

1. For Case Management type users if the case management or early intervention caseloads are not syncing or are incompletely syncing, it can be fixed when a user is assigned a caseload:

Caseload	Caseload Type	Action	
ACMC: USER-Demo1	Case Management	Add	Assigned To
ACMC: USER-Demo2	Case Management	Add	Assigned To

2. From the 'Admin' tab, under 'Care' section, click on 'Assign CM By External ID' next to Batch Case Manager Assignment

To Do	Care	
Individual	Individual Intake	New   Pending Admission   Import from Excel
<b>Admin</b>	Individual	List   By Program   Search   Archive   Legacy IDF Archive
Agency Reports	Individual Enrollment Archive	By Program   By Individual
Settings	Add/Remove Individual(s) to Program	Add/Remove
	ISP Program Scoring Method	New   List
	Type of Habilitation Service	List
	ISP Plan	Configure Service Provider
	Behavior Plan	Behavior List   Intervention List   Restraint List
	Outcome Measure Types	List
	Time Tracking	Create Template   Template List
	Batch Case Manager Assignment	List   <b>Assign CM by External ID</b>

3. Enter the Case Management Users' CDSS Login ID and click the 'Assign' button. The caseload(s) would be updated.

\*CDSS (case sensitive, usually has a numeric digit at the end). This is what generates the caseload from CDSS into Therap.

**Batch Case Manager Assignment**

Case Manager External ID \*