



State Oversight Accounts in Therap

How to get there, and what is in the Oversight Account?



Health & Human Services

TEST ENVIRONMENT - Do Not Enter Real Data

Program: No Program Selected Choose Program
Profile: Internal Switch Profile
Module:

- To Do
- Individual
- Individual Home Page
- Settings

Currently Empty

- Issue Tracking
 - New
 - My Issues
- SComm
 - Inbox
 - Sent Items
 - Compose
 - Drafts
 - Custom User Group



After you have logged into your care coordination account, click on Switch Profile

⚠ TEST ENVIRONMENT - Do Not Enter Real Data

A Profile will function according to the privileges assigned to you under that Profile. You may view the Roles and Caseload Details assigned to a Profile by clicking on the Details link. You may logout from different Profiles but you will be taken to your Default Profile every time you login to the system.

Switch Profile

Select the Profile to switch to

- External [Details](#)
- Internal [Details](#)

Cancel

Switch

First, click on the External button

Second, click Switch

⚠ TEST ENVIRONMENT - Do Not Enter Real Data

Provider: SPA Care Coordination

Program: No Program Selected

Profile: External

Module:

[Switch Provider](#)

[Go To Oversight](#)

[Choose Program](#)

[Switch Profile](#)

To Do

[Individual](#)

[Individual Home Page](#)

[Settings](#)

Modules

High Medium Low

◆ Individual Plan - New | Search

Active Change Form

1

Issue Tracking

[New](#)

[My Issues](#)

SComm

[Inbox](#)

[Sent Items](#)

[Compose](#)

[Drafts](#)

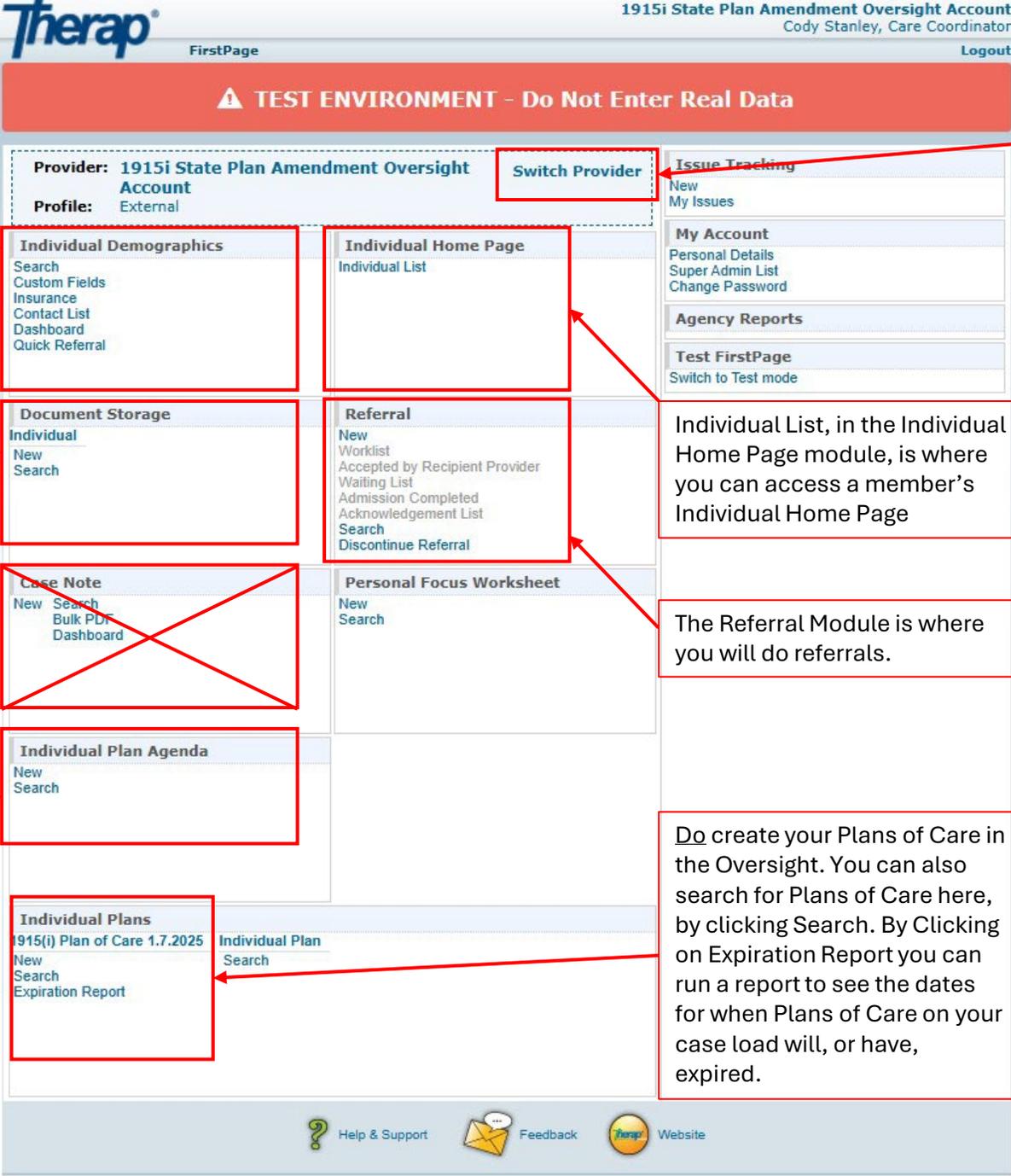
[Custom User Group](#)

Tuesday

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July 2025

You are now in the External profile. Now you need to click on Go to Oversight. The Go to Oversight button will appear in the External profile, only after you have a member assigned to your care coordination agency. If you are new, and do not have anyone assigned to your care coordination agency, then this button will not be here until you do.



Individual Demographics, is where you look up the member's Individual Demographic Form (IDF). You can also access the IDF from the member's Individual Home page. In the member's Individual Home page, the IDF is under Go To.

Document Storage is where you store a member's documents in the Oversight profile. The WHODAS, and 1915i admission paperwork can be found here. Document Storage can also be accessed under the Module tab in the member's Individual Home Page.

Do not do your case notes in the Oversight. Do them in your Internal profile.

Another way to access your Individual Plan Agendas, is to access them through here. You can also access them via the Modules tab in the member's Individual Home Page.

Individual Demographics
Search
Custom Fields
Insurance
Contact List
Dashboard
Quick Referral

Individual Home Page
Individual List

Document Storage
Individual
New
Search

Referral
New
Worklist
Accepted by Recipient Provider
Waiting List
Admission Completed
Acknowledgement List
Search
Discontinue Referral

Case Note
New Search
Bulk PDF
Dashboard

Personal Focus Worksheet
New
Search

Individual Plan Agenda
New
Search

Individual Plans
1915(i) Plan of Care 1.7.2025
New Search
Expiration Report

Switch Provider

Issue Tracking
New
My Issues

My Account
Personal Details
Super Admin List
Change Password

Agency Reports

Test FirstPage
Switch to Test mode

Individual List, in the Individual Home Page module, is where you can access a member's Individual Home Page

The Referral Module is where you will do referrals.

Do create your Plans of Care in the Oversight. You can also search for Plans of Care here, by clicking Search. By Clicking on Expiration Report you can run a report to see the dates for when Plans of Care on your case load will, or have, expired.

Click on Switch Provider, and then select your care coordination account. Once you do that, it will take you to your External profile, where you will click on Switch Profile. Then select Internal, and then click Switch. This will take you back to your Internal profile.

Also, by clicking on Switch Provider, you can switch to the supportive service accounts to review the case notes of the services a member is receiving. When you click on Switch Provider it will list all the other provider accounts that your Oversight account has been linked to through the different referrals you have sent out and have been accepted. You will need to know which specific provider the member is working with. You will select that provider's account. This will take you into a limited view of their Internal profile. You can then do a case note search to look up the case notes for a specific member that is working with them.