

## Active Cases: Subfolder

The “Active Cases” subfolder displays a user’s active case assignments.

### **Steps to Navigate to the “Active Cases” Subfolder Menu and Managing Active Cases**

**Step 1:** Navigate to the Home Workspace\*.

*\*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 “My ClientTrack” secondary sidebar menu option. A dropdown menu will appear under the “My ClientTrack” 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 3.1 Selecting Clients:** Select the “Active Cases” secondary sidebar menu option. ClientTrack will navigate to the “Active Case Assignments” workspace container.

To select a client, click the select icon\* next to the appropriate client. ClientTrack will navigate to the client’s dashboard and switch from the Home Workspace to the Client Workspace.

*\*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”.*

### **Step 3.2: Managing Active and Inactive Cases – 2 Methods**

### **Method #1 of 2**

Select the “View Inactive Cases” button\* on the top right corner of the “Active Case Assignments” workspace container. Client Track will navigate to the “Inactive Case Assignments” workspace container.

*\*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”.*

**Step 4:** Click the edit icon next to the appropriate client. ClientTrack will navigate to the “Client Case Assignment” workspace container form.

**Step 5:** Select the “Status” box and select the “active” to change the client’s status.

**Step 6:** Click “Save” to close. Click “Cancel” to exit without saving. ClientTrack will navigate to the “Client Case” Assignment” workspace container and the newly activated client will be removed from the populated list.

### **Method #2 of 2**

Managing Active and Inactive Cases through “Case Manager Assignments”\* in the “Edit Client” subfolder.

*\* For information and instructions on managing case assignments through the “Case Manager Assignment” subfolder, see Chapter 4: Client Workspace: Menu Options, Folder, and Subfolders/Edit Client: Folder/Case Managers: Subfolder*



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### Active Case Assignments

All of your active case assignments are displayed below. To select an existing assignment, click **Select this client** on the left of the record you want to change.

Client name search box → Client Name:  → Click to view inactive case assignments → View Inactive Case Assignments

Search

170 results found.

	Client Name 	Begin Date	End Date	Program
	Albom, Bryan	03/02/2022		COJ- CV ESG HP 2021-2022
	Anderson, Douglas	11/01/2023		HUD VASH SSVF P1 RRH Referrals

Clicking icon will take you to the client's profile in the Client Workspace

Active Cases

### Active Cases – Reassigning Case Managers

To reassign cases via the “Case Load Reassignment”<sup>\*</sup> tool, a user will need access to “HMIS Reports.” To request access, email [hmis@changinghomelessness.org](mailto:hmis@changinghomelessness.org).

<sup>\*</sup>For information and instructions on the Case Load Reassignment subfolder, see Chapter 3: Home Workspace: Menu Options, Folders, and Subfolders/HMIS Reports: Folder/Case Load Reassignment: Subfolder in the “HMIS Basic User 2025 Manual”.