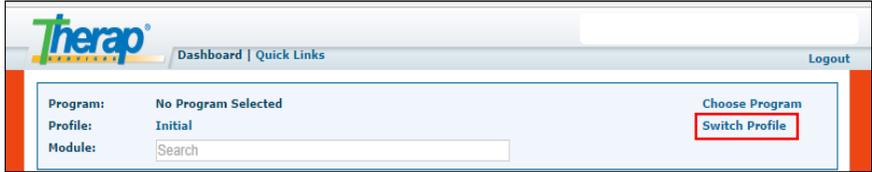
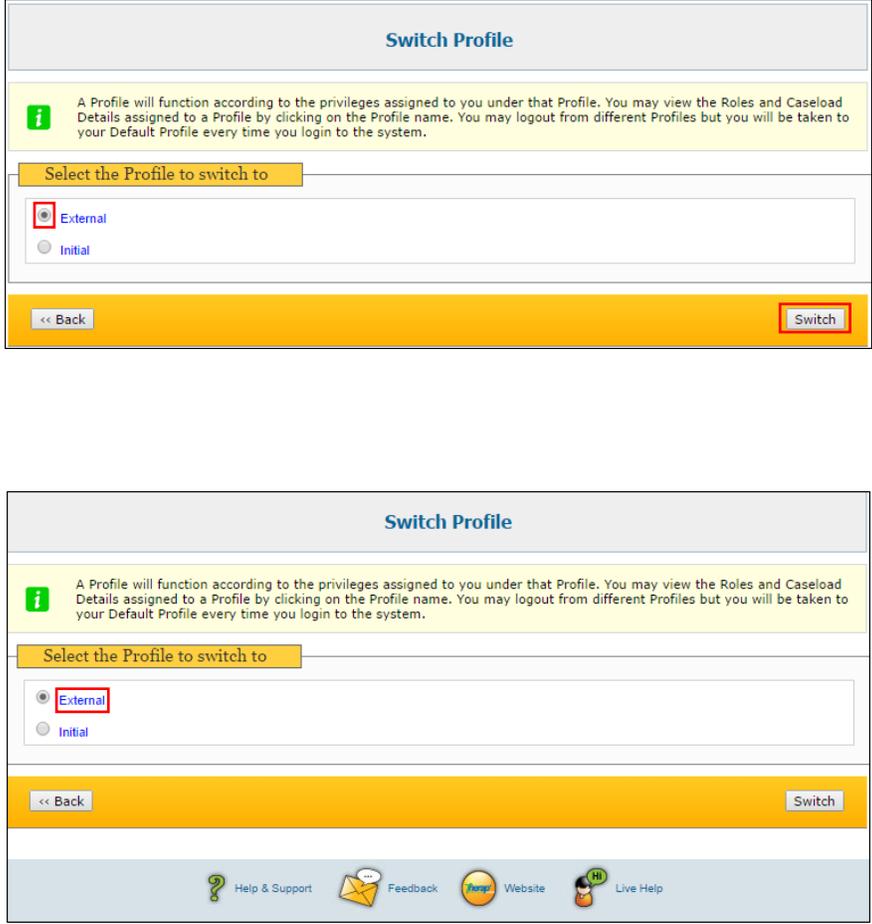


# HOW TO SEARCH AN INDIVIDUAL ELIGIBILITY

Steps that will be used in this How-To process.

1. Search an Individual Eligibility
  - All Case Management Providers

## SEARCH AN INDIVIDUAL ELIGIBILITY

1) Log in to Therap	<a href="https://secure.therapservices.net/auth/login">https://secure.therapservices.net/auth/login</a>
2) Select the <i>Switch Profile</i> link under the Choose Program option of the Dashboard	 <p>The screenshot shows the Therap dashboard with the following details: Program: No Program Selected, Profile: Initial, and Module: Search. A 'Choose Program' button is visible, with a 'Switch Profile' link highlighted in a red box.</p>
<p>3) In the Switch Profile page, click on the <i>External Radio</i> button then click <i>Switch</i></p> <p>3.1 If you are unsure which profile is the correct one, click on the <i>Profile Name</i></p>	 <p>The first screenshot shows the 'Switch Profile' page with an information icon and a message: 'A Profile will function according to the privileges assigned to you under that Profile. You may view the Roles and Caseload Details assigned to a Profile by clicking on the Profile name. You may logout from different Profiles but you will be taken to your Default Profile every time you login to the system.' Below this is a section 'Select the Profile to switch to' with two radio buttons: 'External' (selected) and 'Initial'. At the bottom are '&lt;&lt; Back' and 'Switch' buttons, with 'Switch' highlighted in a red box.</p> <p>The second screenshot is identical to the first but includes a footer with icons for 'Help &amp; Support', 'Feedback', 'Website', and 'Live Help'.</p>

3.2 Verify the Super Role Name is *Case Management-Shareable*. If Super Role Name is different choose another profile name.

**Profile Details**

Profile Name : External  
 Super Role Name : **Case Management - Shareable**

**Note:** You may view the Roles and Caseload Details assigned to a Profile by clicking on the Profile Name. The Case Management profile allows you to search for forms related to Linked individuals who are in the Linked Providers accounts.

4) From your dashboard, click on the *Go To Oversight* link under the Switch Provider option

Provider:

Program: No Program Selected  
 Profile: External  
 Module:

Switch Provider  
**Go To Oversight**  
 Choose Program  
 Switch Profile

**Note:** At this point, you will be directed to the Oversight provider account.

5) From the Oversight dashboard, click on *Search* under the Eligibility section

Provider: Department of Disabilities and Special Needs  
 Profile: External

Eligibility  
**Search**

My Account  
 Personal Details  
 Super Admin List  
 Change Password

Agency Reports

Test FirstPage  
 Switch to Test mode

Help & Support Feedback Website Live Help

6) In the Search Eligibility page, enter an individual name in the *Individual Box* then click *Search*

**Search Eligibility**

Form ID

Individual

Approve Date From  To

Effective Date To From  To

Eligibility Request Date From  To

Outcome  
 Eligible  
 Not Eligible  
 Undetermined

Eligibility Category  
 Autism Spectrum Disorder  
 High Risk Infant/At Risk Child  
 Intellectual Disability  
 Related Disability

Eligibility Processing Status - Please Select -

Requested Eligibility Category - Please Select -

Eligibility Referred By - Please Select -

Status  
 Approved  
 Pending Approval  
 Pending Provider Response  
 Pending Review

Region

Cancel

**Note:** When entering an individual name you can narrow your results by inputting the first three letters of their last name and/or first name. This will limit the results to individuals whose last name and/or first name begins with the letters you choose. Do not add a comma between the last and first name. For example, John Doe and Doe John will retrieve the same listing. Doe, John will yield no result. This field is not case-sensitive.

7) From the Search Results page, click on any section of the results to view Eligibility Data

7.1 When there are multiple eligibility determinations for one individual, the image to the right will display.

Form ID	Approve Date	Eligibility Request Date	Eligibility Category
	00/01/1996	00/01/1996	Autism Spectrum Disorder
	11/09/1988	11/09/1988	Intellectual Disability

7.2 When there is a single eligibility determination for an individual, the image to the right will display.

Form ID	Individual	Approve Date	Effective Date	Eligibility Request Date	Outcome	Eligibility Category	Eligibility Processing Status	Eligibility Referred By	Requested Eligibility Category	Status	Create Date	Region
		03/31/2014	02/05/2017	03/31/2014	Eligible	Intellectual Disability				Approved	03/27/2017	6

8) After clicking on any column in the Result List section from the search results page, the Eligibility Form will open up

Eligibility Approved ⓘ

**Demographic**

Individual Name	Oversight ID
DOB 02/05/2011	Age
SSN	Medicaid No.

**Eligibility Request**

Eligibility Request Date	03/31/2014	Requested Eligibility Category
Region	6	

**Eligibility Decision**

Eligibility Category	Intellectual Disability		
Effective Date From	03/31/2014	Effective Date To	02/05/2017
Outcome	Eligible	Processing Status	
Eligibility Referred By	External System ID	80171	
Justification			