How to Remove PS from Staff Caseload

- 1. Search for the client using the "Client Search" options.
- 2. Once client is selected, on the left-hand side, go to the drop-down list labeled "client".
- 3. Select "Treatment Team".

≡	SmartCare	IHSA - Fresno County		۹ \star 🛔	Patient V	/, One (1) 🚽
	±	H	≣	Client Dashb	oard	
n	My Office		>	Client Trackin	g	
2	Client		<	Appointments For	Today	
CF	Client Funds			Assessment/Scree	ning Tools ゝ	
- 3				Client Dashboard		
ß	SmartLinks			Crisis Assessment		
				Inpatient/Resident	tial	
				Special Population	s	
				Special Population	s (SUD)	
				Treatment Episode		
				Client Inquiries		
				Client Information	>	e D
				Client MAR		IN MAN DR Fre
				Contacts/Message	s 🔉	2024 99
				Disclosures/Reque	ests	⊇gmail.com ;9) 111-1111
				Documents	>	
				Medical	>	3
				Client Programs		
				Programs (Admin)		
				Reports		ole
				Timelines/Flags/Ev	vents >	Staff: 4816-MF
				Treatment Team		staff: 4528L-TF aff: 4528P-TP
				Utilities	>	Clinician/The
						Accidnment St

You can also type "treatment Team" into the search bar to get to this page.

4. Click on name of provider you'd like to remove

How to Remove PS from Staff Caseload

Treatment Team (1	.6)			
All Roles	~	Active	~	As
Treatment Team Member				
Gonzalez, Marcos				
<u>Pettengill, Natasha</u>				
Pettengill, Natasha				
Duran, Alexandra				

- 5. Deselect the "active" box.
- 6. In-put the end date.
- 7. Select the correct program.

Treatment Team Details

O Contact Start Date	07/06/2023 🛗 🗸	C External	₩ ~	 Staff 	Active
Staff Role	Gonzalez, Marcos Case Manager	Program	7011-Turning Point - Dragonf 🗸]	
Phone Nu	imbers		Addresses		Comments

To ensure you've removed from caseload correctly, repeat steps 1-3 and the provider should no longer be listed. Continue to the steps below if this is not the case.

How to Remove PS from Staff Caseload

NOTE: If the provider/staff that you need to remove is still there check the program assignments. Follow steps below.

- 1. With the PS profile open, use the search option and type "Client Programs". Select the "Client Programs (Client) option from the menu.
- 2. From the Client Programs page, locate the program you need to remove the staff member from. The assigned staff members name will appear in the "Assigned Staff" column on this page.
 - a. Example: you need to remove Dr. Brown as the prescriber for a PS. From the Client Programs page, you will look for the program number and name. FCDBH uses 2922-Doctors Main Building as the program name.

Program Name	Status	∇	Enrolled	Discharged	Assigned Staff
2922-Doctors Main Bui	Enrolled		07/01/2023		Brown, Frederick

3. Click on "Enrolled" to bring up the "Program Assignment Details" screen.

Program Assignme	Additional Information					
General						
Program Name	2922-Doctors Main Building-07/01/2023-07/02/2 🗸	Primary	Current Status	Enrolled		~
Client	Patient, One					
ssigned Staff	Brown, Frederick		Requested Date	06/03/2023	*	
	,		Enrolled Date	07/01/2023	*	
omment			Discharged Date		*	
			Next Schedule Service			

- 4. In the "Assigned Staff" menu, click the drop-down arrow to open the list of providers.
- 5. With the drop-down menu open, scroll all the way to the top of the list. There should be a blank entry at the very top. Click on this blank spot. The assigned staff box should now be empty.

General	
Program Name	2922-Doctors Main Building-07/01/2023-07/02/2 🗸
Client	Patient, One
Assigned Staff	~

6. Click "Save" upper right of the screen. There should now be no assigned staff in the PS profile.