

Configure Case Note Template

Users assigned with the **Provider Setup** administrative role will be able to configure Case Note Templates.

1. Click on the **Template Configuration** link beside the **Case Note Template** option from the **Admin** tab.

To Do		
Individual		
Health		
Agency		
Admin	General	
Agency Reports	Provider	Preferences Password Policy Archive Preference
Individual Home Page	User	New List Import from Excel Search Imported Excel Titles New Title Assign External System ID Self Password Reset
	Change Password	User List
	Questionnaire	Create Search
	Case Note Template	Manage Location Manage Activity Type Create Template Search Template Template Configuration

2. On the 'Case Note Template Configuration' page, select the required Templates from the **Approved Template(s)** drop-down field. The templates selected from this list will be available to users while creating Case Notes.

Case Note Template Configuration

Provider Therap Global Demonstration Provider (DEMOTG-TGD)

Approved Template(s) 16 items selected 

Template Name	Action
dis	
Disability Identification	<input checked="" type="checkbox"/>
The Washington Group Short Set of Questions on Disability	<input checked="" type="checkbox"/>
Demo Assessment	<input type="checkbox"/>
Mobility Test	<input type="checkbox"/>
Child Assessment- HICHAC	<input type="checkbox"/>
Demo Casenote Template	<input type="checkbox"/>
PLP Case Study	<input type="checkbox"/>

Default Template - Please Select -

Cancel Save

Note: Users may select a default template from the **Default Template** drop down field which shows the selected Approved Templates. This default template will be automatically selected while creating a Case Note; however, users will be able to select another template from the drop-down list to create a Case Note.

Case Note Template

Provider	<input type="text"/>
Approved Template(s)	<ul style="list-style-type: none">- Please Select -Case StudyChecklist for Autism in Toddlers (CHAT) ParentChecklist for Autism Toddlers (CHAT)Child Assessment- HIC-HACDemo 1Demo AssessmentDemo Casenote TemplateDevelopment AssessmentDisability IdentificationHouse# 73/4, Road # 86, Bashundhara R/A, Dhaka - 1Initial InterviewMobility TestPLP Case StudyReading AssessmentSample Assessment QuestionsShort Set on Functioning
Default Template	<input type="text"/> 

Cancel**Save**

3. Click on the **Save** button to save the configuration.

Case Note Template Configuration

Provider Therap Global Demonstration Provider (DEMOTG-TGD)

Approved Template(s) 17 items selected

- Case Study x
- Checklist for Autism in Toddlers (CHAT) Parent x
- Checklist for Autism Toddlers (CHAT) x
- Child Assessment- HICBAC x
- Demo 1 x
- Demo Assessment x
- Demo Casenote Template x
- Development Assesment x

Default Template Disability Identification

[Cancel](#)[Save](#)

A confirmation message will be displayed if the configuration has been successfully saved. Click on the **Back to Configuration** 'Case Note Template Configuration' page. Click on the **Back to Dashboard** link to go back to the Dashboard.

Case Note Template Configuration saved successfully

Actions

[Back To Configuration](#)
[Back to Dashboard](#)