

Case Managers: Subfolder

The “Case Managers” menu option lists any Case Managers that are currently working with or previously worked with the client. When enrolled, the workflow only allows for one case manager assignment per enrollment.

Steps to Navigate to the “Case Managers” Subfolder Menu

Step 1: Select the appropriate client profile via Quick Search*, Find Client: Folder**, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the “Client Workspace”***

** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the “HMIS Basic User 2025 Manual”.*

*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using “Find Client” in the “HMIS Basic User 2025 Manual”.*

**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

Step 2: Select the “Edit Client” secondary sidebar* menu option. ClientTrack will navigate to the “Client Information” workspace container, and a dropdown menu will appear under the “Edit Client” folder.

**For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the “HMIS Basic User 2025 Manual”.*

Step 3: Select the “Case Managers” subfolder from the dropdown on the secondary sidebar menu option. ClientTrack will navigate to the “Case Manager Assignment” workspace container.

Q Search

Find Client

HMIS Intake

Client Files

Document Check

Client Dashboard

Edit Client

Address History

Client Photo

Interested Others

Case Managers

Notifications

Alias History

Document Check

Client Files

ID Card

Case Notes

Assessments

Referrals

Clients / Case Manager Assignments

Lebron James 4/4/1994 624 904-555-8458

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

5 results found.

Case Manager	Email	Office Phone	Begin Date	Status	End Date	Enrollment	All Associated Enrollments
Michael Holbrook	mholbrook@changinghomelessness.org		08/01/2024	Active		CRM - Emergency Services	
Edin Sabanovic	esabanovic@changinghomelessness.org	904-354-1100	08/05/2022	Inactive	01/03/2023	ABH - CASA	
training trainer	training@eshc.org	904-555-1100	09/28/2021	Inactive		SSVF - Intake Navigation	
Benjamin Robertson	brobertson@changinghomelessness.org	904-354-1100	07/28/2020	Inactive		MHRC - Coordinated Entry	
Jonathan T Grant	JGrant@ESHcnet.org	904-354-1100	12/06/2018	Inactive	12/18/2019	SCO - Single Men Shelter Program	

Case Managers Folder

Updating or Transferring Case Manager Assignments

Use the “Edit Case Assignment” to edit/update case management assignments. This will have the effect of transferring the case assignment to the new Case Manager.

* For information regarding the Case Manager subfolder, go to Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Edit Client/Case Managers: Subfolder in the “HMIS Basic User 2025 Manual”.

Steps to Transfer Case Managers in the “Case Managers” Subfolder Menu

Step 1: Select the appropriate client profile via Quick Search*, Find Client: Folder**, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the “Client Workspace”.**

** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the “HMIS Basic User 2025 Manual”.*

*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using “Find Client” in the “HMIS Basic User 2025 Manual”.*

**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the “HMIS Basic User 2025 Manual”.*

Step 2: Select the “Edit Client” secondary sidebar* menu option. ClientTrack will navigate to the “Client Information” workspace container, and a dropdown menu will appear under the “Edit Client” folder.

** For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the “HMIS Basic User 2025 Manual”.*

Step 3: Select the “Case Managers” subfolder from the dropdown on the secondary sidebar menu option. ClientTrack will navigate to the “Case Manager Assignment” workspace container.





The screenshot displays the 'Case Manager Assignments' page for a client named LeBron James. The sidebar on the left contains various navigation options, with 'Case Managers' highlighted. The main content area shows a table of assignments with columns for Case Manager, Email, Office Phone, Begin Date, Status, End Date, Enrollment, and All Associated Enrollments. The table lists five assignments, including Michael Holbrook, Edin Sabanovic, training trainer, Benjamin Robertson, and Jonathan T Grant.

Case Manager	Email	Office Phone	Begin Date	Status	End Date	Enrollment	All Associated Enrollments
Michael Holbrook	mholbrook@changinghomelessness.org		08/01/2024	Active		CRM - Emergency Services	🔗
Edin Sabanovic	esabanovic@changinghomelessness.org	904-354-1100	08/05/2022	Inactive	01/03/2023	ABH - CASA	🔗
training trainer	training@eshc.org	904-555-1100	09/28/2021	Inactive		SSVF - Intake Navigation	🔗
Benjamin Robertson	brobertson@changinghomelessness.org	904-354-1100	07/28/2020	Inactive		MHRC - Coordinated Entry	🔗
Jonathan T Grant	JGrant@ESHcnet.org	904-354-1100	12/06/2018	Inactive	12/18/2019	SCO - Single Men Shelter Program	🔗

Case Managers Folder

Step 4: Find the Case Manager Assignment that needs to be updated and click the edit button*.

*To view a list of icons and buttons used in Client Track HMIS, see Chapter:1: HMIS ClientTrack Basics/Key Terminology and Navigation/Icons and Buttons in the "HMIS Basic User 2025 Manual".



Case Manager	Email	Office Phone	Begin Date ↓	Status	End Date	Enrollment	Enrollments
 Michael Holbrook	mholbrook@changinghomelessness.org		08/01/2024	Active		CRM - Emergency Services	
 Edin Sabanovic	esabanovic@changinghomelessness.org	904-354-1100	08/05/2022	Inactive	01/03/2023	ABH - CASA	


Edit Case Manager Assignment


Step 5: On the “Case Manager Assignment” workspace container form, edit the box after “and Ending on” to reflect the end date of the current case manager’s assignment with the client. Select the “Status” to “Inactive”. Click “Save” to save or click “Exit” to exit without saving. ClientTrack will navigate to the “Case Manager Assignments” workspace container. An updated list with any edits/changes will be visible.


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: *  and Ending on 

Case Manager: * 

Enrollment: * 

Status: * 

Case Manager Assignment Form

Step 6: To add a new case manager assignment, click the “Add Case Assignment” button. ClientTrack will navigate to the “Case Manager Assignment” workspace container form. ClientTrack will default the case assignment begin date as the current date, but this date is editable if applicable by selecting and typing/replacing the text in the box.

Step 7: Client Track will default the “Case Manager” assignment to the currently signed in user. To edit when applicable, click in the “Case Manager” field and start typing the new case manager’s name or click on the magnifying glass. A pop-up window will allow a search for existing case managers in the system. Select or type in the new case manager’s name into the “Case Manager” field. Select “Save” to save changes or select “Cancel” to exit without saving. ClientTrack will navigate to the “Case Managers Assignments” workspace container.