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 <i>Manage</i> link located in the		To Do		General		
	Super Role section.		Agency Reports	Provider	Preferences Archive Prefe New List Ii	Password Policy rence mport from Excel	-
	2.1) - Please check your list of		Settings	User Physician Information	Titles Assign Extern List Physicia	al System ID	-
	super roles and do the following to create a Case			Change Password	User List		-
	Manager Super Role if you do			User Privileges	Manage Arcl Legacy Archiv	nive e Upto Jul 2011	
	not already have on created. If			Admin Roles	List Legacy	Archive	_
	you have one created proceed			Splash Message	Create Upda View	te/Delete	-
	User Account section on page			Caseload	Manage Arcl	nive	-
	2.			Super Role	Manage Arcl Legacy Archiv	nive e	
3)	Click Create New Super Role.			(1 of 1) (4 (4)	1 10 11		
		Supe	r Role	Super Role Description	Super Role Type	Action	
		Case Management	- Shareable	This role provides case management users shared access into other provider accounts.	Shareable Super Role	View	Assigned To
					Super Role	Edit	Assigned To
		-			Super Role	Edit	Assigned To
					Super Role	Edit	Assigned To
				(1 of 1) (1	1		
		Export To Excel					
		Cancel				Crea	ite New Super Role

CREATE CASE MANAGER USER ACCOUNT -CREATE CASE MANAGER USER **account**

4)	Name the super role						
	"Case Manager."	Name: *	Case Manager				
		Description:					
		This role pro	ovides case managers access to crea	te notes for an individual.			
5)	Check the appropriate						
	privileges (shown		Case Note		Individual Home		
	right).		✓ Case Note		✓ Individual Home Page		
			Document Storage				
			Document Storage View	-114			
			Document Storage Delete				
			Individual Data				
			✓ Individual Data View				
			Individual Data Edit Individual Admit/Discharg	ge			
6)	Scroll to the bottom of						
- /	the page and click	Time 1	Tracking	TMS Roles		Waiting List	
	Save.	🔲 Tim	ne Tracking Data View	Supervise Trainee		Waiting List View	
		Tim	ne Tracking Data Edit			U Waiting List Enrollment	
		Cano	cel				Save

CREATE CASE MANAGER USER ACCOUNT

1)	From your Therap dashboard with the Admin tab selected, click the <i>New</i> link in the User section.	To Do Admin Agency Reports Settings	General Provider P User E Physician Information Li	references Password Policy irchive Preference iew List Import from Excel itles Issign External System ID ist 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:* Last Name:* User Type:*	Jane Doe Case Manager ▼	
3)	Scroll to the bottom of			
	Save button.	« Back		Save
4)	On the following Personal Details page, you may enter desired			

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	information and Enable	Preferences	
	Notifications by	Time Zone:* US/Eastern V	
	checking that option.	Enable Notification:	
5)	Scroll to the bottom of the page and click the <i>Save</i> button.	User Information Privilege Super Admin List Cancel Save	
6)	Return to the dashboard then click Assign External System ID option under the	Program: Choose Program Profile: Module: Search	
	General section next to User from the Admin	To Do Issue Tracking General My Issues	
	Tab.	Individual Provider Provider Provider Provider Preferences Password Policy Archive Preference	
		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.	User List	-
	7.1) - Name is removed due to HIPAA compliance.	(1 of 1) I of 1 Login Name First Name Last Name Title Employee ID Type Status Director of Family Director of Family Support Services Case Manager Active	
8)	Enter in their CDSS		_
	login Id in a case	User External System ID Assignment	
	click Save.	User Information	
		First Name Last Name Login Name	
		Title * External System ID	
		« Back Cancel Save]
	Note: This	attaches the CDSS Loain ID to the established Therap User's Loain ID.	

9) From the success pop			ADD FROM LES AND	JINNELOL
up window, click		Care		
Dashboara.		Individual Intake	New Pending Admission Import from Excel	
9.1)- On the same screen click the Admin		Individual	List By Program Search Archive Legacy IDF Archive	
Tab then click Assign CM By External ID option		Individual Enrollment Archive Add/Remove Individual(s) to Program Referral	By Program By Individual	
under the Care section			Add/Remove	
next to Batch Case			Search Archive	
Manager Assignment.		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 <i>Assign.</i>	Batch Case M * Case Manag External Cancel	lanager Assignment er ID		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 <i>Manage</i> link	To Do	General	
located in the User	Individual	dual Provider	Preferences Password Policy
Privileges section.	Agency		Archive Preference
	Admin	User	New List Import from Excel Titles New Title Assign External System ID
	Agency Reports	Physician Information	List Physician List
		Change Password	User List
	Individual Home Page	User Privileges	Manage Archive Legacy Archive Upto Jul 2011

2) From the User List page, click on the new user	, User List		
name.			
	Login Name First Name Last Name Title Employee ID Type Status Director of Family Director of Family Case Manager Active		
3) Click on the text <i>Initial:</i> <i>Regular</i> and rename the profile "Internal" then click <i>Change</i> .	Profiles Initial : Regular Super Role : Change Name of Initial Profile Name: * Internal Change		
4) Click on the text <i>Super</i> <i>Role.</i>	Profiles Internal : Regular Super Role : Caseload Name No records found. Add Caseload		
5) Choose the "Case			
Manager" super role.	Change Super Role in Internal Profile		
	(1 of 1) is ref 1 is ref Super Role Super Role Type		
	Super Role Description All Action This role provides case management users shared access into other		
	provider accounts. Shareable Super Role Choose Assigned To This role provides case management supervisor users shared access into Shareable Super Role Choose Assigned To		
	Case Manager This role provide case managers access to create notes for an individual. Super Role Classor Assigned To		
6) Click Add Caseload.			
	Profiles		
	Internal : Regular		
	Super Role : Case Manager		
	Caseload Name		
	No records tound.		
Note: If the user's caseload	does not annear in this list, see the Theran user quide for Assigning an External System		
	ID to Case Manaaers.		
7) Add the appropriate			
caseload (s) for the Case			

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ADD PROFILES AND PRIVILEGES -ADD PROFILES AND PRIVILEGES

		THE THEFTELSTATE TRATELESES	
Manager then click the		×	
"V" to close screen	Add Caseland in Internal Deallin		
A to close screen.			
	(1 of 1) in a 1 bo bi		
	Caseload	All Action	
	::ACMPC:: User -	Provider Case Management Add Assigned To	
	::AOMPC:: User -	Provider Case Management Add Assigned To	
	CAOMPC:: User -	Provider Case Management Add Assigned To	
9) Cliels Add Drefile			
8) CIICK Add Profile.			
	Profiles		
	Internel - Begular		
	Internal . Regula		
	Super Role : Case Manager		
	Caseload Name		
	::ACMPC::	Assigned To Remove	
	"ACMPC"	Assigned To Remove	
		Assigned To Persus	
	AUMEU	Assigned to Remove	
	Add Caseload		
	Add Profile		
		1	
Name the profile			
"External" and select			
	- Add New Profile	×	
Case Manager as the			
Profile Type.			
,,	Name: *		
	External		
	Profile Type: *		
	Case Manager		
		Add	
10) Under your newly			
created profile, click on	External Case Manager		
the text Super Pole	Super Role :	Delate Profile	
the text super Kole.		Delete Profile	
	Caseload Name		
	No records found.		
	Add Caseload		

11) Choose the "Case		1.001				
11) Choose the Case	Change Super Bols in External Brofile					
Management –	Management – Change Super Role in External Profile					
Shareable super role.	r role.					
		Super Role Description	Action			
	Case Management - Shareable	Inis role provides case management users shared access into other provider accounts.	Choose Assigned To			
	Case Management Supervisor- Shareable	This role provides case management supervisor users shared access into other provider accounts.	Choose Assigned To			
		(1 of 1) 14 44 1 (b) (b)				
12) Click Add Caseload.						
	External: Case Manager					
	Super Role : Case Management - Shareable		Delete Profile			
	Caseload Na	ne				
	No records found.					
	Add Caseload					
13) Add the ACMC: user						
– (user's name)			×			
caseload then close	Add Caseload in External Profile					
the popup window		(1 of 1) (4 (4 1 (5)))				
the popup whitew.	Caseload	Caseload Type	tion			
		All	tion			
	::ACMC:: User -	Case Management Add	Assigned To Assigned To			
	::ACMC:: User -	Case Management Add	Assigned To			
		(1 of 1) (4 4 1) (1 of 1)				
Note: If the user's caseload a	does not appear in this list, see the	Therap user guide for <u>Assigning</u>	an External System			
	ID to Case Mana	gers.				
14) Scroll to the bottom		-				
of the page, check		Agency Wide and Administrative Roles				
"Enable SComm						
"and "Multi Provider	Administrative Roles SComm Roles					
Scomm" then slick	Sen managed Frivilege	Multi Provider SComm				
Scomm, then click	COIS SComm					
the Save button.	Individual Care SComm Only					
	Cancel		Save			