

## Case Management Guide: Assigning External System ID to Case Managers

1. Click on the **View** link beside **Report Library** from the 'Agency Reports' tab of your Dashboard.

Agency Wide Reports	
Staff Report	<a href="#">View</a>
Demographic Report	<a href="#">View</a>
Last Login Information	<a href="#">View</a>
<b>Report Library</b>	<a href="#">View</a>
Individual Contact Report	<a href="#">View</a>

2. Search for the report, **Unmapped External ID with Count** and generate the report.

**List of Reports**

Search Reports

Report Name:

Report Description:

Input Tags:

One item found.

1

Report Name

Unmapped External ID with Count

3. You can obtain the **External System ID** from the report under the column titled: "MAPPED\_CASE\_MANAGER\_ID".

**Report :: Unmapped External ID with Count**

MAPPED_CASE_MANAGER_ID	COUNT
Mia Cole	1

4. If the user that needs to be assigned the **External System ID** already exists in the system, click on the **Assign External System ID** link under the User section of the Admin tab to search for the user.

Individual	<b>General</b>	
Agency		
Admin	<b>Provider</b> <span style="float: right;">Preferences   Password Policy   Archive Preference</span>	
Agency Reports	<b>User</b> <span style="float: right;">New   List   Import from Excel   Titles   <b>Assign External System ID</b></span>	

5. On the User List page, select the name of a user to assign an **External System ID**.

User List					
(1 of 1) [1] << >>					
Login Name	First Name	Last Name	Title	Employee ID	Status
<a href="#">j.sanders</a>	John	Sanders	Case Manager		Active
<a href="#">b.harris</a>	Brian	Harris	Case Manager		Active
<a href="#">m.cole</a>	Mia	Cole	Case Manager		Active
(1 of 1) [1] << >>					

**Note:** If the user you are searching currently does not exist in the system, you may create a new user with the User Type 'Case Manager'. You can refer to our guide below on creating a new user:

<https://support.therapservices.net/documentation/case-management-provider-and-oversight/usertypes/>

6. On the 'User External System ID Assignment' page, enter **External System ID** obtained from **Unmapped External ID with Count** report and click on the **Save** button.

### User External System ID Assignment ⓘ

**User Information**

<b>First Name</b>	Mia
<b>Last Name</b>	Cole
<b>Login Name</b>	m.cole
<b>Title</b>	Case Manager
<b>* External System ID</b>	<input type="text" value="Mia Cole"/>

**Note:** *The user assigned with the External System ID must be a 'Case Manager' type user.*

7. Assign External System IDs to all the Case Manager type users that appear on the **Unmapped External ID with Count** report.