



Team Members – ITM Job Aid

The *Team Members* screen allows users to view, edit, or add Team Members to the Referral. Team Members are individuals who support the Client either in a Professional, Natural, or Caregiver support capacity. If the Referral was made in KIDS the *Team Members* screen will also contain any Professional, Natural, or Caregiver Supports identified in the KIDS referral.

Team Members

Navigation

1. From the **Dashboard**: Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus.
 - a. Click on the **Team Members** tile.



Team Members screen Overview

The screenshot shows the 'Team Members Information' interface. At the top, there are radio buttons for 'Active' (selected) and 'All' (callout 1), and checkboxes for 'Professional', 'Natural', and 'Caregivers' (callout 2). An 'Add Team Member' button is on the right (callout 3). Below is a table with columns: First Name, Last Name, Gender, Support Type, Support Category, Contact#, and MCI. A row shows 'September' (callout 4), 'November', 'Male', 'Friend', 'Natural/Community Support', and '1000608263' with a red 'X' icon (callout 5). At the bottom, there is a 'Show 10 entries' dropdown and pagination links: 'First', 'Previous', 'Next', 'Last'.

1. *Team Members* radio buttons: The *Team Members Information* grid defaults to displaying active Team Members. To view both active and inactive Team Members select the *All* radio button. To view only active Team Members, select the *Active* radio button.
2. *Support Category* checkbox filters: These checkboxes can be used to filter the Team Member list to display any combination of Professional Team Members, Natural Supports Team Members and/or Caregivers Team Members by clicking the checkboxes next to the relevant category or categories. The list defaults to displaying all Team Member types.
3. To add a new Team Member click the **Add Team Member** button.
4. To view or edit the information entered for a Team Member click on the desired individual's first name in the *Team Members Information* grid. That individual's *Team Member* pop-up will appear.
5. The icon to the right of the MCI number in the *Team Members Information* grid indicates whether or not the individual's MCI clearance has been performed.
 - a. A indicates that an MCI clearance has not been performed.
 - b. A indicates that an MCI clearance has been performed.
 - c. To clear or re-clear an MCI click on the or for the desired individual.
 - d. Clicking on the MCI number for a Team Member will open ClientView and display the Team Member's information in ClientView.



Adding a new Team Member

1. To add a new Team Member click **Add Team Member**.

Select	First Name	Last Name	Gender	Support Type	Contact #	MCID
<input type="radio"/>	September	November	Male			1000608263

- a. The *Search Team Members* pop-up will appear. Enter all information known about the individual and click **Search**. The *Search Location* defaults to "ALL" in order to Search all of DHS but can be
- b. Review the *Search Results*. If the individual appears in the *Search Results* click the *Select* radio button to the right of the desired individual and click **Add To Referral**.
- c. Clicking **Cancel** will close the *Search Team Members* pop-up without saving a selection.
- d. If the individual is not in the *Search Results* click **Create Team Member**.

Important Note: Creating a New Team Member will also create a new MCI ID for this individual. Please search carefully to ensure that duplicates are not created.



Completing the Team Member pop-up

1. Once **Add To Referral** or **Create Team Member** is clicked, the *Team Member* pop-up will appear.

Team Member

Support Category* Support Type Business Name Prefix

First Name* Middle Name Last Name Birth Date

Gender* Primary Phone# Notes

Email SSN

Secondary Phone# Active*

Address Details

Address Type Address Summary

Address Type* Address 1* Address 2 City

County Neighborhood/Municipality State Zip Code Extension **Save Address**

Save **Cancel**

- a. Enter all of the applicable information for this Team Member (Support) in the *Team Member* pop-up.
 - i. The *Support Category* will display in the Participants grid under *Role*.
 - ii. The Support can be made Active or Inactive at any time by selecting "Yes" or "No" from the *Active* drop-down. Only Active Team Members can be included in Contacts and Meetings.
- b. Multiple addresses can be entered for the Team Member under Address Details. A Team Member must have an address to be invited to a Meeting by Mail.
 - i. To include an address, enter the address and select the *Address Type*.
 - ii. click **Save Address** to add this address to the *Address Details* grid.



- iii. If an address has been added in error click the delete icon [] to the right of the address in the *Address Details* grid to delete it.

Address Details	
Address Type	Address Summary
Business	123 Main St Pittsburgh, PA, 15215



- c. To save the Team Member click  .
- d. To close the *Team Member* pop-up without saving or making changes to the Team Member click  .

For more information...

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access the Self Service Tool go to <http://servicedesk.alleghenycounty.us>