

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”

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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.

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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”.

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Case Manager Assignments

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+ 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.

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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 RRH (RRH)

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

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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

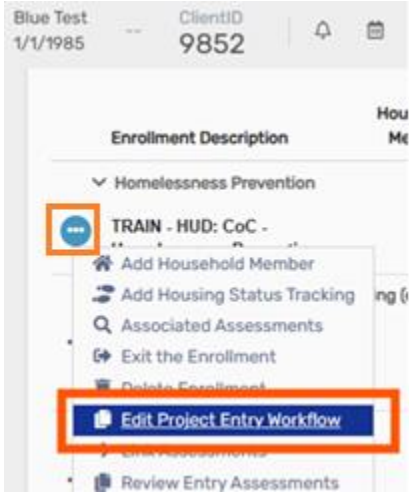
Case Managers Report

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.

This screenshot shows the 'HUD Program Enrollment' page. The page title is 'HUD Program Enrollment'. Below the title, it says 'Project: * TRAIN - HUD: CoC - Homelessness Prevention'. There is a 'Household' section with a definition: '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)."' Below this is a table with columns: Name, Sex, Age, Project Start Date, Exit Date, and Case Manager. There are two rows of data. The first row has 'Test, Blue' as the name, 'Client prefers not to answer' as the sex, '41' as the age, '03/30/2026' as the project start date, and 'MM/DD/YYYY' as the exit date. The second row has 'Test, Baby Blue' as the name, 'Client prefers not to answer' as the sex, '19' as the age, '03/30/2026' as the project start date, and 'MM/DD/YYYY' as the exit date. To the right of the table is a 'Case Manager' search bar with a magnifying glass icon. The search bar contains the text 'HMIS6'. The search bar is highlighted with a red rectangular box.

Name	Sex	Age	Project Start Date	Exit Date	Case Manager
Test, Blue	Client prefers not to answer	41	03/30/2026	MM/DD/YYYY	HMIS6
Test, Baby Blue	Client prefers not to answer	19	03/30/2026	MM/DD/YYYY	HMIS6

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.

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 ⓘ
☒	Test, Blue	Client prefers not to answer	41	03/30/2026	MM/DD/YYYY	HMIS11
☒	Test, Baby Blue	Client prefers not to answer	19	03/30/2026	MM/DD/YYYY	HMIS11