

TREATMENT TEAM



Treatment Team

Treatment Team

- Getting here:** Click on either the main menu item **Tx Team** or in **Admission/Treatment Team**. This screen allows you to record all the members of the treatment team. The treatment team may be composed of staff and non-staff persons.
Note: If you entered this information in the Admission module it will pre-populate here.
- When you enter this screen, the lower half is grayed-out. Click on the link for **Add Team Member** to add one treatment team member at a time.
- Select either a **Staff** or **Non-staff Name**, their **Role/Relation**, and **Start Date**.
- Review Member:** Indicates whether the team member is a member of the **Treatment Review** team. Any member of the **Treatment Review** team will have a signature line on the client's **Treatment Plan**.
- Select Yes or No for the **Primary Care Staff** field to indicate if the person you are adding to the team is the client's primary staff member. Each client can have only one **Primary Care Staff**.
Note: Selecting staff as **Primary Care Staff** allows the user to search for clients for whom a specific counselor is **Primary Care Staff** by using the search function on the **Client Search** screen.
- Select Yes or No for the **Deny Access to Client Records**. You should usually select No so that this member of the treatment team will be able to view the client's record.
- Use the **Add Team Member** hyperlink to add additional members.

The screenshot shows the I-SMART interface for the 'Treatment Team' screen. At the top, it displays user information: 'User: Cleland, Lonnie', 'Loc: Iowa Dept. of Public Health, Test Facility', and 'Client: Client, Testing | 6711049867 | Case #: 1'. There is a 'Print View' icon and a 'Logout' button. The left sidebar contains a navigation menu with options like 'Home Page', 'Agency', 'Group List', 'Client List', 'Client Profile', 'Linked Consents', 'Non-Episode Contact', 'Activity List', 'Intake', 'Wait List', 'Treatment Team', 'Assessments', 'Crisis and Placement', 'Admission', 'Program Enroll', 'Notes', 'Treatment', 'Outcomes', 'Discharge', 'Follow Up', 'Consent', 'Referrals', 'Episode List', 'System Administration', and 'My Settings'. The main content area features a table with columns: 'Team Member Name', 'Is Primary Care Member?', 'Review Member', 'Role/Relation', 'Start Date', 'End Date', and 'Actions'. Below the table is a form titled 'Assign Group' with fields for 'Staff Name', 'Non Staff Name', 'Role/Relation', 'Review Member', 'Primary Care Staff', and 'Deny Access to Client Records'. There are also fields for 'Start Date', 'End Date', and 'Notes'. A 'Finish' button is at the bottom right.

This screenshot shows the same I-SMART interface, but with data entered. The table now contains one row: 'Cleland, Lonnie' with 'Is Primary Care Member?' set to 'Yes', 'Review Member' set to 'Yes', 'Role/Relation' as 'Primary Care Staff', and 'Start Date' as '12/7/2011'. The 'Assign Group' form below has 'Staff Name' set to 'Cleland, Lonnie', 'Start Date' set to '12/7/2011', 'Role/Relation' set to 'Primary Care Staff', 'Review Member' set to 'Yes', 'Primary Care Staff' set to 'Yes', and 'Deny Access to Client Records' set to 'No'. The 'Finish' button is highlighted in blue, and 'Cancel' and 'Save' buttons are also visible.

Treatment Team

Treatment Team

The screenshots illustrate the workflow for adding a group to a treatment team. The first screenshot shows the current team members. The second screenshot shows the selection of a group from a list of available groups. The third screenshot shows the assignment of the selected group to a staff member, including setting dates and roles.

8. **Note:** The drop-down list for non-staff member comes from the contact list setup in the Client Profile. If you do not see the name of the person you are trying to add to the team, you need to first add that person to **Collateral Contacts**.
9. Click on the link for **Add Contacts** which will take you to the **Collateral Contacts** screen. You can add the details there, save, and then come back here to add the person to the team.
10. To add a group of people to a client's treatment team at one time, click the **Assign Group** hyperlink. The groups were created in the Agency module.
11. Click the desired group from the **Available Groups** list and click the right pointing arrow to select the group. Then click **Assign**, this will add all of the individuals from the group to the **Treatment Team**.
12. Click **Finish** to return to the **Activity List** Screen.