

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**.

The screenshot displays the SMART QA IGRS interface. At the top, it shows the user's name (Black, Dovella), location (Middle Earth Treatment Clinic, Gandalf Lane), and client information (Finch, Jeremy | M110355553F1 | Case #: 1). The date is October 2010. The main content area is titled "Treatment Team" and contains a table with columns: Team Member Name, Is Primary Care Member?, Review Member, Recovery Team Member, Role/Relation, Start Date, End Date, and Actions. Below the table is the "Assign Group" form, which includes fields for Staff Name, Non Staff Name, Role/Relation, Review Member, Primary Care Staff, Deny Access to Client Records, and Recovery Team Member. The "Review Member" field is set to "Yes" and is circled in red. The "Add Team Member" button in the top right corner of the form is also circled in red. A red arrow points from the "Review Member" field to the "Add Team Member" button. Below the screenshot, text reads: "Clicking **Yes** to Review Member will trigger this team member's name to appear on the printed version of the client's Treatment Plan, with a place for signature".

Team Member Name	Is Primary Care Member?	Review Member	Recovery Team Member	Role/Relation	Start Date	End Date	Actions
Finch, Atticus	No	Yes	No	Father	5/1/2008		Review
161, Training	No	No	No	Counselor	5/1/2008	7/15/2009	Review
170, Training	No	No	No	Counselor	5/1/2008		Review
Jones, Rita	No	Yes	No	Mother	4/17/2009		Review
Nolan, Jenny	No	No	No	School Staff	4/17/2009		Review
Howard, Mari	No	Yes	No	Case Manager	7/14/2009		Review
163, Training	No	Yes	No	Case Manager	7/15/2008	3/31/2009	Review

Assign Group

Staff Name: [Dropdown] Start Date: 4/17/2009 End Date: [Dropdown]

Non Staff Name: Jones, Rita Notes: [Text Area]

Role/Relation: Mother

Review Member: Yes

Primary Care Staff: No

Deny Access to Client Records: No

Recovery Team Member: No

Buttons: Cancel Save Finish

Add Team Member

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**.

SMART QA IGSR

User: Black, Dorella
Loc: Middle Earth Treatment Clinic, Grandf Lane
Client: Finch, Jeremy | M1103555555F1 | Case #: 1

Diagnosics Print View Logout

October 2010

Team Member Name	Is Primary Care Member?	Review Member	Recovery Team Member	Role/Relation	Start Date	End Date	Actions
Finch, Atticus	No	Yes	No	Father	5/1/2008		Review
161, Training	No	No	No	Counselor	5/1/2008	7/15/2009	Review
170, Training	No	No	No	Counselor	5/1/2008		Review
Jones, Rita	No	Yes	No	Mother	4/17/2009		Review
Nolan, Jenny	No	No	No	School Staff	4/17/2009		Review
Howard, Mari	No	Yes	No	Case Manager	7/14/2009		Review
163, Training	No	Yes	No	Case Manager	7/15/2008	3/31/2009	Review

Assign Group Add Team Member

Staff Name [Dropdown] Start Date 10/17/2009 End Date 11/15/2010

Non Staff Name Jones, Rita Notes

Role/Relation Mother

Review Member Yes

Primary Care Staff No

Deny Access to Client Records No

Recovery Team Member No

Cancel Save Finish

To expire a Team Member, enter an End Date.

When finished, click **Save**.