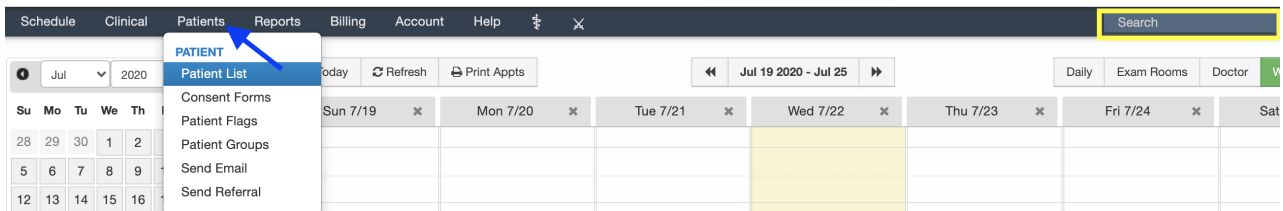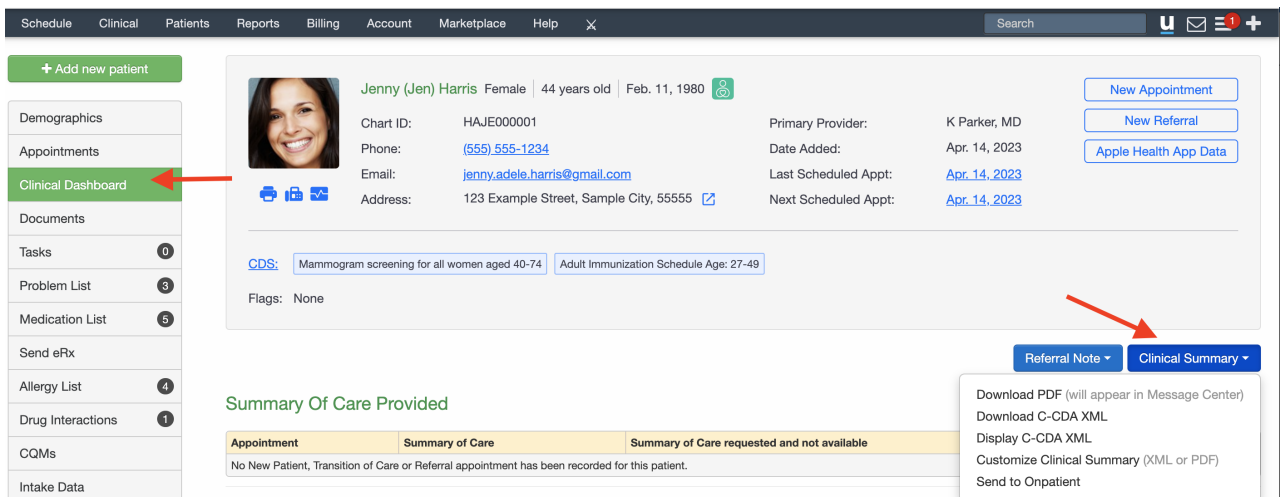# Adding Care Team Members to a Patient's Chart

07/24/2024 12:04 pm EDT

You can add care team members to a patient's appointment so that the information is contained in the patient's Clinical Summary and C-CDA files.

1. Open a patient chart by searching for a patient in the navigation **Search** bar or through **Patients** > **Patient List**.

2. Go to the **Clinical Dashboard** on the left.

3. Scroll down to the **Additional Options** section and click on **Care Team Members**.

Clinical Dashboard

- Documents
- Tasks — 0
- Problem List — 3
- Medication List — 7
- Send eRx
- Allergy List — NKDA
- Drug Interactions — 4
- CQMs
- Intake Data
- Lab Orders
- Immunizations
- Growth Charts
- onpatient Access
- Education Resources
- Communication
- Family History
- Imaging Orders
- Implantable Devices

App Directory

- Health Gorilla
- Physitrack

amoxicillin 500 mg oral tablet | 308192 | Take 2 a day for 10 days | Take 2 a day for 10 days | 20.000 C4

Lab Results

Status	Date	Documents
No lab result has been recorded for this patient.		

Legacy Lab Results

LOINC Code	Lab Description	Date	Sign-Off	Status
No Lab Result information is available for this patient.				

Active Clinical Decision Support Rules For Patient

	ID	Description	Release Date	Care Info
Dismiss Alert	s6	Adult Immunization Schedule Age: 19-21		Refer to Adult Immunization schedule.

Resolved Clinical Decision Support Rules For Patient

ID	Description	Release Date	Care Info	Bibliography
No CDS rules in Resolved or In Progress state for this patient.				

Import Structured Clinical Record

Type of record: [C-CDA — Consolidated Clinical Document Architect ∨]

File to upload (*.xml): [Choose File] No file chosen

[Preview File]

Additional Options:

Care Plan | Care Team Members | Functional Status | Mental Status | Create Syndromic HL7 Message for CDC | Import CCR Lab Result | Social Data |

4. The provider for the appointment is automatically included. You can add other team members by clicking **Edit** next to the appointment.

Michelle Harris (Female | 23 years old | Oct. 14, 1999) ✎ HAMI000005

Phone: (650) 555-5555 **Email:** Missing
Address: 1001 N Rengstorff Ave Mountain View , CA 94040
CDS: Adult Immunization Schedule Age: 22-26

Date Added: Oct. 13, 2021
Last Scheduled Appt: Mon Apr 25, 2022
Next Scheduled Appt: Thu Aug 04, 2022

[New Referral] [Fax Demographics] [🖶 Print Demographics]   [Apple Health App Data] [♥ Vitals] [+ Schedule New Appointment]

Care Team Members

Appt Scheduled Time	Appt Provider	Care Team Members	Action
Oct 14, 2021 15:05	Jane Smith	None selected	✎ Edit
Oct 16, 2021 09:00	Jane Smith	None selected	✎ Edit
Oct 16, 2021 09:45	Jane Smith	None selected	✎ Edit
Oct 17, 2021 13:30	Jane Smith	None selected	✎ Edit
Oct 18, 2021 13:15	Jane Smith	Jane Smith, Dr. James Smith	✎ Edit
Oct 19, 2021 14:00	Jane Smith	Jane Smith	✎ Edit

5. Add the necessary Care Team Members and click **Save**.

Select Care Team Members

Search by name   **0 selected**

- ☐ Jane Smith
- ☐ Sample Billing `Inactive or Suspended`
- ☐ Nick Riviera
- ☐ Lab Tech `Inactive or Suspended`
- ☐ Test Staff `Inactive or Suspended`
- ☐ Manager Sample `Inactive or Suspended`
- ☐ Sample Nurse `Inactive or Suspended`
- ☐ Walk Me `Inactive or Suspended`
- ☐ Sample Staff
- ☐ DrChrono Content
- ☐ Dr. James Smith
- ☐ Pasword Test

| Select Active | Select All | Select None | Save | Close |

6. Once added, the Care Team Members will appear next to the appointment.

Care Team Members

Appt Scheduled Time	Appt Provider	Care Team Members	Action
Oct 14, 2021 15:05	Jane Smith	Jane Smith, Dr. James Smith, Sample Staff	✏ Edit
Oct 16, 2021 09:00	Jane Smith	None selected	✏ Edit
Oct 16, 2021 09:45	Jane Smith	None selected	✏ Edit
Oct 17, 2021 13:30	Jane Smith	None selected	✏ Edit
Oct 18, 2021 13:15	Jane Smith	Jane Smith, Dr. James Smith	✏ Edit
Oct 19, 2021 14:00	Jane Smith	Jane Smith	✏ Edit

7. Under the **Clinical Dashboard** section, click on the **Clinical Summary** menu. Select the format you would like to export or view.

8. Under the Encounter information, the Care Team Members will be listed along with their roles in the practice.

Encounters

Oct. 14, 2021, 3:05 p.m. Encounter

Provider: Jane Smith - Family Practitioner at Office 1 (225 Schilling Circle Hunt Valley, MD 21031, (443) 555-5555)

Care Team Member: Custom - Jane Smith
Custom - Dr. James Smith
Office Manager - Sample Staff

9. Care team members will also be added as Performers in the patient's health summary in the CCDA.

Patient Health Summary

Patient	Lucy Sample	
Patient Previous Name		
Date of birth	September 2, 1993	**Sex**
Race	Unknown	**Ethnicity**
Contact info	Primary Home: , US Tel (Cell): +1(410)-555-5555	**Previous Address**
Preferred Language	Information not available	
Patient IDs	105313682 2.16.840.1.113883.3.7621 appointment_247395194 2.16.840.1.113883.3.7621	
Document Created	April 10, 2023, 13:29:24, EST	
Care provision	from September 14, 2022, 14:26:27, EST to April 10, 2023, 13:29:24, EST	
Performer	James Smith	
Performer	Sample Staff	
Author	Dr. James Smith, Office 3	