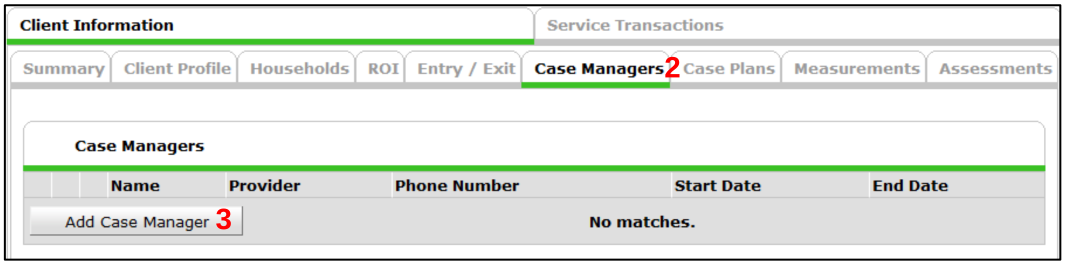
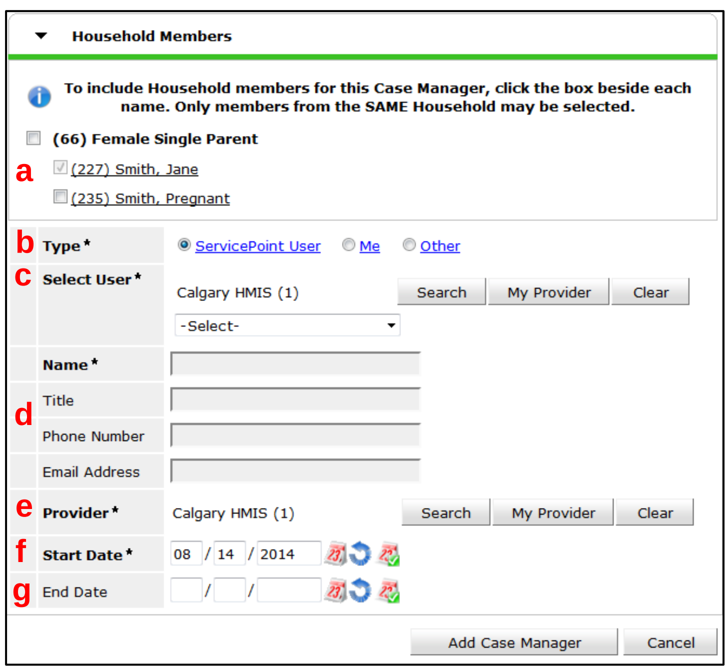
How to Assign a Case Manager

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



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