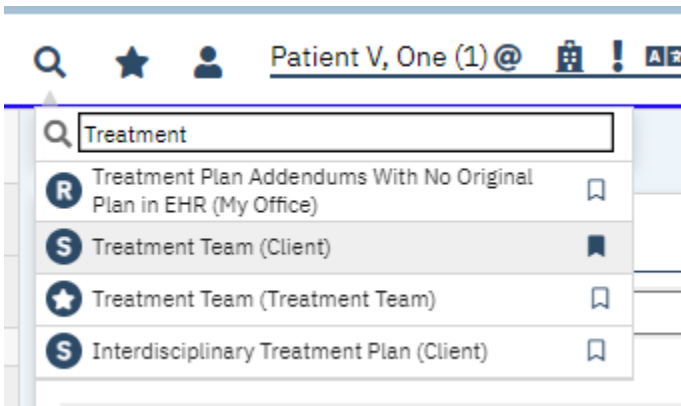


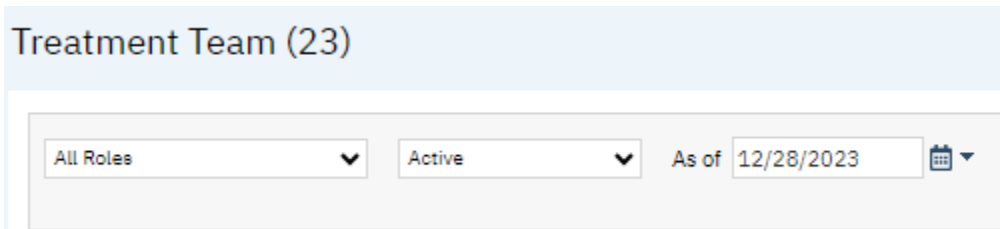
Assigning a Client to a Treatment Team Member

Option 1:

1. With the client profile open navigate to the search bar and type in “treatment”. Select the “Treatment Team (Client)” option.




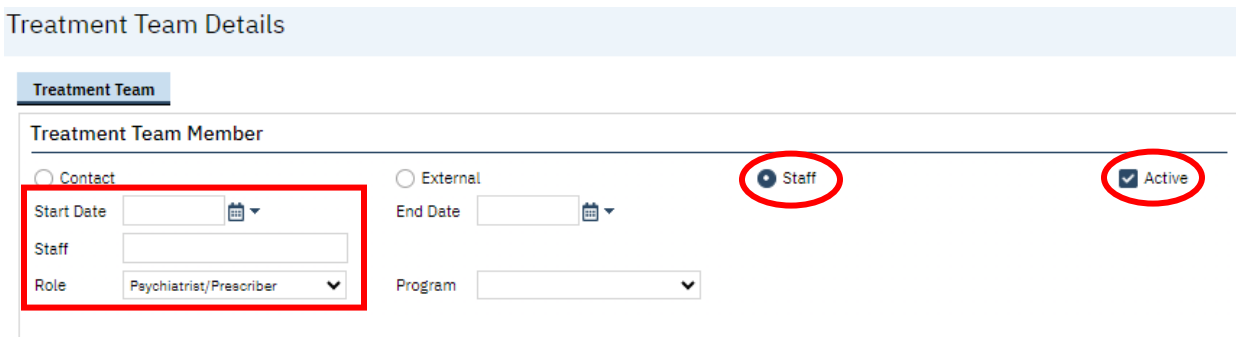
2. This will bring you to the Treatment Team page for the selected client.



If the client already has assigned staff to their treatment team, you will be able to view them here.

To assign a new staff member to the treatment team:

1. After following the steps outlined above, navigate to the top right of the screen, and click on the “new” option . This will bring you to the “Treatment Team Details” screen.
2. On this screen you will select the bubble next to “Staff”. This will automatically narrow the options generated from the drop-down menus.



3. Make sure the check box next to “Active” is selected, as shown above.

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- Next enter today's date as the Start Date. Leave the end date box blank.
- In the box for "Staff" enter the last name of the provider/clinician you are adding. For example, for Dr. Brown you would type "Brown". **Be sure to select the correct provider as there may be multiple staff with the same last names.**
- In the box for "Role" select the "Psychiatrist/Prescriber" option when assigning a doctor. If you are assigning a different type of staff such as Therapist or Counselor, select the appropriate option from the drop down.

A rectangular button with a dark background and a white icon of a floppy disk followed by the word "Save" in white text.


- Click "Save" in the upper right.

Option 2:

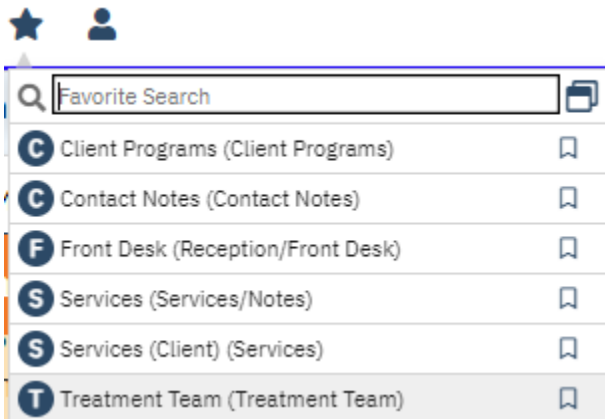
After opening the client profile, navigate to the far left of the screen.

Hover your cursor over the option for "Client". From the sub menu that shows up, navigate to the bottom of the list, and select "Treatment Team".

Follow above steps 1 -7 to assign to treatment team.

Note: The treatment team screen can be added to your "favorites" list by selecting the add to favorites button in the top right. 

After adding to your favorites, you will be able to access it by clicking the favorites button on the far left.



Assigning a Client to a Treatment Team Member

