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.

X	Q Search	Clients / Client Dashboa	rd							DB	¢ 🗎
۲	🕅 Client Dashboard	Luke Skywalker Social Straight Social Straight Straight Social Straight Str	Security Number Clien	t ID 18334 [¢]	a 0						
	Q Find Client	✓ PH - Rapid Re-i My Fake Organi	tousing zation CoC RRH (RRH-R8)	1 11/)7/2022 1	1/07/2022		1971923		11/7/2022	
~	12↓ Intake	✓ Exited									
☆	🖋 COVID-19 Vaccine Intake	✓ Coordinated En	try try (R1)	1 11/	17/2022		11/07/2022	1971922	1971924 Data not collected	11/7/2022	
	> 🗅 Client Profile										
	Common Client Assessments	Case Manager Assig	nments							Ľ	
	> 🗋 Client Enrollment and Client Services					2 results	found.				
			Case Manager	Begin Date 👫	Status	End Date	Enrollment		All Assoc Enrollme	ciated ents	
		C î	David Boltz	11/07/2022	Active		My Fake Organizat	ion CoC RRH (RRH-R8)	٢		
		ď	David Boltz	11/07/2022	Inactive	11/07/2022	Coordinated Entry (R1)	0		

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.



Next - to add a new Case Manager to the open enrollment click "Add Case Assignment"

X	Q Search	Clients / Client	Dashboard / ClientTrack Form					DB 4 m
*	 Client Dashboard Find Client 	Luke Skywalker 1/1/2000 Case Manage	Social Security Number C XXX-XX-0000 1 er Assignments	048334	⊟ ::			< 0
 La Intake COVID-19 Intake COVID-19 Vaccine Intake COVID-19 Vaccine Intake COVID-19 Vaccine Intake 								nment, click the Add Case Assignment. To ase Assignment 🗄 Case Managers Report
	Client Profile Common Client Assessments					2 results fo	bund.	
	> 🗅 Other Assessments		Case Manager	Begin Date ↓	Status	End Date	Enrollment	All Associated Enrollments
	 Client Enrollment and Client Services 	C 🕯	David Boltz	11/07/2022	Active		My Fake Organization CoC RRH (RRH-R8)	0
		œ	David Boltz	11/07/2022	Inactive	11/07/2022	Coordinated Entry (R1)	0

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.

X	Q Search	Clients / Client Dashboard / Case Manager Assignments / ClientTrack Form	DB 4	
*	Client Dashboard Client	Luke Skywalker Social Security Number Client ID 0.48334 A ID 1048334 A ID 104834 A ID 10484 A ID 1048		A
	 Client Dashboard Client Dashboard Find Client Intake COVID-79 Intake COVID-79 Vaccine Intake Client Profile Common Client Assessments Client Enrollment and Client Services 	With and an		8
Ø			Save Can	cel

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

Case Manager As	ssignment				
Enter a Begin Date .	Search	enter an End Date and select Status – Inactive.			
	Find Case Manager				
	Locate a case manager by us organization, leave the Name than a single organization.	ing the selection cri selection criteria bl	teria below. To get a list of all case r ank and select an Organization. Use	nanagers in an ers may belong to more	
	Organ	Name: Lori Wood	l Organization	~	
	0,94.			Q Search	
			1 result found.		
	Name 12	Office Phone	Email	# of Active Cases	
	Lori Wood		lwood1@ihcda.in.gov	11	
				Cancel	a

1.			
x	Q Search	Clients / Client Dashboard / Case Manager Assignments / ClientTrack Form	
*	Client Dashboard Client G. Find Client	Luke Skywalker Social Security Number Client ID A B C III 1048334 C III 1048334	< 0
	11 Intake		
	11 COVID-19 Intake	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.	
\$	SCOVID-19 Vaccine Intake	Assignment beginning on: * 11/09/2022	
	Client Profile	Case Manager:* Lori Wood Q	
	> Common Client Assessments	Enrollment:* 11/07/2022 - My Fake Organization CoC RRH (RRH-R8) V	
	> 🗅 Other Assessments	Status: * SEECT ** Y Fake Organization CoC RRH (RRH-RB)	
	> Client Enrollment and Client		
	Services		
0			Save Cancel

Click on the **"Enrollment"** dropdown and choose the enrollment for the Case Manager assignment.

Make sure the **"Status"** box displays **"Active"** then click **"Save"** in the bottom right corner.

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*	Client Dashboard G Find Client To Intake O OUID 10 Intake	Luke Skywalker Social Security Number Client ID 1048334 A III 1048334 C IIII 1048334 A IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII		<
☆	COVID-19 Initiate COVID-19 Vaccine Intake CovID-19 Vaccine Intake Common Client Assessments Other Assessments Control Client Enrollment and Client Covid Client	Assignment beginning on: * 11/09/2022 🛱 and Ending on MM/DD/YYYY 🛱 Case Manager.* Lori Wood Q Enrollment: * 11/07/2022 - My Fake Organization CoC RRH (RRH-R8) v Status: * Active v		
	Services			
Ø			Save	Cancel

The Case Manager assignment has now been changed.

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* **	Q Find Client Coordinated Entry Intake COVID-19 Intake	Luke Skywalker 1/1/2000 Case Manage	¹²³⁻⁰⁰⁻⁰⁰⁰⁰ ^{ClientID} 10483 r Assignments	34 🌣 🛱	0			< 0			
☆	COVID-19 Vaccine Intake COVID-19 Vaccine Intake COVID-19 Vaccine Intake Covid Client Covid Clie	Intake 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 Manager Report.									
	Client CE Consent Forms Case Notes		Case Manager	Begin Date ↓	Status	End Date	Enrollment	All Associated Enrollments			
	Assessments Assessments	ď	Lori Wood	11/09/2022	Active		My Fake Organization CoC RRH (RRH-R8)				
	Services Enrollments	Ľ	David Boltz	11/07/2022	Inactive	11/08/2022	My Fake Organization CoC RRH (RRH-R8)	٢			
	 ➤ Family Members 1□ Paused Workflows 										

Please email the <u>HMISHelpDesk@ihcda.IN.gov</u> for HMIS system questions or the <u>DVHelpDesk@ihcda.IN.gov</u> for DV ClientTrack questions.