, SSN: XXX-XX-4444, Client ID: 1048309). The page title is "Case Manager Assignments". A red box highlights the "+ Add Case Assignment" button. Below the button, a table lists 9 case manager assignments. The table has columns for Case Manager, Begin Date, Status, End Date, and Enrollment. The assignments are as follows:

Case Manager	Begin Date	Status	End Date	Enrollment
Grant Peters	03/16/2022	Inactive	04/06/2022	My Fake Organization ES (ES-R8)
Lori Wood	03/16/2022	Active		My Fake Organization ES (ES-R8)
Lori Wood	03/03/2022	Inactive	03/16/2022	My Fake Organization PATH (SO-R8)
Lori Wood	02/22/2022	Inactive	03/03/2022	My Fake Organization CoC RRH (RRH-R8)
Lori Wood	01/10/2022	Inactive	01/10/2022	My Fake Organization PATH (SO-R8)
Lori Wood	01/10/2022	Inactive	01/10/2022	My Fake Organization HOPWA(PSH-R8)
Lori Wood	01/10/2022	Inactive	01/10/2022	My Fake Organization SSVF HP (HP-R8)
Lori Wood	01/06/2022	Inactive	01/06/2022	My Fake Organization CoC RRH (RRH-R8)
Lori Wood	01/06/2022	Inactive	01/06/2022	My Fake Organization ES (ES-R8)

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 screenshot shows the ClientTrack interface for a Case Manager Assignment. The client information at the top includes the name "Test Test", date of birth "2/2/1989", Social Security Number "XXX-XX-4444", and Client ID "1048309". The assignment form contains the following fields:

- Assignment beginning on: 04/06/2022
- Case Manager: Daniella Jordan (highlighted with a red box and a red arrow pointing to the magnifying glass icon)
- Enrollment: 03/16/2022 - My Fake Organization ES (ES-R8)
- Status: Active

At the bottom right of the form, there are "Save" and "Cancel" buttons.

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

The screenshot shows the ClientTrack interface. At the top, there's a search bar and user information for 'Test Test' (DOB: 2/2/1989, SSN: XXX-XX-4444, Client ID: 1048309). Below this is a 'Case Manager Assignment' section with instructions: 'Enter a Begin Date. Select the Case Manager assigned to the client. Select the related Location and Enrollment for the case. Then select Date and select Status – Inactive.'

A 'Find Case Manager' pop-up window is open. It has a search bar at the top. Below it, instructions state: 'Locate a case manager by using the selection criteria below. To get a list of all case managers in an organization, leave the Name selection criteria blank and select an Organization. Users may belong to more than a single organization.'

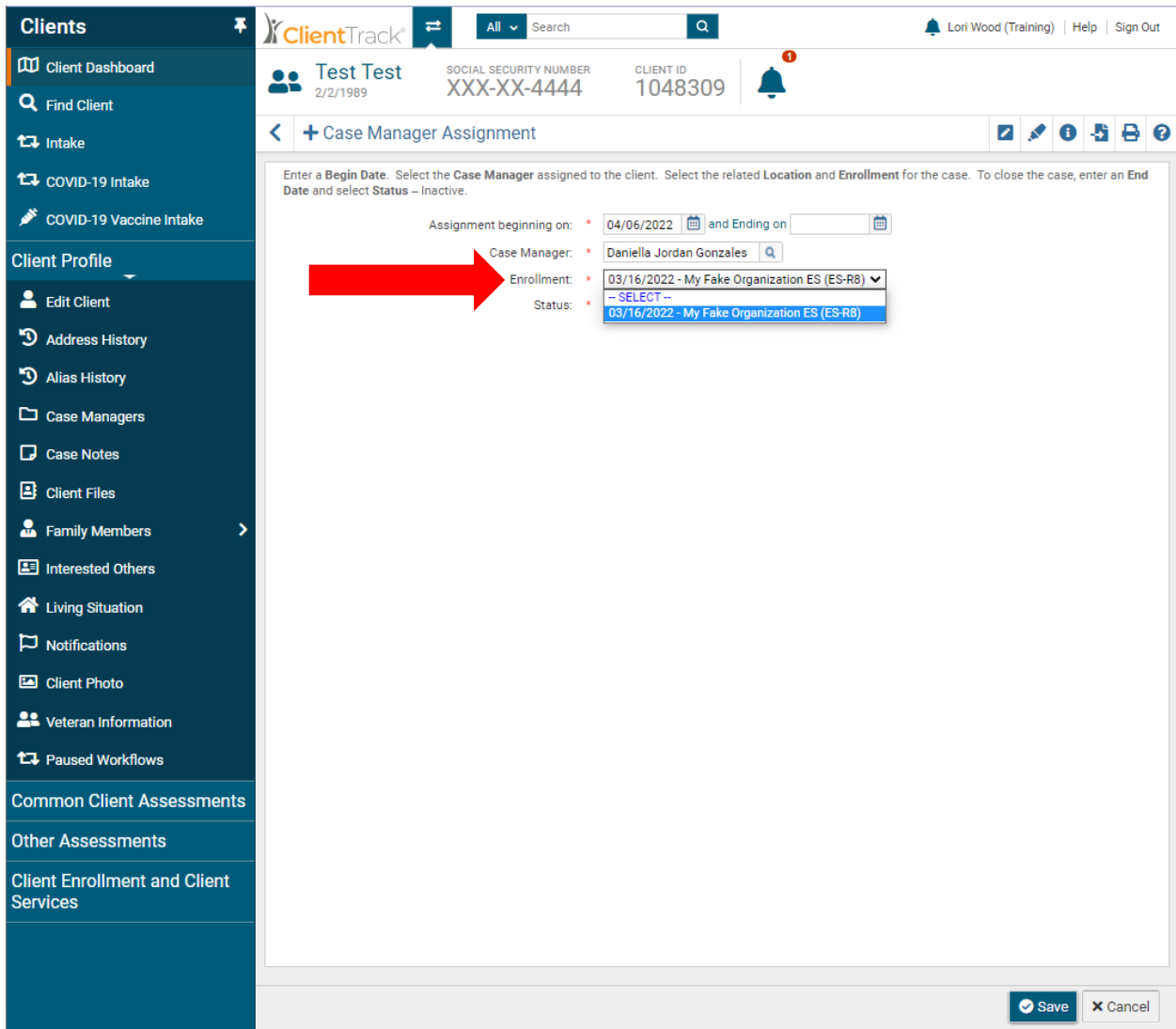
The search criteria are:  
Name: Daniella Jordan Gonzales  
Organization: \* My Fake Organization

A 'Search' button is present. Below the search bar, it says '1 result found.'

Name ▲	Office Phone ▲	Email ▲	# of Active Cases ▲
Daniella Jordan Gonzales	17-232-0469	djordan@ihcda.in.gov	0

A red box highlights the name 'Daniella Jordan Gonzales' in the table. At the bottom right of the pop-up window is a 'Cancel' button.

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



The screenshot shows the ClientTrack interface for a Case Manager Assignment. The left sidebar contains navigation options such as Client Dashboard, Find Client, Intake, COVID-19 Intake, and Client Profile. The main content area displays the assignment form for client 'Test Test' (SSN: XXX-XX-4444, Client ID: 1048309). The form includes fields for 'Assignment beginning on' (04/06/2022), 'Ending on', 'Case Manager' (Daniella Jordan Gonzales), 'Enrollment' (03/16/2022 - My Fake Organization ES (ES-R8)), and 'Status' (- SELECT -). A red arrow points to the Enrollment dropdown menu. At the bottom right, there are 'Save' and 'Cancel' buttons.

ClientTrack

All Search

Lori Wood (Training) | Help | Sign Out

Test Test  
2/2/1989

SOCIAL SECURITY NUMBER  
XXX-XX-4444

CLIENT ID  
1048309

+ 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: \* 04/06/2022 and Ending on

Case Manager: \* Daniella Jordan Gonzales

Enrollment: \* 03/16/2022 - My Fake Organization ES (ES-R8)

Status: \* - SELECT -

03/16/2022 - My Fake Organization ES (ES-R8)

Save Cancel

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

The screenshot shows the ClientTrack interface for a Case Manager Assignment. The client is identified as Test Test (2/2/1989) with Social Security Number XXX-XX-4444 and Client ID 1048309. The assignment form includes the following fields:

- Assignment beginning on: 04/06/2022
- Ending on: [Empty]
- Case Manager: Daniella Jordan Gonzales
- Enrollment: 03/16/2022 - My Fake Organization ES (ES-R8)
- Status: Active (selected from a dropdown menu)

A red arrow points to the Status dropdown menu, and the Save button in the bottom right corner is highlighted with a red box.

The Case Manager assignment has now been changed.

Please email the [HMISHelpDesk@ihcda.in.gov](mailto:HMISHelpDesk@ihcda.in.gov) for HMIS system questions or the [DVHelpDesk@ihcda.in.gov](mailto:DVHelpDesk@ihcda.in.gov) for DV ClientTrack questions.