



## 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.

The screenshot shows the 'shop 4 support' wizard interface. At the top left is the logo. The top right shows the user's name 'Hello, Ian Price, you are acting as Basil Fawly' and links for 'End act as' and 'Log off'. Below the logo, it says 'You are here: Individuals / Create'. The main content area is a wizard with four steps: '1. Select individual', '2. Personal details', '3. Further personal details', and '4. Support team'. Step 4 is currently active. A checkbox labeled 'Would you like to add a user to Support team?' is checked. On the right side of the wizard, there are 'Previous' and 'Finish' buttons. At the bottom right, there are links for 'Terms of use' and 'Powered by Valueworks'.

## 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.

The screenshot shows the 'shop 4 support' interface. At the top, there is a user greeting: 'Hello, Ian Price, you are acting as Basil Fawley | End act as | Log off'. The breadcrumb trail reads: 'You are here: Individuals / Reginald Perrin / Edit / Add ST member'. The 'Wizard Steps' sidebar on the left shows three steps: '1. Select user', '2. Confirm relationship', and '3. Set-up permissions'. The main content area displays a message box titled 'ST wizard. Select user step' with instructions: 'Please select User from the list below. If required user is from another organisation please change it: select type of organisation first and then type the name of organisation into a text box'. Below the message, there are form fields for 'Select organisation type:' (set to 'Local authority'), 'Input organisation name:' (empty), and 'Selected organisation:' (Wigan Council). A 'Create' button is visible. Below these fields is a table of users with columns for 'Name' and 'Address'.

	Name	Address
	Amy Smith	2 College Street, Leigh, Wigan, WN7 2RF
	Arthur Smith	3 Crown Avenue, Formby, Liverpool, L37 6ZZ
	Bill Smith	2 Firtree Walk, Lowton, Warrington, WA3 2 NW
	Carol Smith	14 Mayfield Road, Orrell, Wigan, WN5 0HZ
	Chris Smith	126 Lowe Lane, Bare, Morecambe, LA4 2NW
	Craig Smith	8 Osbourne Ave, Wigan Road, Atherton, M46 0JE
	Diana Smith	14 Merton Rd, Stanley Road, Bootle, L20 3DL

## 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.



Hello, Ian Price, you are acting as [Basil Fawly](#) | [End act as](#) | [Log off](#)

[Home](#) | [Help](#)

You are here: Individuals / Reginald Perrin / Edit / Add ST member

X

Wizard Steps

- 1. Select user
- 2. Confirm relationship
- 3. Set-up permissions

Relationship:

Please select one of the proposed below roles to delegate corresponding permissions to selected user:

**Support team**  
 Care manager  
 Support worker

Action	Image	Attribute description	Order
X	Home telephone	8 5656 56 56 56	3
X	Email	user@user.com	1
X	Mobile	8 0989 989 89 8989	2
X	Home telephone		4

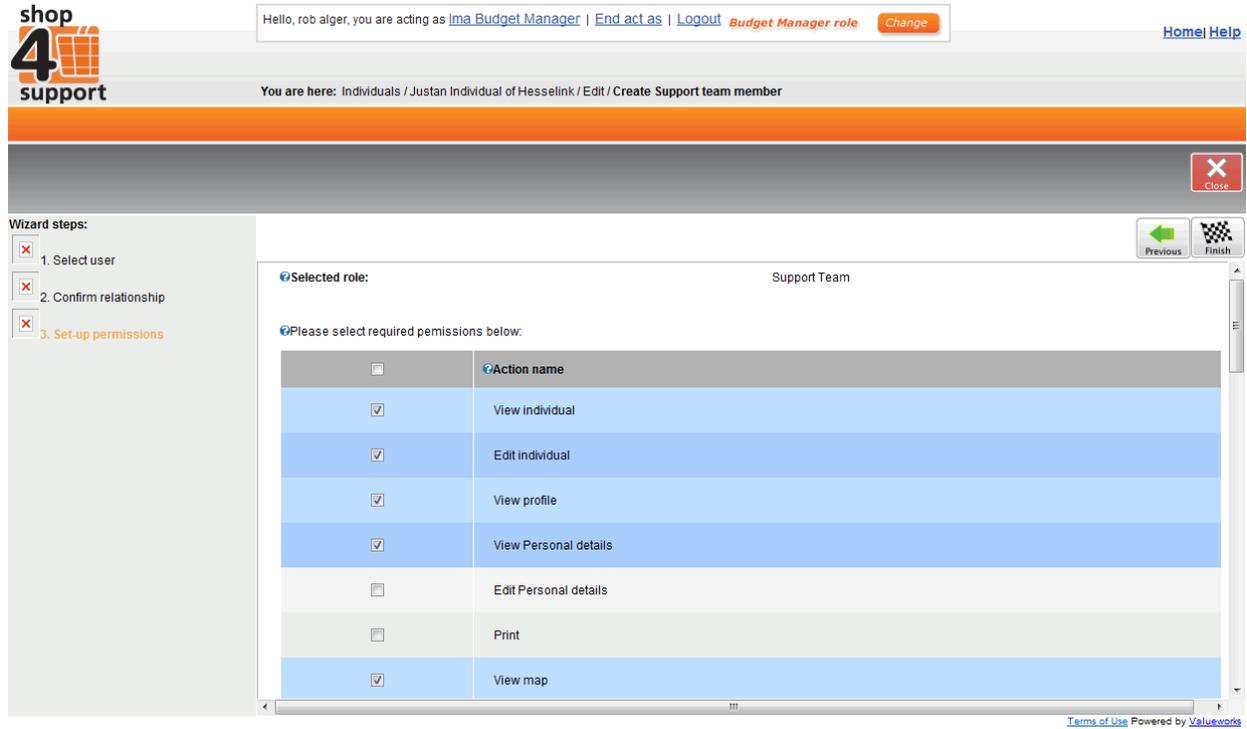
← Previous
Next →

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### 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.

