

# 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.

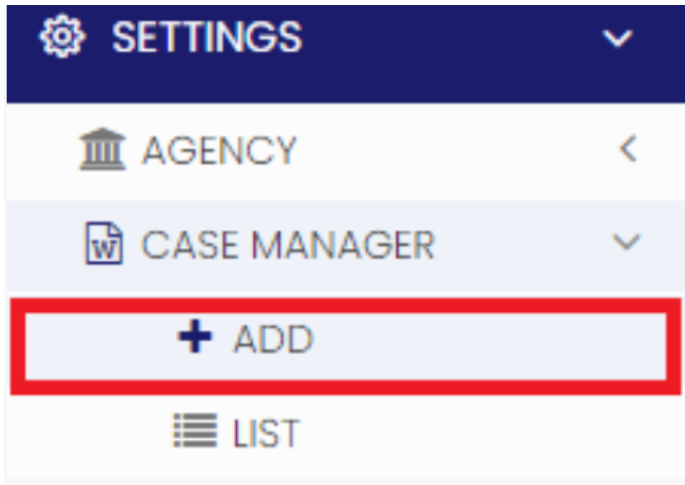
**Settings >> Case Manager >> +Add option**

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

 SETTINGS

 AGENCY

 CASE MANAGER

 ADD


 LIST


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









CASE MANAGER LIST CASE MANAGERS INFORMATION

☐ Refresh

Active

 Disable Selected

 + Case Manager

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

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"/> <b><input type="button" value="Delete"/></b>
<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"/> <b><input type="button" value="Active"/></b>