Create New Caseloads

Caseloads determine what individuals users are able to access. Users assigned with the **Caseload** Role are able to create and update caseloads.

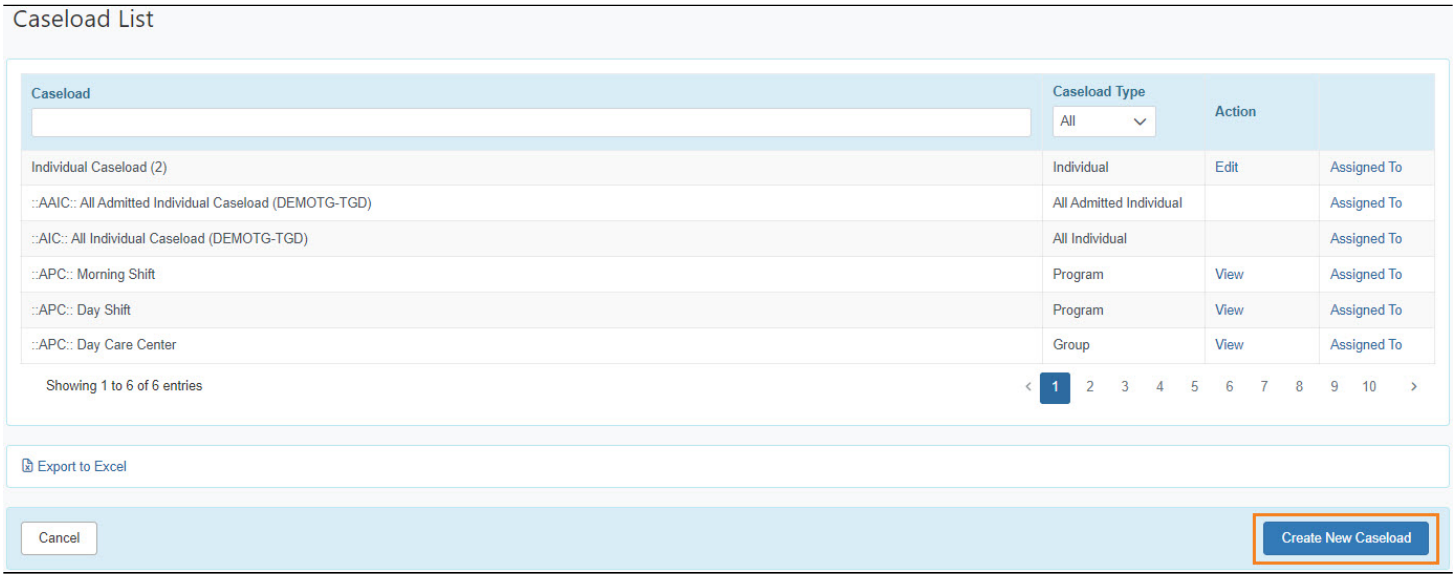
Therap's System has different types of caseloads. Some caseloads are automatically created.In addition to the auto generated caseloads, you can create additional ones based on the needs of your organization. This guide details the steps needed to set up Individual and Group caseloads. To know more about types of caseloads click here.

To create a new Caseload follow the steps below:

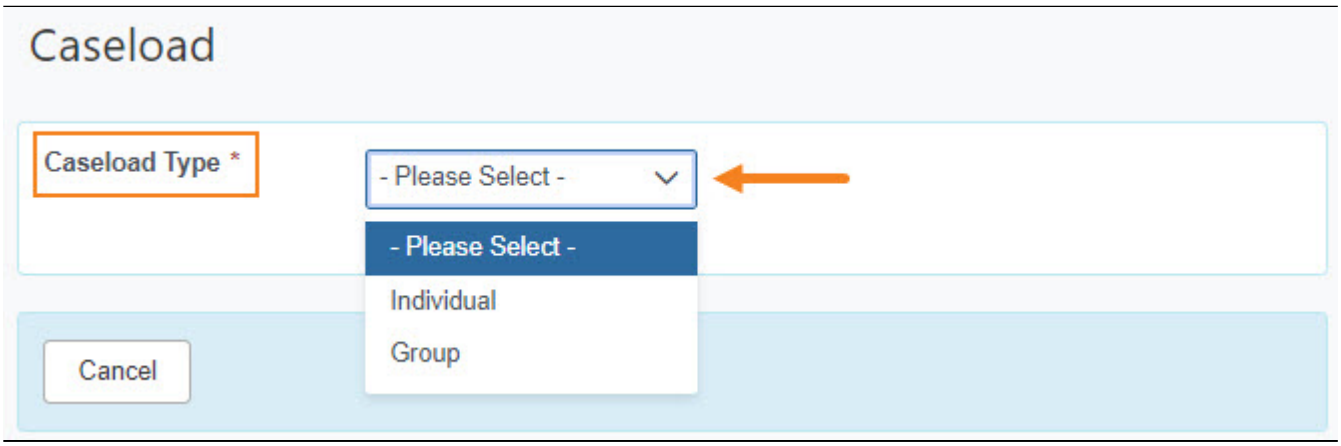
1. Click on the **Manage** link beside the **Caseload** option under the Admin tab.

© Therap Global 2018 - 2020. All Rights Reserved. U.S. Patents #8819785, #8739253, #8281370, #8528056, #8613054, #8615790, #9794257

2. This will open the **Caseload List** page where the existing Caseloads will be displayed. To create a new Caseload, click on the **Create New Caseload** button at the bottom of the page.



3. On the **Caseload** page, select a **Caseload Type** you want to create from the drop down menu. Two types of caseloads will be there : Individual or Group.

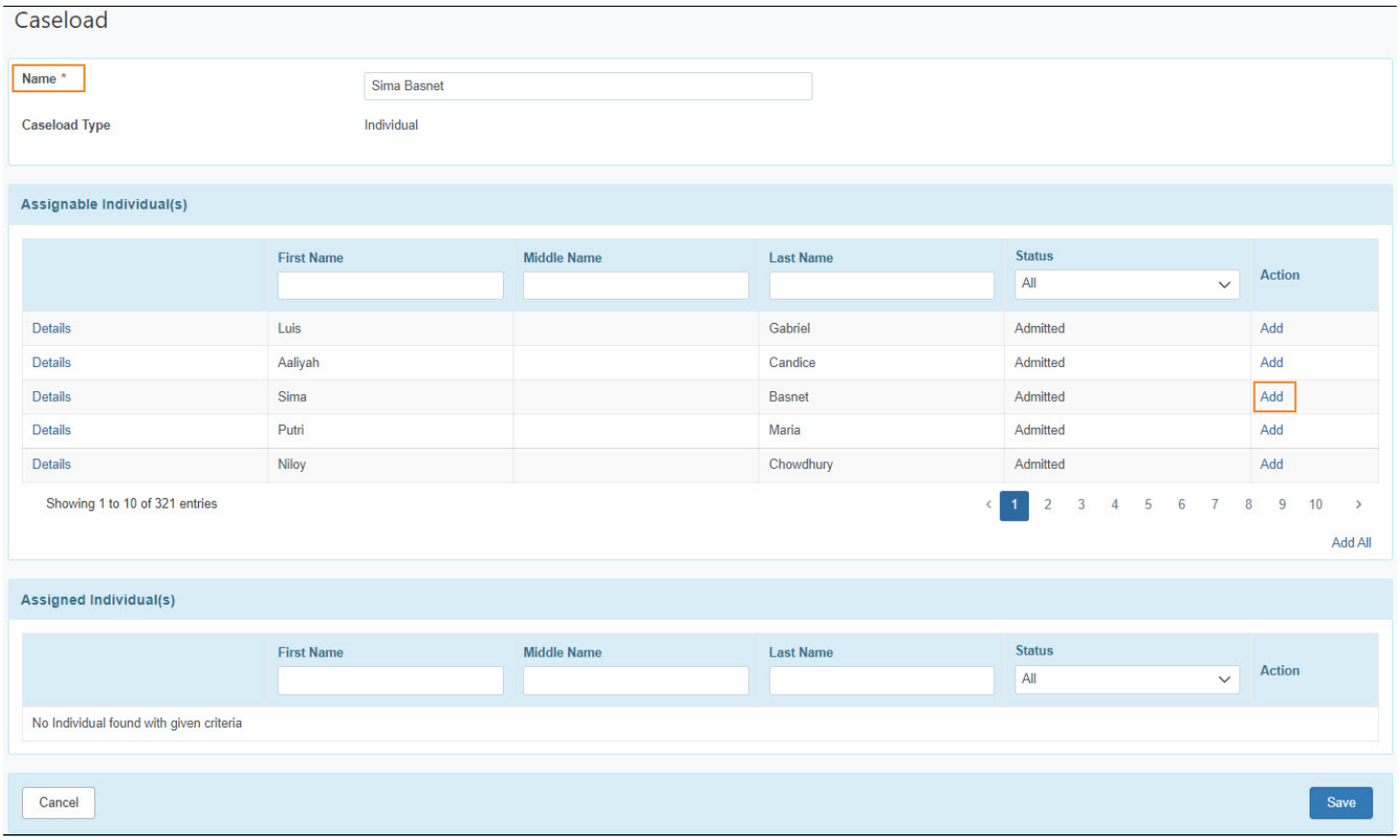


Individual Caseload

© Therap Global 2018 - 2020. All Rights Reserved. U.S. Patents #8819785, #8739253, #8281370, #8528056, #8613054, #8615790, #9794257

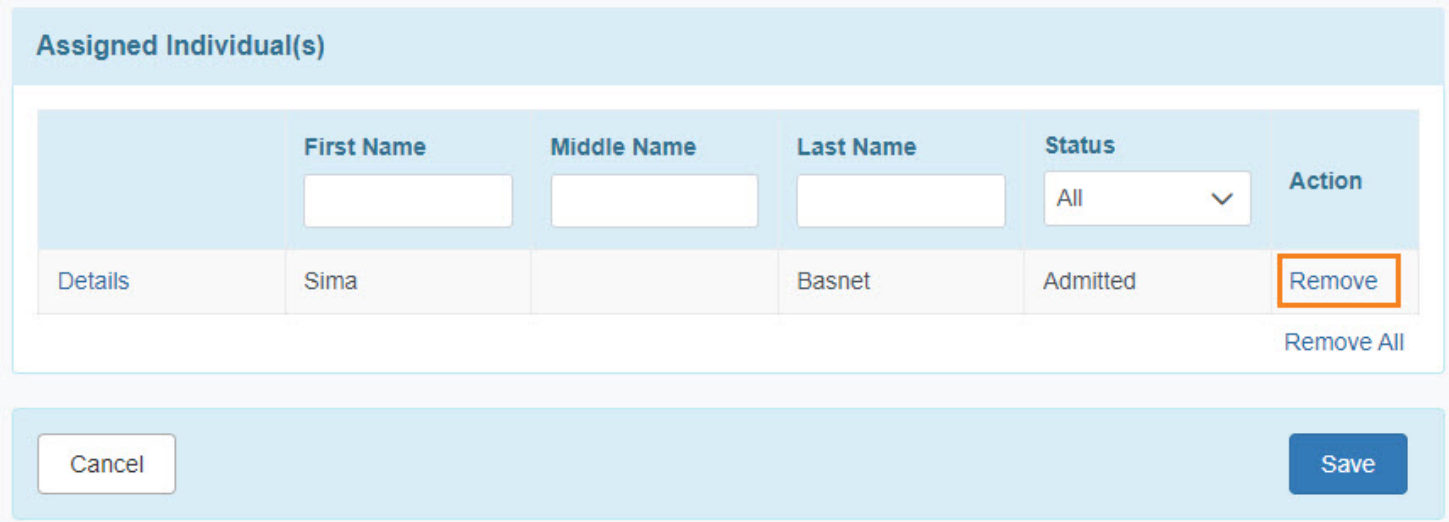
An Individual Based caseload allows the user access to all information about the individual(s) regardless of status or program enrollment.

4. Selecting **Individual** from the dropdown will open the **Caseload** page. Provide a **Name** for the Caseload. In the **Assignable Individuals** section of the page, click on the **Add** link to add the individual to the Caseload.



5. The individual added will appear in the **Assigned Individuals** section of the page. After adding the individuals, click on the **Save** button.

© Therap Global 2018 - 2020. All Rights Reserved. U.S. Patents #8819785, #8739253, #8281370, #8528056, #8613054, #8615790, #9794257



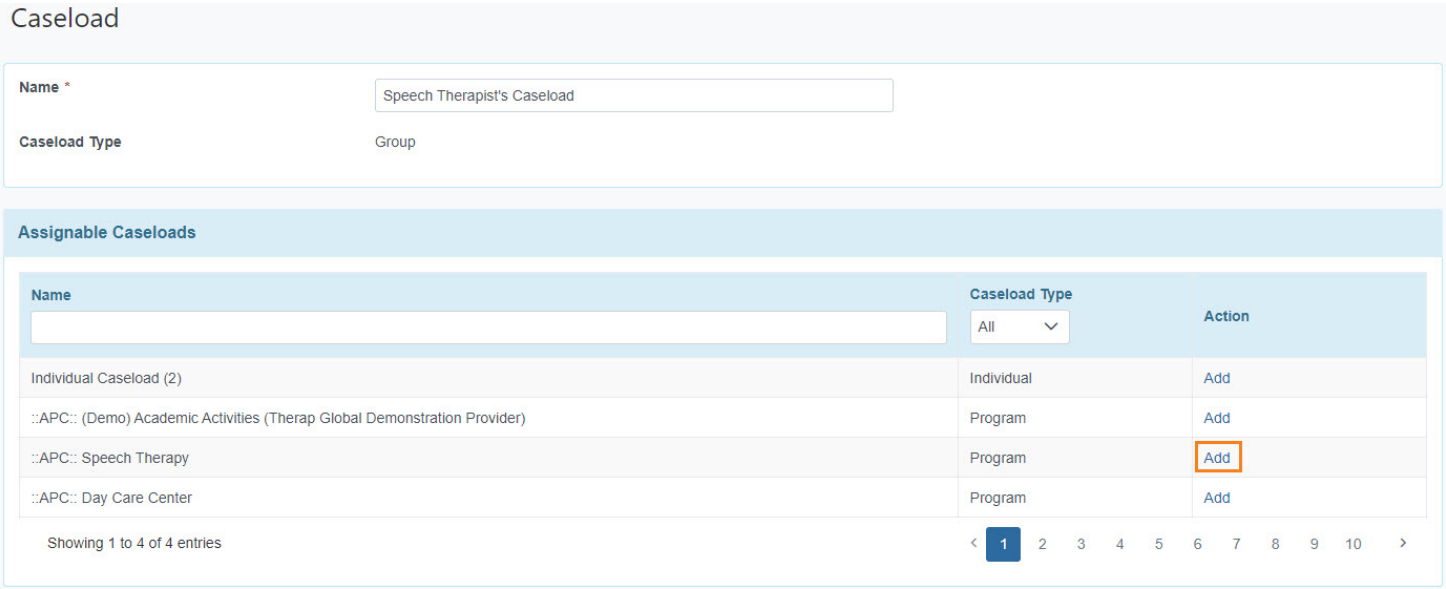
To remove an individual, click on the **Remove** link.

Group Caseload

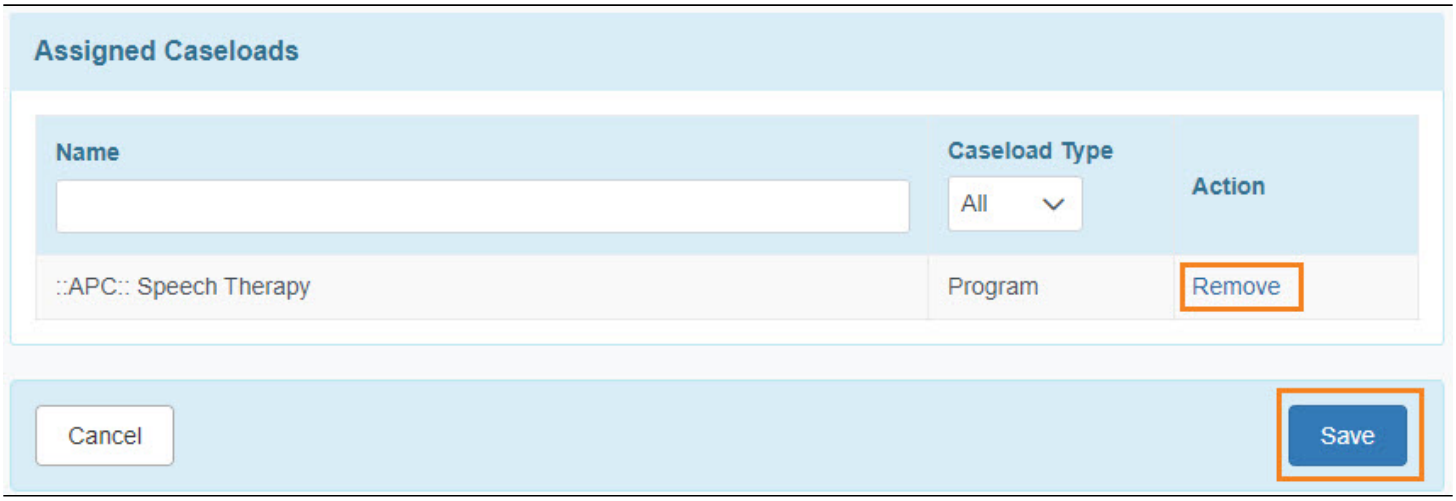
Users assigned with group caseload will gain access to only those specific programs or individuals created under that particular group caseload.

6. On the Caseload page, select **Group** option from the Caseload type. This will take to the Caseload page where the user has to provide a **Name** for the caseload. In the **Assignable Caseloads** section of the page, click on the **Add** link to add the desired caseloads to the **Group Caseload.**

© Therap Global 2018 - 2020. All Rights Reserved. U.S. Patents #8819785, #8739253, #8281370, #8528056, #8613054, #8615790, #9794257



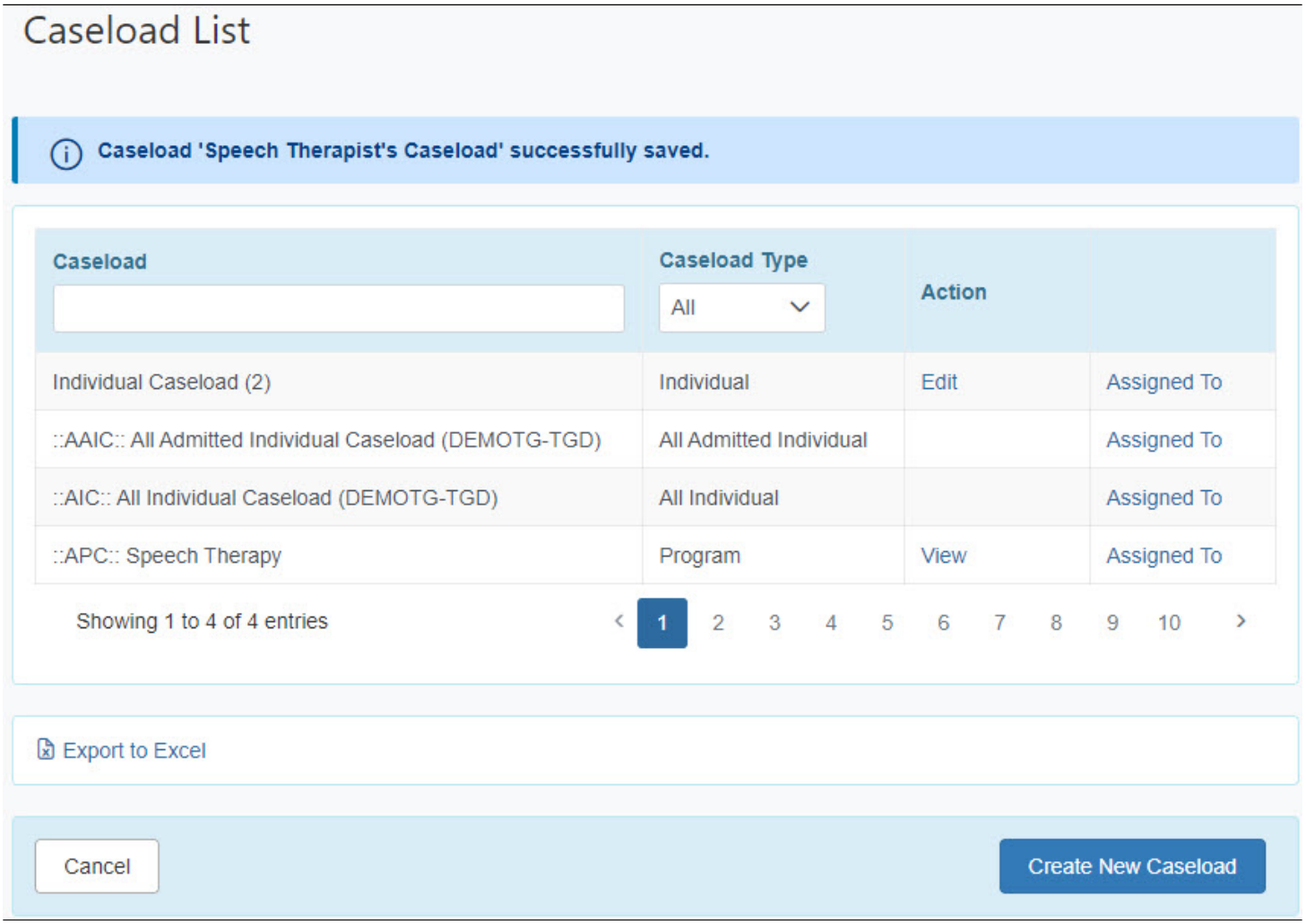
7. The caseloads that were added will appear in the **Assigned Caseloads** section of the page. After adding the caseloads, click on the **Save** button.



If you need to remove a caseload, click on the **Remove** link.

© Therap Global 2018 - 2020. All Rights Reserved. U.S. Patents #8819785, #8739253, #8281370, #8528056, #8613054, #8615790, #9794257

8. To view the list of users assigned with a Caseload, click on the **Assigned To** link. To edit the caseload, click on the **Edit** link next to that Caseload on the **Caseload List** page.



To know more about types of caseloads click here.

© Therap Global 2018 - 2020. All Rights Reserved. U.S. Patents #8819785, #8739253, #8281370, #8528056, #8613054, #8615790, #9794257