

## Guidance ECRS 2015-05

### Assigning and Unassigning Individuals to an Oversight Account User

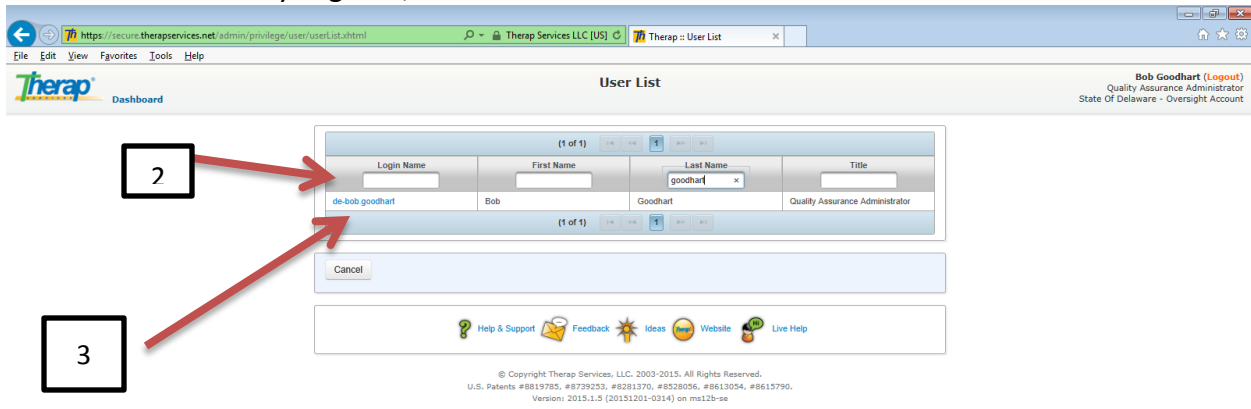
Due to recent changes implemented by Therap, the process for assigning and unassigning individual(s) to a user's caseload has changed. In order to make changes, we can no longer search for a user by their name, but will need to know the user's ID in order to search and make changes.

#### If the user is temporally handling a caseload for another user

1. System Administrator select "Manage Privilege"

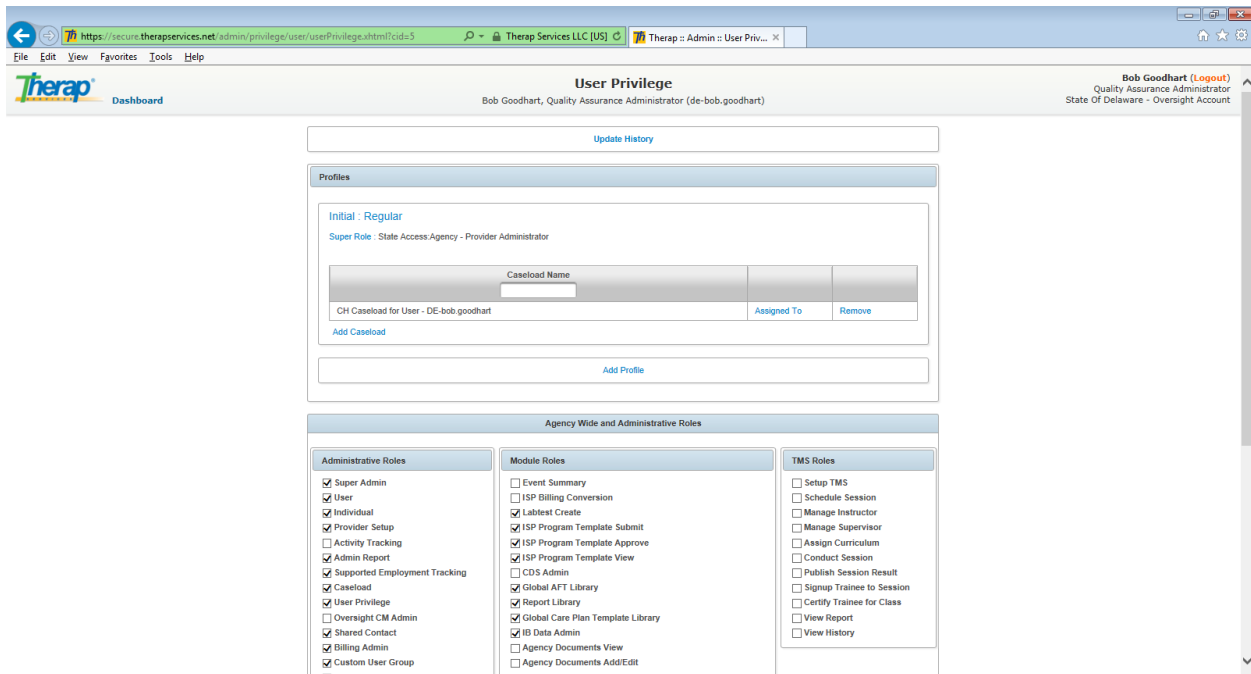
The screenshot displays the unified dashboard for Therap Services LLC [US]. The interface is organized into a grid of functional areas. A red arrow points from a box containing the number '1' to the 'Manage Privilege' option within the 'Access Control' section. The 'Access Control' section includes options for 'Manage Privilege', 'Administrative Role Assignments', and 'Manage Caseload'. Other visible sections include 'Change Password', 'Individual Intake', 'Multi-Provider Individual', 'Role', 'Provider Preference', 'Service Directory', 'Comprehensive Health Assessment', 'Global Template Library', 'Secure Communications', and 'Archived Data'. The browser's address bar shows the URL 'https://secure.therapservices.net/ma/ffpage/unifiedDashboard' and the page title is 'Therap :: FirstPage'.

2. Search for the user by Login ID, Last Name or First Name

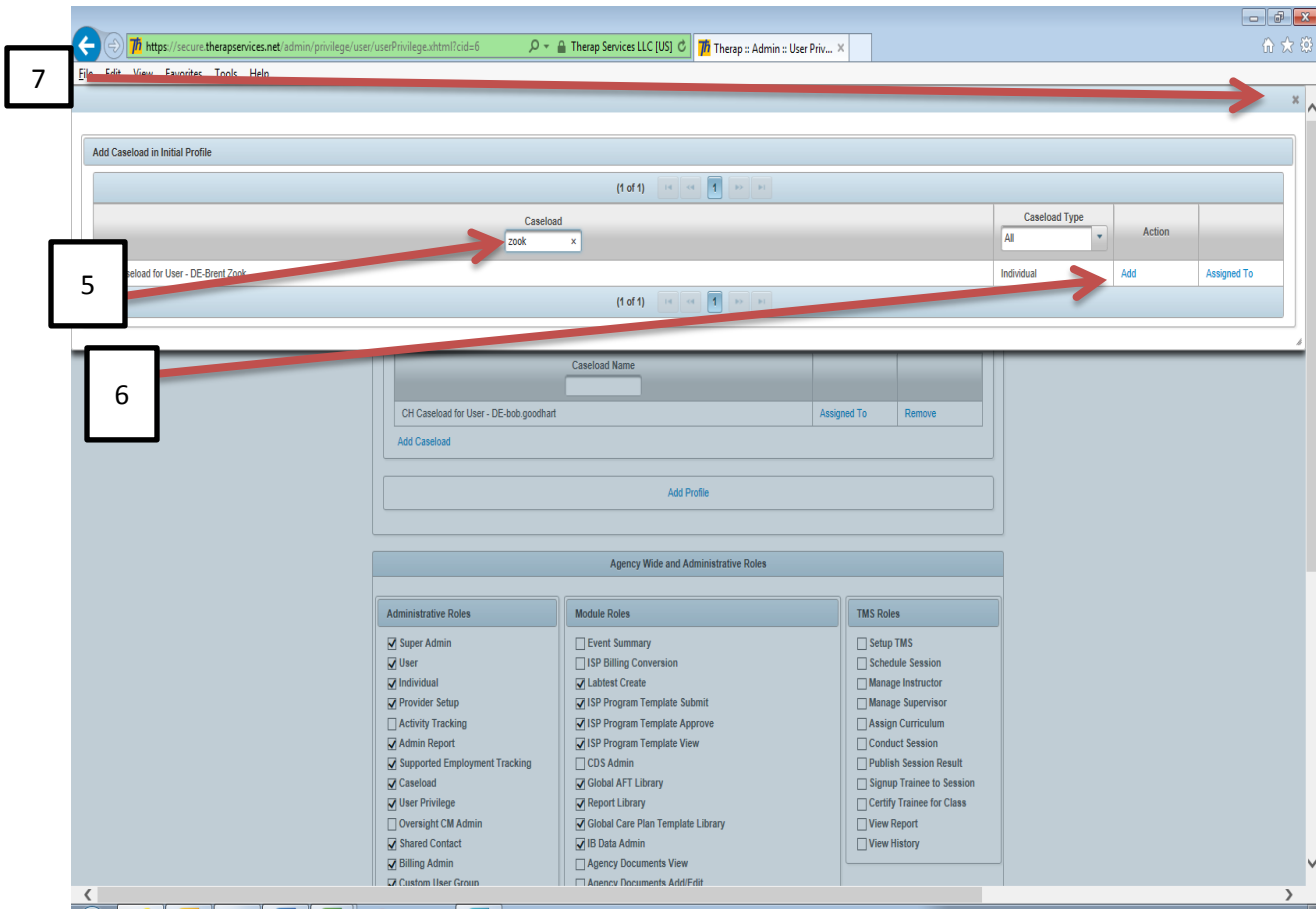


3. Select the user name that you wish to update

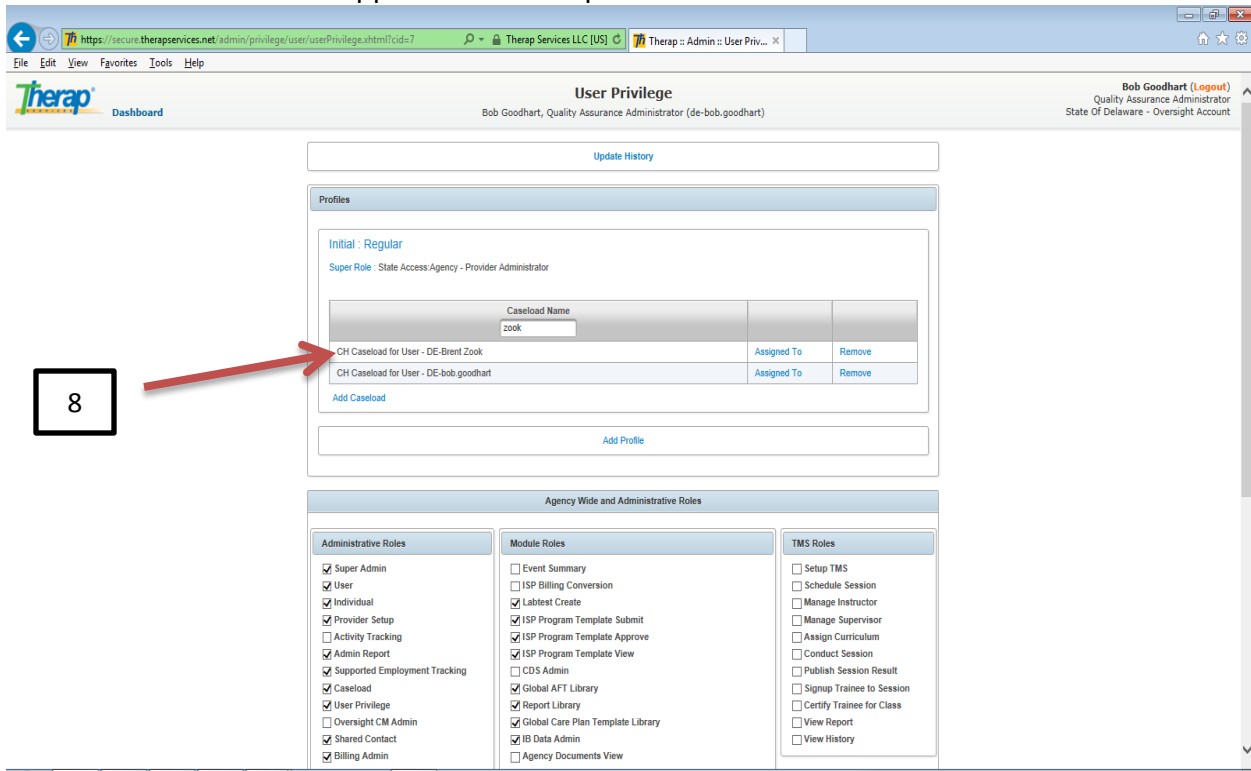
4. Select "Add Caseload"



5. Search the user ID for the caseload that you wish to assign temporarily to the user in addition to their caseload. (You will need to know the user name of the caseload you wish to assign as you cannot search by name for those who do not have a user ID with their name in part.)
6. Select "add" to the right of the caseload to be assigned (the caseload should disappear from the list).
7. Click on the "x" in the upper right corner



8. The caseload should now appear in the user profile. Scroll to the bottom and save.



(This can only be done for the reassignment of complete caseloads. If a user's caseload is divided between multiple users, then the instructions below will need to be followed)

## To Assign or Unassign an individual from a User Caseload

1. System Administrator select “Manage Caseload” (You will need to know the user ID before performing the next function)

The screenshot shows a web browser window with the URL <https://secure.therapservices.net/ma/fpage/unifiedDashboard>. The browser title is "Therap Services LLC [US]" and the page title is "Therap :: FirstPage". The dashboard is a grid of various administrative functions. A red arrow points from a box containing the number "1" to the "Manage Caseload" option under the "Access Control" section.

Change Password	Individual Intake
User List Search User	New Pending Admission Individual List (All) Search Individual
Multi-Provider Individual	Access Control
Select Individual for Referral Link Individuals with Oversight ID Synchronize Linked Individual Data	Manage Privilege Administrative Role Assignments Manage Caseload
Role	Security
Manage Super Role Default Notification Profile	Configure Password Policy
Provider Preference	Signup Agreement
Title List Provider Preference Create Splash Message Update/Delete Splash Message	New List
Service Directory	
<b>Service</b> Service Directory Create Service Category Service Category List	<b>Waiver</b> Create Waiver Waiver List
	<b>Service Provider</b> Create Service Provider Service Provider List Create Provider Service Approval Provider Service Approval List
Comprehensive Health Assessment	Global Template Library
Search	Global Custom Form Template Search

Navigation sidebar on the right:

- Last login information
- Report Library
- Secure Communications**
- Compose
- Inbox
- Sent Items
- Drafts
- Trash
- Manage Folder
- Settings
- Custom User Group
- Message Audit
- Test FirstPage**
- Switch to Test mode
- Archived Data**
- Super Role Archive
- User Privilege Archive
- Archived Provider Preference Search
- Archived Legacy Super Role Search

2. Search for caseload by the user ID then select “edit” to the right

Therap Dashboard

Caseload List

Bob Goodhart (Logout)  
Quality Assurance Administrator  
State Of Delaware - Oversight Account

Caseload	Caseload Type	Action	Assigned To
CH Caseload for User - DE-bob.goodhart	Individual	Edit	

Export To Excel

Cancel Create New Caseload

Help & Support Feedback Ideas Website Live Help

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U.S. Patents #8819785, #8739253, #8281370, #8528056, #8613054, #8615790.  
Version: 2015.1.5 (20151201-0314) on ms12b-se

2

3. Under the “Assignable Individuals” section, search for the individual you wish to add to the user’s caseload. Search by Last and First Name, or Medicaid Number of Oversight ID. Any individual in the Oversight Account that is not already assigned to this user will appear.
4. Select “Add” to the right of the individual you wish to add.

The screenshot shows the 'Assign Individuals' interface. At the top, it says 'Type: Individual' and 'Update History'. Below this is the 'Assignable Individuals' section, which includes search filters for Last Name (welch), First Name (michael), Medicaid Number, ID Number, and Oversight ID. A dropdown menu shows search results: Aulism Delaware, Bancroft Neurohealth, Bear Health Care Service, and Benedictine Delaware. Below the search is a table with columns: First Name, Middle Name, Last Name, Oversight Id, Code, Status, and Add. The table contains two rows: Michael Welch (Admitted) and Michelle Willis (Admitted). Below this is the 'Assigned Individuals' section, which shows a table with columns: First Name, Middle Name, Last Name, Oversight Id, Code, Status, and Remove. The table contains two rows: Alfred Smith (Admitted) and Alison Robbins (Admitted). Red arrows and numbered boxes (3, 4, 6) highlight key steps: 3 points to the search filters, 4 points to the 'Add' button in the 'Assignable Individuals' table, and 6 points to the 'Remove' button in the 'Assigned Individuals' table.

5. Search for the next individual, etc. When you have added the last individual, scroll to the bottom and click "save". This will save the changes.
6. If you wish to unassign an individual from the caseload, you search for the individual under the "assigned Individuals" section and select "remove" to the right of the name.
7. Search for the next individual to unassign, etc. When you have unassigned the last individual, scroll to the bottom and click "save". This will save the changes.

Changes to caseloads sometimes are not immediate and will take 20-30 minutes to "catch up" in the system. The user should log out and back into Therap or wait 20-30 minutes before logging into the system.