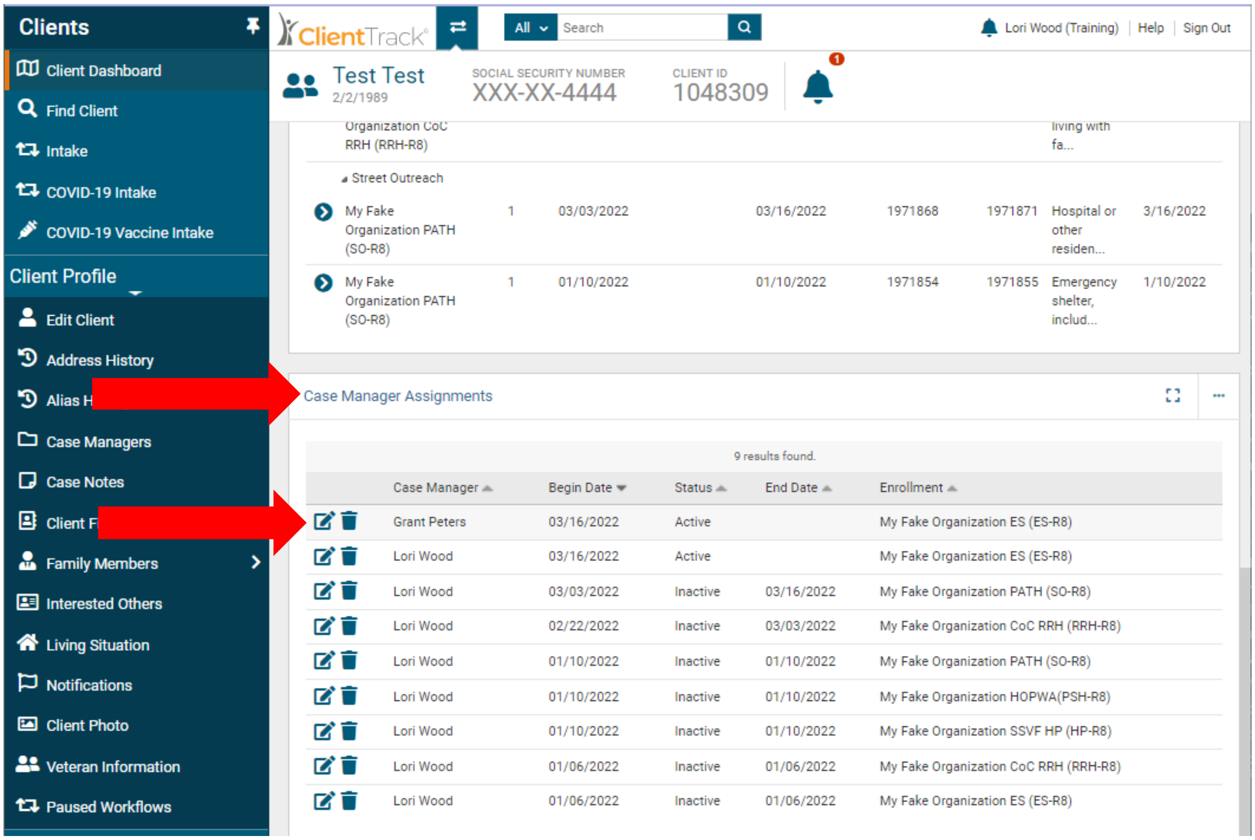
How to Guide

Changing/Editing the Case Manager Assignment

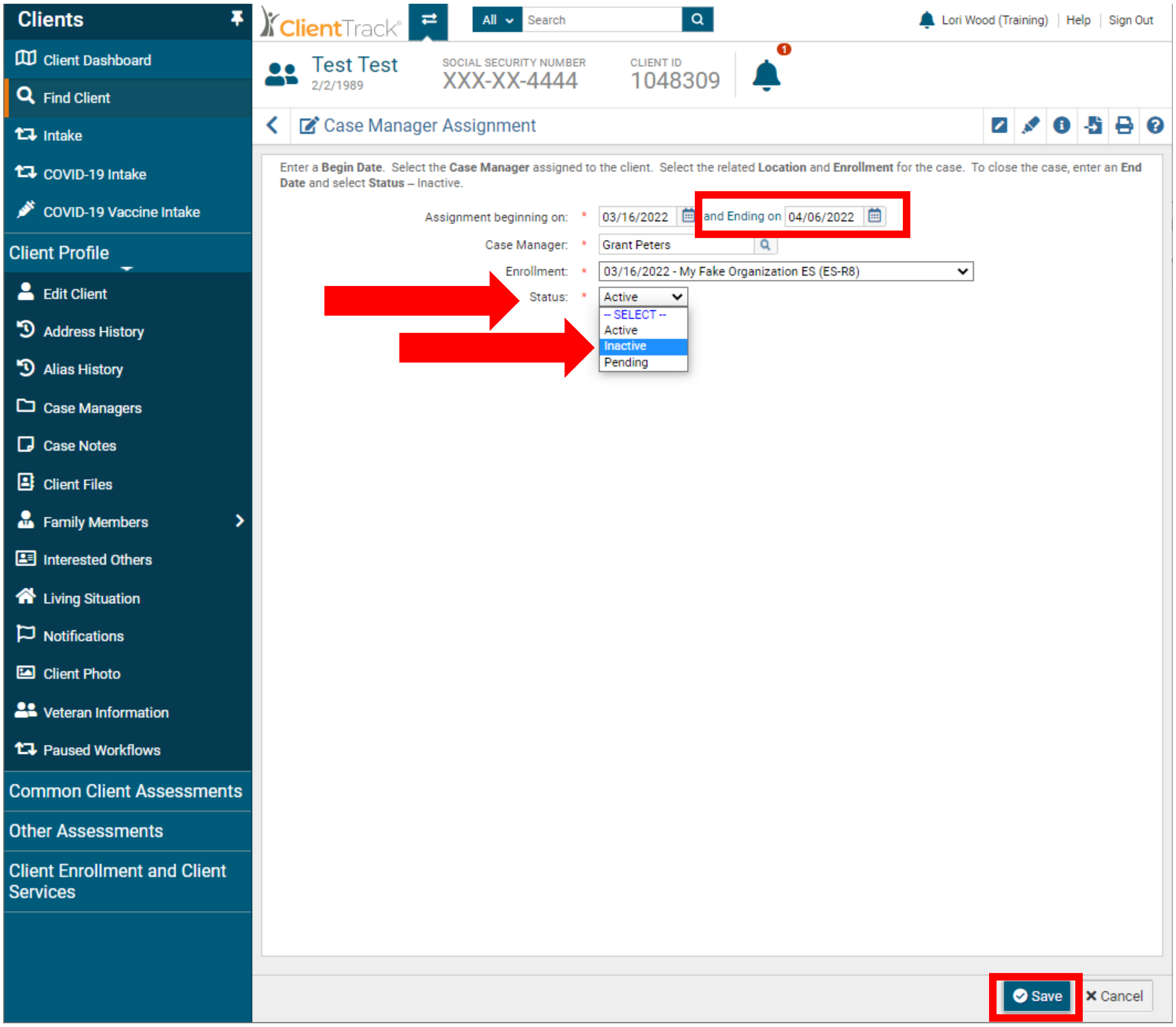
To change/edit the CM assignment, go to the Client's Dashboard. In the Case Manager section of the Client's Dashboard, click on the little blue pencil to the left of the Case Manager's name you wish to edit.



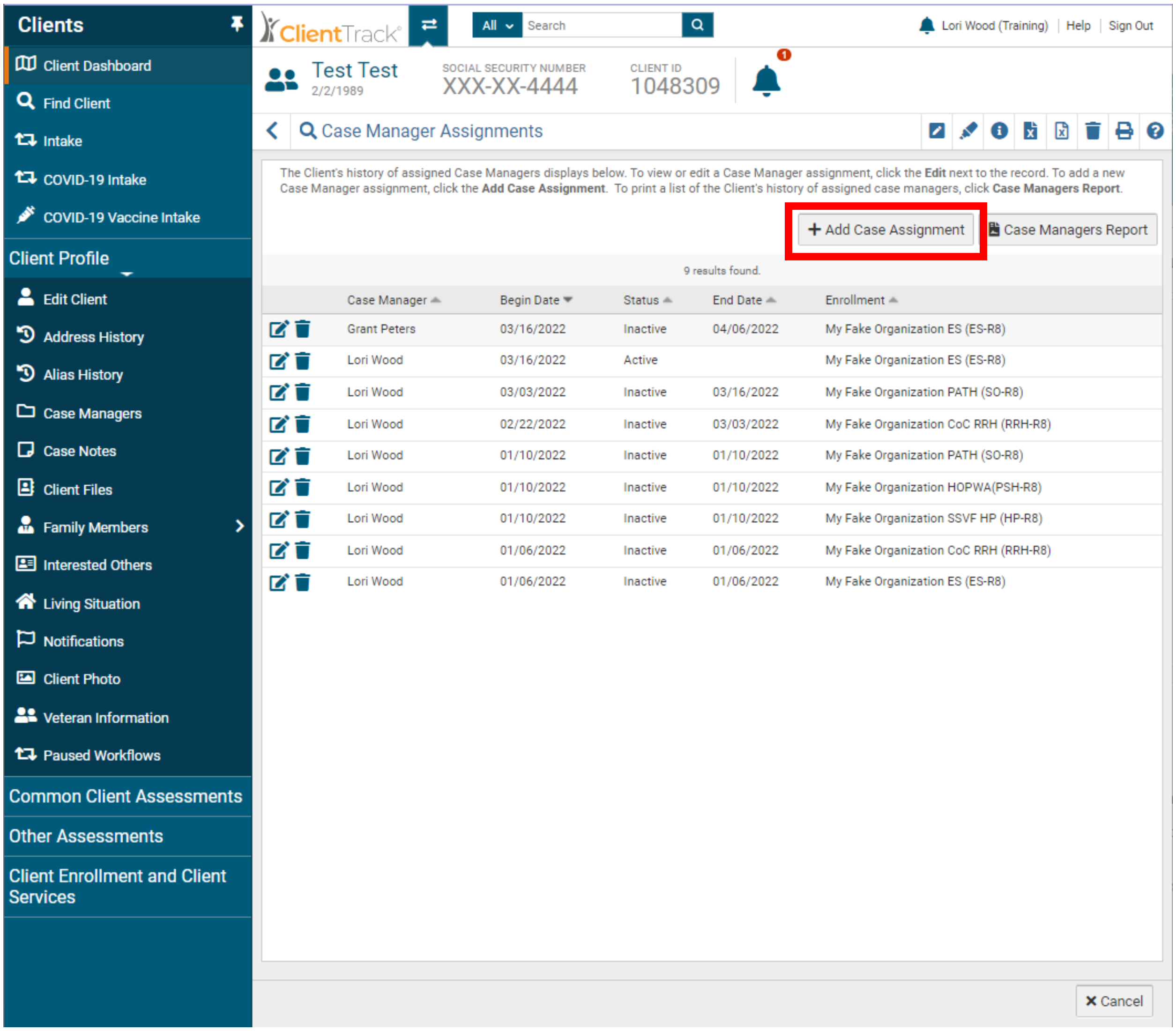
Type in a date in the **"and Ending on"** field to end the Case Manager's assignment.

Next, click on the **"Status"** dropdown and select **"Inactive"**

Click **"Save"** in the bottom right corner of the screen.

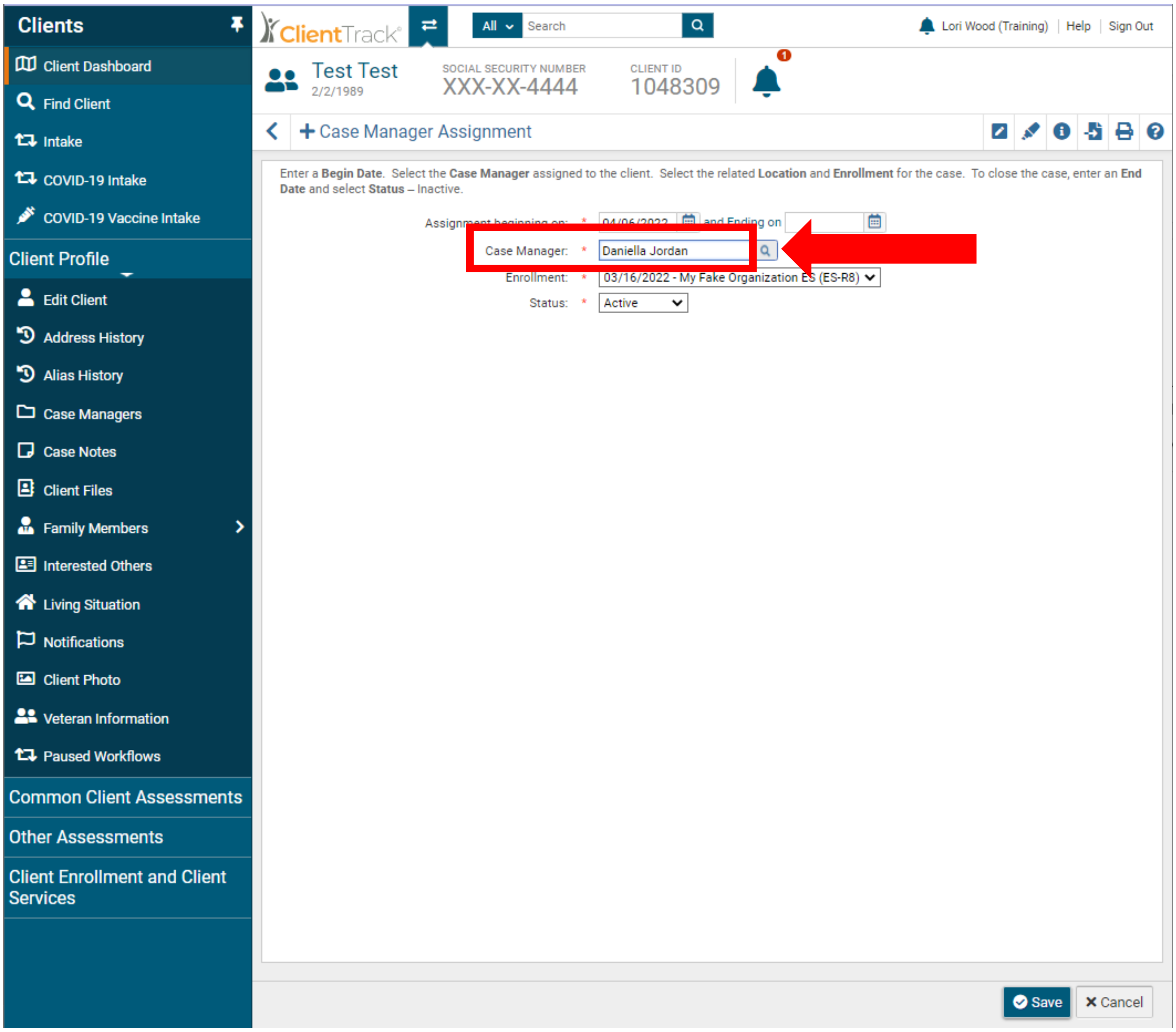


Next – to add a new Case Manager to the open enrollment click **“Add Case Assignment”**

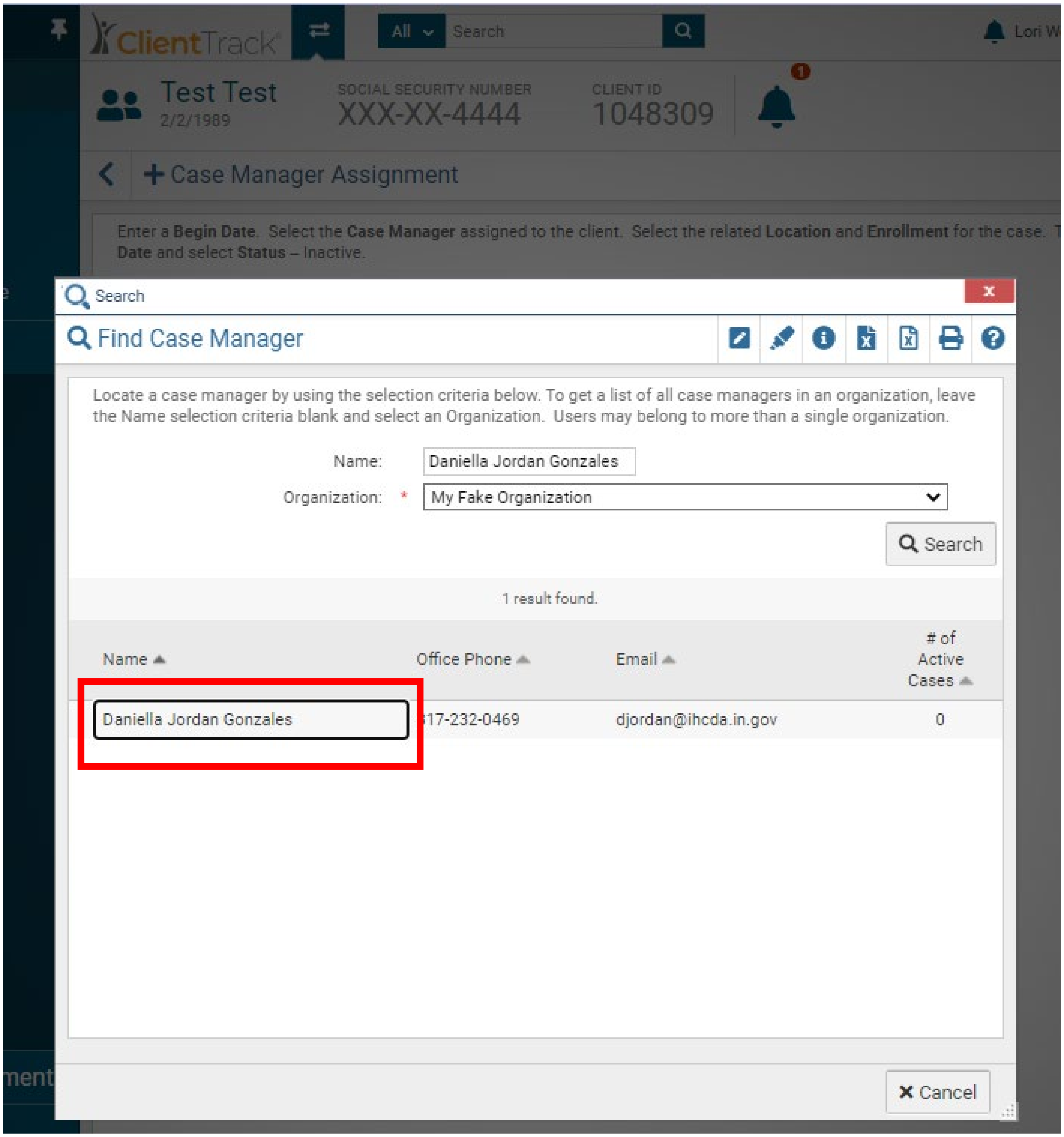


In the **"Case Manager"** field, type in the name of the new Case Manager

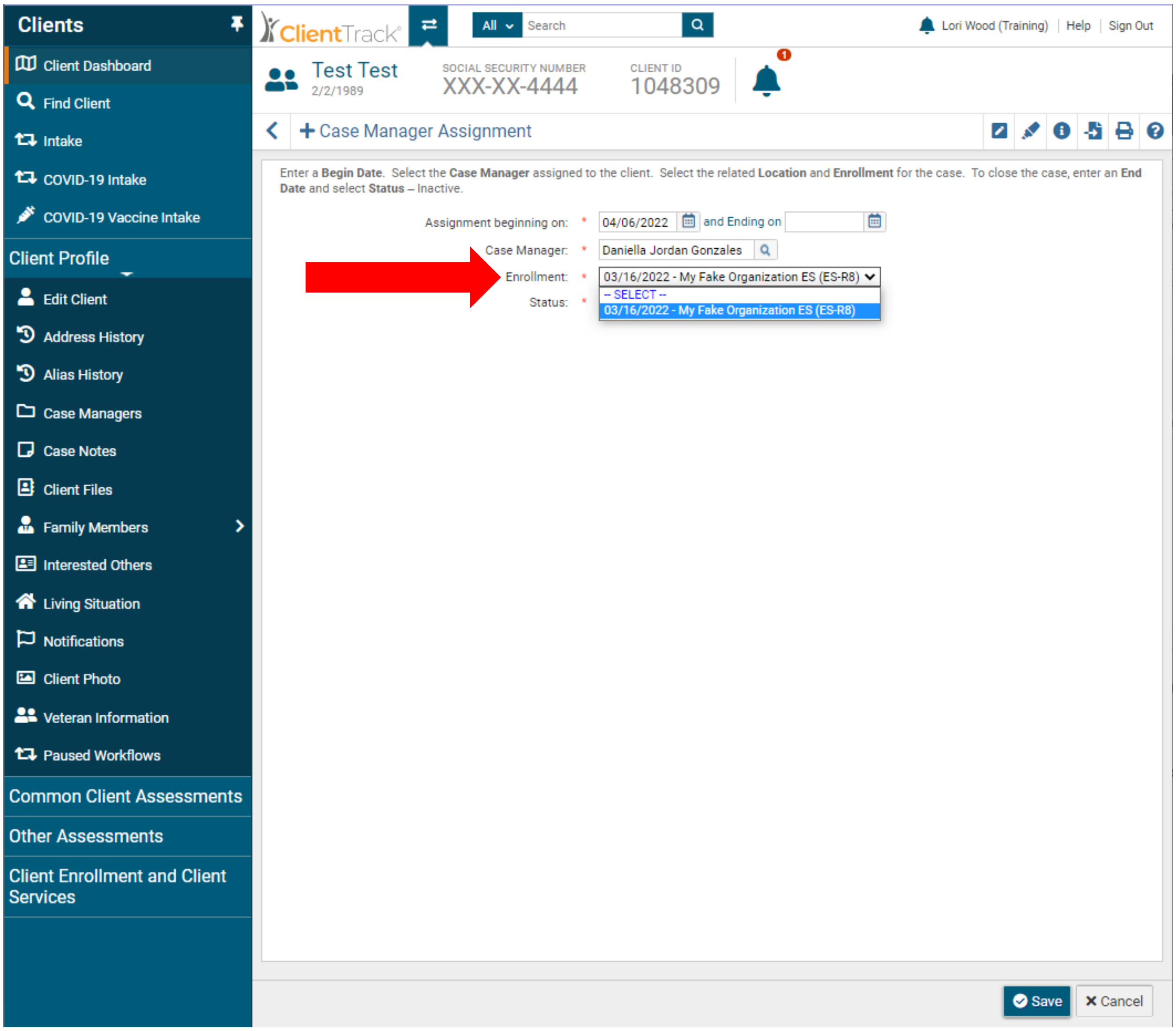
Next, click on the magnifying glass in the Case Manager field.



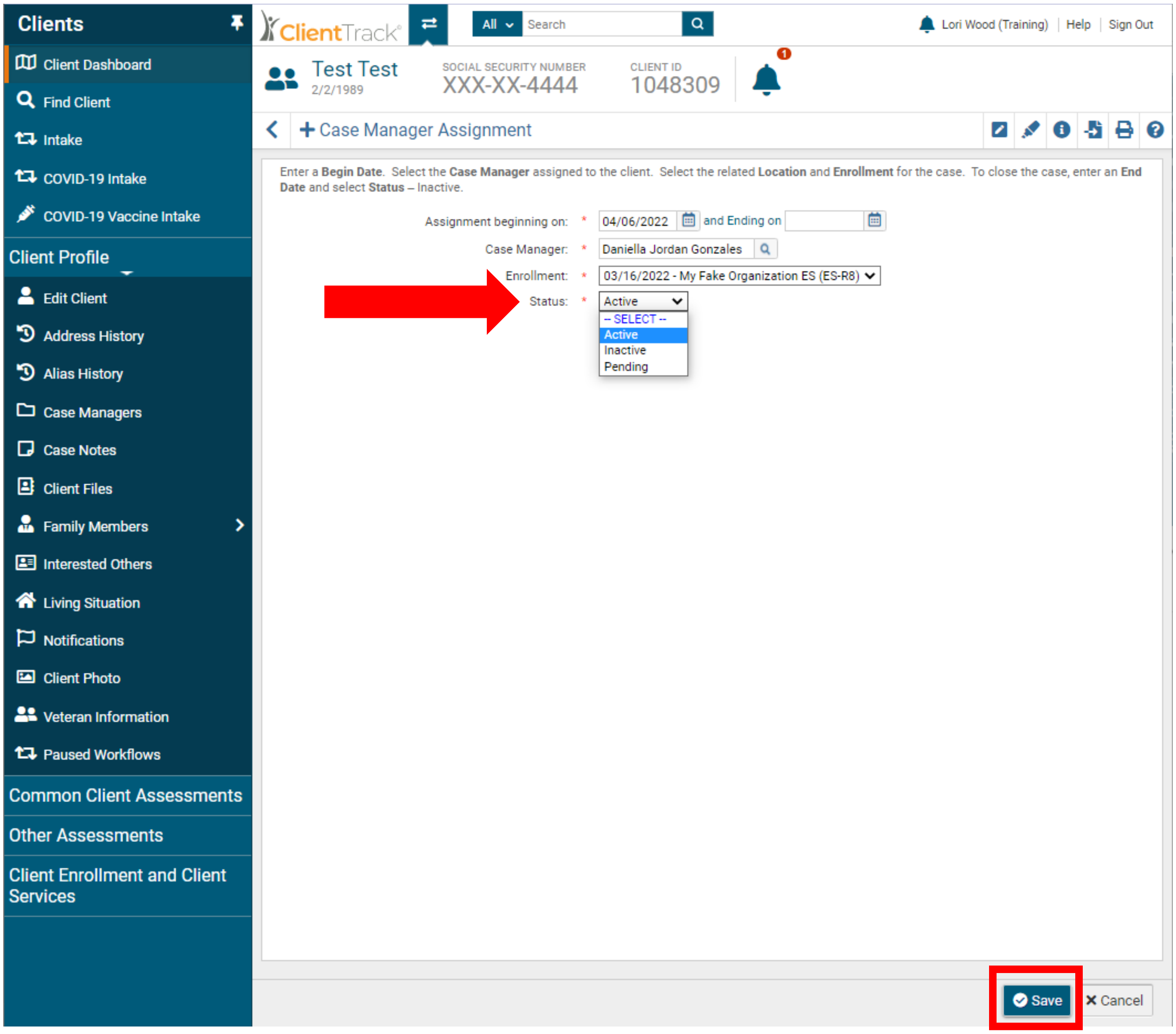
The Case Manager's name will appear in a pop-up window. Click on the Case Manager's name.



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.



The Case Manager assignment has now been changed.

Please email the HMISHelpDesk@ihcda.in.gov for HMIS system questions or the DVHelpDesk@ihcda.in.gov for DV ClientTrack questions.