

# MANAGING ASSIGNED CASES IN CAMS

## TO VIEW A CASE MANAGER'S OPEN/WAITLISTED CASES

With a **Supervisor account**, Supervisors are able to see all Open and Waitlisted cases assigned to a given Case Manager.

Supervisors are **also** able to **re-assign** cases to a different Case Manager if desired.

To see cases assigned to a given Case Manager :

1. Hover over My Cases on the menu to the left of the screen.
2. Select "Manage Workers"
3. From the Choose a worker dropdown menu, select the worker in question.
4. From the Case Status dropdown, select "Open" to view the selected worker's Open cases, or select "Wait" to view the worker's Waitlisted cases.

**Note** that once you are in a Worker's profile, you can also pivot between **Wait** and **Open** to see the Case Manager's open and waitlisted cases.

## TO REASSIGN A CASE

1. Select the Case you wish to re-assign from the list of cases showing in the Workers profile (click on the Program Name ([blue link](#)) to go into the targeted case.

(The example below shows the Open cases [see top right of the screen] that have been assigned to Zakaria Dhib (see "Worker").

The screenshot displays the CAMS interface for a worker's profile. On the left is a navigation menu with options like 'My Cases', 'New Intake/Referral', and 'Log Out'. The main content area shows a worker profile for 'Zakaria Dhib' with fields for 'User Name / Start Date', 'Email Address', 'Last Log On', 'Waitlist Manager(s)', 'Is a team Member', and 'Worker Supervisor(s)'. Below the profile is a table of assigned cases. The table has columns for 'Client #', 'Client Name', 'Case #', 'Program Name', 'Status Date', 'Days', and 'Case Notes'. One case is listed for 'John Test' with Case # 2, assigned to 'John Howard Montreal' on '2018-Jun-28' with '1' day remaining. The interface includes dropdown menus for 'select Worker' and 'select Case Status', and a 'Submit' button.

Client #	Client Name	Case #	Program Name	Status Date	Days	Case Notes
2	John Test	2	John Howard Montreal	2018-Jun-28	1	2 Unread

2. Once you are in the targeted case, scroll down to the Program & Worker section and click on the Worker's name.

Intake Form	Needs Assmt.	Service Plan	Monthly Report	Mid/Final SNAP	Discharge FollowUp	Incident Report	Case Notes
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Client Short Information

Client Name	John Test	Gender	Male
Birth Date	0000-00-00 Not Set	Phone 1	
Phone 2		Phone 3	
Address	Montreal, QB		
Email			
Comments			

Include Comments in print

Program & Worker

Program	Worker	Status	Status Date	P.D. Date
John Howard Montreal	Zakaria Dhib	Open	2018-Jun-28	PDD

  

Date	Action	Status	Author	Comments	Real Date
2018-Jun-22	Refer	Wait	Kassandra Roy		2018-Jun-28 10:28:48
2018-Jun-28	Open	Open	Kassandra Roy	[ Zakaria Dhib ] Referred June 22nd, enrolled June 28th	2018-Jun-28 10:38:26

Add new Family Member

- Once in the next screen, go to the **“Add/Transfer Worker”** section and from the *Choose a worker* dropdown menu, select the name of the new worker you would like to assign the case to.
- Click **“Add worker”** to assign the case to the new worker.
- Then, to discharge the previously assigned worker, go to the **“Discharge Worker”** section and select the targeted worker’s name from the dropdown menu.
- Be sure to enter the applicable discharge date in the **“Start/End Date”** field.
- Click **“Discharge Worker”** to discharge the worker.

Case Worker

Client Short Information

Client Name	John Test	Gender	Male
Birth Date	0000-00-00 Not Set	Phone 1	
Address	Montreal, QB		

#	Program	Worker	Assigned Date	Status Date	Status	P.D. Date
2	John Howard Montreal	Zakaria Dhib	2018-06-28	2018-06-28	Open	0000-00-00

*Start/End Date	2018-06-28	Comments:	
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<b>Add/Transfer Worker</b> Kassandra Roy <input type="button" value="Add worker"/> <input type="button" value="Transfer worker"/>	<b>Discharge Worker</b> Zakaria Dhib <input type="button" value="Discharge worker"/>
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Id	Member	Role	Team	Start Date	End Date	Days	Live	Last Change
3	Kassandra Roy	M		2018-06-22	2018-06-27	5	N	2018-06-28 10:38:26
4	Zakaria Dhib	W		2018-06-22	2018-06-22	0	N	2018-06-28 11:44:43
5	Zakaria Dhib	W		2018-06-28		0	Y	2018-06-28 11:44:43