Individual Intake – Admit and Program Enrollment

Users assigned with the **IDF Admin** *Administrative Role* will be able to enter individuals into the Therap system. Users with the **IDF Admin** *Administrative Role* or the **Individual Admit/Discharge** caseload-based role will be able to admit individuals into the system.

- **Entering Individuals into Therap System**
- **Admitting Individuals into Therap System**
- **Enrolling Individuals into Program(s)**

Entering Individuals into Therap System

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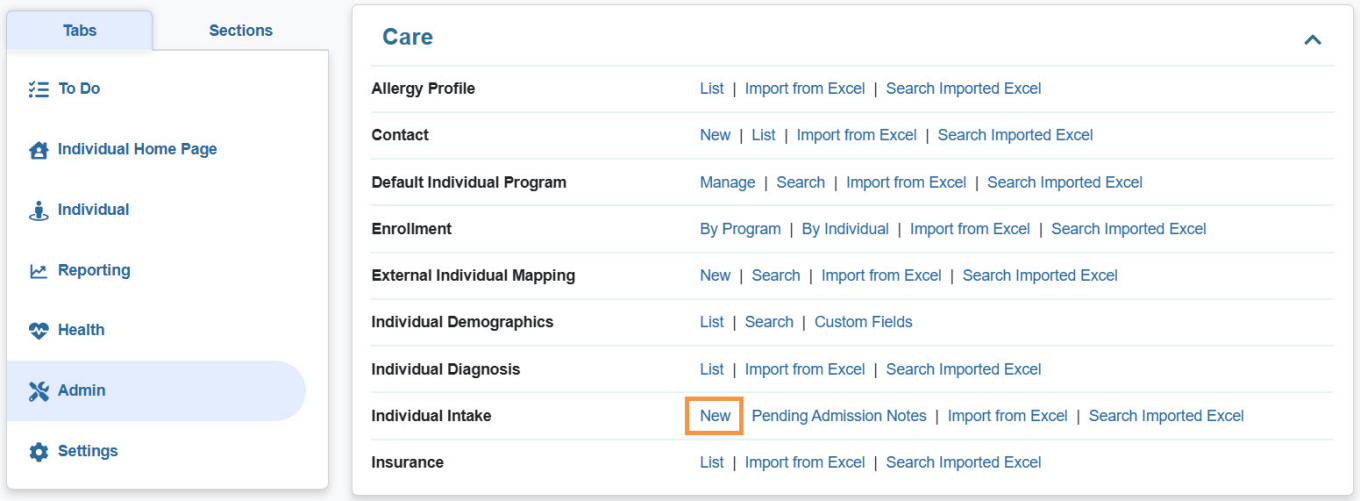
1. On the Admin tab, click on the **New** link beside **Individual Intake** under the **Care** section.



Individual Demographic Form (IDF) will be opened. *It is to note that The* ***Individual Data form (IDF)*** *has been renamed to the* ***Individual Demographic Form (IDF)*** *and updated with a new interface.*

Individual Demographic Form (IDF) includes fields for the individual's basic demographic information, individual's Photo, oversight information, residential address and mailing address. Each section of the IDF now has its own page. Users will be able to navigate to each IDF section by using the links at the bottom of the form. Information added in the IDF can be updated according to the needs of your agency.

Individual Demographic Form (IDF) New

Photo 1 | Add Image

Photo 1 Date | MM/DD/YYYY

Title | - Please Select -

Gender | - Please Select -

* First Name

* Last Name

Middle Name

Suffix

Birth Date | MM/DD/YYYY

Goes By

SSN

xxx-xx-xxxx / xxxxxxxxx

Medicaid Number

E-mail

Phone Number

Race | - Please Select -

Ethnicity / Hispanic Origin | - Please Select -

Class Membership | - Please Select -

Residential Address

Residential Program / Site Address | - Please Select -

Attention or in care of

Address

Street 1

Street 2

City

State | State

State

Zip Code

Country | Country

Country

Location

Primary Phone

Secondary Phone

Additional Phone

Mailing Address

Attention or in care of

Same as Residence Address

Address

Street 1

Street 2

City

State | State

State

Zip Code

Country | Country

Country

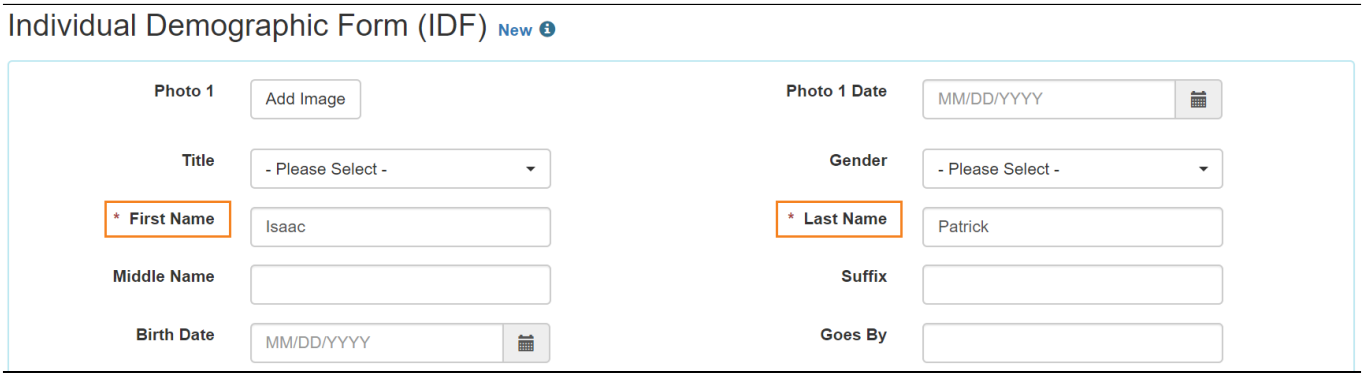
Primary Phone

Secondary Phone

Additional Phone

Cancel | Back | Save

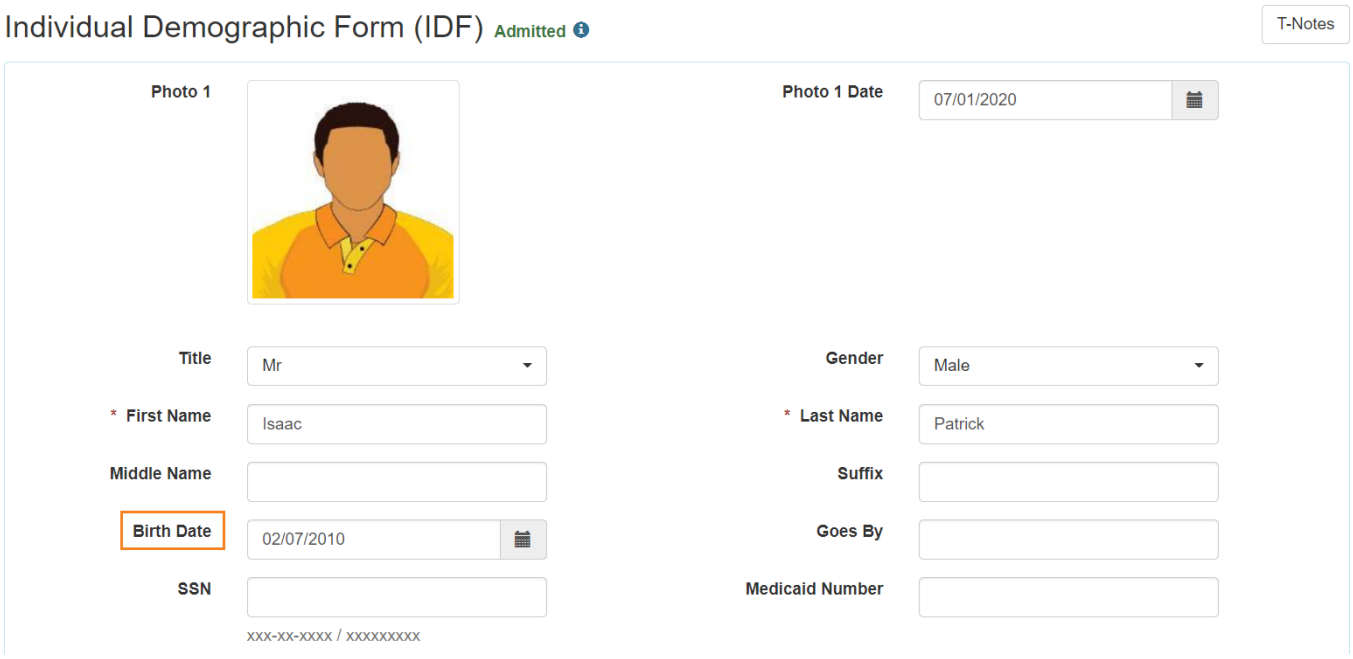
2. Enter the individual's **First Name** and **Last Name**.



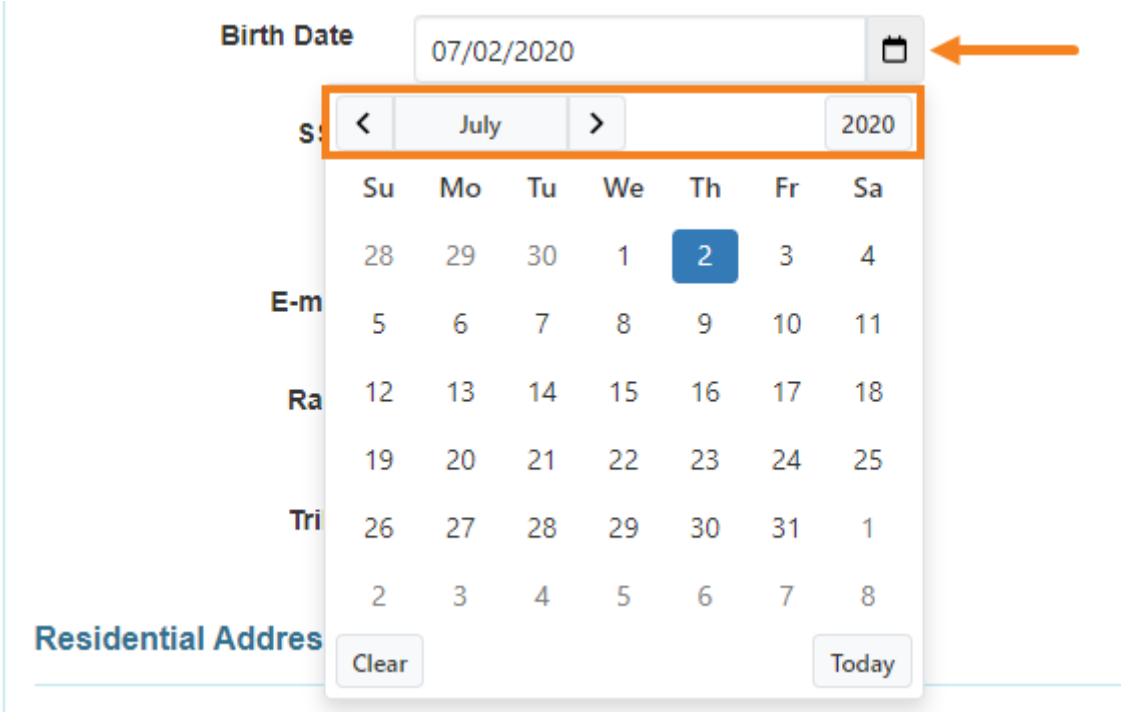
Note:

- Photo 1 & Photo 1 Date fields are optional. If you want to add a photo, click on the 'Add Image' to add the photo of the individual. You may also add the date that you uploaded the photo if you would like to.
- Title and Gender are optional fields; to select these click on the 'Please Select' of the respective fields. Selecting the gender of the individual will show in future reports.
- Middle name and Suffix are optional fields and not required.

3. Select the **Birth Date** of the individual. While Birth Date is optional, it is highly suggested to improve the quality of information about the individual, and will show up in future reports if filled out.

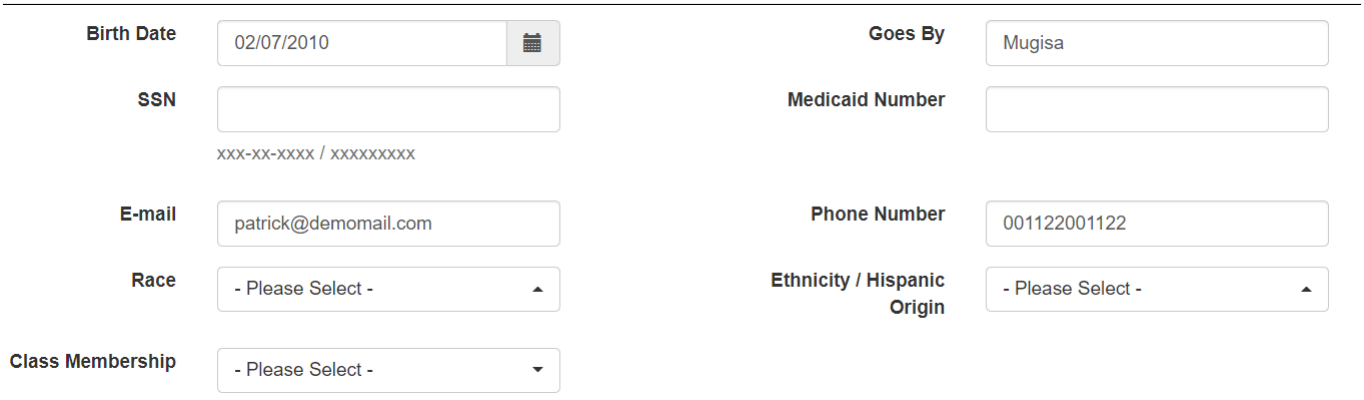


Note: The calendar field takes the format of Month/Date/Year. Many countries do not use this style of recording the day. Users can type in Month/Date/Year for the date or can click on the calendar icon to find the correct date (as shown below)

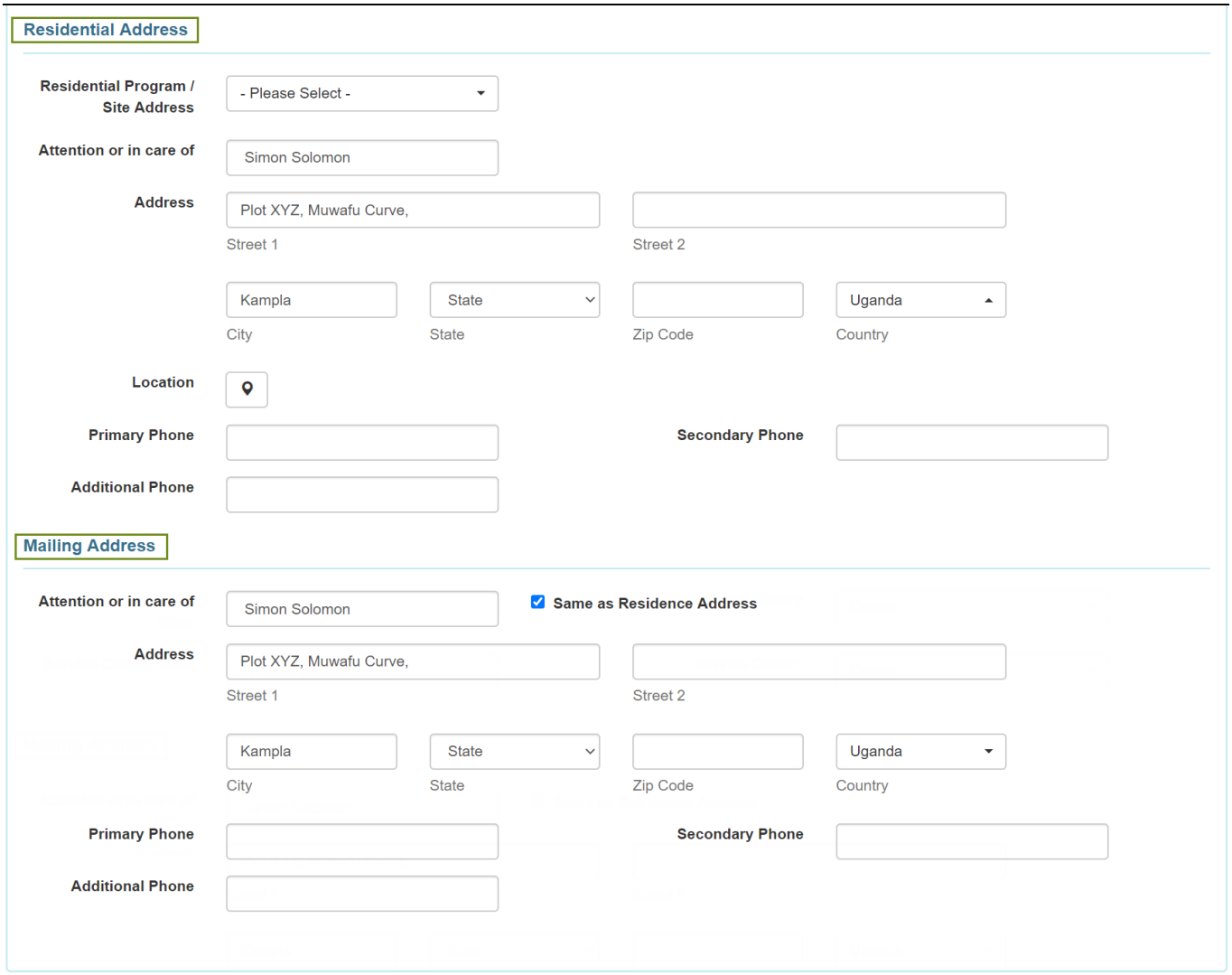


Note:

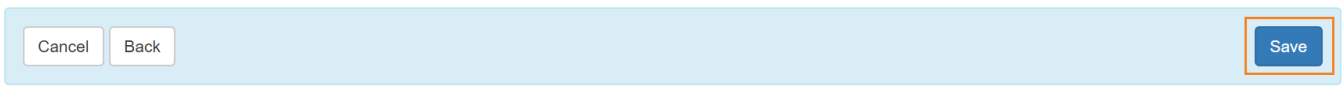
- “Goes By” is also optional and can be entered if an individual has multiple names and you want to make it clear what name they go by. You can also enter a nickname here.
- Skip **SSN,** and **Medicaid Number** as they are US-only fields.
- Email and Phone Numbers are optional fields; if you have this information you can enter those.
- Race, Ethnicity/Hispanic Origin & Class Memberships fields are optional.



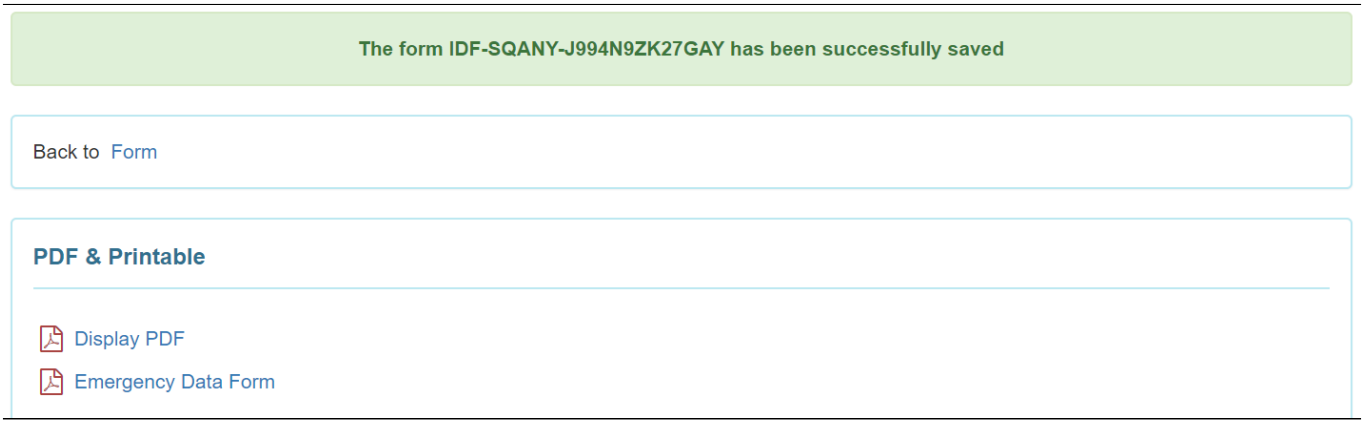
- Fields in **Residential Address** and **Mailing Address** sections are optional. You may enter information in those if required by your agency.



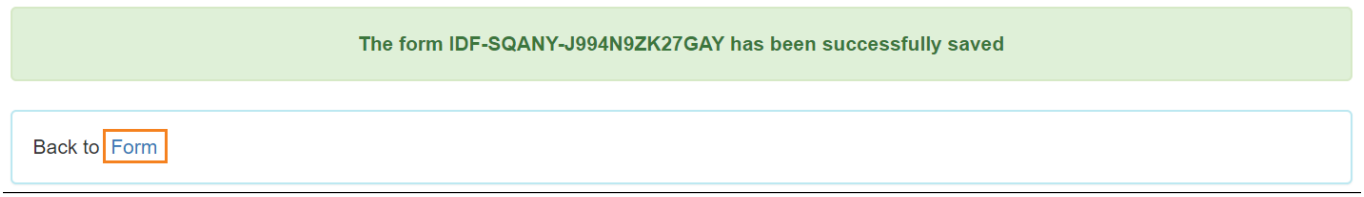
4. After entering necessary information, click on the **Save** button at the bottom of the page.



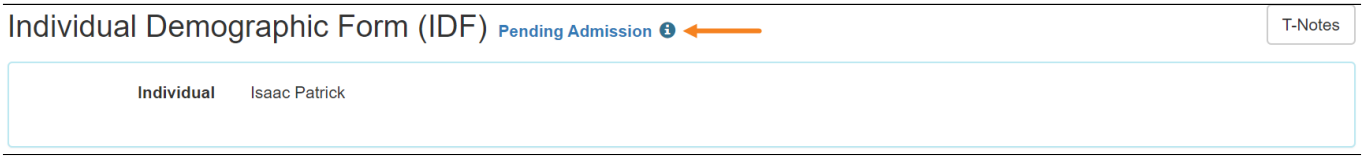
Once saved, a success message will be presented. Under the success message there will be a link to open the IDF and links for opening the form in PDF format.



5. Click on the **Form** link to open the Individual Demographic Form.



The **Individual Demographic Form (IDF)** will have **Pending Admission** status.



Admitting Individuals into Therap System

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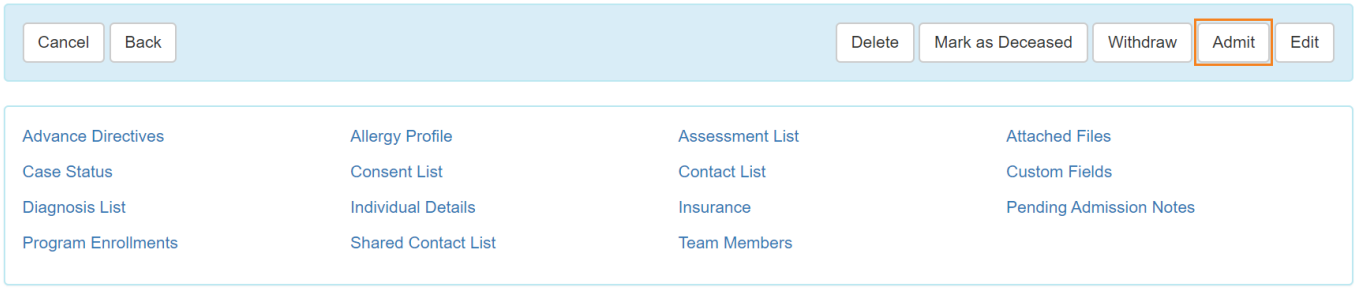
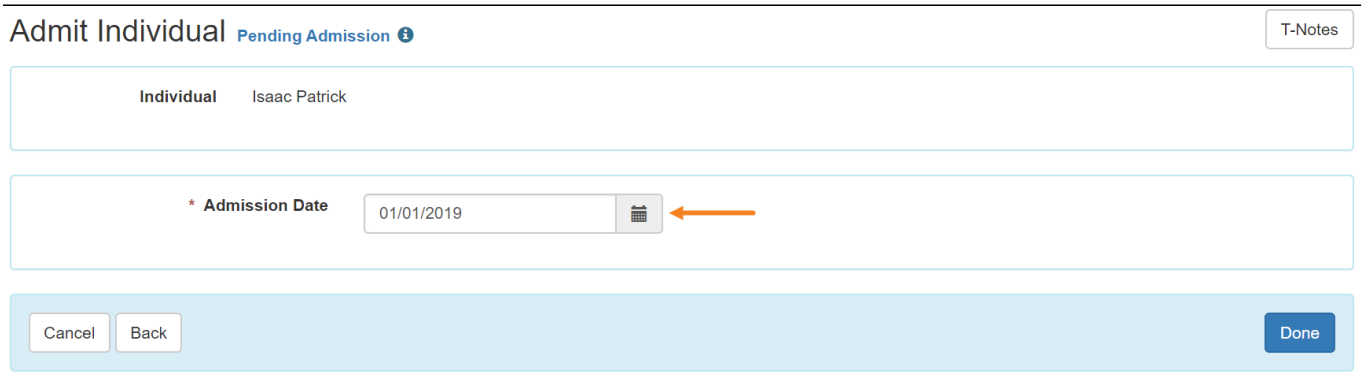
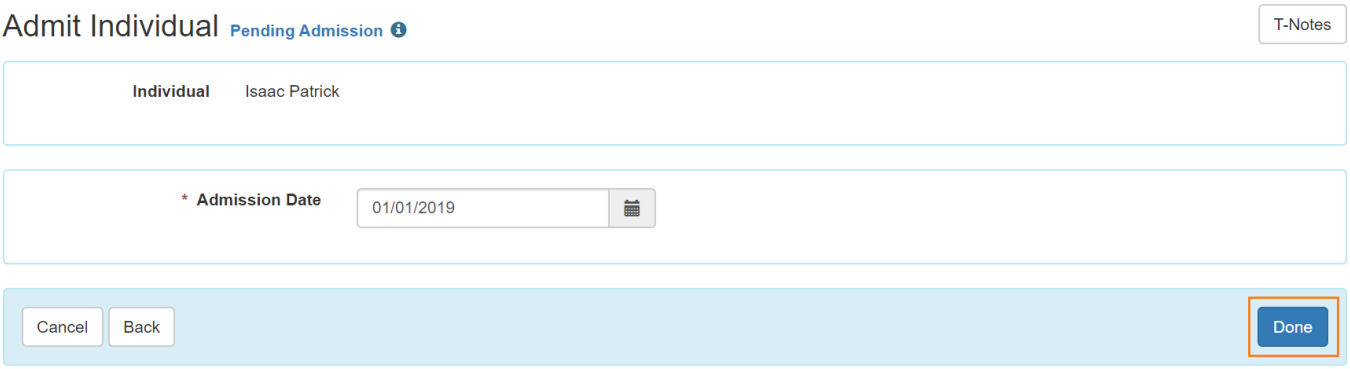
1. Scroll all the way to the bottom of the **IDF** and click on the **Admit** button.



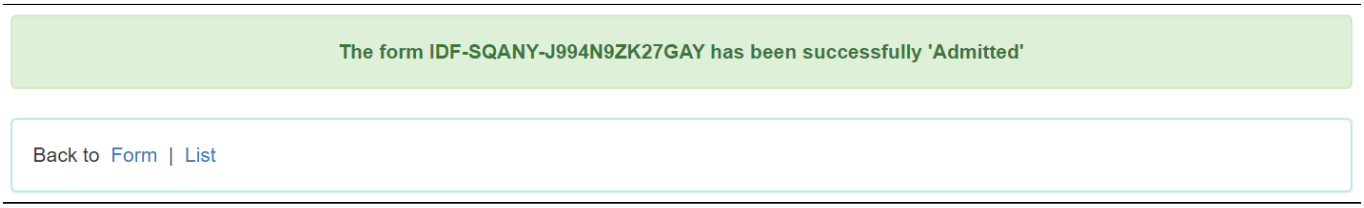
2. On the next page, select the **Admission Date** in which the individual is/was admitted.



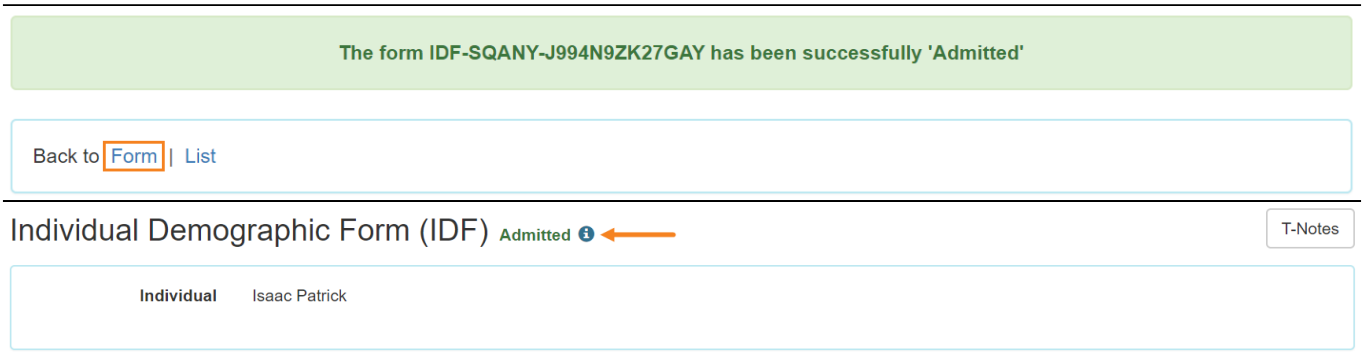
3. After selecting the date, click on the **Done** button.



Once done, a success message will be shown.



4. Clicking on the **Form** link will open the **Individual Demographic Form** showing **Admitted** status.



Enrolling Individuals into Program(s)

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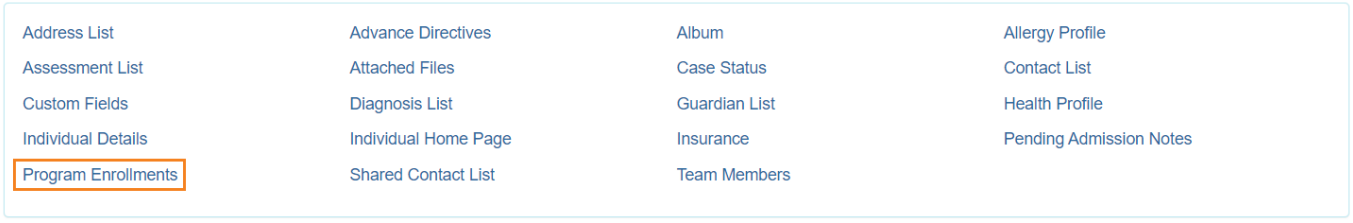
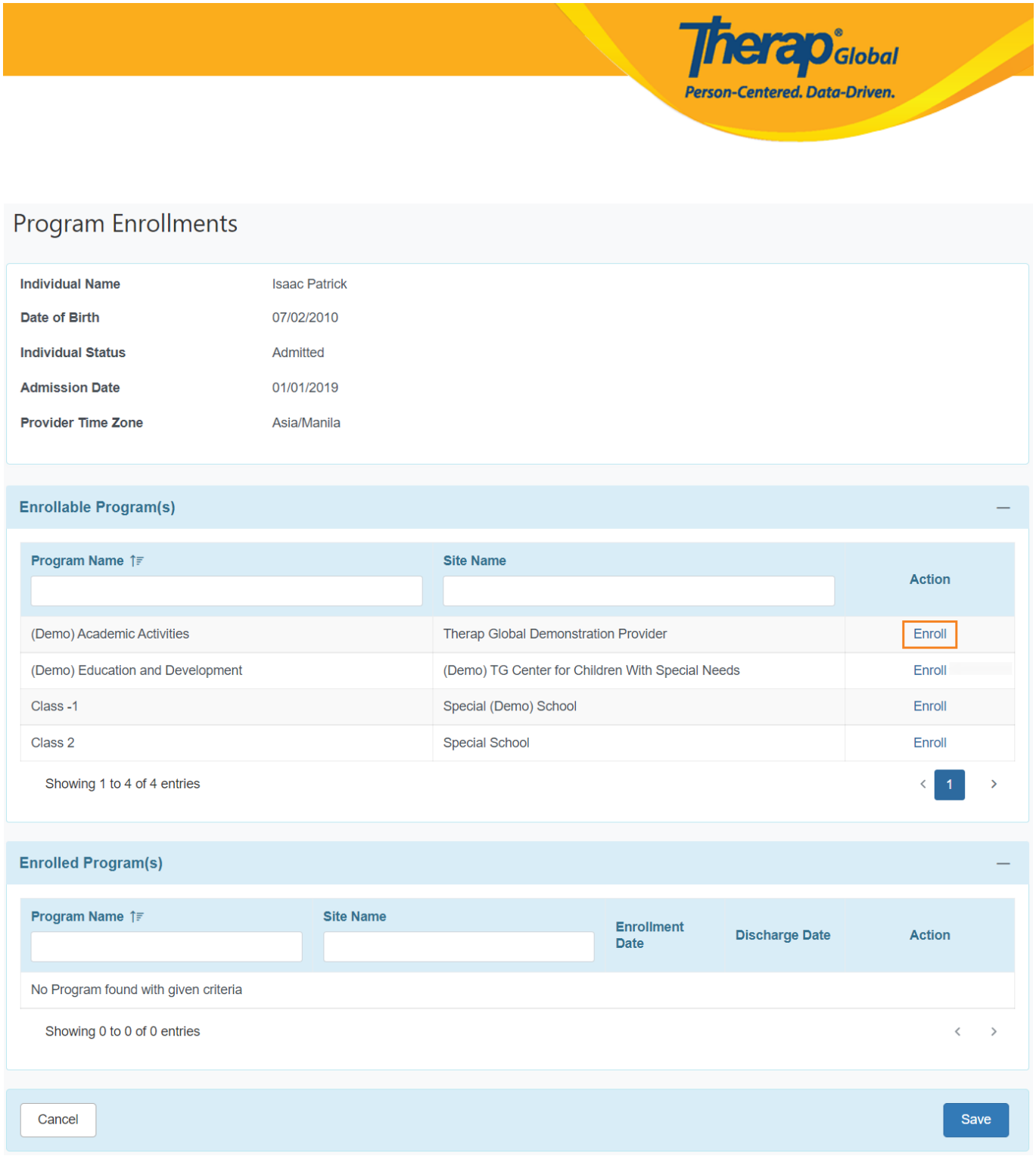
Enrolling individuals in at least one program is necessary to perform the majority of documentation within Therap.

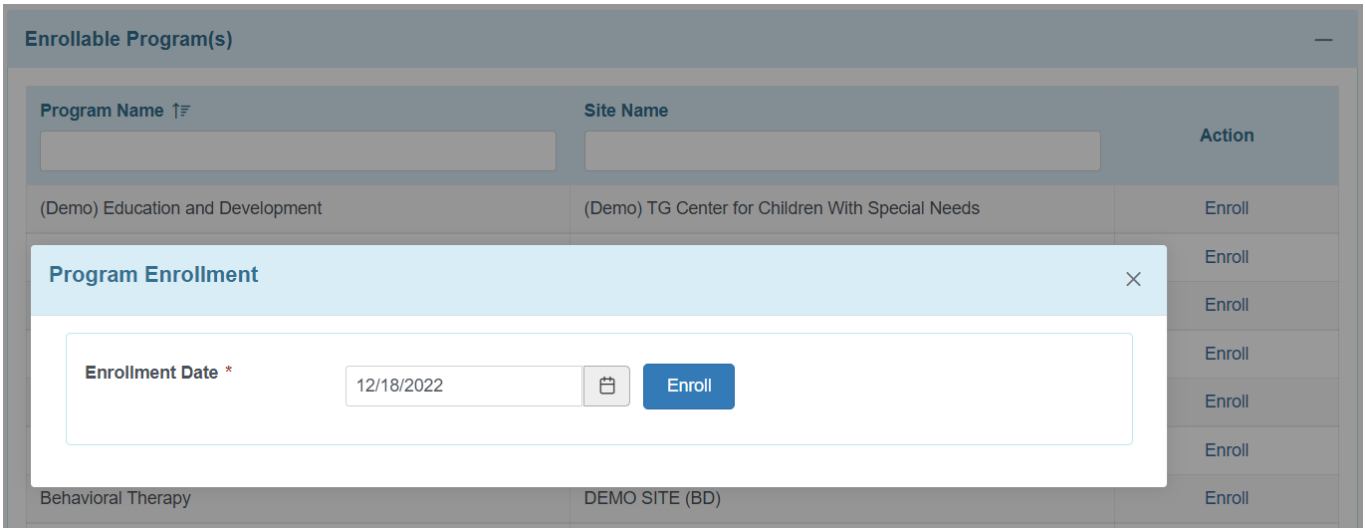
1. Scroll down on all the way to the bottom of the **IDF** page and click on the **Program Enrollments** link



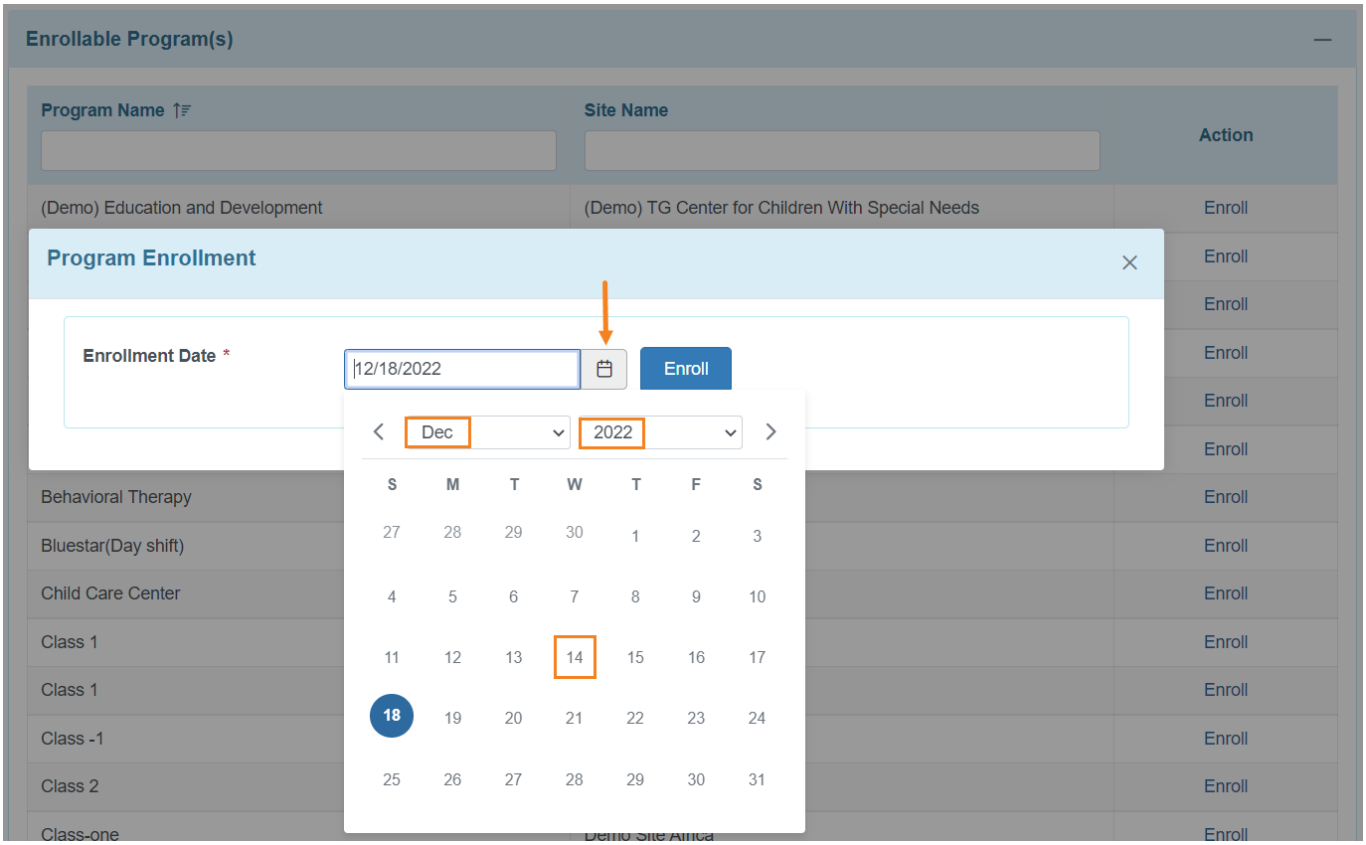
2. The Program Enrollment page will be opened showing a list of **Enrollable Program(s)** for the Individual. Click on the **Enroll** link of the preferred program.



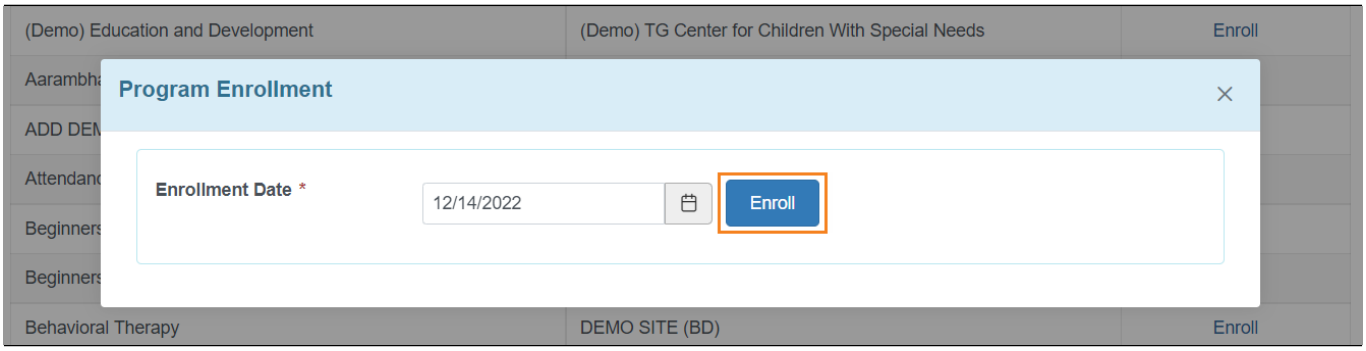
A pop up box titled as **Enrollment Date** will be opened. The current date will be found as pre-selected.



3. Select the actual **Enrollment date** from the calendar app by clicking on the calendar icon and selecting the correct date. If you do not know the actual date they were enrolled then you can use today's date. You are able to go back and update the date of enrollment if you want to change it later.

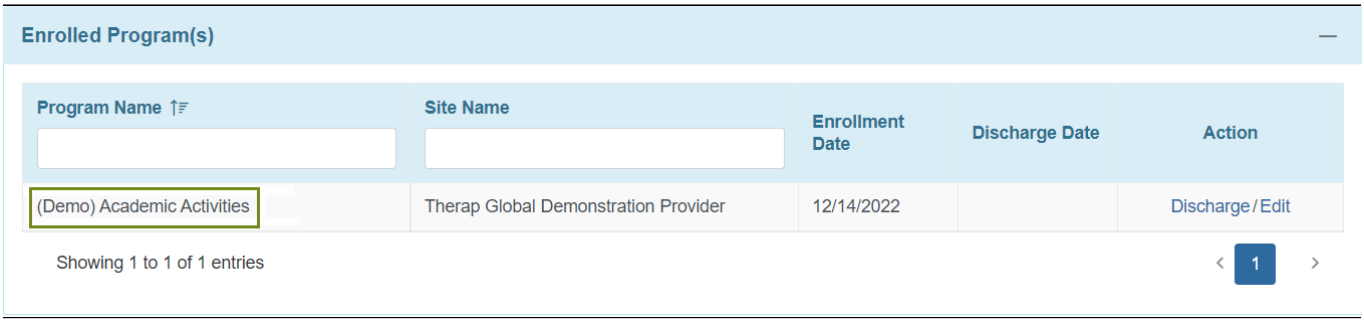


4. Click on the **Enroll** button.



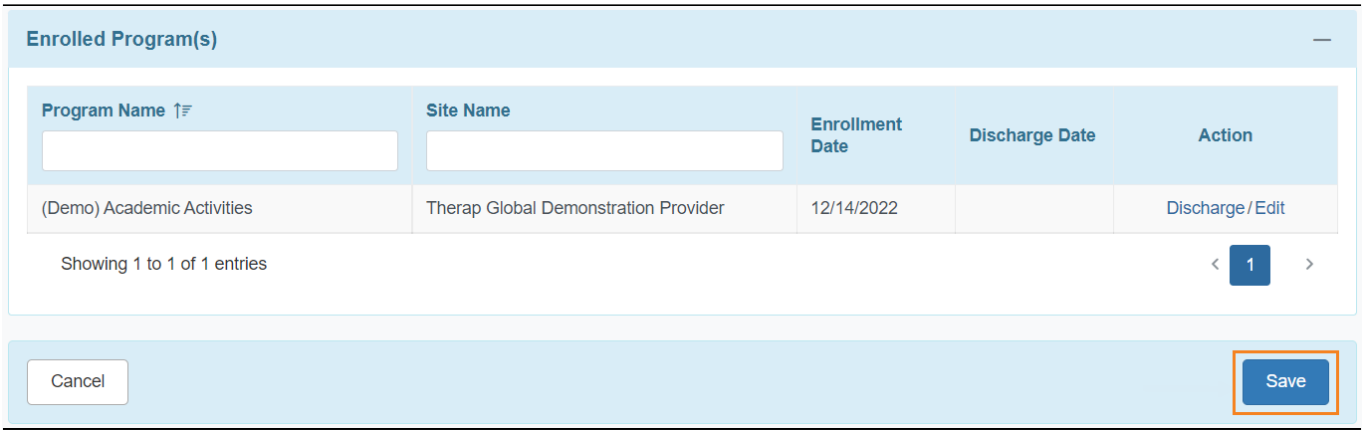
The name of the selected program will be shown in the Enrolled Program(s) section at the

bottom of the page.



Note: Individuals can be enrolled in multiple programs. To enroll an individual in additional programs repeats steps 2 through 4 for each program as needed.

5. Click on the **Save** button at the bottom of the page to save program enrollment related information.



The Individual Demographic Form (IDF) of the individual will be opened. You can update information in the IDF according to your needs.

Individual Demographic Form (IDF) Admitted

T-Notes

Individual Isaac Patrick, 3231256

Photo 1

Photo 1 Date

Title	Mr	**Gender**	Male
First Name	Isaac	**Last Name**	Patrick
Middle Name		**Suffix**	
Birth Date	07/02/2010	**Goes By**	
SSN		**Medicaid Number**	
E-mail	patrick@demoemail.com	**Phone Number**	0011220011
Race		**Ethnicity / Hispanic Origin**	
Class Membership			

Residential Address

Attention or in care of	Simon Solomon		
Address	Plot XYZ, Muwafu Curve, Kampala, Uganda		
Location			
Primary Phone		**Secondary Phone**	
Additional Phone			

Mailing Address

Attention or in care of	Simon Solomon		
Address	Plot XYZ, Muwafu Curve, Kampala, Uganda		
Primary Phone		**Secondary Phone**	
Additional Phone			

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Health Profile
Individual Details
Individual Home Page
Insurance
Pending Admission Notes
Program Enrollments
Shared Contact List
Team Members