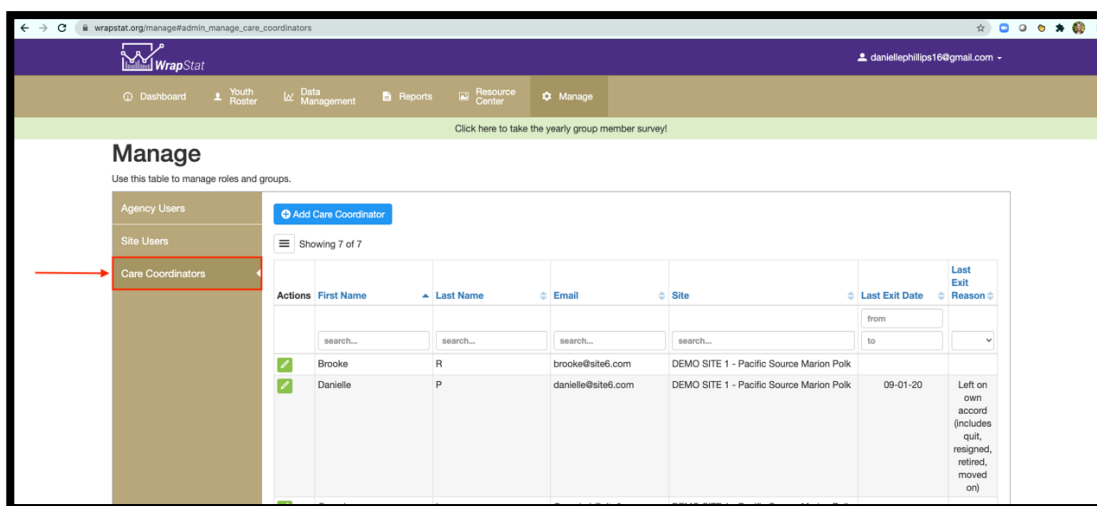
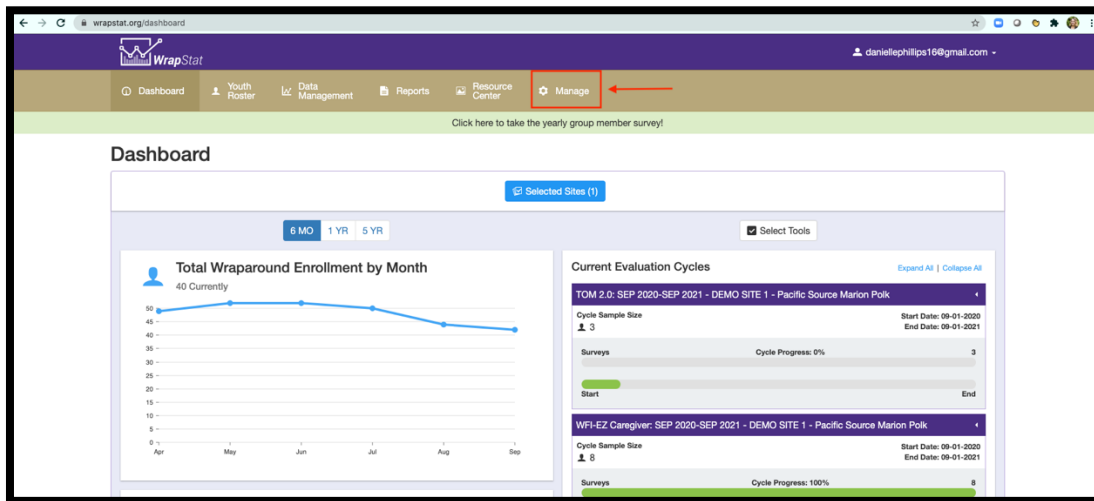


Adding and Updating Care Coordinator Names in WrapStat

ADDING A CARE COORDINATOR

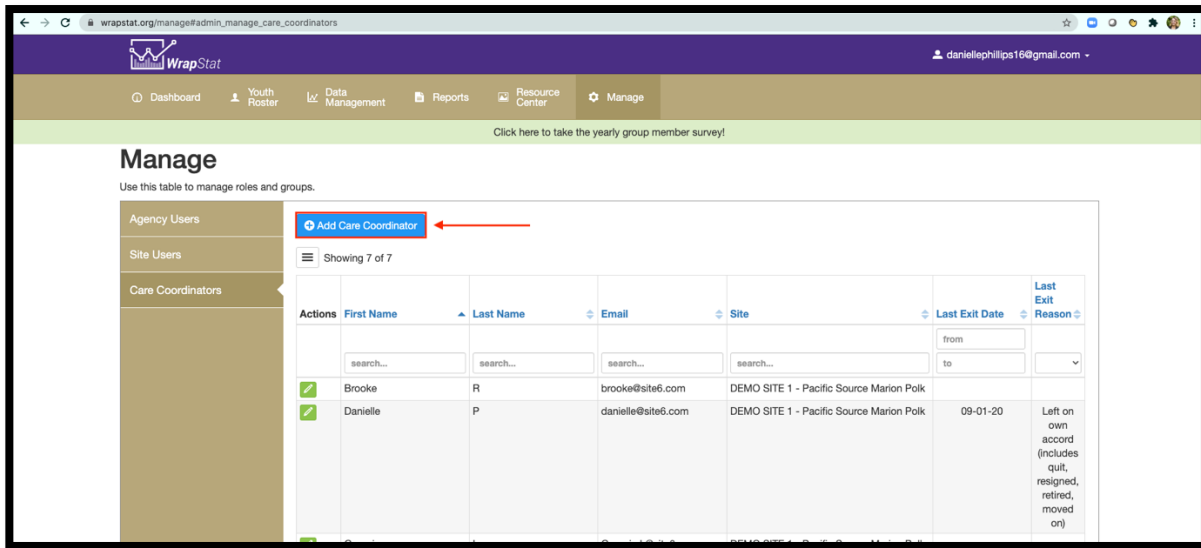
In order for the appropriate **Care Coordinators** to be displayed for selection in the **Youth Record**, Data Partners must first ensure that the list of **Care Coordinators** is updated and correct.

To add a **Care Coordinator**, start by moving your mouse over the **Manage Tab** at the top of the page and left click. Then left click on the **Care Coordinators Subtab** on the left of the screen.



Review the list to ensure that all **Care Coordinators** are represented. If not, follow the following steps to add a new **Care Coordinator** to the list.

Hover your mouse over the **Add Care Coordinator** button and left click.



The 'Add New Care Coordinator' form includes the following fields:

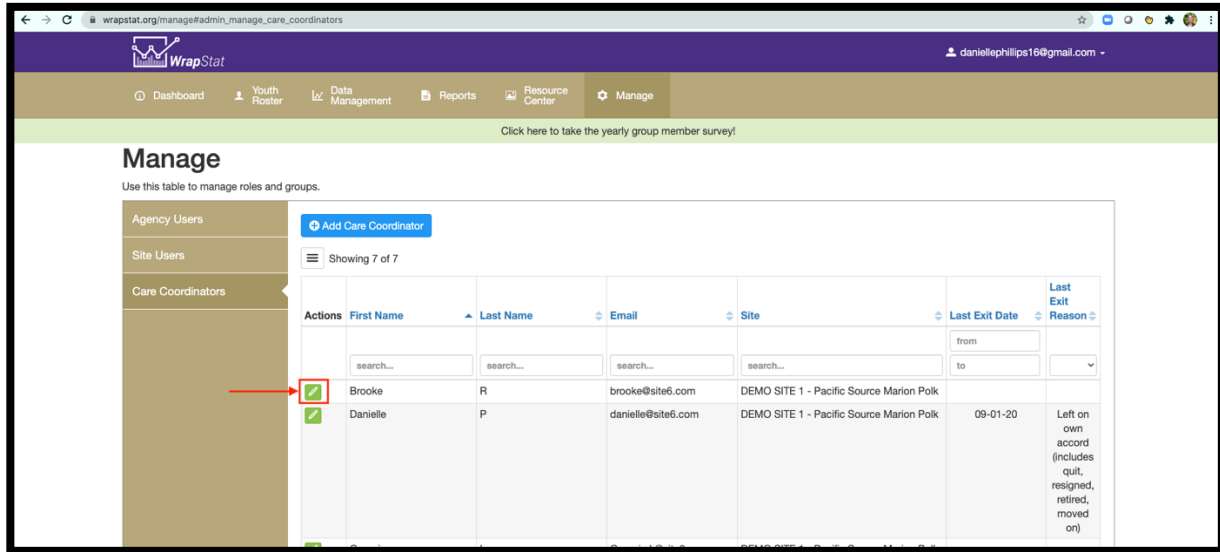
- Site:** A dropdown menu with a search bar. The list of sites includes: DEMO - Health Share (Multnomah), DEMO - Health Share (Washington), DEMO - PacificSource (Centro Latino), DEMO - PacificSource (Direction Service), DEMO - Trilium (Direction Service), DEMO - Trilium (Centro Latino), DEMO SITE 1 - Pacific Source Marion Polk, and DEMO Site 1 - Washington.
- Email:** A text input field.
- First Name:** A text input field.
- Last Name:** A text input field.
- ID Number:** A text input field.
- Phone Number (no dashes or parenthesis - 10 digits only):** A text input field.
- Exit Date:** A date input field.
- Exit Reason:** A dropdown menu with the option '--Please select an exit reason--'.
- Submit:** A blue button at the bottom right.

- Select your agency from the **Site** list,
- Complete the following fields:
 - **Email,**
 - **First Name,**
 - **Last Name, and**
 - **Phone Number**
- Click the blue **Submit** button.

If you plan on using the text message feature to text WFI-EZs for Care Coordinators to complete, make sure that you enter a cell phone number for each Care Coordinator record.

EDITING A CARE COORDINATOR

Once you have saved the **Care Coordinator** record, you can edit any name on this list as needed by clicking on the green **Edit** button.



ENTERING EXIT INFORMATION FOR A CARE COORDINATOR

When a Care Coordinator leaves your organization, you can archive their record in WrapStat.

Locate the **Care Coordinator** by searching in the **Care Coordinator Tab** or by scrolling down to their name. Click the green **Edit** icon next to the **Care Coordinator** name.



A window will open with the Care Coordinator's information.

Edit Care Coordinator ✕

Site: *
Per page: Showing 1 of 1 rows

Site ▲

search...

DEMO SITE 1 - Pacific Source Marion Polk

Email: *

First Name: *

Last Name: *

ID Number:

Phone Number (no dashes or parenthesis - 10 digits only):

The care coordinator will be archived if exit date and exit reason is set.

Exit Date:

Exit Reason:

- Enter the date the **Care Coordinator** left your organization as the **Exit Date**.
- Select an **Exit Reason** from the list provided (This list was created by WERT.)
- Click the **Submit** button.

The care coordinator will be archived if exit date and exit reason is set.

Exit Date:

Exit Reason:

Left on own accord (includes quit, resigned, retired, moved on)

Dismissed from employment (includes fired, laid off)

Changed positions within the same site and organization (promoted or assigned a different role)

Transferred to a different site within the same organization

Do not know

A NOTE ON ARCHIVING CARE COORDINATORS

When a **Care Coordinator** record is archived, they are automatically removed from any **Youth Records** in which they were listed. When in the **Youth Record**, you will see the message below at the top right of your screen indicating that there are youth records without a **Care Coordinator**. It's better to add the new **Care Coordinator** to youth records prior to archiving a **Care Coordinator**.

NOTICE

Some youth are missing a care coordinator

Show (4)