

Configure Case Note Template

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

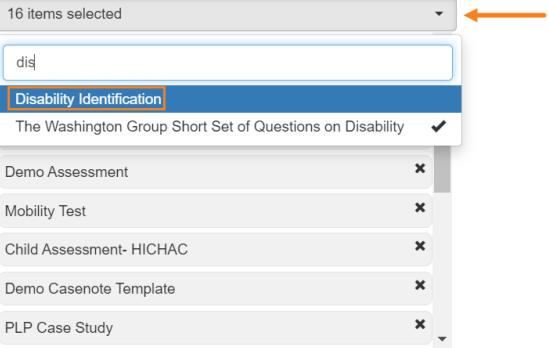
1. Click on the **Template Configuration** link beside the **Case Note Template** option from the **Admin** tab.

To Do		
Individual		
Health		
Agency		
Admin	General <hr/> <div style="display: flex; justify-content: space-between;"> <div style="flex: 1;"> Provider </div> <div style="flex: 1;"> Preferences Password Policy Archive Preference </div> </div> <hr/> <div style="display: flex; justify-content: space-between;"> <div style="flex: 1;"> User </div> <div style="flex: 1;"> New List Import from Excel Search Imported Excel Titles New Title Assign External System ID Self Password Reset </div> </div> <hr/> <div style="display: flex; justify-content: space-between;"> <div style="flex: 1;"> Change Password </div> <div style="flex: 1;"> User List </div> </div> <hr/> <div style="display: flex; justify-content: space-between;"> <div style="flex: 1;"> Questionnaire </div> <div style="flex: 1;"> Create Search </div> </div> <hr/> <div style="display: flex; justify-content: space-between;"> <div style="flex: 1;"> Case Note Template </div> <div style="flex: 1;"> Manage Location Manage Activity Type Create Template Search Template Template Configuration </div> </div>	
Agency Reports		
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) 

Template Name	Action
dis	X
Disability Identification	✓
The Washington Group Short Set of Questions on Disability	✓
Demo Assessment	X
Mobility Test	X
Child Assessment- HICBAC	X
Demo Casenote Template	X
PLP Case Study	X

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	<input type="text"/> - Please Select -
Approved Template(s)	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 Assesment 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	<input type="text"/> - Please Select -

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 Assesment
Default Template	<input type="text"/> Disability Identification

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](#)