



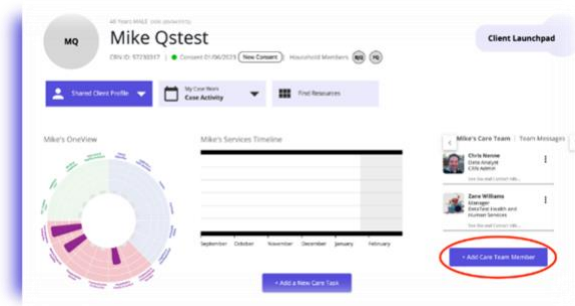
Care Team

Inviting users to the Care Team

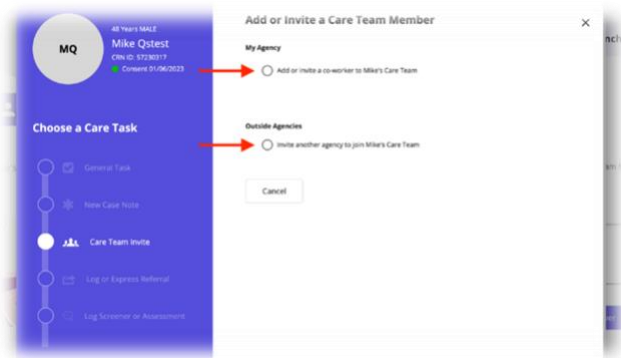
There may be times when you would like to invite another user in CRN to be on a client's care team. You can do this without having to send a referral to the other user.

Pro Tip: You must be on the clients care team, and they must have given consent for you to add care team members

First, navigate to the client's profile Overview & Care Teams page and click + Add Care Team Member.



You will then select if you want to add/invite a co-worker or a user from another entity. Selecting "Add or invite a co-worker to the Care Team" will show a list of participating co-workers you may invite to or add the care team. Selecting "Invite another agency to join the Care Team" will allow you to select an entity and then participating users from that entity to send an invite to. Inviting someone to the care team requires the corresponding user to accept, where adding directly adds them to the care team. You can only add users from your own entity.



Once an invite is sent a care team invite will show in your task feed.

Client Name	Date	Task / Event	Status	Priority
MQ Qstest Mike	01/20/2021	Invite to Care Team	Pending	
		Referral- Stage	Requested	

ProTip: Your task feed updates in real time. Keep track of the status of your invite to track if the recipient has accepted, declined, or has not replied yet.

