

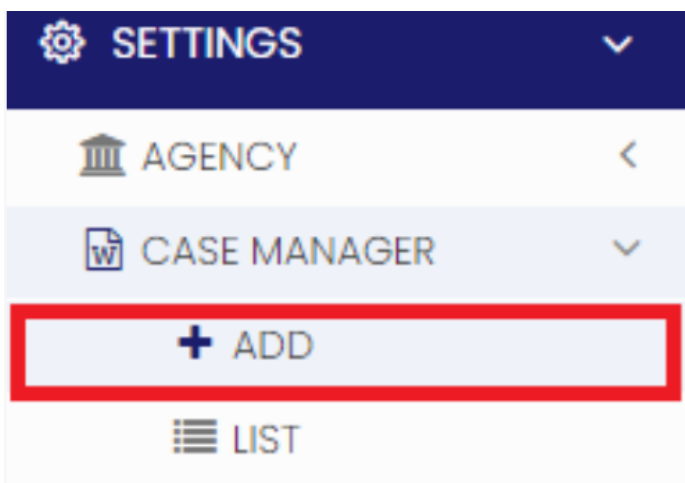
# Case Manager

A case manager plays a crucial role in coordinating and managing the care of patients. They assess the patient's needs, create care plans, coordinate with healthcare providers, ensure necessary services are provided, and monitor the patient's progress, all while focusing on maintaining the patient's comfort.

## Adding Case Manager

Note: All Fields marked with \* are mandatory and must be filled out, otherwise the system will generate an error indicating that the required information is missing.

**Settings >> Case Manager >> +Add option**



Update the required fields in Case Manager details and Click Save option.

**Case Manager Details**

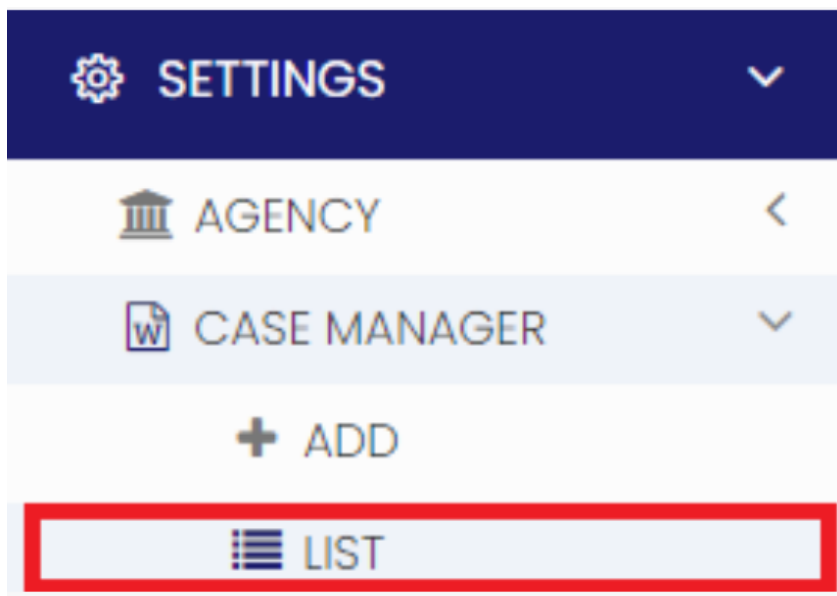
<b>Agency*</b>	Select Agency	<b>Notes</b> Notes
<b>First Name*</b>	First Name	
<b>Last Name*</b>	Last Name	
<b>Email</b>	Email	
<b>Extension</b>	Extension	
<b>Phone</b>	(xxx) xxx-xxxx	
<b>Cell</b>	(xxx) xxx-xxxx	
<b>Fax #</b>	(xxx) xxx-xxxx	
<b>Case Worker ID #</b>	Case Worker ID	

Save Cancel

# Editing Case Manager

For Editing the Case Manager information, follow these steps:

**Settings >> Case Manager >> List**



Select the Case Manager from List and Click Edit option on the right side of the screen.

☐ Refresh Active  

Name ^	Email	Agency	Phone	Case Worker ID	Referral Count	Action
<input type="text" value="Name"/>	<input type="text" value="Email"/>	<input type="text" value="Select Agency Location"/>	<input type="text" value="Phone"/>	<input type="text" value="Case Worker ID"/>		<input type="button" value="Search"/> <input type="button" value="Reset"/>
<input type="checkbox"/> Alex, John	johnwe345@gmail.com	New Testing	(454) 875-4564	N/A	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input checked="" type="checkbox"/> James, Daniel	danjames@gmail.com	New Testing	(256) 487-9878	N/A	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> Thomas, Mary	mary89we@yahoo.com	Eliza Agency	(987) 446-5561	N/A	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> William, Peter	peter564@gmail.com	Eliza Agency	(864) 577-8785	N/A	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Now, edit the required information and click update option.

## EDIT CASE MANAGER ENTER THE CASE MANAGER INFORMATION

## Case Manager Details

Agency\* First Name\* Last Name\* Email Extension Phone Cell Fax # Case Worker ID # 

Notes

# Delete Case Manager

Settings >> Case Manager >> List

Select the Case Manager from the list using the check box and click Delete or Disable Selection option on the screen.

☐ Refresh Active  

Name ^	Email	Agency	Phone	Case Worker ID	Referral Count	Action
<input type="text" value="Name"/>	<input type="text" value="Email"/>	<input type="text" value="Select Agency Location"/>	<input type="text" value="Phone"/>	<input type="text" value="Case Worker ID"/>		<input type="button" value="Search"/> <input type="button" value="Reset"/>
<input checked="" type="checkbox"/> Clark, Miller	Miller@gmail.com	Eliza Agency	N/A	N/A	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/> James, Daniel	danjames@gmail.com	New Testing	(256) 487-9878	N/A	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Now, the Case Manager details gets deleted and we can view the Case Manager under Deleted list.

CASE MANAGER LIST CASE MANAGERS INFORMATION

☐ Refresh Deleted + Case Manager

Name ^	Email	Agency	Phone	Case Worker ID	Referral Count	Action
<input type="text" value="Name"/>	<input type="text" value="Email"/>	<input type="text" value="Select Agency Location"/>	<input type="text" value="Phone"/>	<input type="text" value="Case Worker ID"/>		<input type="button" value="Search"/> <input type="button" value="Reset"/>
<input type="checkbox"/> Clark, Miller	Miller@gmail.com	Eliza Agency	N/A	N/A	0	<input type="button" value="Active"/>

The user can also Restore the deleted Case Manager details by using the option Active on the right side of the screen.

CASE MANAGER LIST CASE MANAGERS INFORMATION

☐ Refresh Deleted + Case Manager

Name ^	Email	Agency	Phone	Case Worker ID	Referral Count	Action
<input type="text" value="Name"/>	<input type="text" value="Email"/>	<input type="text" value="Select Agency Location"/>	<input type="text" value="Phone"/>	<input type="text" value="Case Worker ID"/>		<input type="button" value="Search"/> <input type="button" value="Reset"/>
<input type="checkbox"/> Clark, Miller	Miller@gmail.com	Eliza Agency	N/A	N/A	0	<input type="button" value="Active"/>

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