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”.

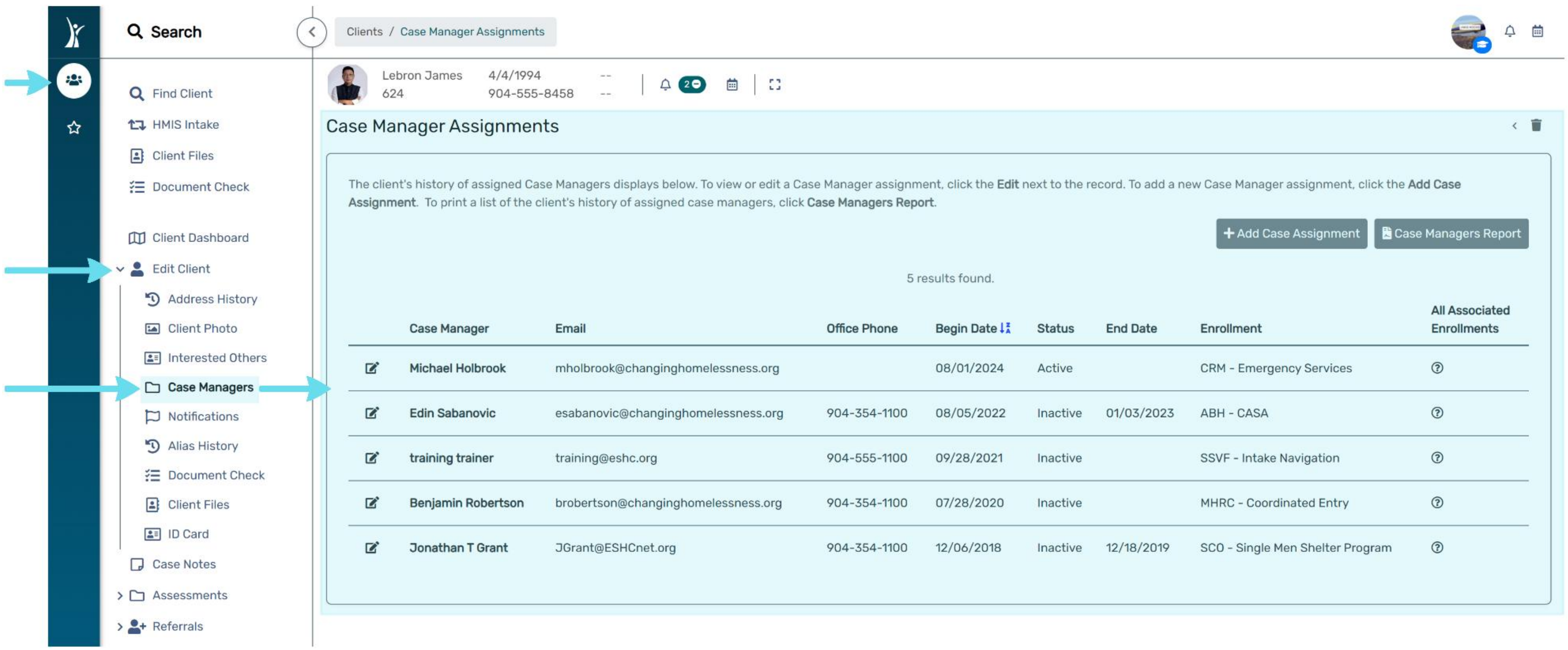
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*Search for Clients Using “Find Client” *in the* “HMIS Basic User 2025 Manual”.

**** 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.



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".

<u>Steps to Transfer Case Managers in the “Case Managers” Subfolder Menu</u>

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”.

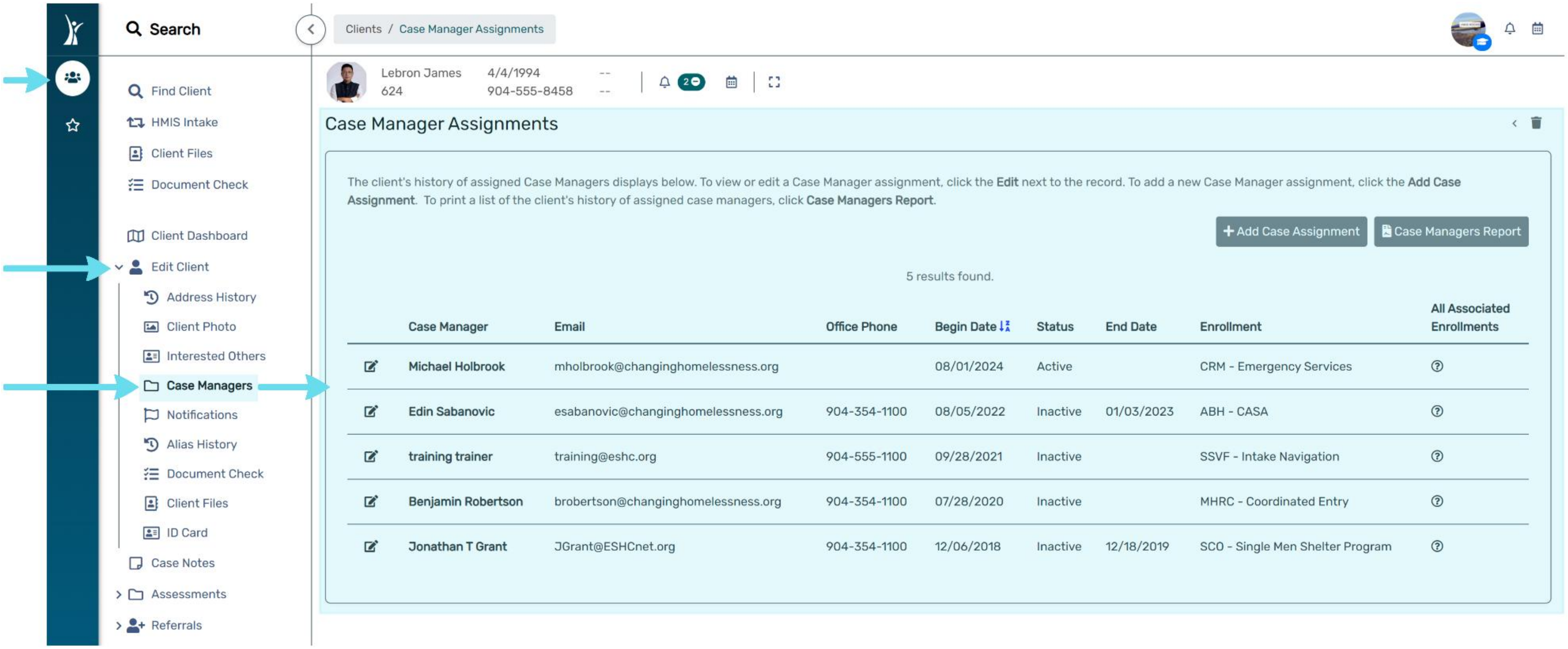
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*Search for Clients Using “Find Client” *in the* “HMIS Basic User 2025 Manual”.

**** 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.



Case Managers Folder

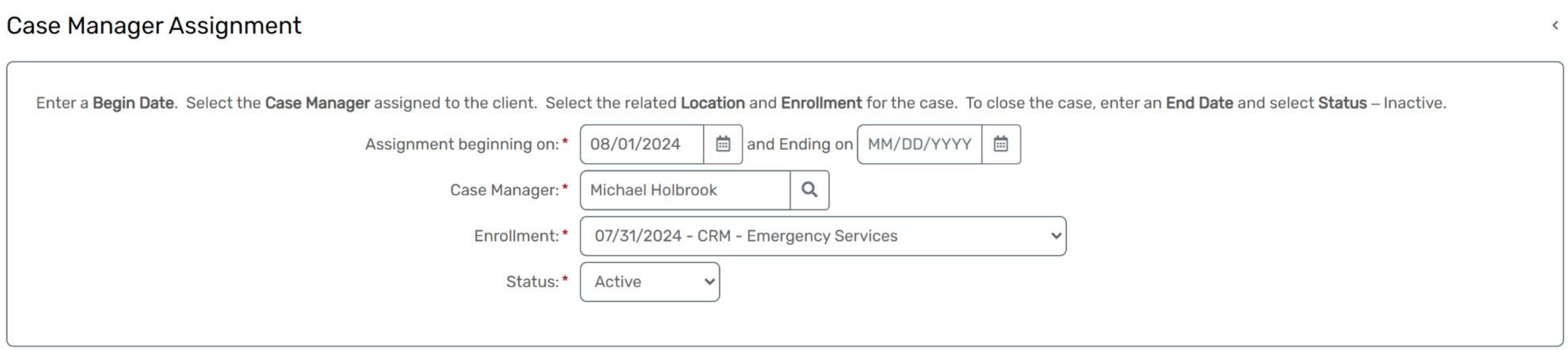
Step 4: Find the Case Manager Assignment that needs to be updated and click the edit button*.

**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:* 08/01/2024 and Ending on MM/DD/YYYY

Case Manager:* Michael Holbrook

Enrollment:* 07/31/2024 - CRM - Emergency Services

Status:* Active

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.