

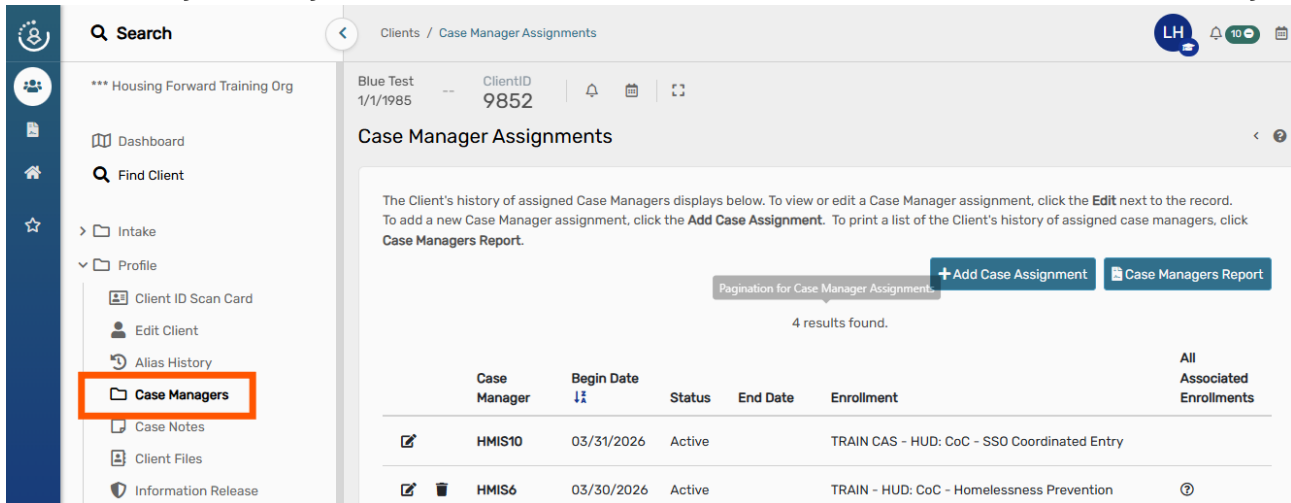
Case Manager Assignments

Every HMIS user in ClientTrack is assigned "Case Manager" access, regardless of their role or job title at their agency. The assigned case manager inside ClientTrack is the HMIS user assigned to that client's enrollment in a given program. A client can have multiple case managers assigned to their enrollment(s).

The case manager is automatically assigned to the HMIS user completing the intake (entry/enrollment) assessment for a client.

Case Manager Assignments

Locate the neighbor using Find Client, once on the client's dashboard select Profile and then Case Managers.

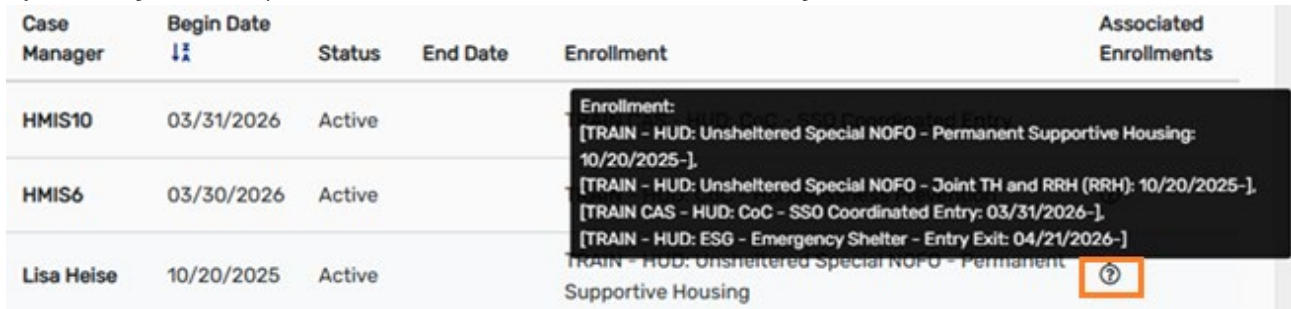


The screenshot shows the ClientTrack interface for a client named "Blue Test" (Client ID: 9852). The "Case Managers" option in the left sidebar is highlighted with a red box. The main content area displays a table of Case Manager Assignments with 4 results found.

Case Manager	Begin Date	Status	End Date	Enrollment	All Associated Enrollments
HMIS10	03/31/2026	Active		TRAIN CAS - HUD: CoC - SSO Coordinated Entry	
HMIS6	03/30/2026	Active		TRAIN - HUD: CoC - Homelessness Prevention	

Case manager assignments are grouped.

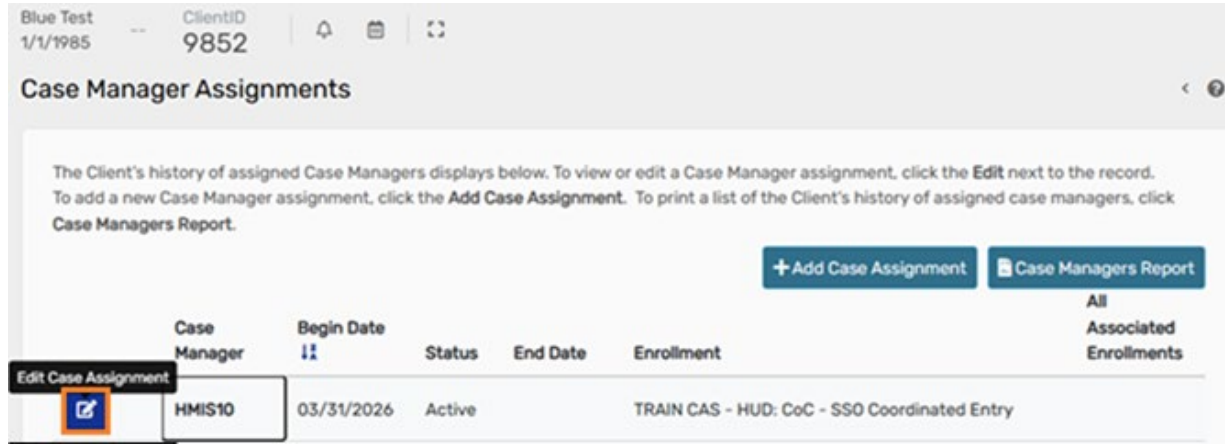
By hovering over the question mark, one can see all the active assignments.



Case Manager	Begin Date	Status	End Date	Enrollment	Associated Enrollments
HMIS10	03/31/2026	Active		TRAIN CAS - HUD: CoC - SSO Coordinated Entry	
HMIS6	03/30/2026	Active		TRAIN - HUD: CoC - Homelessness Prevention	
Lisa Heise	10/20/2025	Active		Supportive Housing	Enrollment: [TRAIN - HUD: Unsheltered Special NOFO - Permanent Supportive Housing: 10/20/2025-], [TRAIN - HUD: Unsheltered Special NOFO - Joint TH and RRH (RRH): 10/20/2025-], [TRAIN CAS - HUD: CoC - SSO Coordinated Entry: 03/31/2026-], [TRAIN - HUD: ESG - Emergency Shelter - Entry Exit: 04/21/2026-]

Steps to Reassign via Case Manager Assignments

On the Case Manager Assignments page, select "Edit Case Assignment" next to the previous case manager for the enrollment.



Blue Test 1/1/1985 -- ClientID 9852

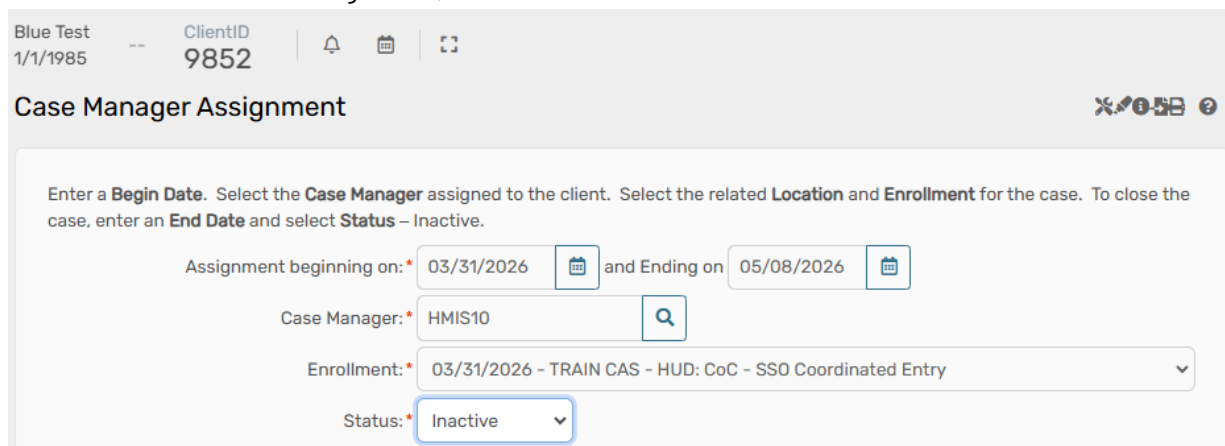
Case Manager Assignments

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 Managers Report**.

[+ Add Case Assignment](#) [Case Managers Report](#)

Case Manager	Begin Date	Status	End Date	Enrollment	All Associated Enrollments
Edit Case Assignment HMIS10	03/31/2026	Active		TRAIN CAS - HUD: CoC - SSO Coordinated Entry	

Add an End Date for the assignment, and set the Status to "Inactive"



Blue Test 1/1/1985 -- ClientID 9852

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**.

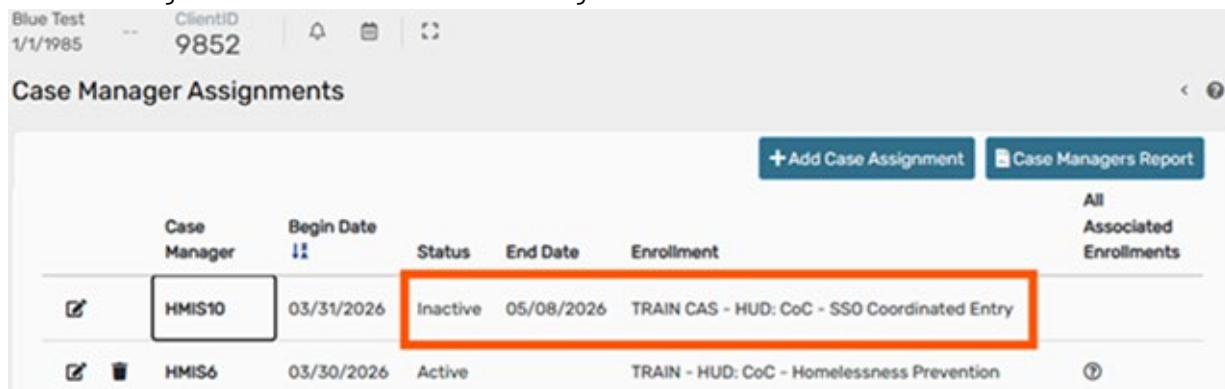
Assignment beginning on: * 03/31/2026 and Ending on 05/08/2026

Case Manager: * HMIS10

Enrollment: * 03/31/2026 - TRAIN CAS - HUD: CoC - SSO Coordinated Entry

Status: * Inactive

Now the assignment shows that the case manager is inactive on the date selected.



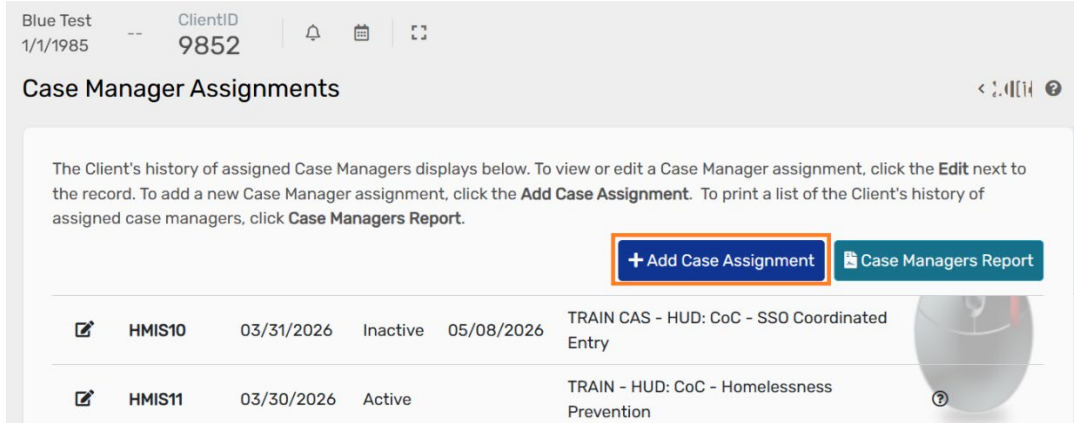
Blue Test 1/1/1985 -- ClientID 9852

Case Manager Assignments

[+ Add Case Assignment](#) [Case Managers Report](#)

Case Manager	Begin Date	Status	End Date	Enrollment	All Associated Enrollments
Edit Case Assignment HMIS10	03/31/2026	Inactive	05/08/2026	TRAIN CAS - HUD: CoC - SSO Coordinated Entry	
Edit Case Assignment HMIS6	03/30/2026	Active		TRAIN - HUD: CoC - Homelessness Prevention	?

To add the new case manager, select "Add Case Assignment".



Blue Test 1/1/1985 -- ClientID 9852

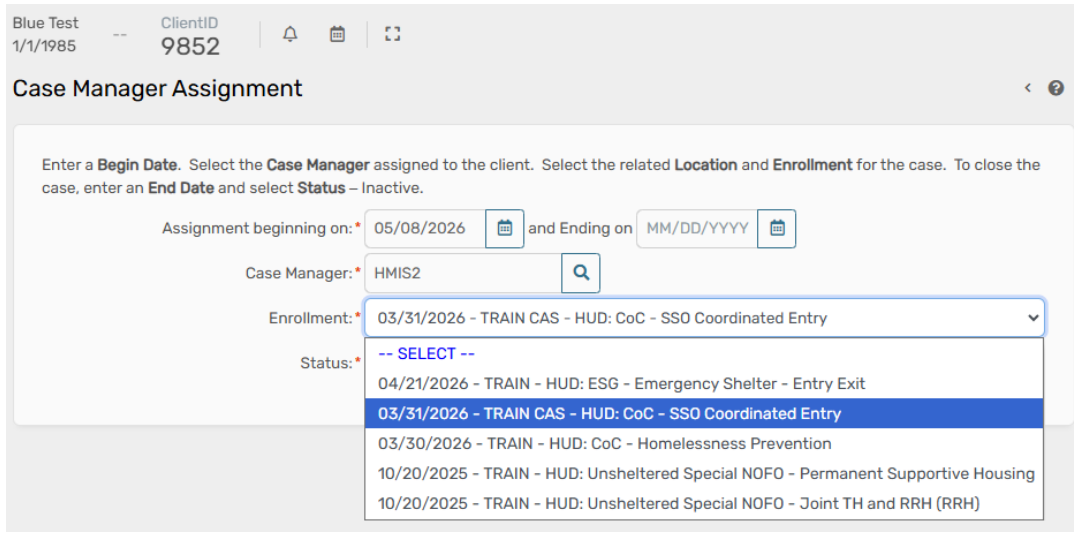
Case Manager Assignments

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 Managers Report**.

+ Add Case Assignment **Case Managers Report**

	HMIS10	03/31/2026	Inactive	05/08/2026	TRAIN CAS - HUD: CoC - SSO Coordinated Entry
	HMIS11	03/30/2026	Active		TRAIN - HUD: CoC - Homelessness Prevention

Select the Start Date, Case Manager's Name, the appropriate Enrollment and set the Status to Active for the assignment.



Blue Test 1/1/1985 -- ClientID 9852

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: 05/08/2026 and Ending on: MM/DD/YYYY

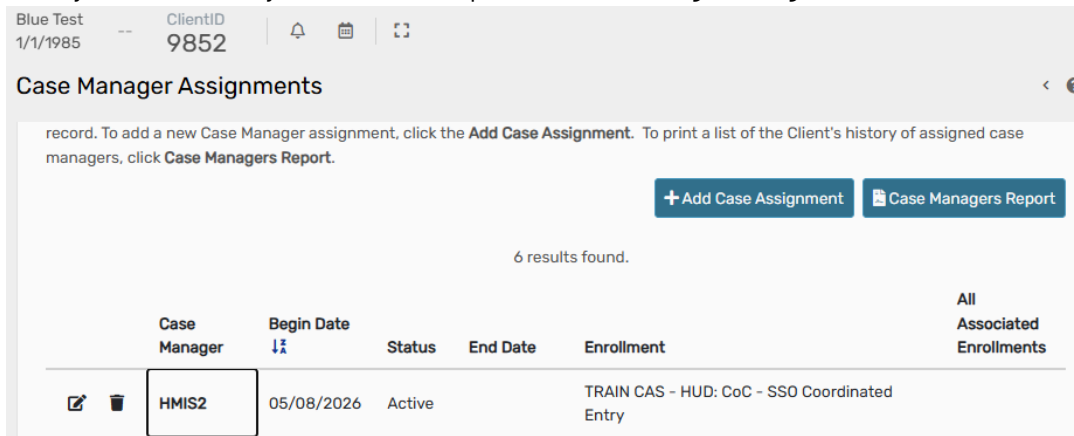
Case Manager: HMIS2

Enrollment: 03/31/2026 - TRAIN CAS - HUD: CoC - SSO Coordinated Entry

Status: -- SELECT --

- 04/21/2026 - TRAIN - HUD: ESG - Emergency Shelter - Entry Exit
- 03/31/2026 - TRAIN CAS - HUD: CoC - SSO Coordinated Entry**
- 03/30/2026 - TRAIN - HUD: CoC - Homelessness Prevention
- 10/20/2025 - TRAIN - HUD: Unsheltered Special NOFO - Permanent Supportive Housing
- 10/20/2025 - TRAIN - HUD: Unsheltered Special NOFO - Joint TH and RRR (RRH)

Once you select Save you will see the updated Case Manager Assignment.



Blue Test 1/1/1985 -- ClientID 9852

Case Manager Assignments

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 Managers Report**.

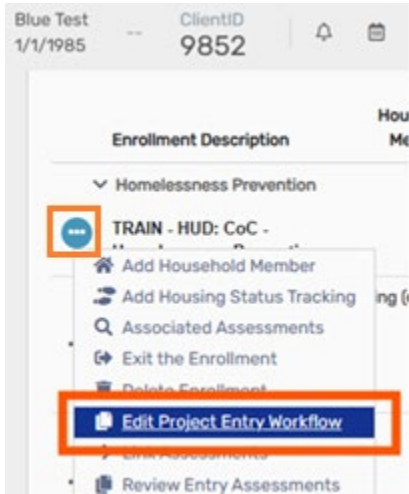
+ Add Case Assignment **Case Managers Report**

6 results found.

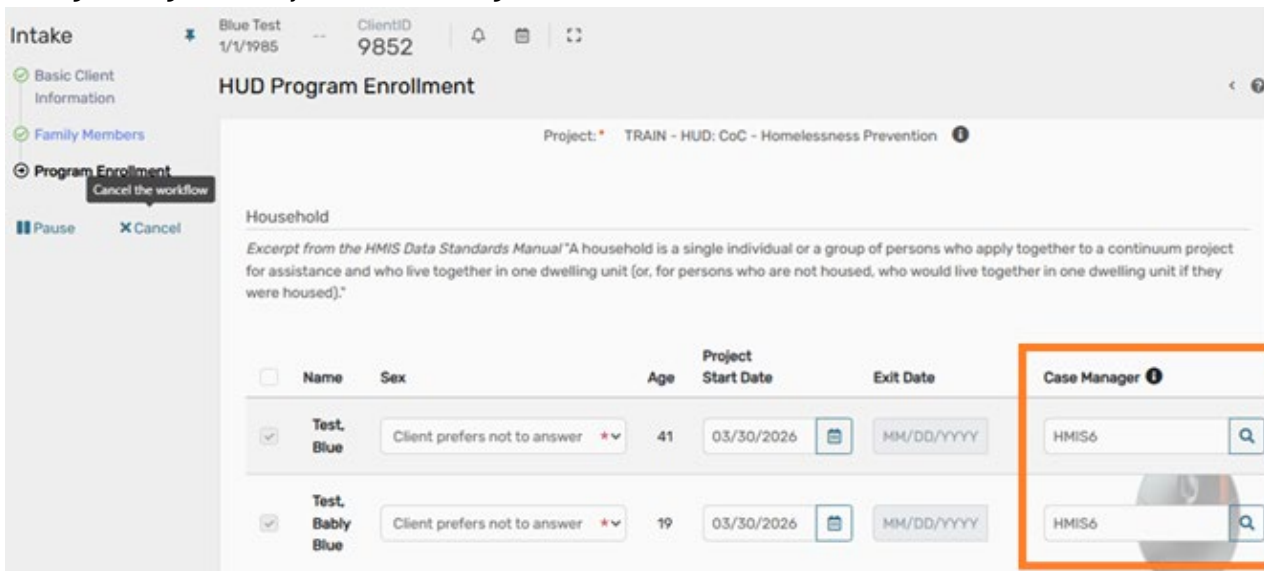
Case Manager	Begin Date	Status	End Date	Enrollment	All Associated Enrollments
	HMIS2	05/08/2026	Active		TRAIN CAS - HUD: CoC - SSO Coordinated Entry

Steps to Reassign via Enrollment

On the neighbor's dashboard under the Enrollments section, locate the enrollment for your project, edit the project entry workflow via the three dots.



Continue through the workflow to the HUD Program Enrollment page and select the search button for the Case Manager assignment(s) you wish to change.



Search for the Case Manager by inputting their name.
 Select the Case Manager you wish to assign to the enrollment.

Find Case Manager

Locate a case manager by using the selection criteria below. To get a list of all case managers in an organization, leave the Name selection criteria blank and select an Organization. Users may belong to more than a single organization.

Only Show Active Case Managers: ⓘ

Name:

Organization: *

13 results found.

Name ↑↓	Office Phone	Email	Owning Organization	# of Active Cases	User Active Status
HMIS Trainer		HMIS@dmrt.org	*** Housing Forward Training Org	0	Active
HMIS1		HMIS1@dmrt.org	*** Housing Forward Training Org	0	Active

Once the new Case Manager is selected, you will see the update on the HUD Program Enrollment page.
 Select "Save" and continue through the workflow.

Blue Test 1/1/1985 ClientID 9852

HUD Program Enrollment

3. The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, site-based, scattered-site subsidy) or expects to have one in a reasonably short amount of time

- For all other types of Service projects including but not limited to: services only, day shelter, homelessness prevention, coordinated assessment, health care it is the date the client first began working with the project and generally received the first provision of service.

Project: * TRAIN - HUD: CoC - Homelessness Prevention ⓘ

Household

Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

	Name	Sex	Age	Project Start Date	Exit Date	Case Manager ⓘ
<input checked="" type="checkbox"/>	Test, Blue	Client prefers not to answer	41	03/30/2026	MM/DD/YYYY	HMIS11
<input checked="" type="checkbox"/>	Test, Baby Blue	Client prefers not to answer	19	03/30/2026	MM/DD/YYYY	HMIS11