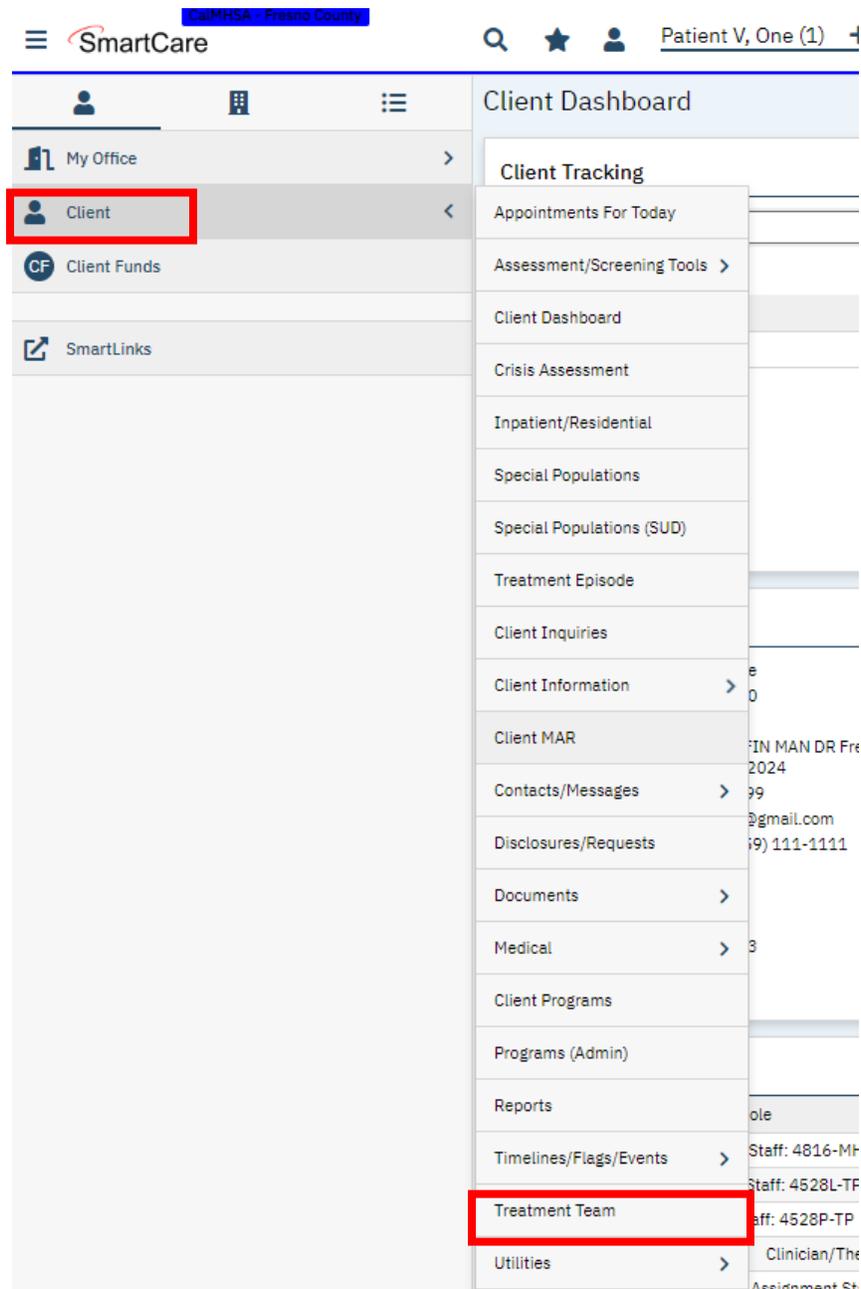


# How to Remove PS from Staff Caseload

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”.



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 (16)

All Roles Active As

Treatment Team Member

- Gonzalez, Marcos
- Pettengill, Natasha
- Pettengill, Natasha
- Duran, Alexandra

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

Treatment Team Details

Treatment Team

Treatment Team Member

Contact  External  Staff  Active

Start Date 07/06/2023 End Date Program 7011-Turning Point - Dragonf

Staff Gonzalez, Marcos Role Case Manager

Phone Numbers

Addresses

Comments

8. Save



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 Assignment Details

Program Assignment    Additional Information

**General**

Program Name	2922-Doctors Main Building-07/01/2023-07/02/2	<input type="checkbox"/> Primary	Current Status	Enrolled
Client...	Patient, One			
Assigned Staff	Brown, Frederick		Requested Date	06/03/2023
			Enrolled Date	07/01/2023
Comment			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.