



### How To View/Add Who's On The Client's Treatment Team

**NOTE: You must have the client open before moving forward with these instructions.**

1. Make sure you have the client open.

The screenshot shows the SmartCare software interface. At the top, there is a navigation bar with the SmartCare logo, search, and user profile (Monica Niesen). A browser tab is open for 'Test Client 1, Sunstreet (1090)'. The main interface is titled 'Client Summary' and contains the following information:

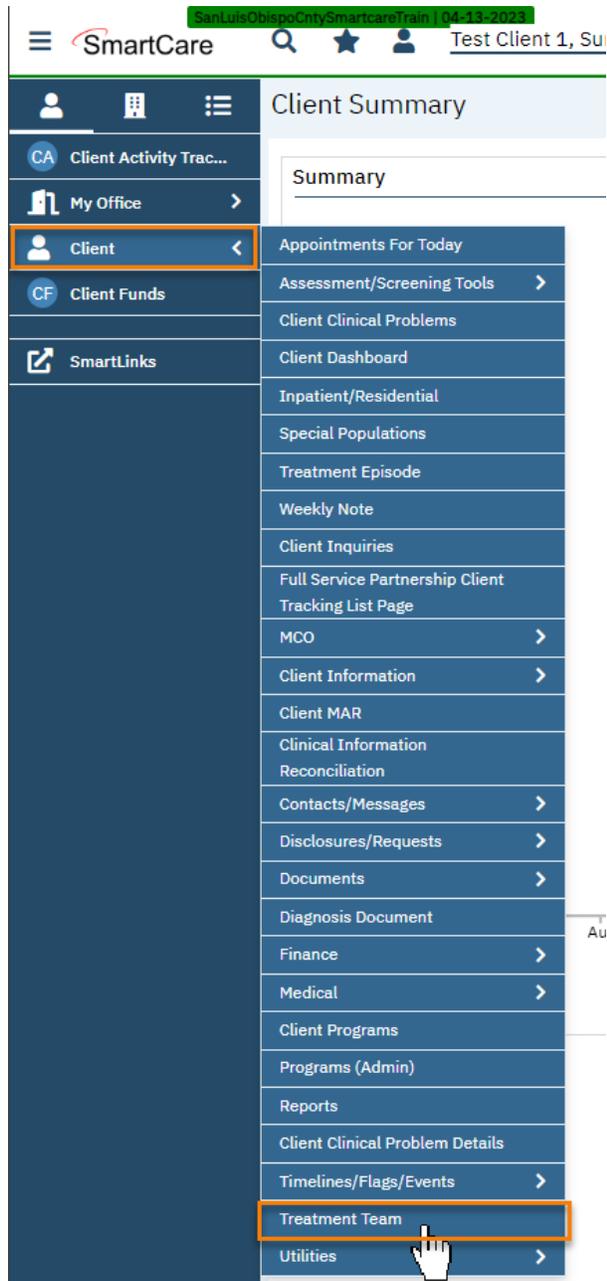
Client ID: <a href="#">1090</a>	Status:	DOB: <a href="#">06/03/1997</a>	Age: <a href="#">26 Years</a>	Sex: <a href="#">Male</a>	Race:	SSN: <a href="#">9999</a>
Name: <a href="#">Test Client 1, Sunstreet</a>	Pronoun:					
Alias(es):	Registered On:	Last Seen On:	Next Scheduled:	Address: <a href="#">123 Test Street San Luis Obispo, CA 93401</a>		
Primary Clinician:	Primary Program: <a href="#">Sunstreet - Test 1</a>	Phone:	Note:			
Primary Physician:	Emergency Contact:	Presenting Problem:				
Guardian:	Healthcare Decision Maker:	External Collections: No				
Internal Collections: No						

Below the summary is a 'Timeline Summary' section with a chart showing 'Services', 'Med Changes', and 'Hospitalization' from July to June. The Y-axis ranges from 0 to 100. A legend indicates 'Admit' with a red triangle and 'Discharge' with a green triangle. The chart shows a peak in Services at 100 in July, followed by a decline and then a sharp increase in Hospitalization starting in January.



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2. On the left hand navigation, click on Client and scroll down and select Treatment Team





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3. This takes you to the **Treatment Team list page**.

Treatment Team (1)

All Roles | Active | As of 06/08/2023 | Apply Filter

Treatment Team Member	Role	Phone	Start Date	End Date	Status
<a href="#">Soares, Melissa K</a>	Program Assignment Staff: Su...	0 -	06/05/2023		Active



### How To View/Add Who's On The Client's Treatment Team

4. To add a treatment team member, click the New icon.

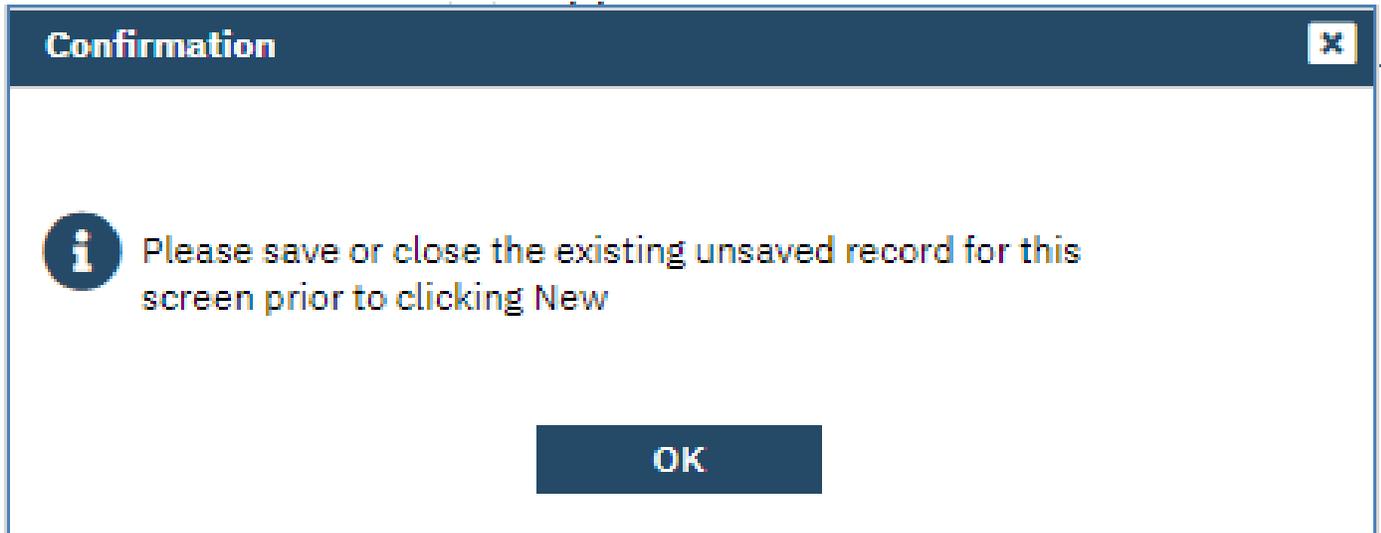
Treatment Team (1)

All Roles | Active | As of 06/08/2023 | Apply Filter

Treatment Team Member	Role	Phone	Start Date	End Date	Status
<a href="#">Soares, Melissa K</a>	Program Assignment Staff: Su...	0 -	06/05/2023		Active



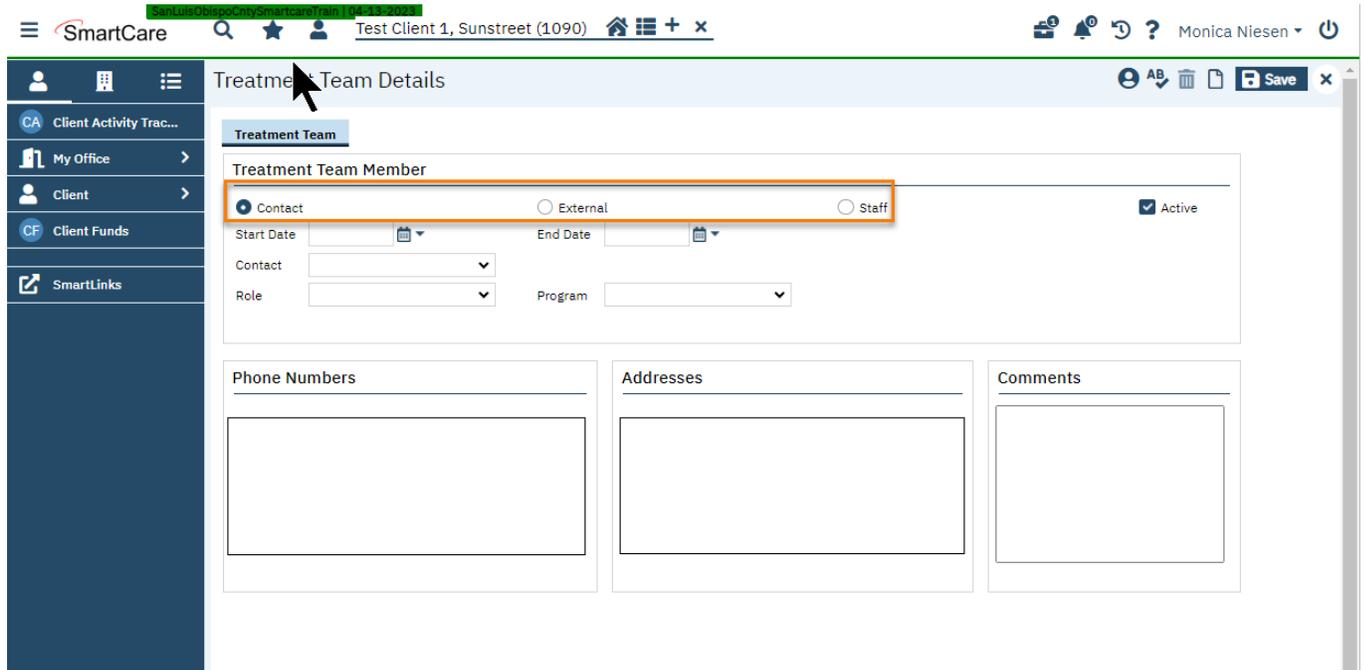
5. A pop-up will appear. Click OK.





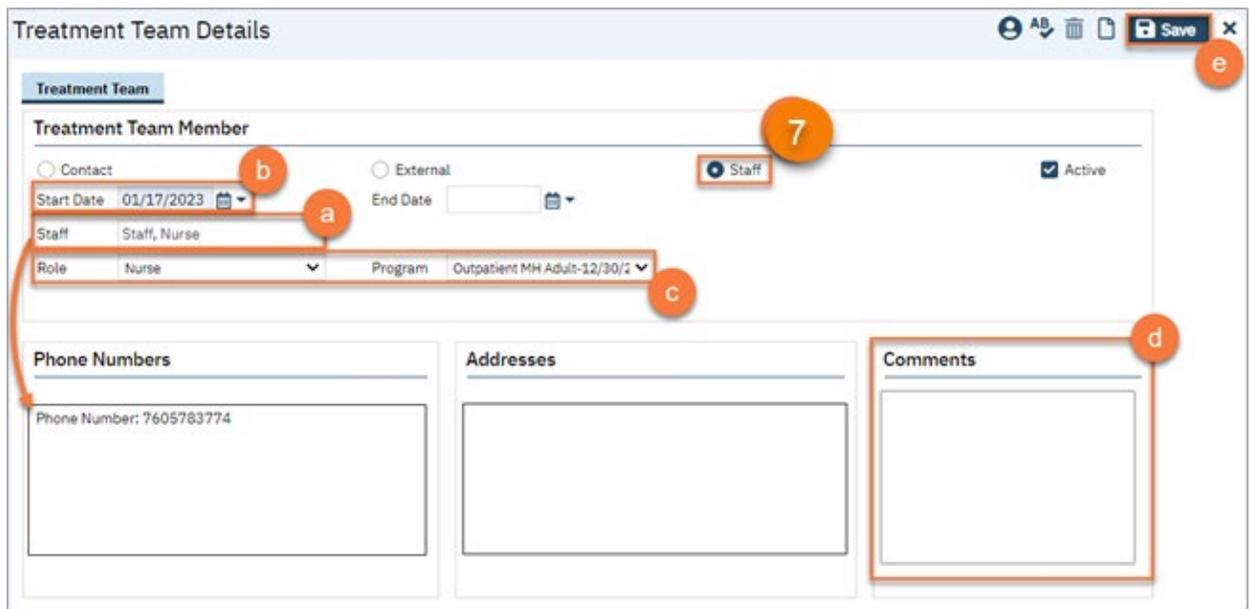
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- This takes you to the Treatment Team Details screen. Select what type of contact person this is: Contact, External, or Staff.



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7. If the person you're adding is a **SmartCare user**, select **Staff**.
  - a. Enter the staff's name and select them from the search results. This will pull forward any information, such as phone number or address, that's tied to the staff in their staff set-up.
  - b. Enter the start date, which is when this person became a member of the treatment team.
  - c. Enter their role as well as what program they work in.
  - d. Add any comments.
  - e. Click Save.



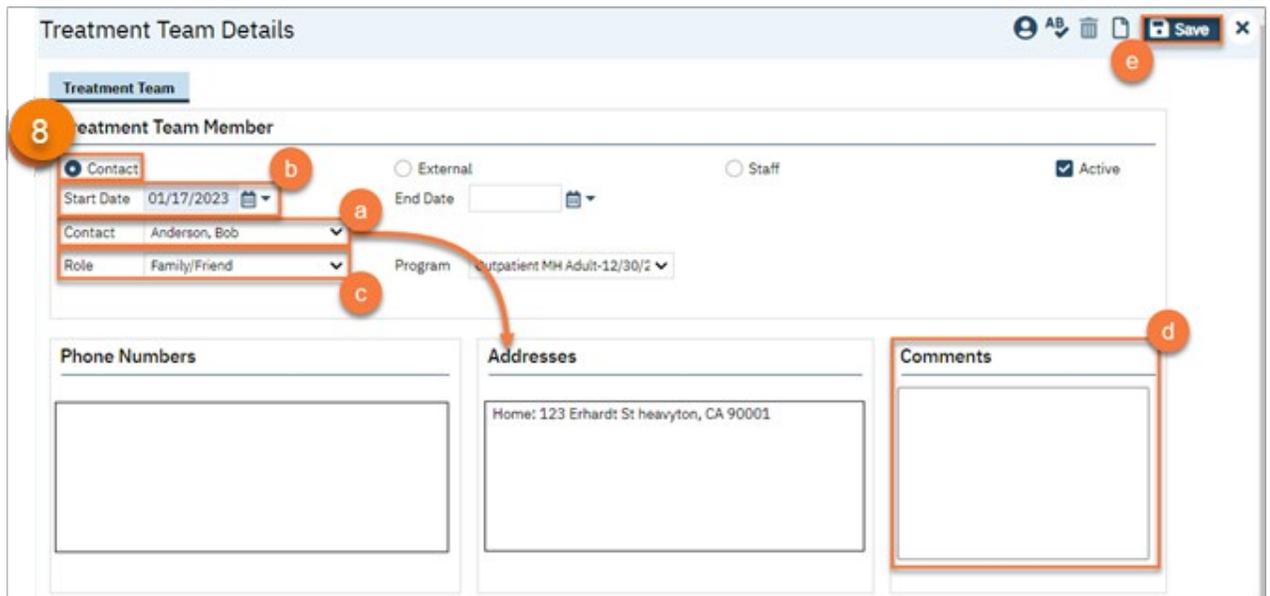
The screenshot shows the 'Treatment Team Details' form. The 'Treatment Team Member' section is highlighted with a large orange circle containing the number '7'. Within this section, several fields are annotated with letters a through e:

- a:** Points to the 'Staff' dropdown menu.
- b:** Points to the 'Start Date' field, which is set to 01/17/2023.
- c:** Points to the 'Role' dropdown menu, which is set to 'Nurse', and the 'Program' dropdown menu, which is set to 'Outpatient MH Adult-12/30/2'.
- d:** Points to the 'Comments' text area.
- e:** Points to the 'Save' button in the top right corner.

Other visible fields include 'Contact' (selected), 'External', 'End Date', and 'Active' (checked). The 'Phone Numbers' section shows a single entry: 'Phone Number: 7605783774'. The 'Addresses' and 'Comments' sections are currently empty.

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8. If the person you're adding is a **contact person** that's already in the Client Information screen, select Contact.
  - a. Select the contact person from the dropdown list. This will pull forward any information, such as phone number or address that has been entered for them in the Client Information screen.
  - b. Enter the start date, which is when this person became a member of the treatment team.
  - c. Enter their role.
  - d. Add any comments.
  - e. Click Save.



The screenshot shows the 'Treatment Team Details' form. The 'Treatment Team Member' section is highlighted with a large orange circle containing the number '8'. Within this section, several fields are annotated with orange circles and letters: 'a' points to the 'Contact' dropdown menu, 'b' points to the 'Start Date' field, 'c' points to the 'Role' dropdown menu, and 'd' points to the 'Comments' text area. A 'Save' button is annotated with 'e'. The form also includes radio buttons for 'External' and 'Staff', and a checked 'Active' checkbox. Below the main form are three sections: 'Phone Numbers', 'Addresses' (containing 'Home: 123 Erhardt St heavyton, CA 90001'), and 'Comments'.



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9. If the person you're adding is an **external resource**, that has not yet been added to the Client Information screen, select External.
  - a. Enter the information, including name, role, start date, organization, and contact information.
  - b. Click Save.

Treatment Team Details

Treatment Team

Treatment Team Member

Contact  External  Staff  Active

Start Date: 01/17/2023 End Date: [ ]

First Name: [ ] Last Name: [ ] Suffix: [ ]

Role: [ ] Program: Outpatient MH Adult-12/30/2

Email: [ ]

Organization: [ ]

Phone Numbers

Business: [ ] [ ]

Business 2: [ ] [ ]

Fax: [ ] [ ]

Home: [ ] [ ]

Addresses

Home: [ ] [ ]

Mailing: [ ]

Comments

Details...

Save



## How To View/Add Who's On The Client's Treatment Team

10. To edit or remove a treatment team member, click on their name from the Treatment Team list page. This takes you to the Treatment Team Details page.

The screenshot shows a web interface titled "Treatment Team (2)". At the top right, there are icons for user profile, star, download, print, help, and close. Below the title is a filter section with dropdowns for "All Roles" and "Active", and a date field "As of 01/21/2023" with a calendar icon. An "Apply Filter" button is on the right. The main content is a table with the following data:

Treatment Team Name	Role	Phone	Start Date	End Date	Status
<u>Staff, Psychiatrist</u>		(888) 123-4567,...	12/31/2022		Active
<u>Clinician, Robert</u>	Program Assignment Staff: O...	(760) 578-3774	12/30/2022		Active



### How To View/Add Who's On The Client's Treatment Team

- a. To remove a treatment team member, make sure to add an end date and de-select the "Active" checkbox.
- b. Once you've finished making your changes, click Save.

The screenshot shows the 'Treatment Team Details' form. At the top right, there is a 'Save' button with a close icon. Below the title bar, there is a 'Treatment Team Member' section. It includes radio buttons for 'Contact', 'External', and 'Staff' (which is selected). There is an 'End Date' field with a calendar icon, highlighted by an orange box and an arrow labeled 'a'. To the right of the 'End Date' field is an 'Active' checkbox, which is checked, also highlighted by an orange box and an arrow labeled 'a'. Below this section are three panels: 'Phone Numbers' (containing two numbers: 8881234567 and (760) 578-3774), 'Addresses' (containing 1610 Arden Way Suite 175), and 'Comments' (which is empty).