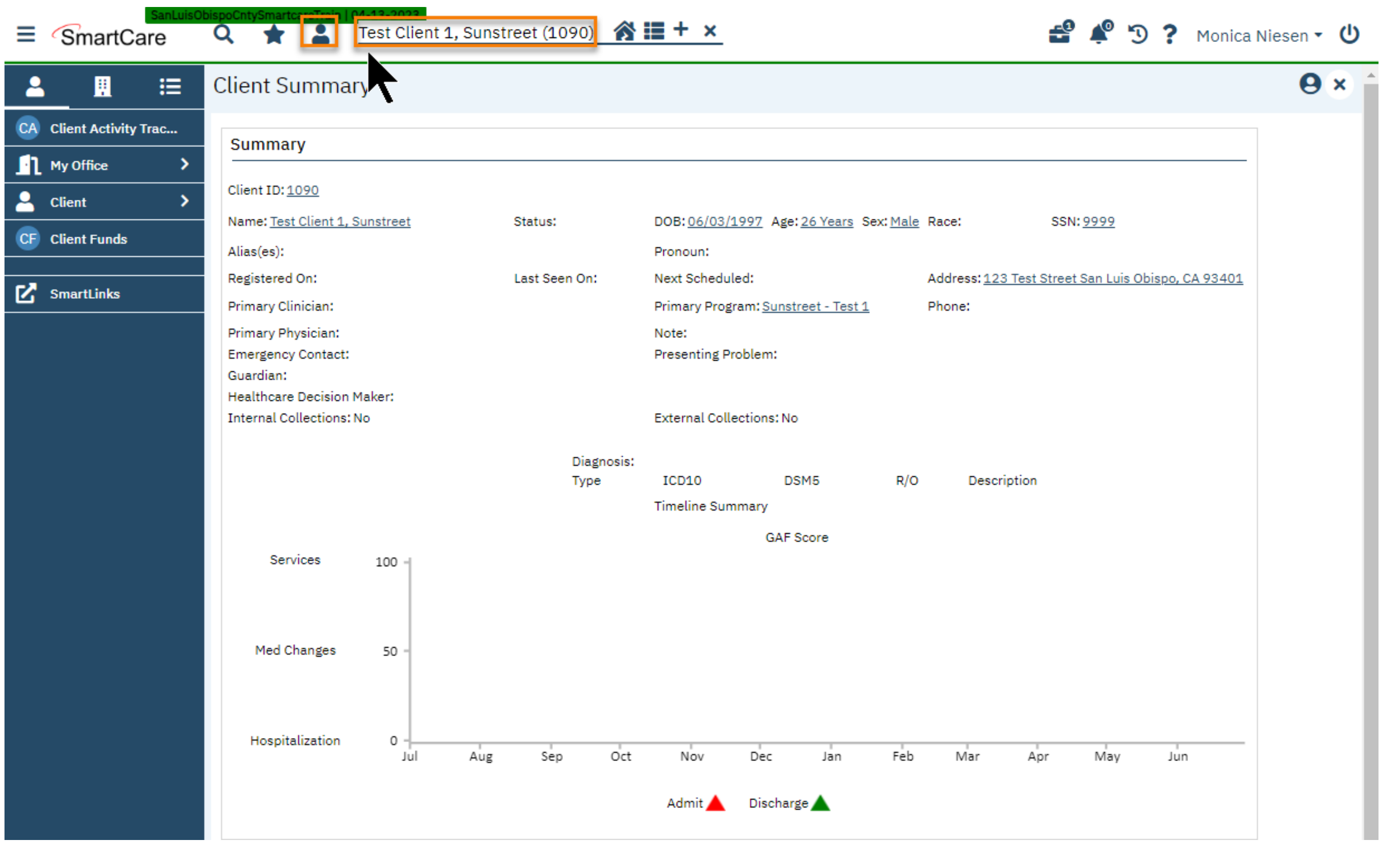
CLINICAL

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

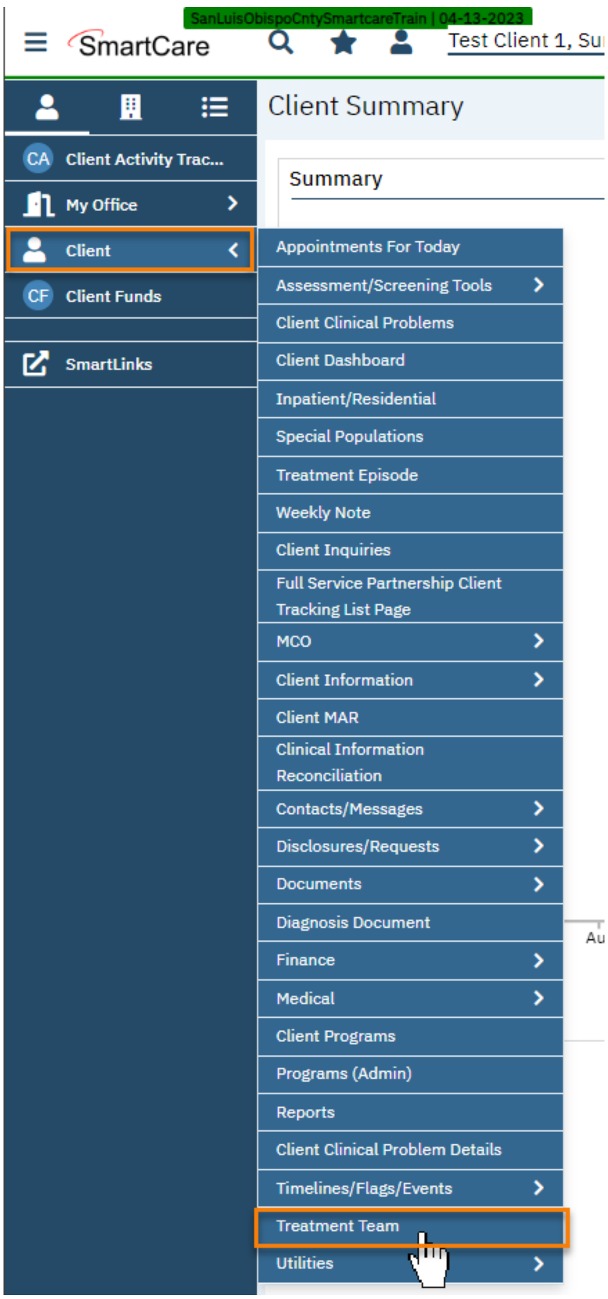
HEALTH AGENCY

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

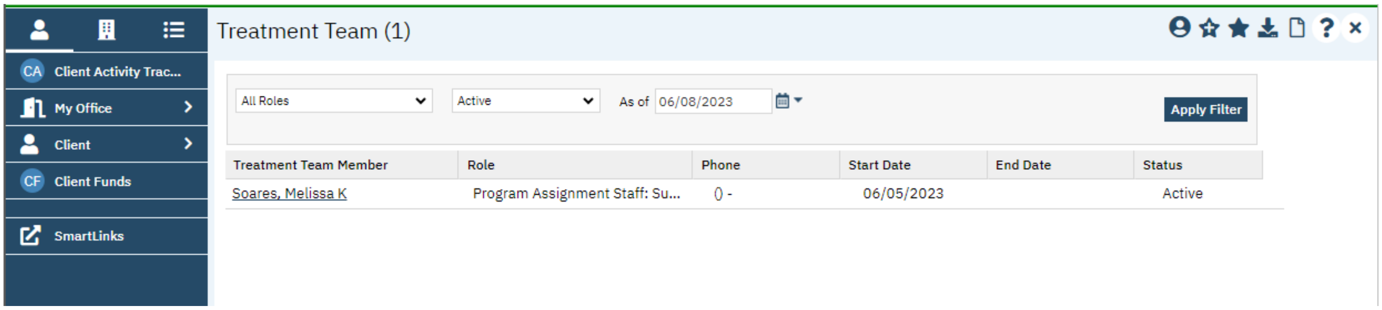
1. Make sure you have the client open.



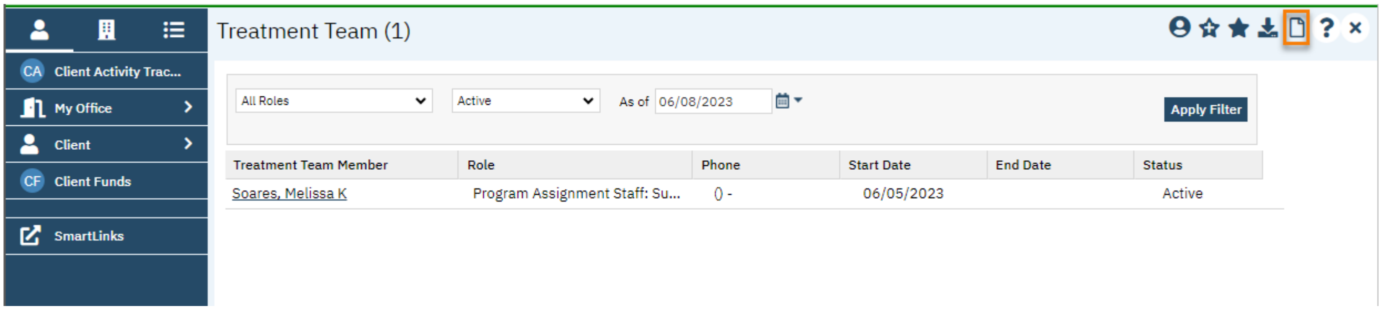
2. On the left hand navigation, click on Client and scroll down and select Treatment Team



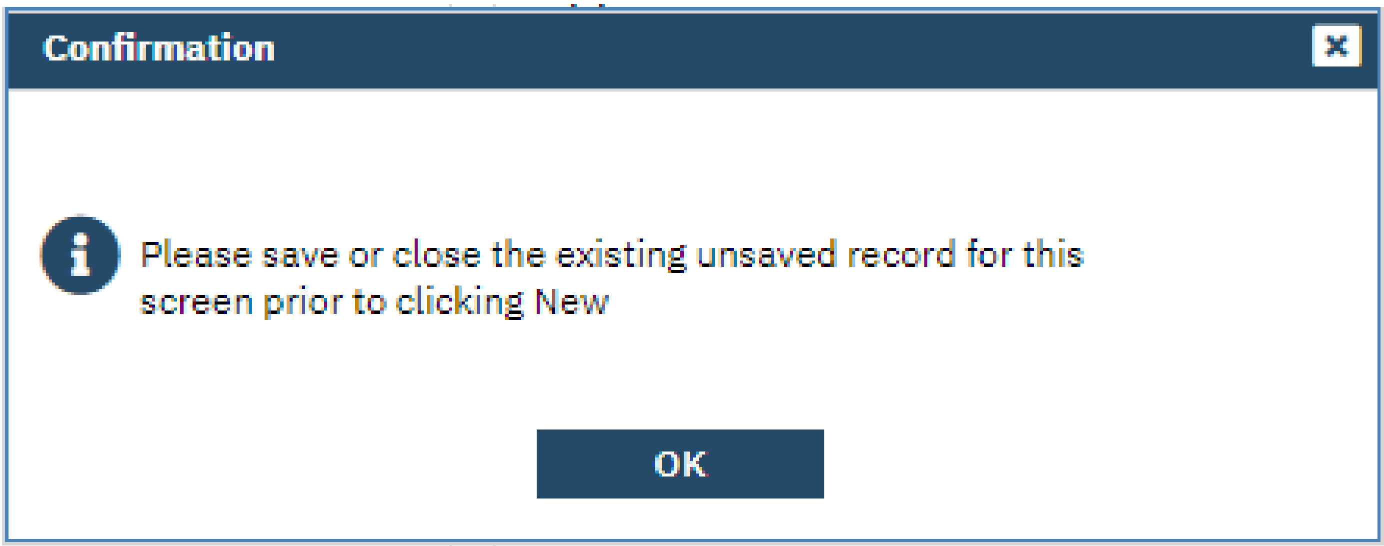
3. This takes you to the **Treatment Team list page**.



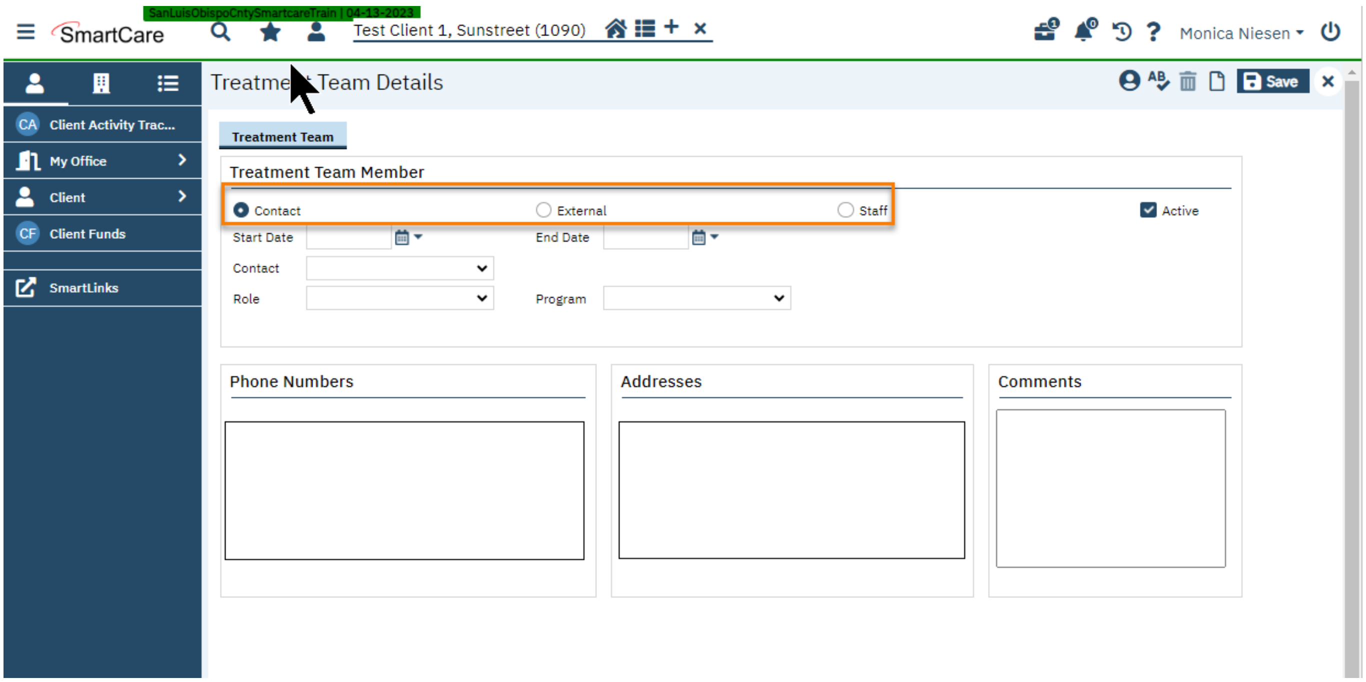
4. To add a treatment team member, click the New icon.



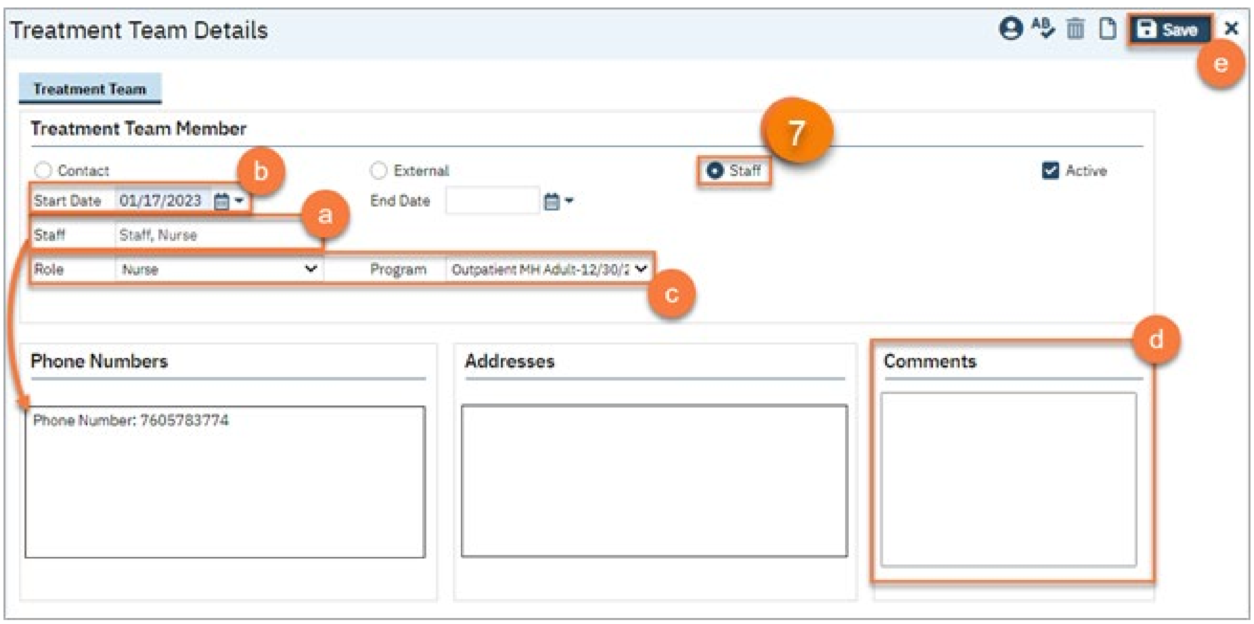
5. A pop-up will appear. Click OK.



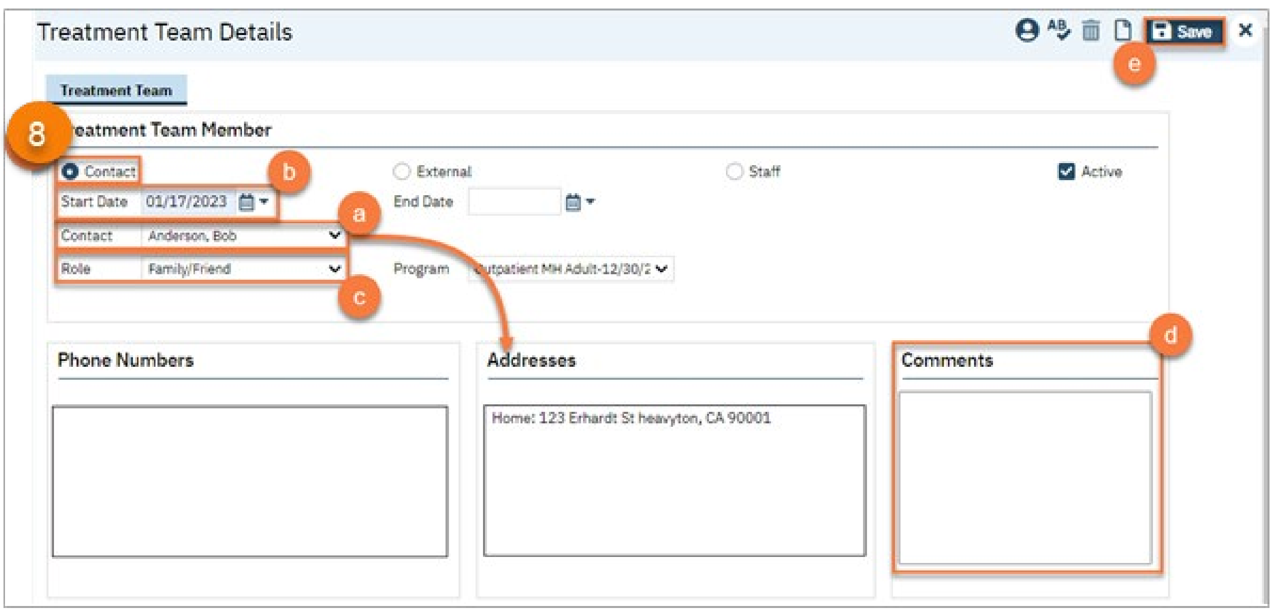
6. This takes you to the Treatment Team Details screen. Select what type of contact person this is: Contact, External, or Staff.



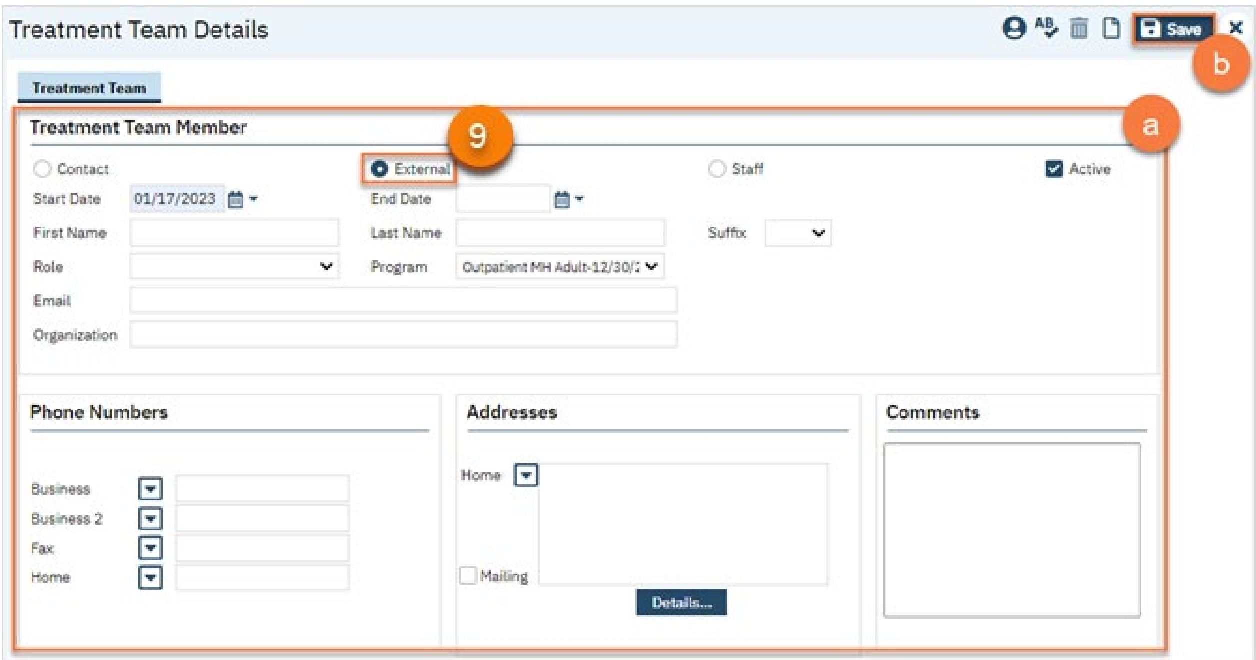
7. If the person you're adding is a **SmartCare user**, select **Staff**.
    a. Enter the staff's name and select them from the search results. This will pull forward any information, such as phone number or address, that's tied to the staff in their staff set-up.
    b. Enter the start date, which 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.



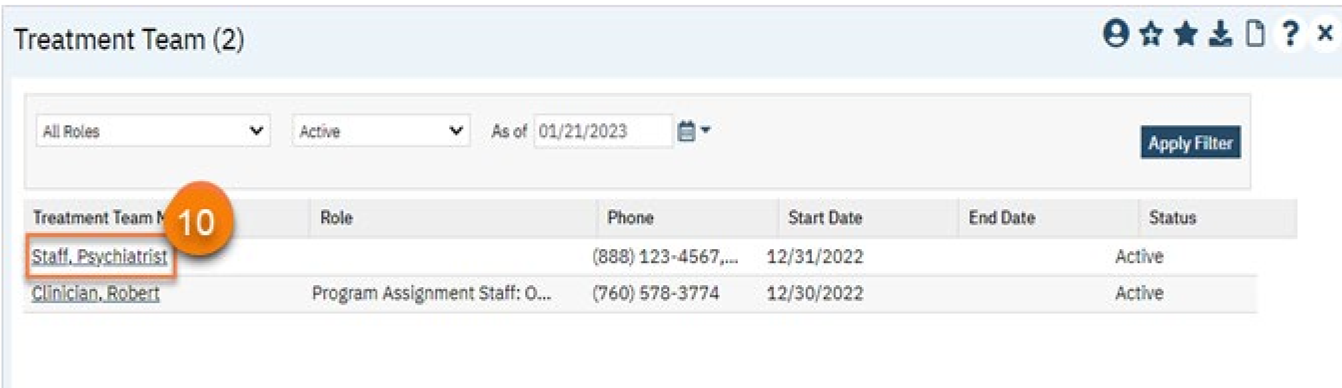
8. If the person you're adding is a **contact person** that's already in the Client Information screen, select Contact.
    a. Select the contact person from the dropdown list. This will pull forward any information, such as phone number or address that has been entered for them in the Client Information 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.



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.



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.



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.