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**.

Sc	chec	lule		Clin	ical	Patients Reports	Billin	g Accou	nt Help	\$ X							Search		
0	J	ul	~	2	020	PATIENT Patient List	oday	2 Refresh	🖶 Print Appts			••	Jul 19 2020 - Jul 25	₩			Daily Exam Ro	oms [Doctor V
Su	M	o T	۲u۱	Ve	Th I	Consent Forms Patient Flags	Sun 7,	′19 ×	Mon 7/2	0 ×	Tue 7/21	×	Wed 7/22	×	Thu 7/23	×	Fri 7/24	×	Sat
28	29	3	30	1	2	Patient Groups	_												
5	6	1	7	8	9 -	Send Email													
12	13	3 1	14	15	16	Send Referral													

2. Go to the Clinical Dashboard on the left.

Schedule Clinical Pa	tients Reports Billing	Account M	arketplace Help 🗙			Search	U 🖸 🗐
+ Add new patient		Jenny (Jen) H	arris Female 44 years old	d Feb. 11, 1980 💧			New Appointment
emographics		Chart ID:	HAJE000001		Primary Provider:	K Parker, MD	New Referral
ppointments		Phone:	<u>(555) 555-1234</u>		Date Added:	Apr. 14, 2023	Apple Health App Data
inical Dashboard		Email:	jenny.adele.harris@gmail.	com	Last Scheduled Appt:	Apr. 14, 2023	
	🖶 🖨 🗠	Address:	123 Example Street, Sam	ple City, 55555 🔀	Next Scheduled Appt:	<u>Apr. 14, 2023</u>	
ocuments							
asks O	CDS: Mammo	gram screening for all	women aged 40-74 Adult Imn	unization Schedule Age: 27	-49		
roblem List	Flame Name						
ledication List 5	Flags: None						
iend eRx						Referra	al Note - Clinical Summary
llergy List						Download PDF	(will appear in Message Center)
orug Interactions	Summary Of C	Care Provided	Download C-CI				
QMs	Appointment	Summar	y of Care	Summary of Care req	uested and not available	Display C-CDA	
QIVIS	No New Patient, Trans			ical Summary (XML or PDF)			
						Send to Onpati	

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

Clinical Dashboard	amoxicillin 500 mg	oral tablet	308192	Take 2 a d	day for 10 days	Take 2 a day for 10 days	20.000 C4
Documents	Lab Results						
Tasks O				_		_	
Problem List 3	Status No lab result has b	een recorde	ad for this nationt	Date		Documents	
Medication List	no lab result has b						
Send eRx	Legacy Lab F	Results					
Allergy List NKDA	LOINC Code		Lab Description		Date	Sign-Off	Status
Drug Interactions	No Lab Result info	rmation is a	vailable for this patient.				
CQMs	Active Clinica	al Decis	ion Support Rules For Patient	t			
Intake Data		ID	Description		Release Date	Care Info	
Lab Orders	Dismiss Alert	s6	Adult Immunization Schedule Age: 19-21		Release Date	Refer to Adult Immunization so	hedule.
Immunizations	Resolved Cli	nical Do	ecision Support Rules For Pat	iont			
Growth Charts	Resolved Cili		cision support rules for fat	ient			
onpatient Access		escription	Release Date		Care Info	Bibliography	
Education Resources	No CDS rules in Re	esolved or Ir	n Progress state for this patient.				
Communication							
Family History	Import Struct	ured Clir	nical Record				
Imaging Orders	Type of	record:	C-CDA - Consolidated Clinical Docume	ent Architect 🗸			
	File to upload	(*.xml): [Choose File No file chosen				
Implantable Devices			Preview File				
App Directory							
Health Gorilla	Additional Op	otions:					
Physitrack			nbers Functional Status Mental Statu	us Create Syndromi	c HL7 Message for C	DC 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.

Michell	e Harris (Female 23 years old Oc	t. 14, 1999) 🕜	HAMI000005
	(650) 555-5555 Email: Missing 1001 N Rengstorff Ave Mountain View , CA 94040	Date Added: Oct. 13, 2021 Last Scheduled Appt: Mon Apr 25, 2022 Next Scheduled Appt: Thu Aug 04, 2022	
CDS:	Adult Immunization Schedule Age: 22-26		
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	
Oct 16, 2021 09:00	Jane Smith	None selected	
Oct 16, 2021 09:45	Jane Smith	None selected	
Oct 17, 2021 13:30	Jane Smith	None selected	
Oct 18, 2021 13:15	Jane Smith	Jane Smith, Dr. James Smith	
Oct 19, 2021 14:00	Jane Smith	Jane Smith	Je 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	Clos

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	
Oct 16, 2021 09:00	Jane Smith	None selected	& Edit
Oct 16, 2021 09:45	Jane Smith	None selected	
Oct 17, 2021 13:30	Jane Smith	None selected	
Oct 18, 2021 13:15	Jane Smith	Jane Smith, Dr. James Smith	
Oct 19, 2021 14:00	Jane Smith	Jane Smith	Je Edit

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

Schedule C	Clinical	Patients	Reports	Billing	Account	Marketplace	Help	×				Search		📙 🖸 🚅 🕂	
+ Add new	patient			<u> </u>	Jenny (Jen)) Harris Femal	e 44 y	ears old	Feb. 11, 1980 员				New	Appointment	
Demographics			P		Chart ID:	HAJE000	001			Primary Provider:	ĸ	Parker, MD	Ne	w Referral	
Appointments			(F	P F	Phone:	<u>(555) 555-</u>	<u>-1234</u>			Date Added:	A	pr. 14, 2023	Apple H	ealth App Data	
Clinical Dashbo	oard				Email:			ogmail.com		Last Scheduled Ap		<u>pr. 14, 2023</u>			
Documents			e 18		Address:	123 Exam	ple Stree	et, Sample	City, 55555 [🔀	Next Scheduled A	ppt: <u>A</u>	<u>pr. 14, 2023</u>			
Tasks	G		CDS:	Mammogram	screening for	all women aged 4	0-74 A	dult Immuniz	ation Schedule Age: 2	7-49					
Problem List		•	Flags: N	lone											
Medication List)	riago: ri												
Send eRx												Refer	ral Note 👻 🚺	Clinical Summary -	
Allergy List	Ģ		0		- Dura dala	1						Download PD	F (will appear in	Message Center)	
Drug Interaction	ns 🕻		Summary	/ UI Care	e Provide	a						Download C-0			
CQMs			Appointment			nary of Care				quested and not available		Display C-CD		WML as DDD	
			No New Patier	nt, Transition	of Care or Ref	erral appointment	has been	recorded for	this patient.			Customize Clinical Summary (XML or PDF) Send to Onpatient			
Intake Data															

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	Previous Address					
	Tel (Cell): +1(410)-555-5555						
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						