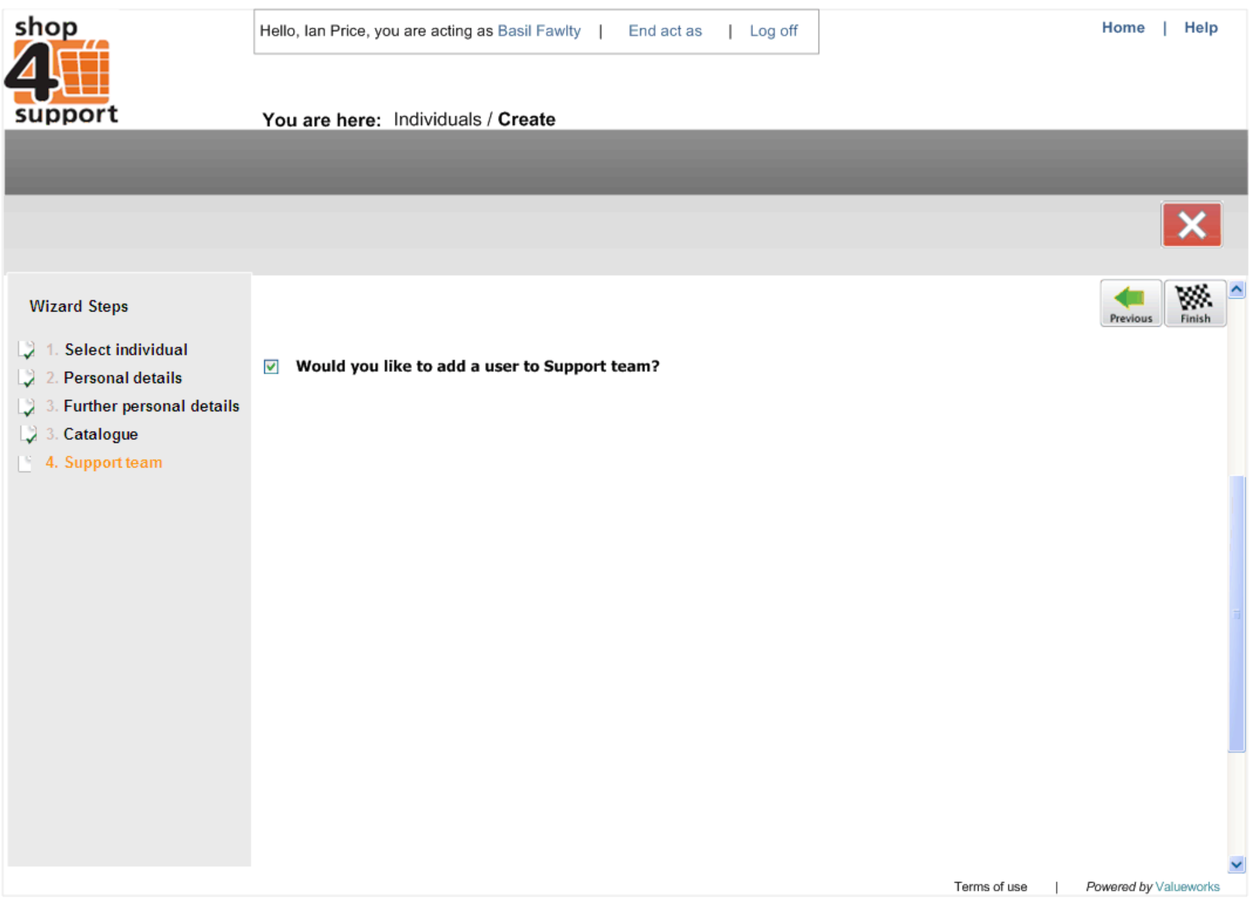
22 How to add a user to an individual's support team

As a budget manager, you can create a personal budget account for an individual. As part of this, you can add users to an individual's support team.

You can activate the Support Team Wizard in the following ways:

1. **When you are creating a Personal Budget Account**

   At Step 4 of the Personal Budget Account Wizard you will be asked if you would like to add a user to the support team, as shown below. Tick the box and a grid with the list of current users from your organisation will appear. Select the relevant user and continue, using the Create Personal Budget Account Wizard.



2. From an existing personal budget account via the Personal Details/Support Team tab.

Once you have logged on as the budget manager/org. administrator, you need to navigate to the Individual's support team tab.

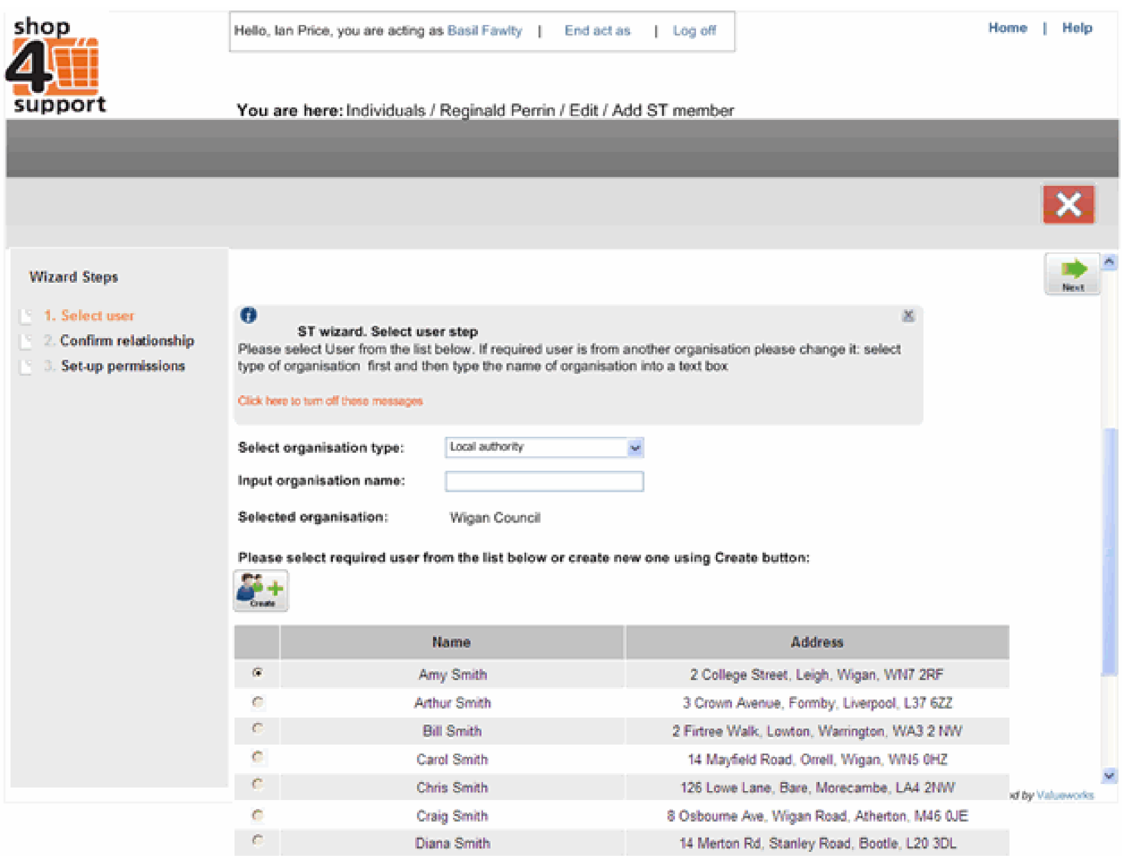
- Click on the Individuals tab on the bottom left navigation panel.
- Click on the individual's folder.
- Click on the Edit button.
- Click on the Personal details folder.
- Click on the Support team tab.
- Click the Add button.

Using the Support Team Wizard

Simply follow the on screen instructions for each stage of the Support Team Wizard.

Step 1 - Select User

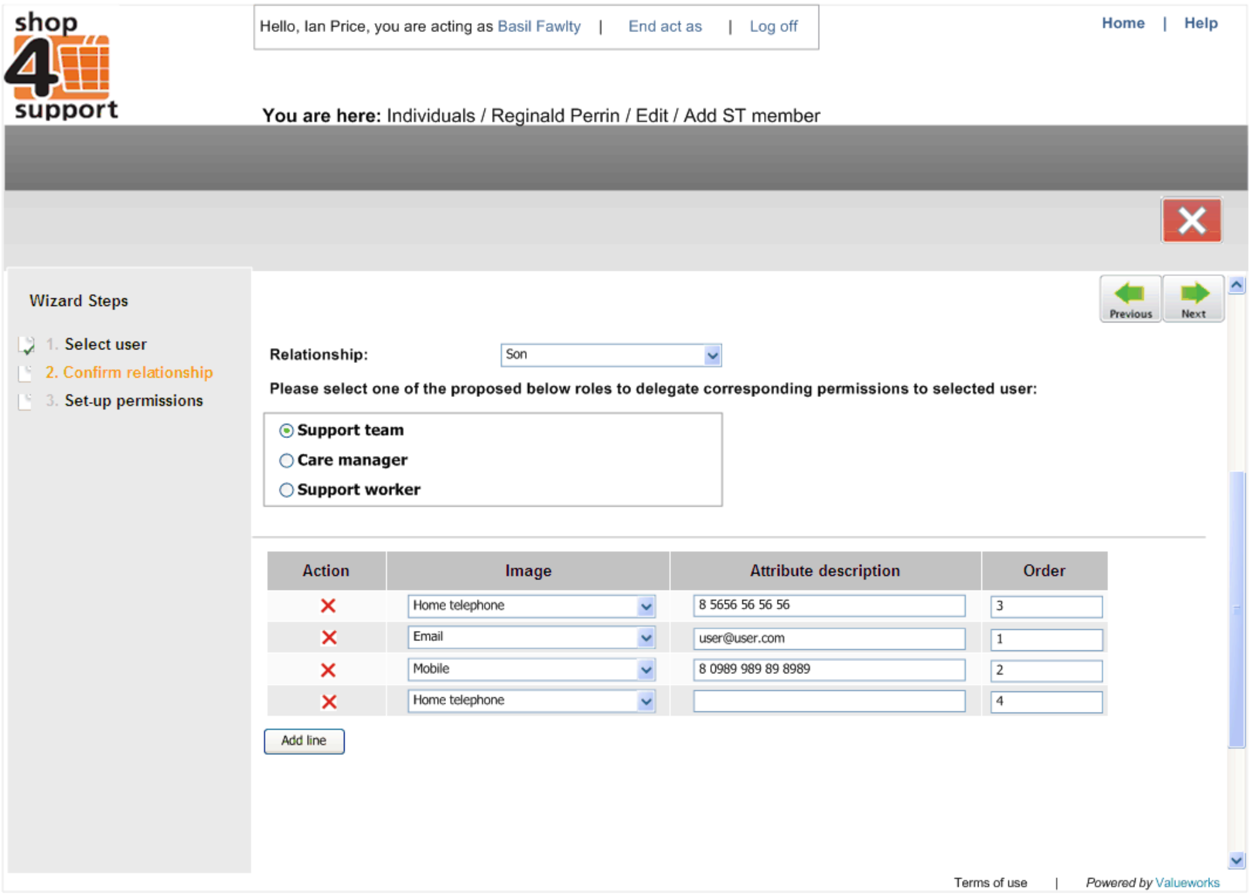
1. Select the type of organisation from the drop down list at the top of the page.
2. Type the organisation name.
3. Select the relevant users by clicking the selection button to the left of the relevant user.
4. You can create a new user by clicking on the Create button.
5. Once you are happy with the details click on the Next button.



Step 2 – Confirm Relationship

Step 2 allows you to determine a set of permissions for a user for the relevant personal budget account.

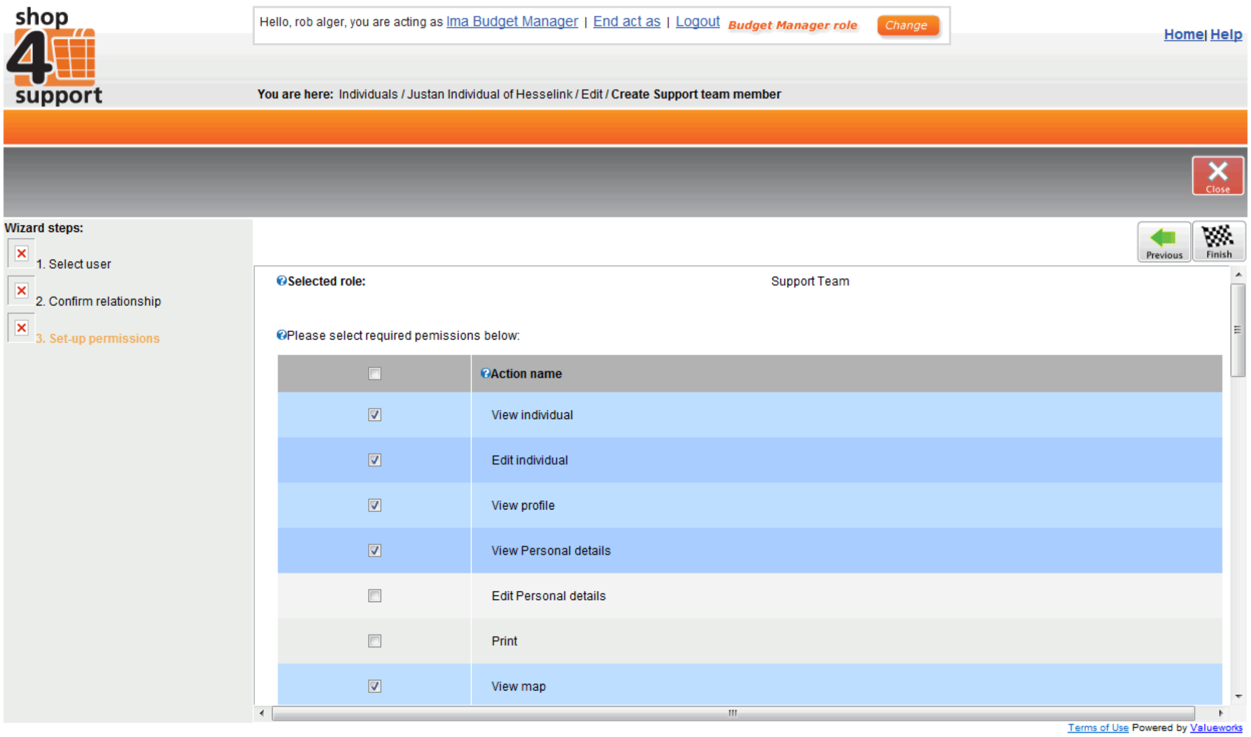
1. Select the relevant relationship the user has with the individual from the drop down menu at the top of the screen.
2. Click on the relevant role. This determines the level permissions for the user.
3. Click on the Add Line button and type in the relevant contact details for the support team member.
4. When you have completed all the relevant information, click on the Next button.



Step 3: Set-Up Permissions

Permissions determine the actions that the support team user can perform.

1. Select the relevant permissions for the user.
2. Once you are happy with the information click on the Finish button.



The support team member will now be listed in the Individual's Personal Details folder shown below. Click on the Support team tab and you can view the member's details. You can also add or delete members from this screen.