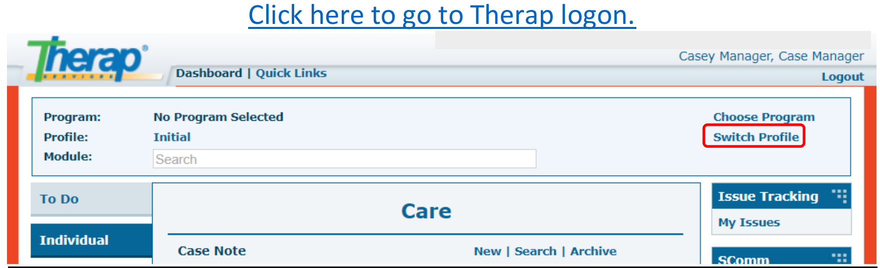
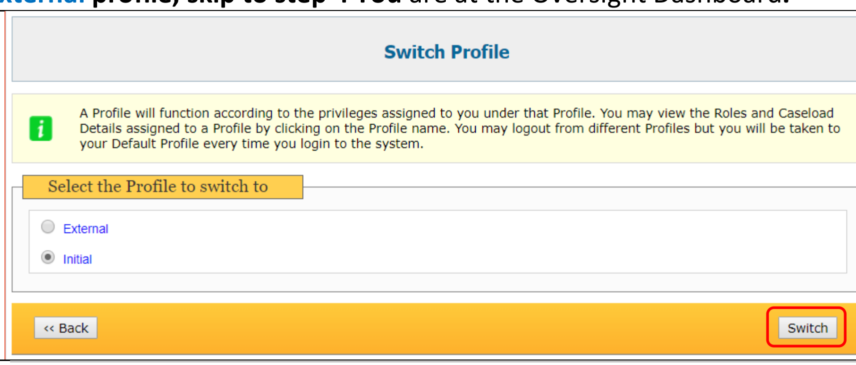
How To: Assessment, Worksheet, and Plan Workflow

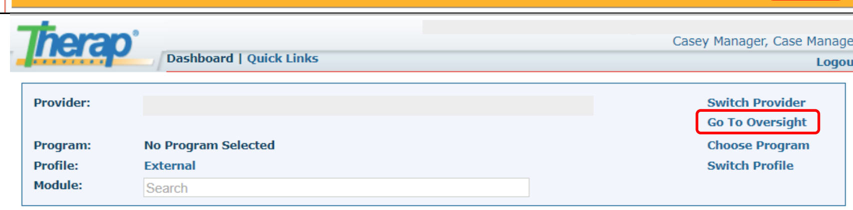
Steps used in this HowTo process.

- Getting to your Assessment, Worksheet, or Plan
- Case Management Assessment Workflow
- Case Management Worksheet Workflow
- Case Management Support Plan Workflow
- Questions

Getting to your Assessment, Worksheet, or Plan

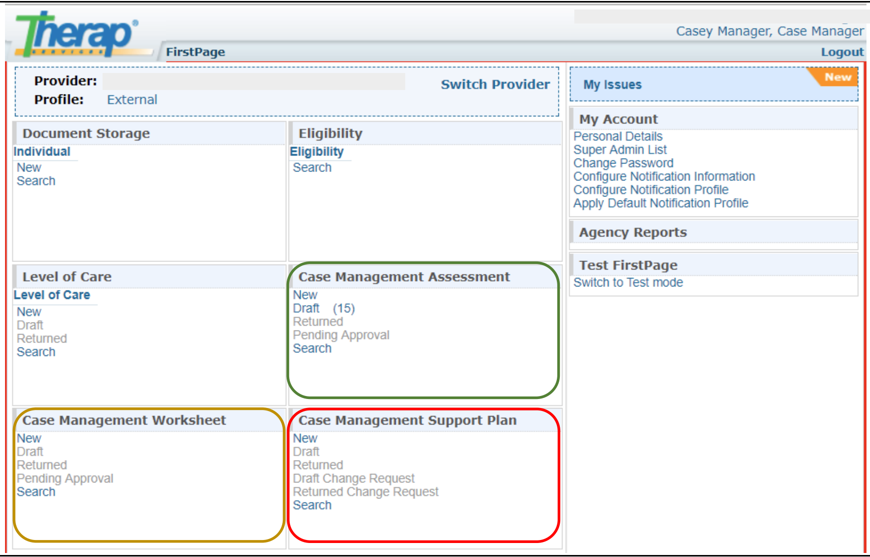
<table>
<tr><td>1. Change your Profile - We will start from your provider Dashboard. This case manager is on their Initial profile (Blue Box) and in their provider context (Green box).

Click Switch Profile (Red box).</td><td>Click here to go to Therap logon.

</td></tr>
<tr><td colspan="2">NOTE: If your default profile is your External profile, skip to step 4 You are at the Oversight Dashboard.</td></tr>
<tr><td>2. Choose the External profile by clicking the button by External (Green Box), and then click the [Switch] button at the bottom right (Red Box).</td><td>
</td></tr>
<tr><td>3. With your new Profile, you are returned to the Provider Dashboard, but there are new options; Switch Provider and Go To Oversight.

Click Go To Oversight (Red Box).</td><td>
</td></tr>
<tr><td colspan="2">NOTE: The Dashboard link (top left of the screen) is sensitive to your Therap location. If you are at Oversignt and click Dashboard it will take you to the Oversight Dashboard. If you are in a provider (like the Initial profile), it will take you to the provider Dashboard. This gives you a very quick way to get back to your current Therap home.</td></tr>
</table>

4. You are at the Oversight Dashboard. At **Oversight** you will see three columns. On this dashboard, find the areas for Case Management Assessment (Green Box), Case Management Worksheet (Gold Box), and Case Management Support Plan (Red Box).

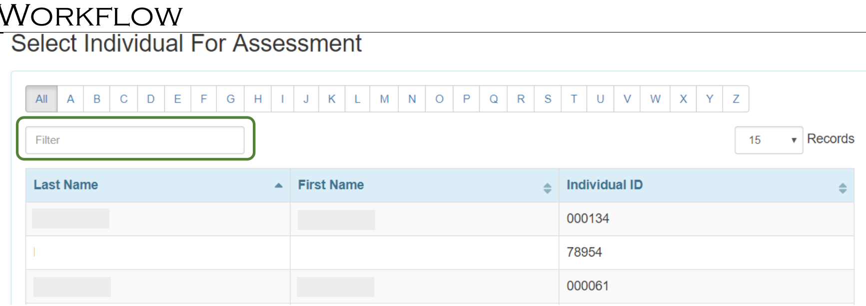
   Click **New** in the Case Management Assessment area (Green Box).



CASE MANAGEMENT ASSESSMENT WORKFLOW

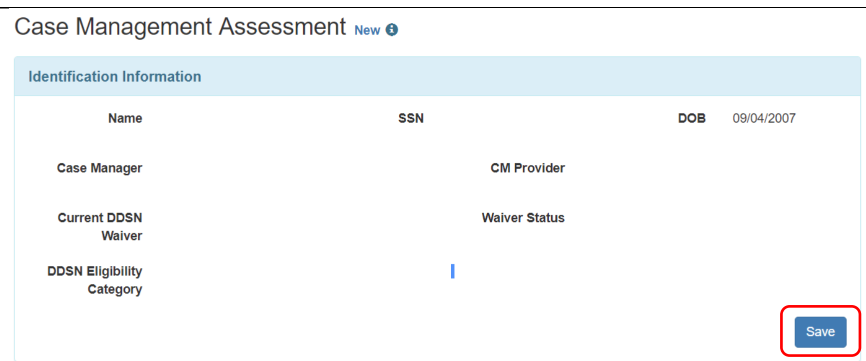
5. Your new Assessment takes you to a list of all people on your caseload like what shows at right. At the top of the names list you can click in the Alphabet letter to limit the list to individuals with a last name starting with a particular letter. You can also type in the Filter area (Green Box) which will filter the appropriate field by what you put in – put in text and names are filtered, put in numbers and the ID is filtered

   Click the row that contains the individual for whom you will do the assessment.



6. Therap then shows the available information on the individual you clicked. Make sure you have the correct individual!

   Click the [Save] button (Red Box).



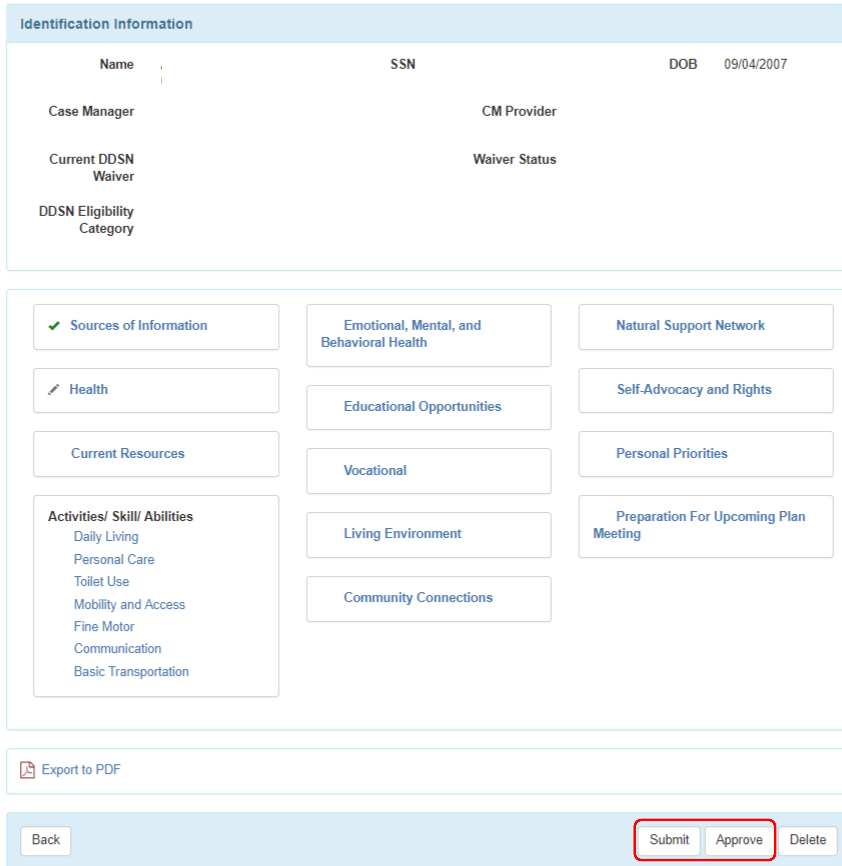
7. The information you confirmed shows at the top of the screen. Immediately below are all the sections of the Assessment where you as Case Manager do your magic.

Immediately left of every Assessment section the status will be represented.

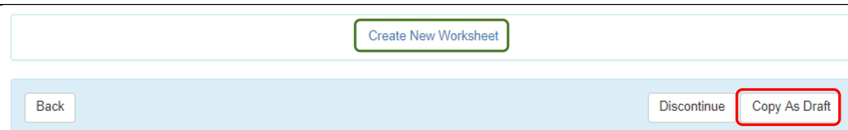
- Blank if it is not started
- Pencil (✐) if it is in process
- Check mark (✓) if it is complete.

At the bottom of the screen, you have three buttons [Submit], [Approve] and [Delete]. Use Approve when you can approve your own Assessments, and Submit when you cannot, you wait for another to approve.

To continue click [Submit] or [Approve] (Red Box).



8. When you are looking at an Approved Assessment the buttons at the bottom of the page change, shown at right. Notice that you can directly create a New Worksheet (Green Box). Further, an assessment can be copied into another new one to start the next assessment for this individual using the [Copy As Draft] button (Red Box). Avoid the [Discontinue] button.

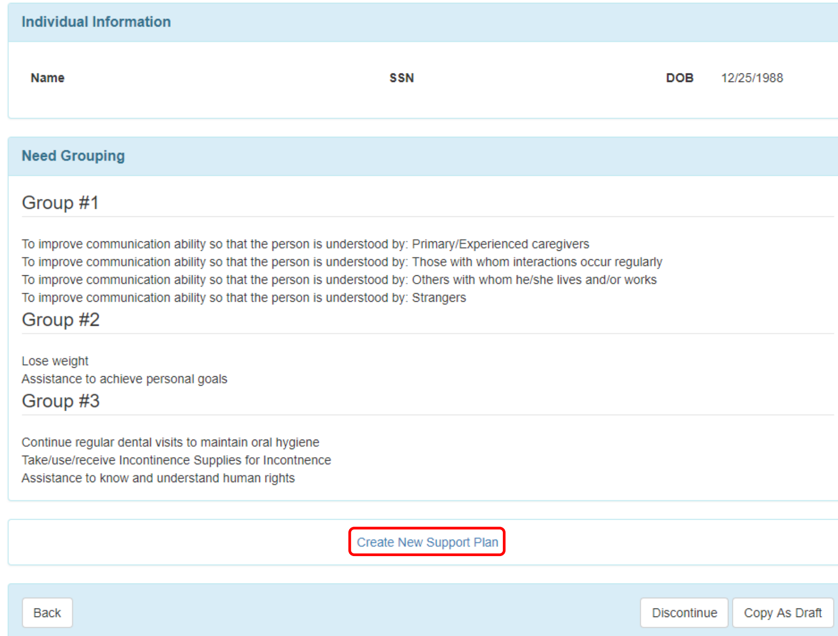


NOTE: You may begin a new Worksheet or Plan in two ways. First, by using the new worksheet link from an approve assessment, see Step 8, above, or the new plan link from an approved worksheet, see Step 9, below. Second, by going back to the Dashboard and selecting New in the Case Management Worksheet section (Gold Box) or the Case Management Support Plan section (Red Box). Using the Assessment and Worksheet links have the advantage of taking the individuals information to the next step and can be fastest.

CASE MANAGEMENT WORKSHEET WORKFLOW

9. At right is a completed and approved Worksheet. Notice a button to [Copy As Draft] or [Discontinue].

   Click Create New Support Plan to move to the next step for this individual (Red Box).

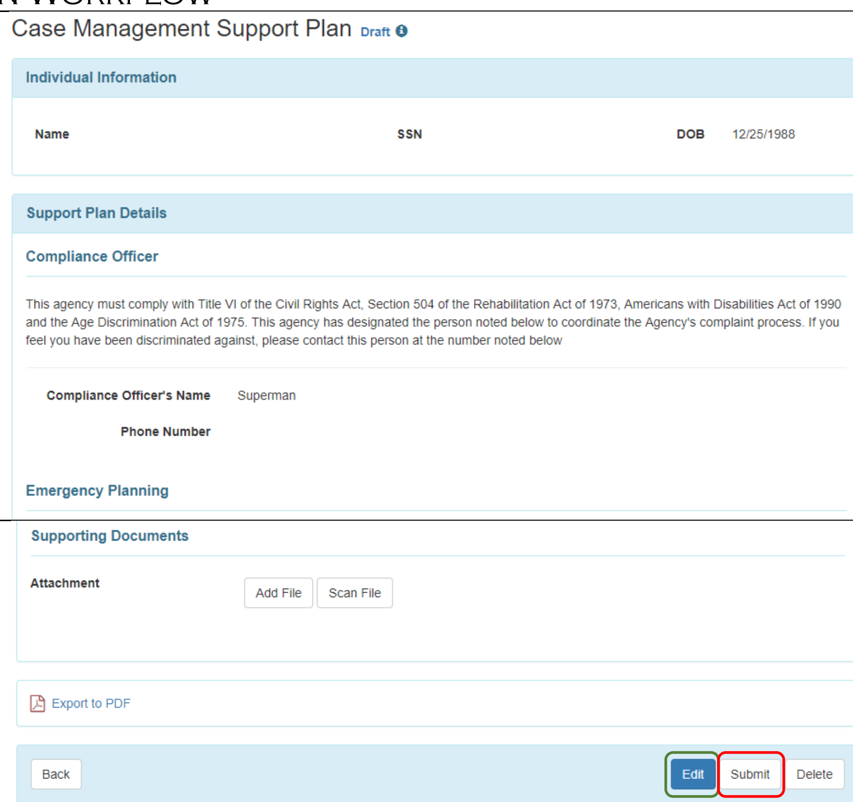


CASE MANAGEMENT SUPPORT PLAN WORKFLOW

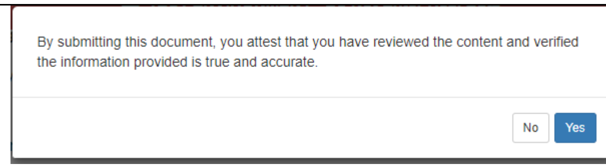
10. A Case Management Support Plan is at right in Draft state. Complete the Support Plan using your Case Manager magic.

11. At right is a saved Support Plan. It can be reopened using the [Edit] button (Green Box). It is deleted using the [Delete] button, requiring that a support plan be restarted. And it is submitted to Waiver Management for approval using the [Submit] button (Red Box).

   Click [Submit] to continue.



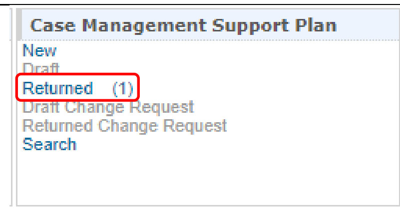
12. When you click Submit you will be asked to attest as to truth and accuracy – this is your signature. To complete the submission of your plan, click [Yes].

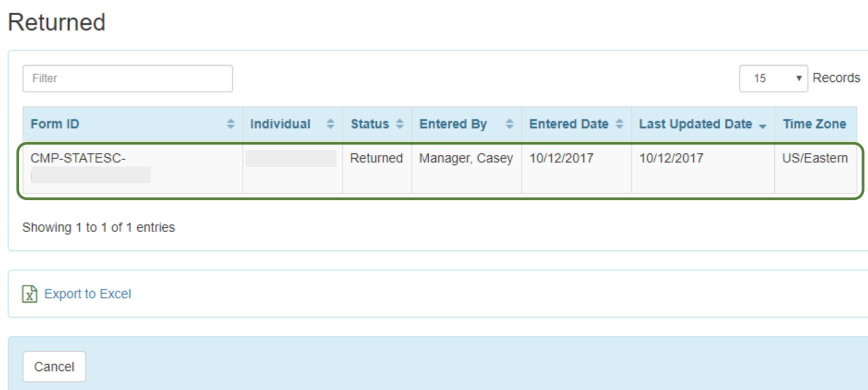


SUPPORT PLAN RETURNS WORKFLOW

13. Returned Support Plans will show up in the **Oversight Dashboard** Case Management Support Plan (Red Box) shown at right and Step 4, above. Notice the line "Returned (1)." Click the link to find your returned plan (Red Box).

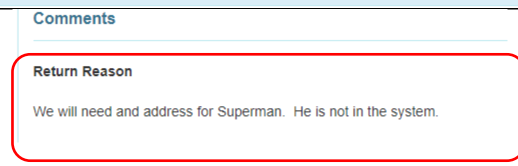
    When you have your list of returned Support Plan, click in the line of the Support Plan you wish to correct (Green Box), opening the support plan.





14. A returned plan will have a Comments section, and among the comments will be a Return Reason (Red Box). Once the stated return reason is corrected you will use the familiar [Submit] button (Green Box) at right to return the form to Waiver Management.

    Click the Submit button to return the Support Plan to Waiver Management.



NOTE: The best way to know when your Support Plan is approved is to set up notifications. Please see "How To Configure User Accounts for Notification."

QUESTIONS

1) How do I know when my Support Plan changes status?	Therap has a wonderful tool called Notifications. See the document "How To Configure User Accounts for Notification."
2) This HowTo does not show me how to complete an Assessment, Worksheet, or Plan. Where is that?	The versions of the Assessment, Worksheet and Support Plan are very like the versions from CDSS. Please use the same processes to complete these same documents in Therap.
3) Can my Plan be returned more than once?	I can be returned until the Waiver Management office can approve it.