

***SWITS* User Manual**

This document focuses on the elements of the Treatment Team.

Total Pages: 2

California
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Treatment Team

Treatment Team

Treatment

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- Getting here:** Click on main menu item **Tx 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 Plan review team.
- 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.
- Select Yes or No for the **Deny Access to Client Records**. If you select yes this member of the treatment team will not be able to view the client's record.
- Use the **Add Team Member** hyperlink to add additional members.

Treatment Team for Jetson, Jane

Team Member Name	Review Member	Role/Relation	Start Date	End Date	Actions
Kelly, Maureen	No	Case Manager	7/6/2004		Review
Conrad, Rodney	No	Parole Officer	7/6/2004		Review
Jetson, George	No	Other	7/6/2004		Review
Jetson, Judy	No	Sister	10/1/2004		Review
Arora, Daksha	Yes	Team Lead	12/7/2004		Review
Kelly3, Maureen	Yes	Direct Service Provider	12/30/2004		Review
Sicchio, Renee	Yes	Case Manager	12/30/2004		Review
Avey, Tom	Yes	Other	12/30/2004		Review
Employee, Test	Yes	Other	1/5/2005		Review

Add Team Member

Staff Name: Start Date: End Date:

Non Staff Name: Notes:

Role/Relation: [Add Contact](#)

Review Member:

Primary Care Staff:

Deny Access to Client Records:

[Finish](#)

Treatment Team for Jetson, Jane

Team Member Name	Review Member	Role/Relation	Start Date	End Date	Actions
Kelly, Maureen	No	Case Manager	7/6/2004		Review
Conrad, Rodney	No	Parole Officer	7/6/2004		Review
Jetson, George	No	Other	7/6/2004		Review
Jetson, Judy	No	Sister	10/1/2004		Review
Arora, Daksha	Yes	Team Lead	12/7/2004		Review
Kelly3, Maureen	Yes	Direct Service Provider	12/30/2004		Review
Sicchio, Renee	Yes	Case Manager	12/30/2004		Review
Avey, Tom	Yes	Other	12/30/2004		Review
Employee, Test	Yes	Other	1/5/2005		Review

Add Team Member

Staff Name: Start Date: End Date:

Non Staff Name: Notes:

Role/Relation: [Add Contact](#)

Review Member:

Primary Care Staff:

Deny Access to Client Records:

[Cancel](#) [Save](#) [Finish](#)

Treatment

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- 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**.
- 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.
- 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.
- 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**.
- Click **Finish** to return to the **Activity List** Screen.

Team Member Name	Review Member	Role Relation	Start Date	End Date	Actions
Kelly, Maureen	No	Case Manager	7/6/2004		Review
Conrad, Rodney	No	Parole Officer	7/6/2004		Review
Jetson, George	No	Other	7/6/2004		Review
Jetson, Judy	No	Sister	10/1/2004		Review
Arora, Daksha	Yes	Team Lead	12/7/2004		Review
Kelly3, Maureen	Yes	Direct Service Provider	12/30/2004		Review
Sicchio, Renee	Yes	Case Manager	12/30/2004		Review
Avey, Tom	Yes	Other	12/30/2004		Review
Employee, Test	Yes	Other	1/5/2005		Review

Available Groups	Selected Groups
Group A RA1487 Test	

Team Member Name	Review Member	Role Relation	Start Date	End Date	Actions
Kelly, Maureen	No	Case Manager	7/6/2004		Review
Conrad, Rodney	No	Parole Officer	7/6/2004		Review
Jetson, George	No	Other	7/6/2004		Review
Jetson, Judy	No	Sister	10/1/2004		Review
Arora, Daksha	Yes	Team Lead	12/7/2004		Review
Kelly3, Maureen	Yes	Direct Service Provider	12/30/2004		Review
Sicchio, Renee	Yes	Case Manager	12/30/2004		Review
Avey, Tom	Yes	Other	12/30/2004		Review
Employee, Test	Yes	Other	1/5/2005		Review