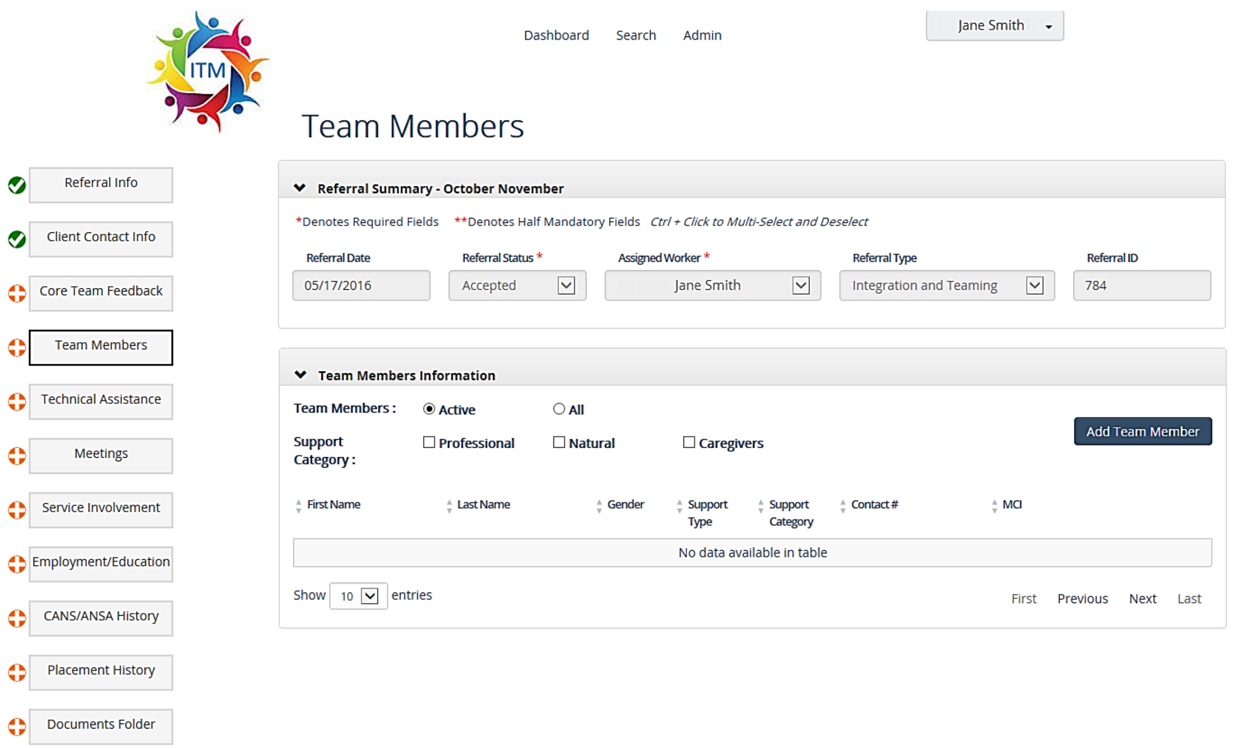
Team Members – ITM Job Aid

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.

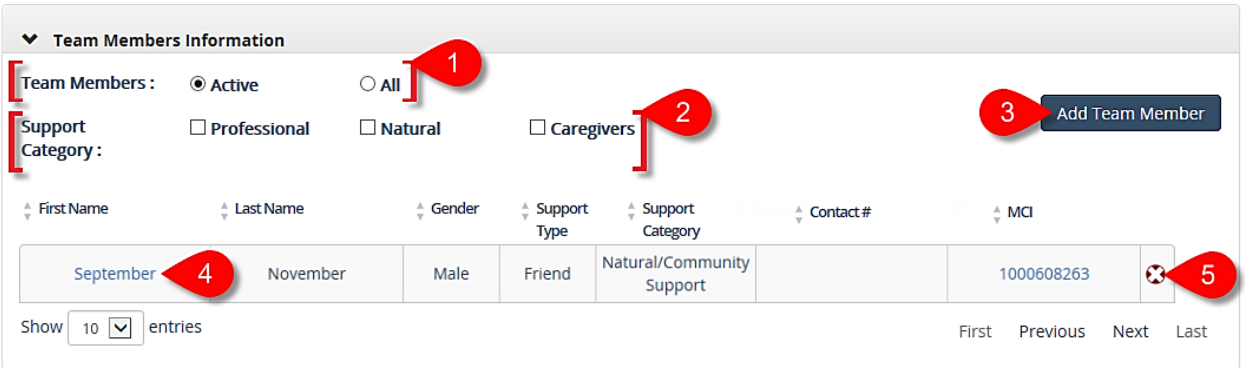
Team Members



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



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.

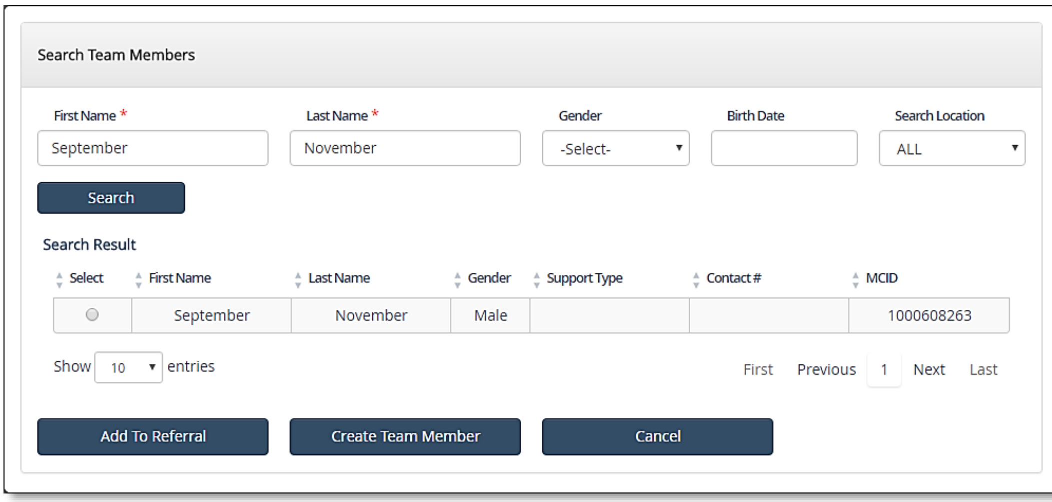
3. To add a new Team Member click the **Add Team Member** button.

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**.



   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**.

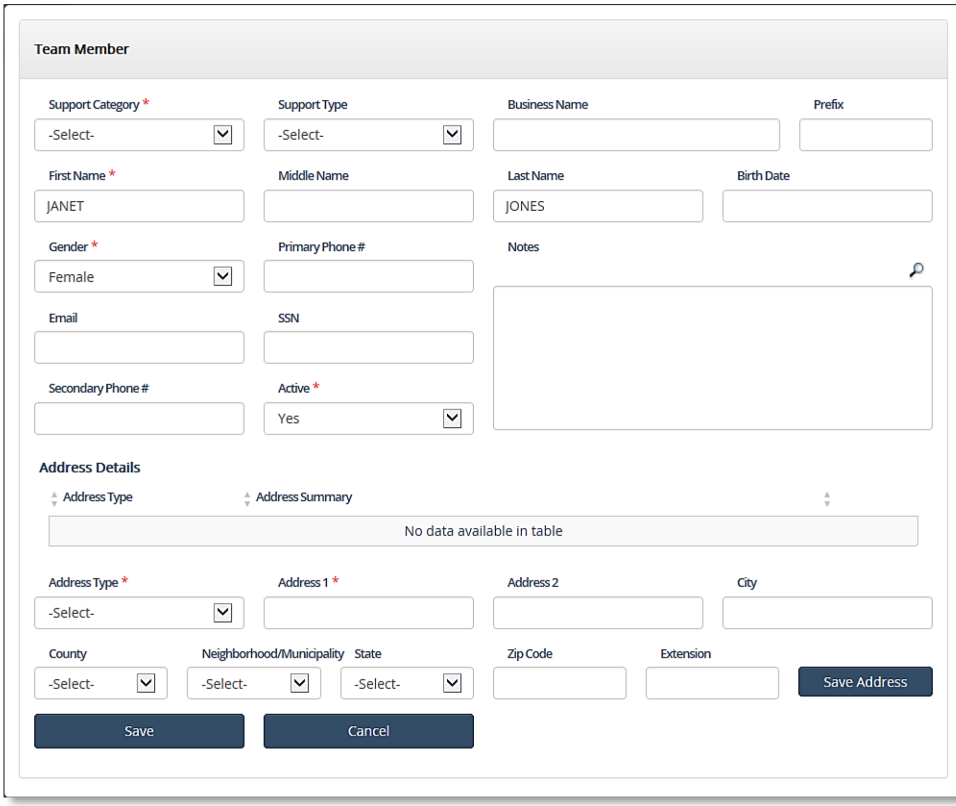
   c. Clicking **Cancel** will close the *Search Team Members* pop-up without saving a selection.

   d. If the individual is not in the *Search Results* click **Create Team Member**.

<u>Important Note:</u> *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

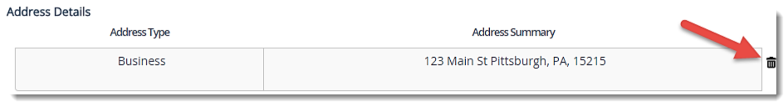
1. Once **Add To Referral** or **Create Team Member** is clicked, the *Team Member* pop-up will appear.



   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.



c. To save the Team Member click **Save** .

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

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