HOW TO: SET UP A CASE MANAGER ACCOUNT IN THERAP

Steps that will be used in this How-To process
1. Create Super Role for Case Manager
2. Create Case Manager User account
3. Add Profiles and Privileges

CREATE SUPER ROLE FOR CASE MANAGER

1)	Log in to Therap.	https://secure.therapservices.net/auth/login
2)	From the Admin tab of your Therap dashboard, click the *Manage* link located in the Super Role section. 2.1) - Please check your list of super roles and do the following to create a Case Manager Super Role if you do not already have on created. If you have one created proceed to the *Create Case Manager User Account* section on page 2.	
3)	Click *Create New Super Role.*	
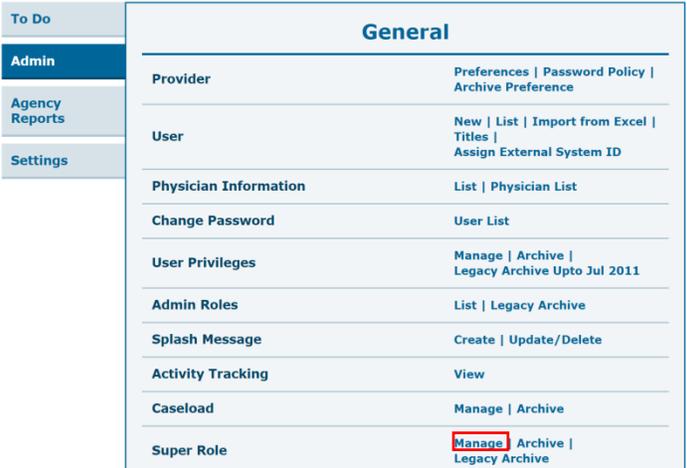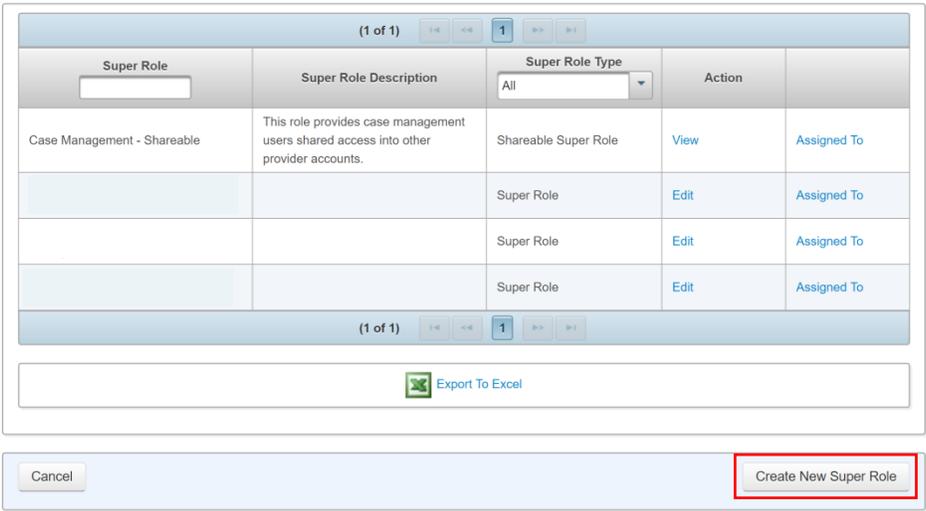
4)	Name the super role "Case Manager."	**Name:** * Case Manager **Description:** This role provides case managers access to create notes for an individual.
5)	Check the appropriate privileges (shown right).	**Case Note** ☑ Case Note **Document Storage** ☑ Document Storage View ☑ Document Storage Add/Edit ☐ Document Storage Delete **Individual Data** ☑ Individual Data View ☑ Individual Data Edit ☐ Individual Admit/Discharge **Individual Home** ☑ Individual Home Page
6)	Scroll to the bottom of the page and click *Save.*	**Time Tracking** ☐ Time Tracking Data View ☐ Time Tracking Data Edit **TMS Roles** ☐ Supervise Trainee **Waiting List** ☐ Waiting List View ☐ Waiting List Enrollment Cancel Save
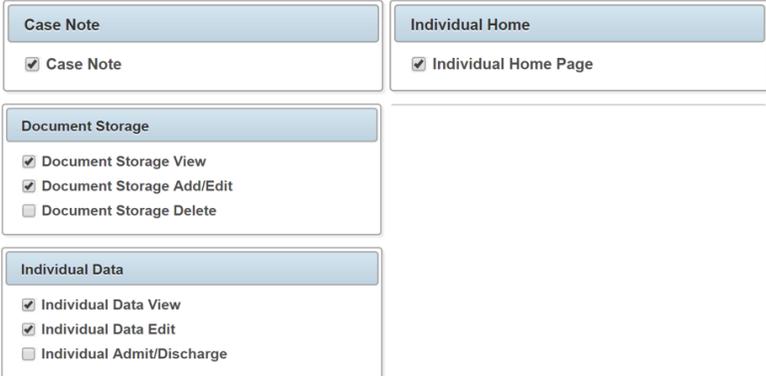
CREATE CASE MANAGER USER ACCOUNT

1)	From your Therap dashboard with the Admin tab selected, click the *New* link in the User section.	To Do **General** **Admin** **Provider** — Preferences | Password Policy | Archive Preference **Agency Reports** **User** — New | List | Import from Excel | Titles | Assign External System ID **Settings** **Physician Information** — List | Physician List
2)	At a minimum, enter required fields and ensure the User Type shows as Case Manager in the User Information section.	**User Information** **First Name:*** Jane **Last Name:*** Doe **User Type:*** Case Manager ▼
3)	Scroll to the bottom of the page and click the *Save* button.	‹‹ Back Save
4)	On the following Personal Details page, you may enter desired	

	information and *Enable Notifications* by checking that option.	**Preferences** Time Zone:* US/Eastern ▼ **Enable Notification:** ☑
5)	Scroll to the bottom of the page and click the *Save* button.	User Information Privilege Super Admin List Cancel Save
6)	Return to the dashboard then click *Assign External System ID* option under the General section next to User from the Admin Tab.	Program: Choose Program Profile: Module: Search **To Do** **General** **Issue Tracking** **Individual** My Issues **Agency** Provider Preferences | Password Policy | Archive Preference **SComm** Inbox (6) **Admin** User New | List | Import from Excel | Titles | New Title | Assign External System ID Sent Items Compose Drafts
7)	From the User List page, click on the new user name. 7.1) - Name is removed due to HIPAA compliance.	**User List** (1 of 1) |◄ ◄◄ 1 ►► ►| Login Name | First Name | Last Name | Title | Employee ID | Type (Case Mana ▼) | Status (All ▼) Director of Family Support Services Case Manager Active
8)	Enter in their CDSS login Id in a case sensitive manner then click *Save.*	**User External System ID Assignment** ⓘ **User Information** First Name Last Name Login Name Title * External System ID [ ] ‹‹ Back Cancel Save
	Note: This attaches the CDSS Login ID to the established Therap User's Login ID.	
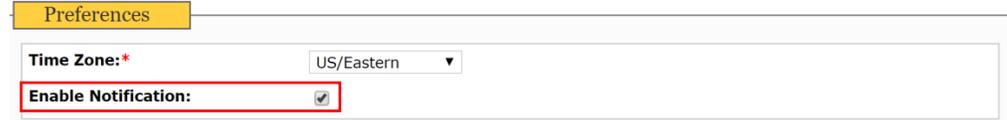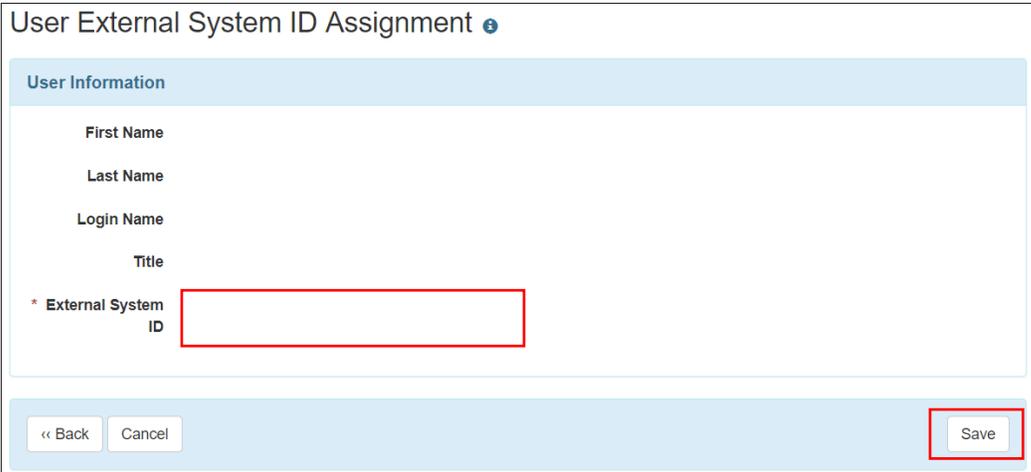
9) From the success pop up window, click *Dashboard*. 9.1)- On the same screen click the *Admin Tab* then click *Assign CM By External ID* option under the Care section next to Batch Case Manager Assignment.	**Care** **Individual Intake** — New | Pending Admission | Import from Excel **Individual** — List | By Program | Search | Archive | Legacy IDF Archive **Individual Enrollment Archive** — By Program | By Individual **Add/Remove Individual(s) to Program** — Add/Remove **Referral** — Search | Archive **ISP Program Scoring Method** — New | List **Type of Habilitation Service** — List **Behavior Plan** — Behavior List | Intervention List | Restraint List **Time Tracking** — Create Template | Template List **Batch Case Manager Assignment** — List | Assign CM by External ID
10) Enter the CDSS ID then click *Assign*.	**Batch Case Manager Assignment** * Case Manager External ID [ ] Cancel Assign
Note: This pulls the caseload from CDSS into Therap.	

ADD PROFILES AND PRIVILEGES

1) From the Admin tab of your Therap dashboard, click the *Manage* link located in the User Privileges section.	To Do Individual Agency **Admin** Agency Reports Individual Home Page **General** **Provider** — Preferences | Password Policy | Archive Preference **User** — New | List | Import from Excel | Titles | New Title | Assign External System ID **Physician Information** — List | Physician List **Change Password** — User List **User Privileges** — Manage | Archive | Legacy Archive Upto Jul 2011

2)	From the User List page, click on the new user name.	
3)	Click on the text *Initial: Regular* and rename the profile "Internal" then click *Change.*	
4)	Click on the text *Super Role.*	
5)	Choose the "*Case Manager"* super role.	
6)	Click *Add Caseload.*	
	Note: If the user's caseload does not appear in this list, see the Therap user guide for Assigning an External System ID to Case Managers.	
7)	Add the appropriate caseload (s) for the Case	
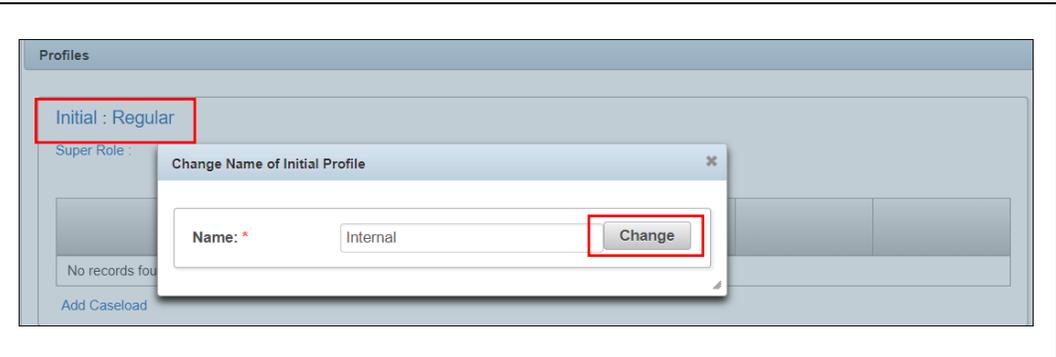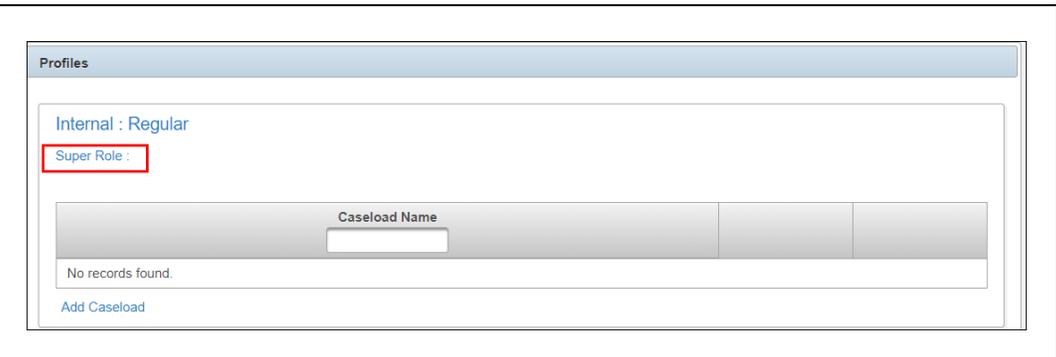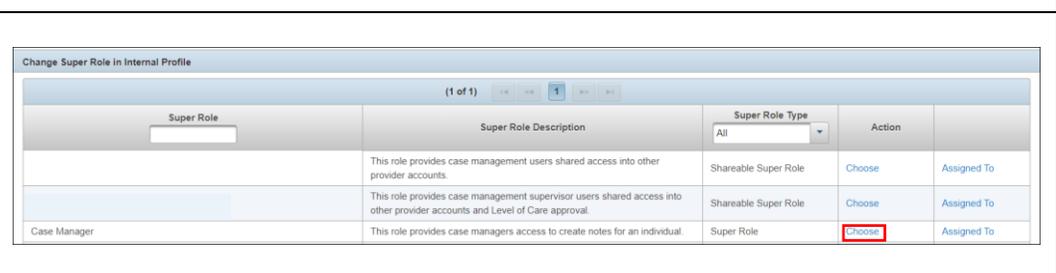
Manager then click the "X" to close screen.	
8) Click *Add Profile.*	
9) Name the profile "External" and select Case Manager as the Profile Type.	
10) Under your newly created profile, click on the text *Super Role.*	
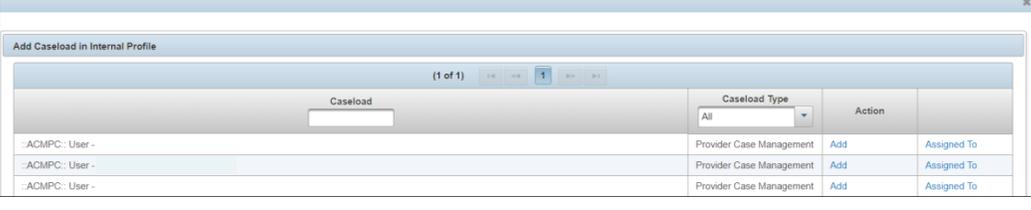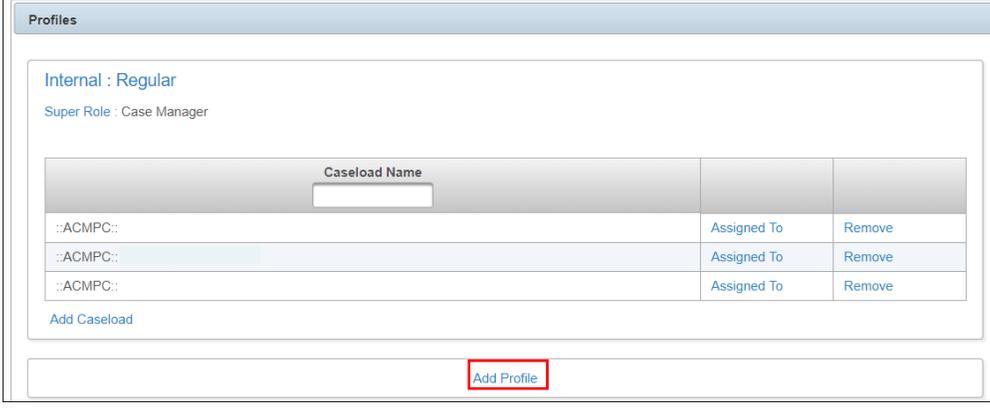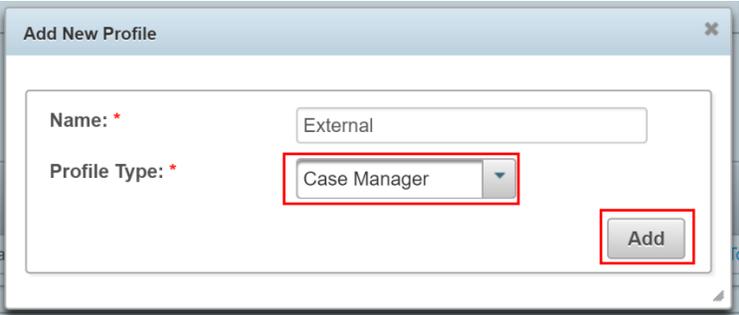
11) Choose the "Case Management – Shareable super role.	
12) Click *Add Caseload.*	
13) Add the ACMC: user – (user's name) caseload, then close the popup window.	

Note: If the user's caseload does not appear in this list, see the Therap user guide for Assigning an External System ID to Case Managers.

14) Scroll to the bottom of the page, check "Enable SComm "and "Multi Provider SComm", then click the *Save* button.	