

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.

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	Physician Information	List Physician List
Admin	Change Password	User List
Agency Reports	User Privileges	Manage Archive Legacy Archive Upto Jul 2011
Individual Home Page	Admin Roles	List Legacy Archive
Settings	Splash Message	Create Update/Delete
	Activity Tracking	View
	Caseload	Manage Archive

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.

Caseload List

Caseload	Caseload Type	Action	
Individual Caseload (2)	Individual	Edit	Assigned To
∴AIC:: All Admitted Individual Caseload (DEMOTG-TGD)	All Admitted Individual		Assigned To
∴AIC:: All Individual Caseload (DEMOTG-TGD)	All Individual		Assigned To
∴APC:: Morning Shift	Program	View	Assigned To
∴APC:: Day Shift	Program	View	Assigned To
∴APC:: Day Care Center	Group	View	Assigned To

Showing 1 to 6 of 6 entries

< 1 2 3 4 5 6 7 8 9 10 >

Export to Excel

Cancel Create New Caseload

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.

Caseload

Caseload Type *

- Please Select -

- Please Select -

Individual

Group

Cancel

Individual Caseload

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.

Caseload

Name *
Sima Basnet

Caseload Type
Individual

Assignable Individual(s)

	First Name	Middle Name	Last Name	Status	Action
				All	
Details	Luis		Gabriel	Admitted	Add
Details	Aallyah		Candice	Admitted	Add
Details	Sima		Basnet	Admitted	Add
Details	Putri		Maria	Admitted	Add
Details	Niloy		Chowdhury	Admitted	Add

Showing 1 to 10 of 321 entries
1
2
3
4
5
6
7
8
9
10
>

Add All

Assigned Individual(s)

	First Name	Middle Name	Last Name	Status	Action
				All	

No Individual found with given criteria

Cancel
Save

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

Assigned Individual(s)

	First Name	Middle Name	Last Name	Status	Action
	<input type="text"/>	<input type="text"/>	<input type="text"/>	All ▼	
Details	Sima		Basnet	Admitted	Remove

Remove All

Cancel

Save

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**.

Caseload

Name *

Speech Therapist's Caseload

Caseload Type

Group

Assignable Caseloads

Name	Caseload Type	Action
<input type="text"/>	All ▼	
Individual Caseload (2)	Individual	Add
::APC:: (Demo) Academic Activities (Therap Global Demonstration Provider)	Program	Add
::APC:: Speech Therapy	Program	Add
::APC:: Day Care Center	Program	Add

Showing 1 to 4 of 4 entries

< 1 2 3 4 5 6 7 8 9 10 >

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.

Assigned Caseloads

Name	Caseload Type	Action
<input type="text"/>	All ▼	
::APC:: Speech Therapy	Program	Remove

Cancel


Save

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

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.

Caseload List

 Caseload 'Speech Therapist's Caseload' successfully saved.

Caseload	Caseload Type	Action	
<input type="text"/>	All 		
Individual Caseload (2)	Individual	Edit	Assigned To
::AAIC:: All Admitted Individual Caseload (DEMOTG-TGD)	All Admitted Individual		Assigned To
::AIC:: All Individual Caseload (DEMOTG-TGD)	All Individual		Assigned To
::APC:: Speech Therapy	Program	View	Assigned To

Showing 1 to 4 of 4 entries

< **1** 2 3 4 5 6 7 8 9 10 >

 Export to Excel

Cancel

Create New Caseload

To know more about types of caseloads click [here](#).