



Merative Social Program Management 8.1

Cúram Multidisciplinary Team Portal Guide

Note

Before using this information and the product it supports, read the information in [Notices on page 17](#)

Edition

This edition applies to Merative™ Social Program Management 8.0.0, 8.0.1, 8.0.2, 8.0.3, and 8.1.

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1 Cúram Multidisciplinary Team Portal Guide

The multidisciplinary team portal is a collaborative tool that allows stakeholders to coordinate with team members to achieve beneficial outcomes for clients and cases. Users can view and schedule meetings, manage assigned tasks, and view member contact information, and more.

1.1 Your Home Page and Profile

The multidisciplinary team portal provides you with tools to manage your clients and cases and helps you coordinate with your co-team members. Your profile includes contact information and a summary of your multidisciplinary teams.

Your Home Page

The multidisciplinary team portal provides you with tools to manage your clients and cases and helps you coordinate with your co-team members. Menu options link to the following:

- The complete list of cases for which you are a multidisciplinary team member
- All clients for these cases
- Your calendar which includes scheduled meetings
- Any work assigned to you via tasks
- Your multidisciplinary teams, their team members, and contact information
- Your online profile

A quick link is also provided allowing you to report an incident.

Summary information is also displayed on the portal home page for scheduled meetings and tasks, recently posted meeting minutes and reported incidents, and any discussions you are currently watching.

Your Profile

Your profile includes contact information and a summary of your multidisciplinary teams. A link is provided to update the contact details in your profile including your name, role within the multidisciplinary team, phone number(s), mailing address, and email address. These updates are automatically published across the organization so that agency workers and multidisciplinary team members can contact you using the most up-to-date information. Links are also provided to view more information about your multidisciplinary teams and to view contact details for the lead members.

Note: Online information including your username, password, and sensitivity security level must be maintained by a system administrator. You will need to contact the organization responsible for maintaining the system in order to maintain these aspects of your online profile.

1.2 Your Cases and Clients

Use the **My Cases** tab to access the complete list of your cases in the multidisciplinary team portal. You can access the complete list of your clients in the multidisciplinary team portal.

Your Cases

The **My Cases** tab allows you to access the complete list of your cases in the multidisciplinary team portal. These are the collaborative social enterprise folders, collaborative outcome plans and collaborative investigation cases for which you are a multidisciplinary team member.

To assist you in managing your cases, each case which has one or more recent transactions since you logged into the portal is highlighted. If for example a new client was added to an outcome plan case since your last login the case will be marked as updated.

The case home page displayed depends on the type of case i.e. whether it relates to an outcome plan, investigation or social enterprise folder. The case representing a social enterprise folder displays a list of clients and cases within the social enterprise folder. These are also viewable via the Clients and Cases links. The case representing an outcome plan displays a list of clients and their objectives. The case representing an investigation shows a list of clients along with the number of open and decided allegations. The sections below describe what is maintained for each type of case.

Common Collaborative Case Information

The following section describes at a high level the information that is maintained for each type of case i.e. discussions, meetings, meeting minutes, attachments and a multidisciplinary team.

Discussions

Multidisciplinary team members can use discussion boards to share advice and important information. These discussion boards can be configured to email multidisciplinary team members when discussions are posted and comments added making it as easy as possible for team members to be informed and have the opportunity to participate in a discussion. For more information on posting discussions, see [1.5 Your Discussion Participation on page 13](#).

Scheduling Meetings and Recording Meeting Minutes

To address the needs of children and their families, meetings can be scheduled from the calendar. PIM integration allows meeting invites to be accepted in personal calendars, making it easier to coordinate meetings. For more information on scheduling meetings in your calendar, see [1.6 Your Calendar on page 14](#).

The record meeting minutes wizard provides functionality for recording general meeting details, adding meeting notes, listing meeting decisions, marking attendees, outlining actions, attaching files, and associating the minutes with case. These meeting minutes can be automatically issued to persons invited to the meeting. For more information on meeting minutes, see [Recording Meeting Minutes Wizard on page 15](#).

Multidisciplinary Team

Each collaborative outcome plan, social enterprise folder, and investigation has a multidisciplinary team of which you are a member (hence why they are accessible to you). Fundamental to the success of social enterprise collaboration is the ability of multidisciplinary

teams to work together to effectively manage the needs of clients and their families. There are two types of multidisciplinary teams in Social Program Management: predefined multidisciplinary teams consisting of persons who continue to work together to help multiple families and individual multidisciplinary teams whose goal is to assist one family in particular.

For both types of multidisciplinary teams, you can view the list of current members and the list of previous members. This allows MDT leaders to see who has worked on the case over time and to contact previous team members when necessary. For example, an MDT leader might wish to find out more about a previous discussion or may require advice on how to work with a client. For individual multidisciplinary teams, you can add new team members and change the lead member. The system will automatically update the team members and lead member listed in the administration component.

Predefined teams, however, must be redefined by an administrator. This is to ensure consistency across all collaborative cases relying on the predefined team. In effect, these predefined teams are not meant to be redefined, since their purpose is to offer consistent representation for clients in similar circumstances. For example, the multidisciplinary team working on child welfare cases should treat each family in the same fashion in order to ensure the protection of all children. Having a team familiar with each other and the work is beneficial to addressing the needs of children and their families.

For more information on your multidisciplinary teams, see [1.4 Your Multidisciplinary Teams on page 13](#).

Recording Notes

Notes can be recorded and a history can be maintained for each note. The note history includes the name of the person who last updated the note, the date and time the updates were added, and the actual changes made to the note.

Attaching Relevant Files

Supplemental files can be attached to the collaborative cases and accessed by other system users who have the appropriate security privileges. Within collaborative cases, it is also possible to attach supplemental files to meeting minutes, discussion comments, and incidents.

Collaborative Outcome Plan Case Information

The following section describes at a high level the information maintained for a collaborative outcome plan case in addition to the information outlined in [Common Collaborative Case Information on page 10](#).

Activities

An activity is a service, referral or action that has been scheduled for a client as part of an outcome plan. Activity information will provide you with a more complete picture of what a client is currently involved in and will assist you in identifying other activities that may assist the client.

Objectives

Objectives are small steps that a client is trying to achieve as part of an outcome plan, for example, remain clean and sober. Objective information will give you a better idea of the objectives and ultimate goal the client is trying to achieve.

Collaborative Investigation Case Information

The number of open and decided allegations are displayed for a collaborative investigation case. This will help you gauge the seriousness of the investigation.

Collaborative Social Enterprise Folder Case Information

The following section describes at a high level the information maintained for a collaborative social enterprise folder case in addition to the information outlined in [Common Collaborative Case Information on page 10](#).

Incidents

Incident reporting is necessary to facilitate prevention, ensuring that potential indicators concerning a family's history are tracked in order to avoid more serious situations. Failure to report an incident, for example of child abuse, could result in a second incident of child abuse and delay the family intervention and referral of the child to child services. Multidisciplinary team members can be automatically notified via email when incidents effecting their clients are reported, updated, or closed. For more information on reporting incidents for your clients, see [1.3 Reporting Incidents on page 12](#).

Cases

Collaborative social enterprise folders are used to group clients and their associated cases together. This provides a more holistic view of a clients interactions with the agency.

Your Clients

You can access the complete list of your clients in the multidisciplinary team portal. This list is the combined list of all the clients with all collaborative cases for which you are an MDT member. You can view the contact details for each client. A link is also provided to email the client at his or her current email address, if it exists.

1.3 Reporting Incidents

Reporting an Incident for an Affected Client

Incidents are events that have (or could have) a direct negative effect on the health and safety of a client, for example, a report of child neglect or abuse, or an accident in a work place. When reporting an incident, the following information can be provided:

- A detailed description of the incident and the date and time the incident occurred
- Names of affected clients
- Name of the person reporting the incident
- Name and contact details of any persons associated with the incident along with their role, for example, witness, guardian, or parent.
- Any supporting documentation, for example, evidence verifying the circumstances of the incident; files can be attached to an incident thus providing evidence and supporting documentation for the incident

Viewing Incidents for Your Clients

Reported incidents are also automatically displayed in all of the affected clients' social enterprise folders.

You can edit incident details, add new participants, change the incident reporter, and add an additional affected client. You can also attach a file to the incident or delete the incident all together.

1.4 Your Multidisciplinary Teams

The Teams tab in the Multidisciplinary Team Portal displays your multidisciplinary teams. Several options are provided to contact multidisciplinary team members from your list of teams.

Viewing the Members of Your Multidisciplinary Teams

You can expand each team to view its multidisciplinary team members.

Contacting Multidisciplinary Team Members

You can choose to send an email to the entire team or else email an individual team member. You can also schedule a meeting and invite all team members to attend. Alternatively, a phone number is provided for each multidisciplinary team member.

1.5 Your Discussion Participation

Viewing Your Discussions

Discussion boards are communication tools that allow comments and questions relating to a particular subject be posted online. Members of the discussion board can actively engage in discussions by responding with their own remarks over time. The purpose of these discussions is to promote coordination and teamwork between multidisciplinary team members and agency workers enabling them to share advice and important information that may impact the resolution of the case.

The main players of a discussion board are the discussion moderator and the discussion watchers. The role of the discussion moderator is to ensure that all discussions within all collaborative outcome plans, investigations and (deprecated) social enterprise folders are handled appropriately and thus has the ability to manage all aspects of a discussion. By default, the discussion moderator is the owner of the collaborative outcome plan, social enterprise folder or investigation. Since discussions can contain highly sensitive and important information, the discussion moderator has the sole responsibility of closing a discussion.

The role of discussion watchers is to actively engage in the discussion by viewing and contributing discussion comments. Discussion watchers can view the discussion and are automatically notified via email when comments are added. By default, you will be added to the list of discussion watchers when you are a multidisciplinary team member, the discussion moderator, or the person who created the discussion. As an external user, you can choose to stop watching a discussion, as well as, choose to start watching it again.

Creating New Discussions and Adding Discussion Comments

When creating a new discussion, you must also enter the discussion title and the first discussion comment. The discussion sensitivity level is automatically set to the lowest level, 1. You can raise the sensitivity level to a level equal to or less than your own sensitivity level. Only users with a sensitivity level equal to or higher than will be allowed to participate in the discussion. Optionally, a file can be attached to the discussion.

1.6 Your Calendar

Use your calendar to view that meetings that you are invited to within your multidisciplinary team, and to schedule a team meeting and invite the team to attend. You can also use your calendar to capture the details of a meeting and issue meeting minutes to attendees and other interested parties.

Viewing Scheduled Meetings in Your Calendar

Your calendar displays all meetings that you have been invited to within your multidisciplinary team. For each meeting invite, a link is provided to view meeting details. Where meeting minutes have already been recorded, you can view these minutes. You can also record meeting minutes, if not done so already. For meetings scheduled by you, maintenance options are provided to invite or remove meeting attendees and to cancel the meeting.

Scheduling Meetings

You can schedule a team meeting and invite the team to attend. When you invite a team, the system automatically contacts all of the team members whose contact details are available. Personal information manager (PIM) integration with Social Program Management meetings enables meeting requests to appear in your calendar and in your external email account, for example, Microsoft® Outlook.

Any person invited to a meeting who has an email address can receive a meeting invite and choose to accept or decline using his or her PIM calendar without having to log into Social Program Management. The following table describes the PIM integration for each possible meeting response:

Table 1: Meeting Response Actions

Code	Case Status
Accept	Meeting invites can be accepted resulting in a reminder being added to the Social Program Management calendar and to the meeting attendee's PIM calendar, for example, a Microsoft Outlook calendar. Within the collaborative case, the meeting attendee is marked as 'Accepted', thus informing interested parties.

Code	Case Status
Decline	When meeting invites are declined, the meeting still appears in the invitee's Social Program Management calendar but will not appear in the PIM calendar. Within the collaborative case, the meeting attendee is marked as 'Declined'.
Mark as Tentative	Meeting invites can be marked as tentative. The meeting will appear in the Social Program Management calendar and in the PIM calendar of the meeting attendee and the status of the meeting is marked as tentative.

Recording Meeting Minutes Wizard

Using the record meeting minutes wizard, you can capture the details of a meeting and issue meeting minutes to attendees and other interested parties. The record meeting minutes wizard also supports work-in-progress minutes, allowing pieces of information to be recorded all at once or over a period of time. The following meeting information can be captured:

- **Meeting Details**
This includes the meeting subject, location, start and end date/time, as well as the name of the person who organized the meeting and the meeting agenda. Any information entered as part of scheduling the meeting will pre-populate the meeting details.
- **Meeting Notes and Decisions**
Meeting notes and decisions can be recorded; these are separate steps in the meeting wizard.
- **Meeting Attendance**
Meeting invitees can be added to the meeting attendees list. Additional invitees can be added, along with their email addresses, to allow for the minutes to be issued to them.
- **Meeting Actions**
Any meeting actions decided upon can be added to the meeting minutes along with the person responsible for the action and the due date by which it is to be complete. A task is created in the background to track progress and is viewable from an internal user inbox and an external user tasks list.
- **Meeting Files**
Files can be attached to meeting minutes. File attachments are accessible by viewing meeting minutes.
- **Meeting Cases**
One or more collaborative cases can be associated with the meeting.
- **Meeting Summary**
This is a summary of the meeting minutes information recorded thus far.

Once the meeting minutes are recorded, you can issue them to any person invited to the meeting. By default, meeting minutes are issued via email with the minutes in an attached PDF document, thus email addresses are required. An informational is displayed when minutes are issued and one or more email addresses are missing or invalid.

1.7 Your Tasks

Use the inbox of your multidisciplinary team portal to view the tasks that are assigned to you. You can add comments to a task that is assigned to you.

Viewing Work Assigned to You

Your multidisciplinary team portal includes an inbox which lists the tasks assigned to you. Each task provides information about an action that you are responsible for completing. Tasks can be assigned to you as part of recording meeting minutes for a scheduled meeting. Agencies can also assign tasks to you as part of their business processing. For example, the agency may request input from you as part of evaluating a client's needs. This input can be tracked in an assigned task.

Managing Your Work

As part of managing your work you can add comments regarding a task. You can also close the task once you have completed the work or else if the task is no longer relevant. Since tasks can be assigned to you in related to a scheduled meeting, a link is provided to view the associated meeting minutes.

Each task has a history which displays all events that have occurred during the life cycle of a particular task. For each event, the name of the person who performed the action and the date and time of that action are recorded.

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