Guidance ECRS 2015-05

Assigning and Unassigning Individuals to an Oversight Account User

Due to recent changes implemented by Therap, the process for assigning and unassigning individual(s) to a user’s caseload has changed. In order to make changes, we can no longer search for a user by their name, but will need to know the user’s ID in order to search and make changes.

If the user is temporally handling a caseload for another user

1. System Administrator select “Manage Privilege”
2. Search for the user by Login ID, Last Name or First Name

3. Select the user name that you wish to update

4. Select “Add Caseload”

5. Search the user ID for the caseload that you wish to assign temporarily to the user in addition to their caseload. (You will need to know the user name of the caseload you wish to assign as you cannot search by name for those who do not have a user ID with their name in part.)

6. Select “add” to the right of the caseload to be assigned (the caseload should disappear from the list).

7. Click on the “x” in the upper right corner
8. The caseload should now appear in the user profile. Scroll to the bottom and save.

(This can only be done for the reassignment of complete caseloads. If a user’s caseload is divided between multiple users, then the instructions below will need to be followed)
To Assign or Unassign an individual from a User Caseload

1. System Administrator select “Manage Caseload” (You will need to know the user ID before performing the next function)
2. Search for caseload by the user ID then select “edit” to the right

3. Under the “Assignable Individuals” section, search for the individual you wish to add to the user’s caseload. Search by Last and First Name, or Medicaid Number of Oversight ID. Any individual in the Oversight Account that is not already assigned to this user will appear.

4. Select “Add” to the right of the individual you wish to add.
5. Search for the next individual, etc. When you have added the last individual, scroll to the bottom and click “save”. This will save the changes.

6. If you wish to unassign an individual from the caseload, you search for the individual under the “assigned Individuals” section and select “remove” to the right of the name.

7. Search for the next individual to unassign, etc. When you have unassigned the last individual, scroll to the bottom and click “save”. This will save the changes.

Changes to caseloads sometimes are not immediate and will take 20-30 minutes to “catch up” in the system. The user should log out and back into Therap or wait 20-30 minutes before logging into the system.