

Add a New Case Role to the Face Sheet

Last Modified on 03/09/2022 3:55 pm EST

Path: Main Menu > Admin Tools Menu > Case Role Setup

About

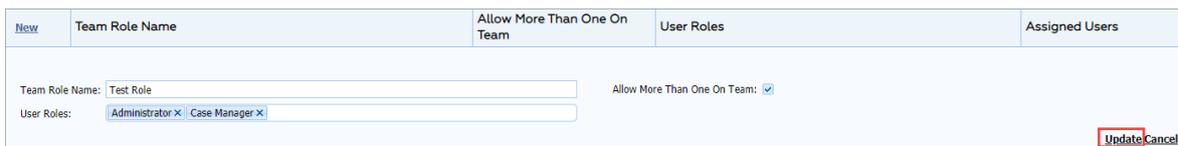
Case Roles allow for staff members to be assigned to multiple Case Assignment categories. Typically, the Case Assignment section on the Face Sheet contains four Case Role drop-down menus. However, it is possible to add additional Case Roles to the Face Sheet. A Case Role must have one or more User Roles assigned to it. Staff associated with that User Role will appear in the Face Sheet Case Role drop-down menus.

Add a New Case Role

1. Navigate to Case Role Setup by following the path above.
2. Click **New**.

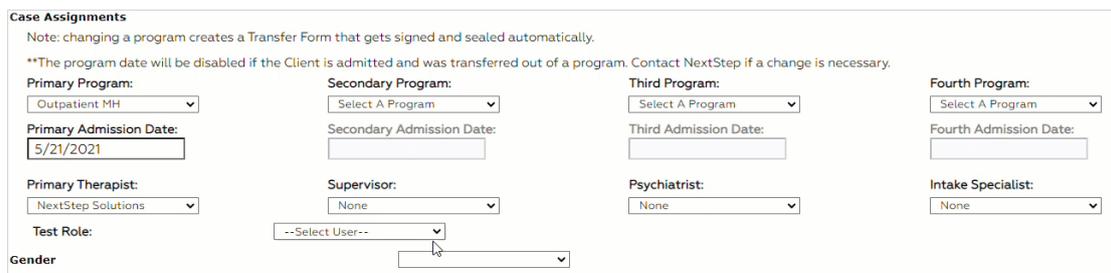


3. Enter a **Team Role Name**.
4. Click into the **User Roles** field and select one or more User Roles from the drop-down menu.
5. (Optional) Select the **Allow More than One on Team** checkbox if you want your staff to be able to select more than one person on the Face Sheet for that particular Case Role.
6. Click **Update**.



Example

Example of new Case Role drop-down menu on Face Sheet that allows you to select one staff member:



Example

Example of new Multi-User Case Role drop-down menu on Face Sheet that allows you to select multiple staff members:

Case Assignments

Note: changing a program creates a Transfer Form that gets signed and sealed automatically.

**The program date will be disabled if the Client is admitted and was transferred out of a program. Contact NextStep if a change is necessary.

Primary Program: Outpatient MH	Secondary Program: Select A Program	Third Program: Select A Program	Fourth Program: Select A Program
Primary Admission Date: 5/21/2021	Secondary Admission Date:	Third Admission Date:	Fourth Admission Date:
Primary Therapist: NextStep Solutions	Supervisor: None	Psychiatrist: None	Intake Specialist: None

Test Role:

New: --Select User--

Gender