

How to add members to your team

To be a member of a team you must first have created your ppm+ Contact.

On the homepage use the drop down to select **Contact** and search for your name as it displays in your contact information .

Search bar showing 'Contact' selected in the dropdown and 'Adam Charles Smith' entered in the search field. An orange arrow points to the search button.

Your contact information will appear in a new tab.
Select the second option: **Membership**.
The teams you are a member of will display on the right.
Select the team you would like to add a member to.

Actions column showing 'Membership' selected. Contact Membership table showing two teams: Dietetic (Critical care SJUH)-DT and Dietetic (ESM) -DT.

The Team tab will appear and be automatically selected.
Select the second option: **Membership**.
Select **Edit Team** from the Actions column on the left.

Actions column showing 'Membership' selected. Team Membership table showing two members: HALE, Deborah (Mrs) : and SMITH, Adam Charles.

The **Team Edit Wizard** pop up will appear.
Click on **+Add**.

Team Edit Wizard window showing the Members tab. Active Members list includes HALE, Deborah (Mrs) (Nurse) and SMITH, Adam Charles (Mr) (Admin). An orange arrow points to the + Add button.

Search for the colleague you want to add to the team.
Click on the + next to their name in the list below.

blanca plazas

Show All Sort by title ascending

Contacts

PLAZAS, Blanca (Miss)	Admin	+
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The individual will be highlighted and the + will turn in to a tick.
Click on **Next** in the bottom right corner.

blanca plazas

Show All Sort by title ascending

Contacts

PLAZAS, Blanca (Miss)	Admin	✓
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Cancel Next

In the next pop up, leave **Valid To** blank and click **Save** in the bottom right corner.

PLAZAS, Blanca (Miss)

Valid From: 05-Dec-2018

Valid To:

Membership Type: Core

Cancel < Prev ✓ Save

You will now see your selected colleague in the members list.

You can continue to add more colleagues by clicking on +Add and repeating the steps above.

Once complete remember to click **Save** in the bottom right.

Team Edit Wizard

- Details
- Specialties
- Addresses
- Members**

Filter Members

Show Active Sort by name ascending

Active Members + Add

HALE, Deborah (Mrs) (Nurse)	Core	Active
SMITH, Adam Charles (Mr) (Admin)	Core	Active
WATERHOUSE, Jay (Mr) (Admin)	Core	Active
THOMSON, John (Mr) (Admin)	Core	Active
PLAZAS, Blanca (Miss) (Admin)	Core	Active

Cancel < Prev ✓ Save

For further information please contact ImplementationTeam
Ext. 60347 or email to leedsth-tr.ImplementationTeam@nhs.net