SmartCare Treatment Team Clean Up

1. In SmartCare search for Caseload (my office) enter the staff you are running for and apply filters. Caseload (417)

All Clients		~	Seen in X days	~	Last Name Begi	na with Any L	etter 🗸	All Programs		~	Apply Filter
All Episode Statu	ses	۲	All Note/Icon Types	~	Staff Anderso	n, Jill	👌 Organiz	ational Hierarchy			4
lient	∆ Ph	one	Axis	Last DOS	Last Seen by	Primary	Episode	Staff	Roles	Notes/Ico	ons

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areQA | 06/08/2023

- 2. In Anasazi pull up the client assignments screen to show closed assignments.
- 3. In SmartCare, with Client Selected in Client Programs, show Enrolled programs and Apply Filters:

🗙 ★ 💄 Gener	ic-1, Non-Slo	(490001) + ×							
Client Programs (9)									
All Programs		✓ Enrolled	~	Other		➤ Apply Filter			
Program Name	Status	Enrolled	narged Assigned Staff	Primary I	ast DOS	Next DOS			
TMHA Generic Client O	Enrolled	02/01/2023	Derose, Tonya	No					
STRTP Mntn Valley Tre	Enrolled	02/04/2021	Nelson, Courtney	No					
B&C Generic Clients O	Enrolled	07/01/2012	Uribe, Arturo M	Yes					
IMD Generic Clients On	Enrolled	07/01/2012	Uribe, Arturo M	No					
SLO Generic Clients On	Enrolled	07/01/2012	Ford, Patricia	No					
NCA Generic Clients O	Enrolled	07/01/2012	Ford, Patricia	No					
NCA Generic Clients O	Enrolled	07/01/2012	Ford, Patricia	No					
SCA Generic Clients On	Enrolled	07/01/2012	Ford, Patricia	No					
SCA Generic Clients On	Enrolled	07/01/2012	Ford, Patricia	No					

- 4. Write down or take a screen shot of open programs/staff assigned.
- 5. Search for Treatment Team in Search Window, select Treatment Team Client. This will bring up the Treatment Team List Page for the selected client. Be sure "Active" is selected.
- 6. Click on the Header field "Treatment Team Member" to Sort by staff. eatment Team (522)

All Roles	✓ As of 06/29/2023	Apply Filter			
Treatment Team Member		Phone	Start Date	End Date	Statu
<u> Jribe, Arturo Medrano</u>	Program Assignment Staff: B&C Generic Clients Only (() -, (408) 465-8280	07/01/2012		Activ
<u> Jribe, Arturo Medrano</u>	Program Assignment Staff: IMD Generic Clients Only (4	() -, (408) 465-8280	07/01/2012		Activ
<u> Jribe, Arturo Medrano</u>	Primary Clinician*	() -, (408) 465-8280	06/29/2023		Activ
Jeberrhein, Cassandra Irene			12/03/2021		Activ
Jeberrhein, Cassandra Irene			12/03/2021		Activ
Jeberrhein, Cassandra Irene			12/03/2021		Active
Jeberrhein, Cassandra Irene			12/03/2021		Active
Jeberrhein, Cassandra Irene			12/03/2021		Activ
Jeberrhein, Cassandra Irene			12/03/2021		Activ
Jeherrhein, Cassandra Irene			12/03/2021		Activ

7. Select the first staff that is marked as "active" status but not on your open programs list. This will bring you to the Treatment Team Details Screen.

reatment Team					
reatment Team	Member				
Contact		 External 		Staff	🗸 Act
Start Date 12/03/2	021 🛗 🕶	End Date			
taff Ueberrh	ein, Cassandra Irene				
Role	~	Program	~	•	
lole	~	Program	~	•	

8. Find the corresponding assignment in Anasazi and the closing date. Enter the closing date as the end date and uncheck Active.

Treatment Team Member								
Contact	t	◯ External	 Staff 	Active				
Start Date	12/03/2021 🛗 🕶	End Date 12/03/2021 🛗 🕶						
Staff	Ueberrhein, Cassandra Irene							
Role	~	Program	~					

- 9. Select Save (upper right corner), then close screen (x). The Treatment Team screen will now show that Team Member removed.
- 10. Repeat as needed.