Adding Contacts and Guardians in Therap

Go to Member's Therap Individual Home Page

You will need to make sure you are in the State Oversight account when adding guardians. This is because all plans of care are created in the State Oversight account.

From the Therap home page, click on the Individual Home Page tab. Enter the member's name in the search box. When the member's name appears, click on it to go to their individual home page. Once you are on the individual's home page, click the carrot next to Go To. Make sure you are on the Home tab under the member's name to see this option. Once you click on the carrot next to Go To, a long list of options will appear. Click on Contact List

Contact List

You are now on the member's Contact List. This is where all contacts for a member are listed. You can add important contacts for anyone working with the member, such as the member's primary doctor. If a member has guardians, this is where you will add them. To add a contact or guardian, click on Add New Contact.

On the Individual Contact page, enter the contact's information. First name, last name and Relationship to Individual are required fields. If the contact is the member's guardian, select the box next to "Is Guardian" in the Guardian section. Even if you select Guardian from the Relationship to Individual dropdown menu, you must still select this box. Once you select the Is Guardian box, there will be options to enter information about what type of guardian this person is. You do not have to answer these questions. However, make sure the guardianship paperwork is saved in the member's document storage in their Oversight profile. You can also add an attachment to the Individual Contact record. Once all the contact information has been entered, click Save.

Adding a Team Member

Next, add the guardian as a Team Member. This step is important because it allows you to add the guardian to the plan of care. If you are looking at the list of contacts, or if you are in the Individual Home Page, you will need to click on Team Members. Once you are on the Team Members page, click on Add Team Member. This opens an Add Team Member pop-up window. In the Team Member Type dropdown, select Contact. Then in

the Contact dropdown select the contact you want to add as a team member. If you are adding a guardian who has legal decision making power, you will need to select the box next to Legal Decision Maker. The guardian's information will also appear. You cannot edit this information here; it is displayed for informational purposes only. Click on Continue. You will now be on the Team Members page. The page will list the contact you just added as team member. Click Save to save the team member. After you click on Save, a confirmation page will indicate that the team member has been saved for the individual.

Adding Participants to the Plan of Care

When you are working on a plan of care (POC) to add a guardian, you will scroll down to the Participants section of the POC. Click on Add Participant. This opens a Participant pop-up window. From the Add from Team Members dropdown, select the team member you want to add to the POC. The team member that is the member's guardian will have 'guardian' in parentheses after their name. After selecting the person, click Continue. The guardian will now appear in the Participants section of the POC. Finish making your edits to the POC. When you are done, select Update without Closing the Change Form. If you are creating a new POC rather than updating an existing one, save the POC instead.