Manage User Privileges

Users assigned with the **User Privilege** Administrative Role will be able to manage user privileges. Users with the **Super Admin** Administrative Role along with the **User Privilege** Administrative Role will be able to assign or unassign the **Super Admin** Administrative Role to other Users.

Centered. Data-Driven.

1. Starting on the Admin tab click on the **Manage** link beside the **User Privileges** option.

To Do	General		
Individual	Provider	Preferences Password Policy	
Health		New List Import from Excel	
Agency	User	Search Imported Excel Titles New Title Assign External System ID Self Password Reset	
Admin	Physician Information	List Physician List	
Agency Reports	Change Password	User List	
Individual	► User Privileges	Manage Archive Legacy Archive Upto Jul 2011	

2. This will open the **User List** page. Click on the **Login Name** of the user that you want to assign privileges to from the list.



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3. This will open the **User Privilege** page where you can assign the **Super Role** and **Caseload**.



User Privilege Anita Hossain, Supervisor (anitaa)	
Update History	
Profile(s)	Add Profile
Initial : Regular Super Role :	
Caseload Name	
No records found.	
Add Caseload	

Assigning Super Role

4. Click on the blue **Super Role** link to view the list of available Super Roles.

To learn more about creating **Super Role** <u>click here</u>

User Privilege Anita Hossain, Supervisor (anitaa) Update History Profile(s) Add Profile Initial : Regular Super Role : Super Role : Caseload Name No records found. Add Caseload		Therap [*] Global Person-Centered. Data-Driven.
Anita Hossain, Supervisor (anitaa) Update History Profile(s) Add Profile Initial : Regular Super Role : Caseload Name No records found. Add Caseload	Llser Privilege	
Update History Profile(s) Add Profile Initial : Regular Super Role : Super Role : Caseload Name No records found. Add Caseload	Anita Hossain, Supervisor (anitaa)	
Profile(s) Add Profile Initial : Regular Super Role : Super Role : Caseload Name No records found. Add Caseload	Update History	
Initial : Regular Super Role :	Profile(s)	Add Profile
Caseload Name No records found. Add Caseload	Initial : Regular Super Role :	
No records found. Add Caseload	Caseload Name	
Add Caseload	No records found.	
	Add Caseload	

5. Click on the **Choose** link to select a particular Super Role from the **Change Super Role** window



rofile Name	Initial			
Super Role		Super Role Description	Action	
Admin		IDF, T-Log, Health Tracking, GERs, GER resolution, ISP data, ISP programs, ISP plan, MAR config., MAR data, Medical info, Time tracking	Choose	Assigned To
Teacher		IDF, T-Log, ISP Data, ISP Program	Choose	Assigned To
Therapist		Health Tracing	Choose	Assigned To

To view the name of the users already assigned with this Super Role click on the ${\bf Assigned}$ ${\bf To}$ link.

rofile Name	Initial			
Super Role		Super Role Description	Action	
Admin		IDF, T-Log, Health Tracking, GERs, GER resolution, ISP data, ISP programs, ISP plan, MAR config., MAR data, Medical info, Time tracking	Choose	Assigned To
Teacher		IDF, T-Log, ISP Data, ISP Program	Choose	Assigned To
Therapist		Health Tracing	Choose	Assigned To



Assigning Caseload

6. To add Caseloads, click on the Add Caseload link.

To learn more about creating **Caseloads** $\underline{click here}$

User Privilege	
Anita Hossain, Supervisor (anitaa)	
Update History	
Profile(s)	Add Profile
Initial : Regular Super Role : T-Log,ISP,HT, GER	
Caseload Name	
No records found.	
Add Caseload	

7. This will open the **Add Caseload** page. Click on the **Add** link beside the required caseloads, to assign the caseload to the user's privilege.



ofile Name Initial			
Caseload	Caseload Type All ~	Action	
Individual Caseload (2)	Individual	Add	Assigned T
:AAIC:: All Admitted Individual Caseload (DEMOTG-TGD)	All Admitted Individual	Add	Assigned T
::AIC:: All Individual Caseload (DEMOTG-TGD)	All Individual	Add	Assigned T
Daily Activities	Program	Add	Assigned T
Day Shift	Individual	Add	Assigned T
Day Care Center	Group	Add	Assigned T

To view the name of the users assigned with the particular Caseload, click on the $\ensuremath{\textbf{Assigned}}$ $\ensuremath{\textbf{To}}$ link.

rofile Name Initial			
Caseload	Caseload Type All ~	Action	
Individual Caseload (2)	Individual	Add	Assigned To
::AAIC:: All Admitted Individual Caseload (DEMOTG-TGD)	All Admitted Individual	Add	Assigned To
::AIC:: All Individual Caseload (DEMOTG-TGD)	All Individual	Add	Assigned To
Daily Activities	Program	Add	Assigned To
Day Shift	Individual	Add	Assigned To
Day Care Center	Group	Add	Assigned To

Note: There are 5 types of Caseloads in Therap system, they are:

The \boldsymbol{AIC} (All Individual Caseload) allows the user access to all individuals that are admitted



into any program in the system generated.

The **AAIC** (All Admitted Individual Caseload) gives users access to all the individuals that are in 'Admitted' status under a particular provider. Users who need access to all admitted individuals do not need to be assigned a separate Caseload if they have the AIC Caseload assigned.

The $\ensuremath{\mathbf{APC}}$ (Auto Program Caseload) gives the user access to any individuals enrolled into that particular program

Individual Based Caseload will gain access to the individuals within the caseload, irrespective of an individual's status or the programs that they are enrolled in.

A **Group Caseload** is a collection of Auto Program Caseloads (APC) and Individual Based Caseloads.

To learn more about the Caseloads types, <u>click here</u>.

8. To remove a **Caseload** from a Profile, click on the **Remove** link.

User Privilege		
Anita Hossain, Supervisor (anitaa)		
Update History		
Profile(s)		Add Profile
Initial : Regular Super Role : T-Log,ISP,HT, GER		
Caseload Name		
::AIC:: All Individual Caseload (DEMOTG-TGD)	Assigned To	Remove

Selecting Agency Wide and Administrative Roles



9. As per user requirement select **Administrative Roles**, **Module Roles**, **SComm Roles**, **Common Roles** etc.

Agency Wide and Administrative Roles		
Administrative Roles	Module Roles	SComm Roles
 Super Admin ISP Data Dashboard User IDF Admin Provider Setup Activity Tracking Admin Report Caseload User Privilege Shared Contact Billing Admin Custom User Group Personal Finance Reset Password Billing Restriction Override Scoring Method Assessment & Screening Admin 	 Event Summary T-Log Program Access ISP Billing Conversion Case Note Billing Conversion Labtest Create ISP Program Template Submit ISP Program Template Approve ISP Program Template View Employer Management Job Development Report Library Assigned Report View Time Tracking Template Management Provider Questionnaire Form Submit Self Created Provider Questionnaire Form View Behavior 	Enable Full SComm Individual Care SComm Send Only Enable Limited SComm
Common Roles	Electronic Billing	
 Enable 13 Months Search (T-Log, GER) Create Data on Inactive Individuals Access to Multi-Individual Event Export Excel Signature Delete 	Billing Claim Create Billing Claim Update Billing Claim Send Billing Claim Status Check Billing Claim Delete Eligibility Inquiry	

10. Once all the privileges are assigned accordingly click on the **Save** button on the bottom right of the page to save the **User's Privileges**.



You are also able to assign **Agency Wide and Administrative Roles** from the **User Privilege** page.

To learn more about Agency Wide and Administrative Roles click here.



To learn more about creating $\textbf{Super Roles} \ \underline{\textbf{click} \ \textbf{here}}$

To learn more about creating **Caseloads** <u>click here</u>