

QRG – Add Case Manger

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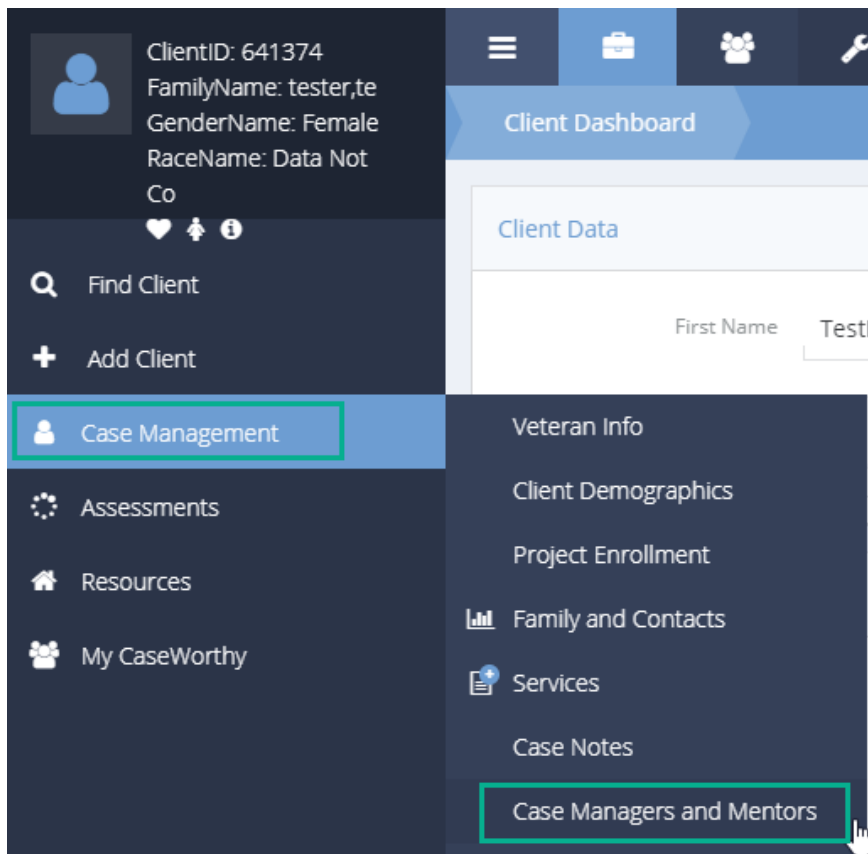
WHO THIS GUIDE IS FOR..... 1

WHAT IS A QRG – QRG stands for **Quick Reference Guide**. Quick Reference Guides are short 1-8 page documents that provide concise practical information and advice on specific topics. Sometimes known as “cheat sheets” quick reference guides are designed for users who know the material or task but need something in front of them to remind them of the steps.

WHO THIS GUIDE IS FOR – This is for Case Manager or Supervisors that want to assign a Case Manager to a client’s enrollment. The enrollment will show the Case Managers name and will show up in My CaseWorthy.

STEPS

Case Management > **Case Managers and Mentors**



Add New (upper right-hand corner)

ClientID: 641374
FamilyName: tester,te
GenderName: Female
RaceName: Data Not Co

Find Client
Add Client
Case Management

Provider/User Case Manager Assignments

Total Rows: 0

Case Manager / Mentor	Program	Begin Date - End Date	Team
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Results Per Page: 50

Hannayd Ruiz Case Manager

+ Add New

Search

Fill out blank and SAVE

ClientID: 641374
FamilyName: tester,te
GenderName: Female
RaceName: Data Not Co

Find Client
Add Client
Case Management
Assessments
Resources
My CaseWorthy

My Case Manager Assignment

Client: TestLLT, TestLLT Age: 72

Enrollment: [dropdown]

Case Manager/Mentor Provider: hrui [dropdown]

Mentor Team: [dropdown]

Email / Notify Case Manager: [input] Create Email

Time period of case assignment

Begin Date: [calendar icon]

End Date: Open [star icon] [calendar icon]

Restriction: Shared

Save Cancel

CaseWorthy