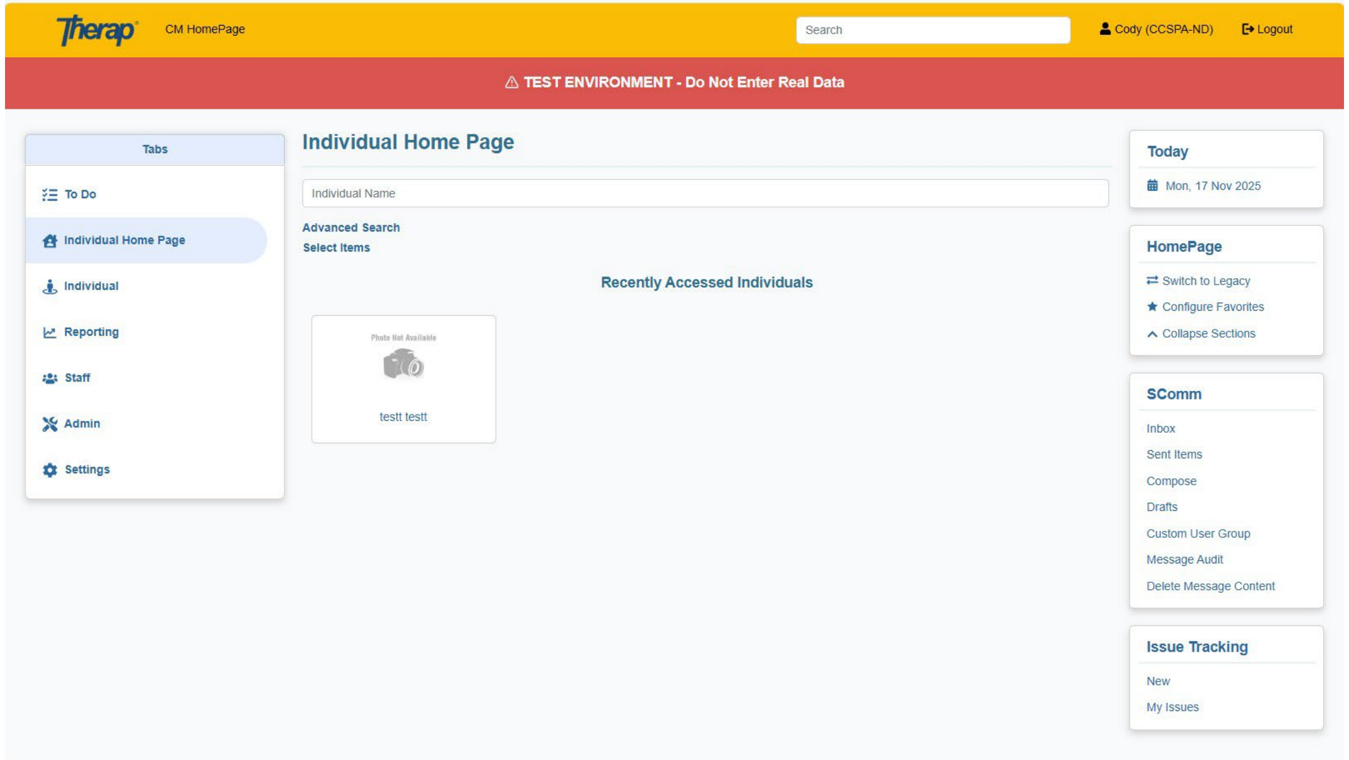
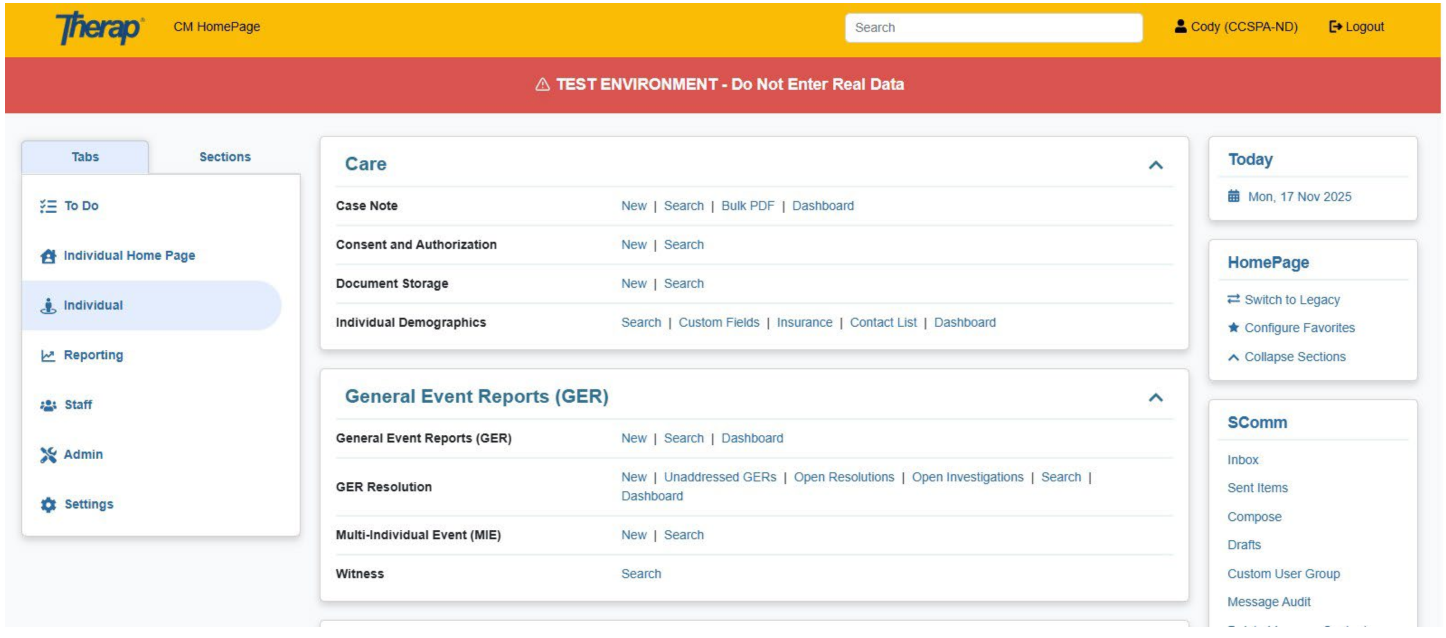
How to create case notes in Therap for 1915(i)

If you are logged in as a care coordinator, you need to make sure that you are in your Internal Profile. If you are in a service provider account, you only have access to the Internal Profile. All case notes are to be done in the Internal Profile. Do not enter case notes in the Oversight profile.

Click on Individual Home Page. This will show a search bar you can type the member's name into to get to their Individual Home Page. If you have already searched for the member, they will be listed under Recently Accessed Individuals.

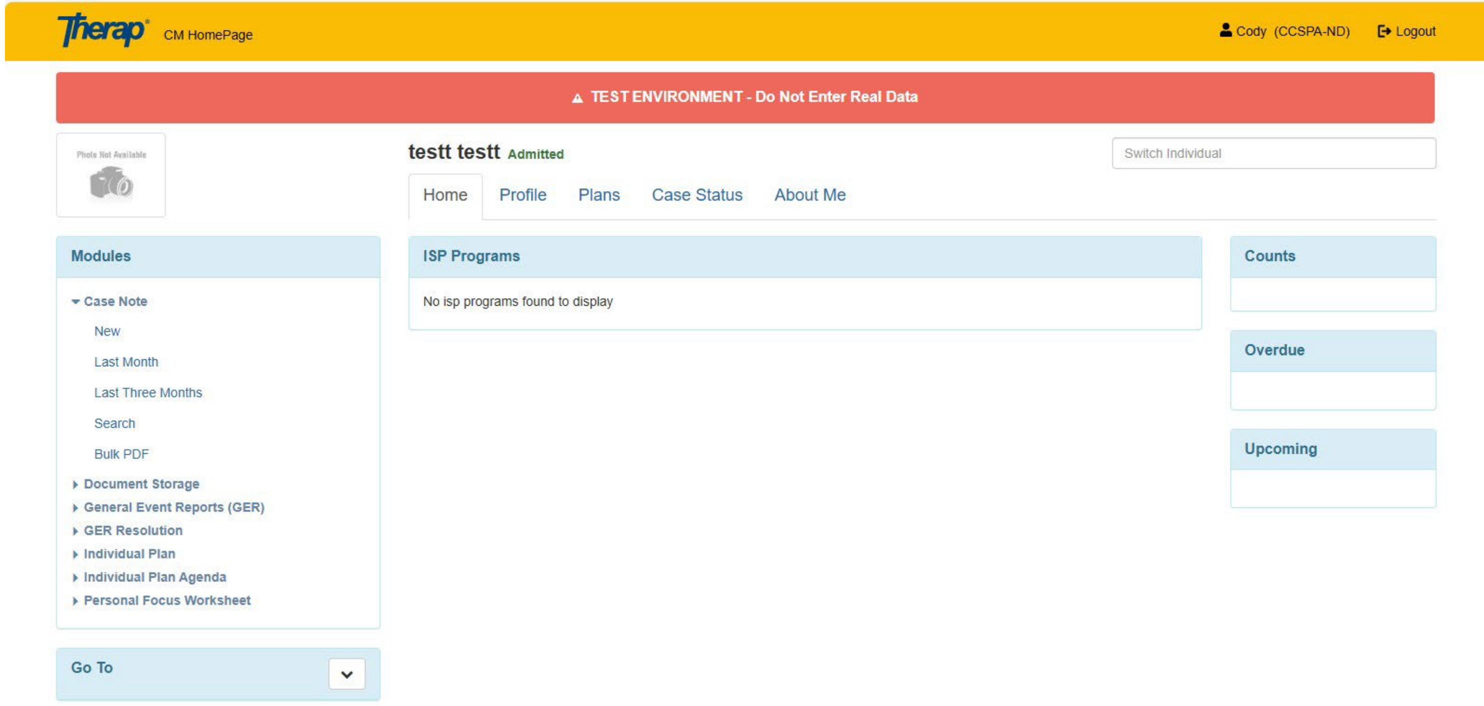


You can also access case notes by clicking on Individual and then clicking on New in the Case notes line.

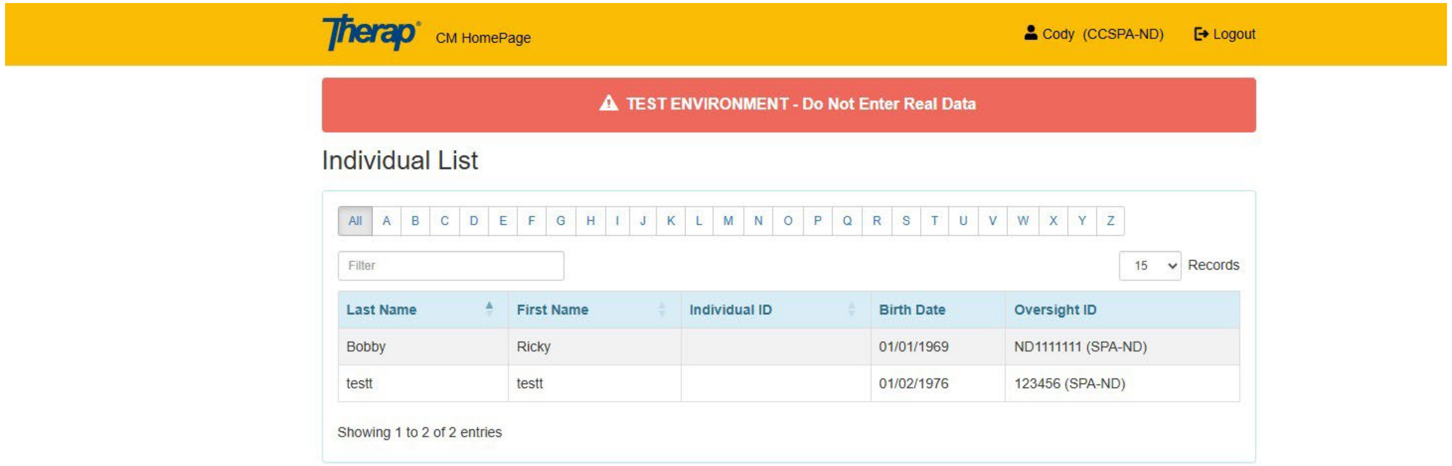


Once you are in the member's individual home page, click on Case Note on the left side. From here you can enter in new case notes by selecting New.

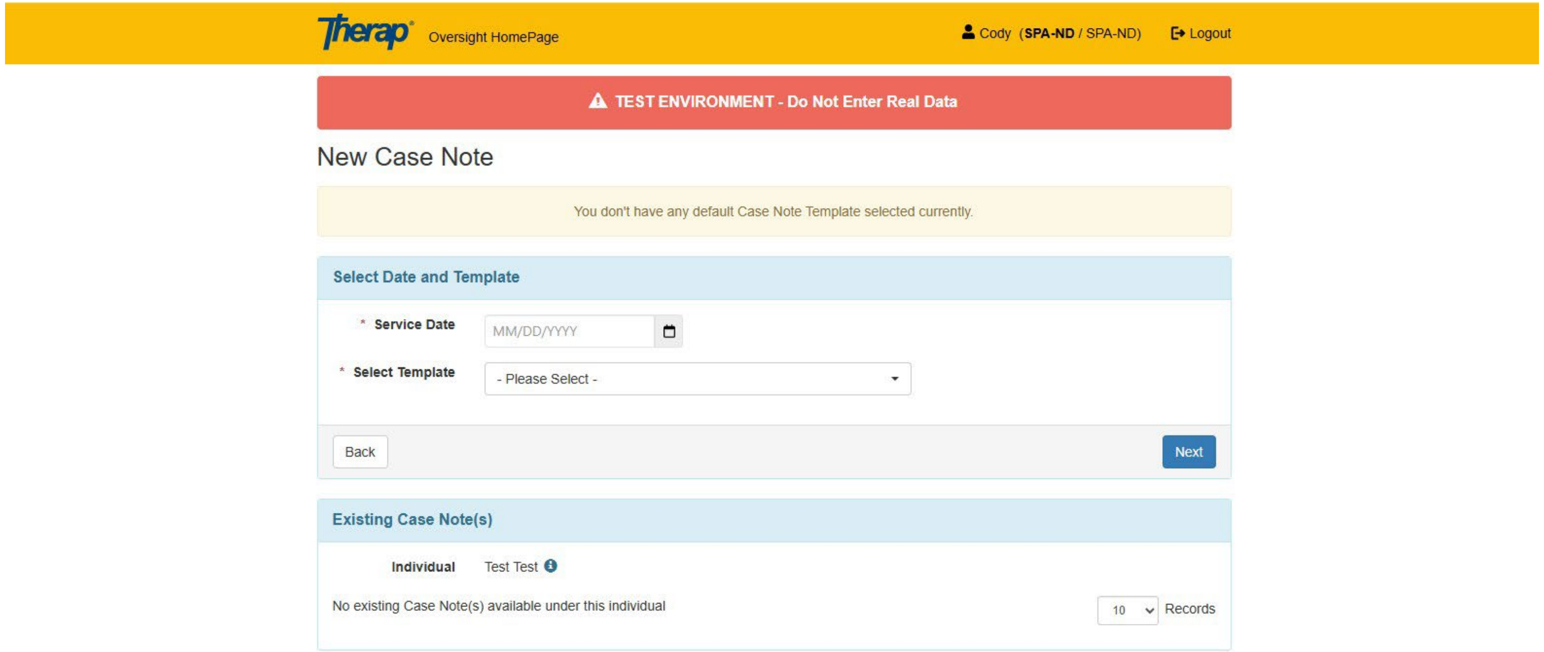
You can also search for previous case notes by clicking on Last Month, Last Three Months, or Search.



If you accessed the case notes by clicking on Individual, you would next have a list of members you can choose from to enter in case notes for. Whomever is listed here, will depend on the case load you are assigned in Therap



The Service Date is date that you rendered the services for the member. You will then select the template you need to use from the Select Template dropdown.



For services rendered before 1/1/2026 you will use the following templates:
Care Coordination 2.6.2025
Non-Medical Transportation 2.20.2025
Supportive Services 2.6.2025

For services rendered on, or after 1/1/2026 you will use the following templates:
Care Coordination 1.1.2026
Non-Medical Transportation 1.1.2026
Supportive Services 1.1.2026
Care Coordination Case Note for Initial 30 Days (you will use this case note for new members, and for the time-period from date of initial contact and the 30-day calendar mark that the plan of care needs to be submitted by to bill retroactively. See the Claims policy for retroactive billing for care coordination. You will answer all questions, except Service Code and Billable. You will then save this case note. Once the plan of care, and the pre-auth are approved, you will then go back to the saved case notes, add in the Service Code and Select Yes for billable, and then submit the case note)

Non-Billable Case Note 1.1.2026 can be used for anything that you think should be case noted in the member's record but is not billable.

For each case note, answer all required questions. Once you are finished with a case note you will Submit it. If you Save a case note, it will not be submitted, and therefore it will be unable to be used for billing, until you have Submitted it.