SMART Tip Sheets
Treatment Team

Treatment Team

Adding a Team Member

Removing a Team Member

This Tip Sheet explains how to add and remove staff members to/from a client's treatment team.

Total Pages: 3

IGSR Technical Support: 301.405.4870

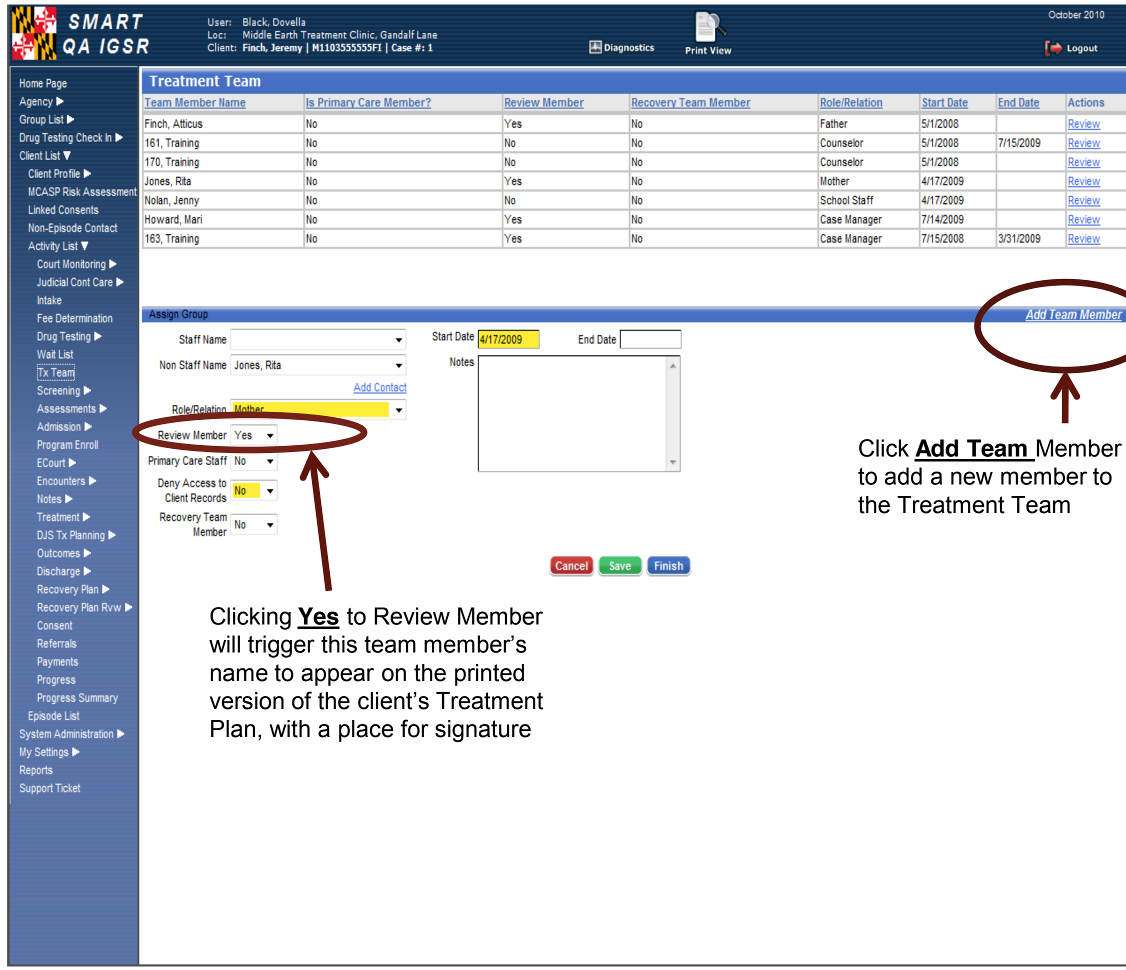
Updated: February 2012

Treatment Team

Developing Treatment Team for the SMART Treatment Plan and Treatment Review

ADDING A TEAM MEMBER

1. **Entry Steps**: Login, Select Facility, Client List, select client, Activity List, go to Menu Tree and select Treatment Team.
2. When you enter the screen the bottom section is grayed out. Click **Add Team Member**. This will activate the bottom section of the screen. *Note:* You can only enter one treatment member at a time.
3. Select a team member from either the **Staff Name** or **Non Staff Name** drop-down field.
4. Click **Role/Relation** to select the team member's relationship to this client.
5. In the **Review Member** field, select yes or no. ***Note:*** Staff set up as "Review Members" will have their names appear on the hard copy of the Treatment Plan, along with a place for their signature.
6. In the **Primary Care Staff** field, there can only be one primary care staff. For the rest of the team, this field should remain "No".
7. The **Deny Access to Client Records** field is used to block a staff member from having access to this client's record. If yes is entered in the field, the staff member will not be able to search or find the client record. Therefore, this field should only be used with permission.
8. Click **Save**.



Treatment Team

Developing Treatment Team for the SMART Treatment Plan and Treatment Review Cont.

Removing a Team Member

1. Go to the **Treatment Team**.

2. Find the staff name to be removed from the treatment team and click the ***Review*** hyperlink next to their name. This will activate the fields at the bottom of the screen.

3. Go to the **Review Member** field and change the “Yes” to “No”.

4. Enter a date in the **End Date** field.

5. Click **Save**.

6. The Treatment Team table located next to the staff members name will now indicate “No” in the **Review Member** column, as well as an End Date. ***Note***: The team member’s name will now be removed from the Treatment Plan.

7. When you are finished click **Finish.** This will take you back to the client’s **Activity List**.

Additional Note*:* The drop-down list for **Non-Staff Name** comes from the contact list located in the **Client Profile** screen. To add a contact to that list, click ***Add Contact***.