

Case Manager

A case manager plays a crucial role in coordinating and managing the care of patients in their own homes. 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 and well-being in a home setting.

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.

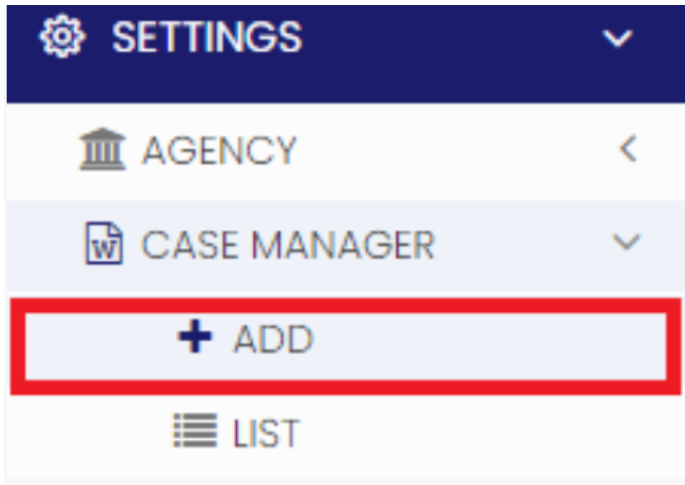
Settings >> Case Manager >> +Add option

The Case Manager serves as the central point of contact for all involved parties, including the patient, family members, caregivers, physicians, therapists and other healthcare professionals. The Case Manager maintains accurate and up-to-date documentation of the patient's care.

By documenting the Case Manager details in the software, the entire care team can easily identify and communicate with the designated case manager, streamlining the coordination process.

Case Manager play a role in determining the level of care required for patients and involved in the billing and reimbursement process.

The Case Manager details can be added in the system under Settings >> Case Manager >> +Add option.



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

ADD CASE MANAGER ENTER THE CASE MANAGER INFORMATION

Case Manager Details

Agency*

Select Agency

▼

First Name*

First Name

Last Name *

Last Name

Email

Email

Extension

Extension

Phone

(xxx) xxx-xxxx

Cell

(xxx) xxx-xxxx

Fax #

(xxx) xxx-xxxx

Case Worker ID #

Case Worker ID

Notes

Notes

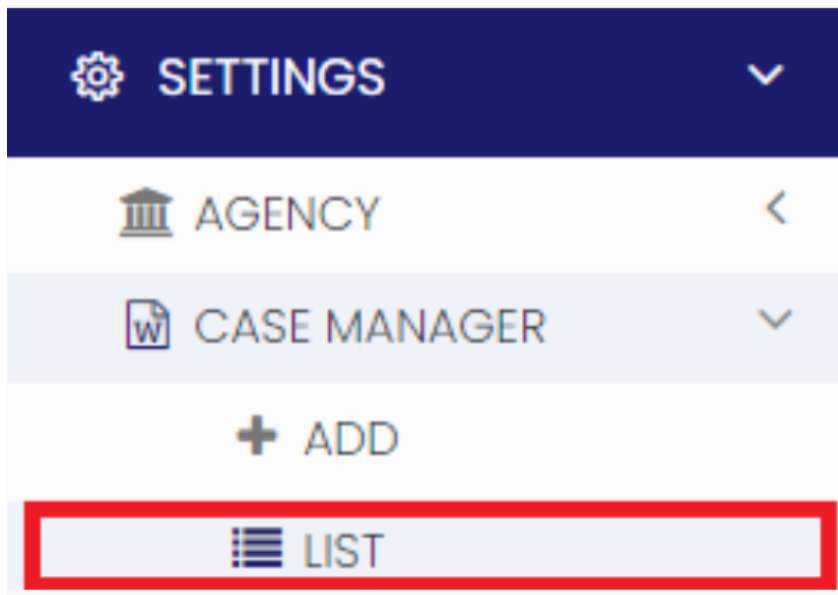
Save

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.

| CASE MANAGER LIST CASE MANAGERS INFORMATION | | | | | | | |
|---|------------------------------------|---|------------------------------------|---|----------------|---------------------------------------|---------------------------------------|
| <input type="checkbox"/> | Refresh | Active ▼ | Disable Selected | + 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"/> 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*

New Testing

▼

First Name*

Daniel

Last Name*

James

Email

danjames@gmail.com

Extension

Extension

Phone

(256) 487-9878

Cell

(xxx) xxx-xxxx

Fax #

(xxx) xxx-xxxx

Case Worker ID #

Case Worker ID

Notes

Notes

Update

Cancel

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.

CASE MANAGER LIST CASE MANAGERS INFORMATION

☐ Refresh Active **Disable Selected** + 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 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="Edit"/> <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="Edit"/> <input type="button" value="Active"/> |