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.

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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.

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							from				
			search	search	search	search	to	~			
		1	Brooke	R	brooke@site6.com	DEMO SITE 1 - Pacific Source Marion Polk					
			Danielle	Ρ	danielle@site6.com	DEMO SITE 1 - Pacific Source Marion Polk	09-01-20	Left on own accord (includes quit, resigned, retired, moved on)			

Add New Care Coordinator ×						
Site: *						
Per page: 50 V Showing 8 of 8 rows						
Site						
search						
DEMO - Health Share (Multnomah)						
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DEMO SITE 1 - Pacific Source Marion Polk						
DEMO Site 1 - Washington						
First 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:						
Please select an exit reason						
Submit						

- Select your agency from the Site list,
- Complete the following fields:
 - Email,
 - First Name,
 - Last Name, and
 - o 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.

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			search	search	search	search	to	· ·			
		· 🖉	Brooke	R	brooke@site6.com	DEMO SITE 1 - Pacific Source Marion Polk					
			Danielle	P	danielle@site6.com	DEMO SITE 1 - Pacific Source Marion Polk	09-01-20	Left on own accord (includes quit, resigned, retired, moved on)			

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.

Add Care Coordinator Showing 26 of 26								
Actions	First Name	Last Name 😄	Emeil 😄	Site ÷	Last Exit Date 💠	Last Exit Reason (;		
					from			
	search	search	search	search	to	~		
	Amber	L	Amber:L@site3.com	DEMO - Trillium (Centro Latino)				

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

Edit Care Coordinator ×	
Site: * Per page: 50 V Showing 1 of 1 rows Site search DEMO SITE 1 - Pacific Source Marion Polk Email: * danielle@site6.com First Name: * Danielle Last Name: * P ID Number:	 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.
Phone Number (no dashes or parentnesis - 10 digits only):	The care coordinator will be archived if exit date and exit reason is set.
	Exit Date:
The care coordinator will be archived if exit date and exit reason is set.	Exit Reason:
	Please select an exit reason
Please select an 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 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**.

Δ	NOTICE	Show (4)
	Some youth are missing a care coordinator	