



## 1.0 Overview

The Case Managers tab is a useful tool that you should use to show that you are working with the clients on your caseload. Other workers at other agencies will be able to see your name and work contact information associated with a file, which can be very helpful in making sure your clients get the support and help they need.

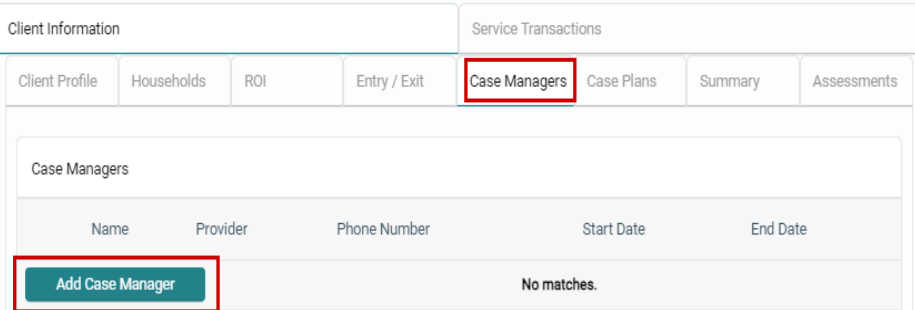
The Case Plans tab is a place to make case notes for your client. These notes can be organized by the specific goals you and your client are working towards. You can also set up notifications for your HMIS homepage, letting you know that you should follow-up with a client about a note or goal you set. This tab is not currently required by Clackamas County, but can make your work easier to keep track of.

## 2.0 Work Instructions

### 1. Add yourself as Case Manager

- a. Select "Case Managers" tab.
- b. Select **Add Case Manager**.

1.



Client Information				Service Transactions			
Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Summary	Assessments
Case Managers							
Name	Provider	Phone Number	Start Date	End Date	No matches.		
Add Case Manager							

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### 1.1 Case Manager pop-up window

# Case Managers and Case Plans Tabs - Work Instructions



- a. Make sure that the correct household, the one which includes the **Household Members** your program is serving, is checked.
- b. **Type** should typically be set to “Me”. However, if you are filling this out for a coworker, you would select “Other” and fill in the name and contact info by hand.
- c. **Start Date** should be the date you began working with the client. You will not need to put an **End Date** until the client is no longer on your caseload
- d. Click **Add Case Manager**

1.1

The screenshot shows a web form titled "Case Manager" for "Case Manager - (82) Bowman, Test". The form includes a "Household Members" section with a list of members: "(51) Couple With No Children", "(82) Bowman, Test", "(83) Bowman, Exam", and "(52) Single Individual". The "Type" field is set to "Me". The "Start Date" is set to "04 / 11 / 2024". The "Add Case Manager" button is highlighted.

## 3.0 Resources

# Case Managers and Case Plans Tabs - Work Instructions



## 3.1 Referenced Material

- [2024 HUD Data Standards](#) (linked)

## 3.2 Related Material

- [2024 CoC Program HMIS Manual](#) (linked)

## 3.3 Contacts

- [HMISAdmin@clackamas.us](mailto:HMISAdmin@clackamas.us)