



## Caseload

Caseload is controlled through Admitting Practitioner, Attending ,Practitioner, and Nursing Case Load Assignment. Inpatient Nurses and Clinical Aids can create a **Caseload Assignment** to manage their patients

## Try it out

1. Navigate to the **Forms & Data Widget**, type **Nursing Caseload Assignment** in the search bar and select.
2. The form will display with your name defaulted in the User ID.
3. Select the unit and clients to include in your caseload.

Currently Logged On User ID  
GALLESM

Currently Logged On User Description  
GALLES,MICHELLE

Include Clients Discharged Within This Number of Days

Select Clients From Unit  
100 Wing (100)

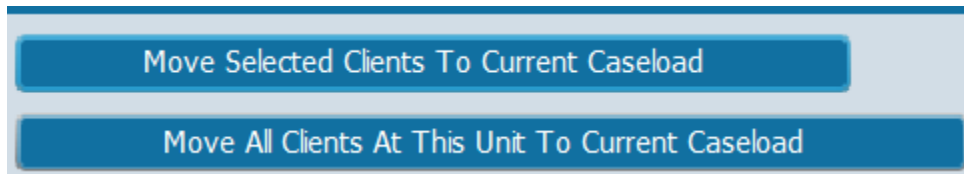
Select Clients To Include In Current Caseload

<input type="checkbox"/>	AARON,CURRENT_LEGAL_INFO (ID:184, Loc. 100 - 115 115B)
<input checked="" type="checkbox"/>	ADMISSION,ROUNDFOUR (ID:226, Loc. 100 - 106 106A)
<input type="checkbox"/>	ADMISSIONS,ROUNDONE (ID:92, Loc. 100 - 105 105B)
<input checked="" type="checkbox"/>	BRADLEY,BOO (ID:154, Loc. 100 - 107 107A)
<input type="checkbox"/>	DETOX,LOWERLEVELCARE (ID:295, Loc. 100 - 106 106B)
<input type="checkbox"/>	DOUGLAS,KIRK (ID:299, Loc. 100 - 114 114A)
<input type="checkbox"/>	FRANKLIN,BENJAMIN (ID:202, Loc. 100 - 107 107C)
<input type="checkbox"/>	FRONTDESK,ROUNDONE (ID:265, Loc. 100 - 108 108A)
<input checked="" type="checkbox"/>	JACOBS,SUSAN (ID:194, Loc. 100 - 103 103C)
<input type="checkbox"/>	JONES TINA (ID:221, Loc. 100 - 112 112A)

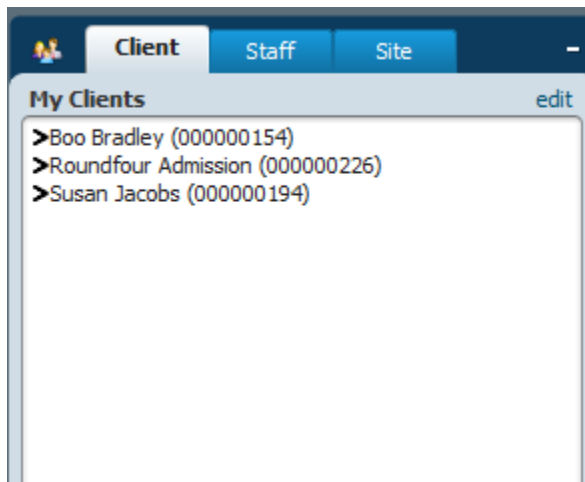
4. Once you have selected the clients for you caseload you can select the button, **Move Selected Clients To Current Caseload**. The medication nurse or the clinical aid will want to include all clients in their caseload.



5. To move all clients to your caseload select, **Move All Clients At This Unit To Current Caseload**.



6. Submit the form when you are completed. The clients you included in your caseload will now display under my clients. These clients will remain on your list when you log out.



Therapists and Providers as well as any outpatient services will use the My Clients Widget; Client or Site Tab, **the My Calendar** Widget or the **Scheduling Calendar** to manage their caseload. To view the site tab navigate to My Clients and click the **Site** Tab on the home page