

Configure Case Note Template

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

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

Disability Identification

The Washington Group Short Set of Questions on Disability ✓

Demo Assessment ✕

Mobility Test ✕

Child Assessment- HICHAC ✕

Demo Casenote Template ✕

PLP Case Study ✕

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 Configuration

Provider Therap Global Demonstration Provider (DEMOTG-TGD)

Approved Template(s)

- Please Select -
- Case Study
- Checklist for Autism in Toddlers (CHAT) Parent
- Checklist for Autism Toddlers (CHAT)
- Child Assessment- HICHAC
- Demo 1
- Demo Assessment
- Demo Casenote Template
- Development Assessment
- Disability Identification**
- House# 73/4, Road # 86, Bashundhara R/A, Dhaka - 1
- Initial Interview
- Mobility Test
- PLP Case Study
- Reading Assessment
- Sample Assessment Questions
- Short Set on Functioning

Default Template - Please Select -

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
- Checklist for Autism in Toddlers (CHAT) Parent
- Checklist for Autism Toddlers (CHAT)
- Child Assessment- HICHAC
- Demo 1
- Demo Assessment
- Demo Casenote Template
- Development Assessment

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](#)