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Overview

A Client may be assigned to several Case Managers. Each Agency may provide at least one Case Manger. The Client may also work with different Case Managers based on the services they receive. This Quick Card Reference provides steps to work with Case Assignments.

Case Assignment Updates

1. Go to the Home Tab
2. Select My Client Track group.
3. Expand the Case Load menu item
4. Click on the Active Cases menu item
5. Click on the Notepad (edit icon) next to the client you want to change.
6. Change the status to inactive.

Case Assignment Removal

If you want to remove your assignment all together (delete any record of it)

1. Go to the Home Tab
2. Select My Client Track group.
3. Expand the Case Load menu item
4. Click on the Active Cases menu item
5. Click on the person icon (go to client icon) next to the client you want to change. This will take you to the Clients Tab - Case Management Group
6. Expand the Edit Client menu item
7. Click on Case Managers
8. Change or delete the entry
 - a. Change - Click on the Notepad (edit icon) next to the entry you want to change
 - b. Delete – Click on the trash can (delete icon) to delete the entry.

For Support, Please

Submit a ticket in the HMIS
Email us at: hmis@computerhelp.biz
Contact Computer Help at (850) 651-0341
Contact Computer Help at (850) 259-4164

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Okaloosa Walton Continuum of Care

HMIS