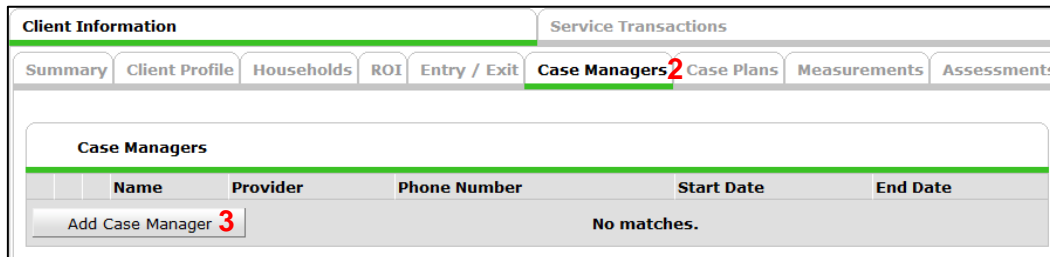


How to Assign a Case Manager

1. Open your client profile
2. Click the Case Manager tab
3. Click Add Case Manager

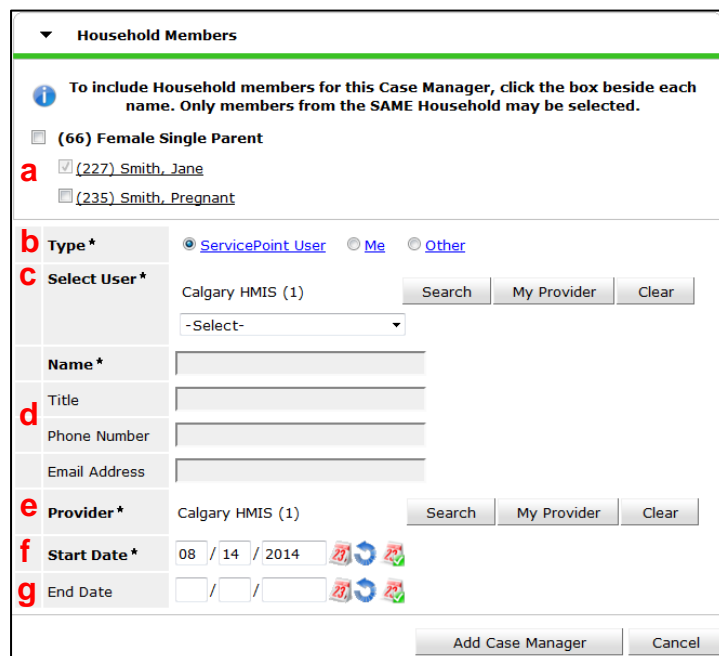


The screenshot shows the 'Client Information' page with the 'Case Managers' tab selected. Below the tab is a table with columns: Name, Provider, Phone Number, Start Date, and End Date. The table is currently empty and displays the message 'No matches.' Below the table is an 'Add Case Manager' button, which is highlighted with a red '3'.

4. On the next window, fill in details:
 - a. **Household Members:** Check the boxes of the members' which are also entering the program
 - b. **Type:** The type chosen will change the other fillable items
 - *ServicePoint User:* Someone who is active in the HMIS System
 - *Me:* Yourself
 - *Other:* An individual not on ServicePoint but a key contact for this client
 - c. **Select User:** Someone who is active in the HMIS System
 - d. **Name, Title, Phone Number, Email Address:** These items will auto-populate unless you have chosen Other as the Type
 - e. **Provider: Confirm it is your provider**
 - f. **Start Date:** Choose the beginning date that they have been the case manager
 - g. **End Date:** Provide a date if it is an interim situation

5. Click Add Case Manager

Complete steps 1-5 for any additional case managers that need to be added



The screenshot shows the 'Household Members' section of the form. It includes a list of household members with checkboxes: '(66) Female Single Parent', '(227) Smith, Jane', and '(235) Smith, Pregnant'. Below this is a 'Type' section with radio buttons for 'ServicePoint User', 'Me', and 'Other'. The 'Select User' section shows 'Calgary HMIS (1)' and a dropdown menu. The form also includes fields for 'Name', 'Title', 'Phone Number', and 'Email Address'. The 'Provider' section shows 'Calgary HMIS (1)'. The 'Start Date' is set to '08 / 14 / 2014' and the 'End Date' is empty. At the bottom are 'Add Case Manager' and 'Cancel' buttons.