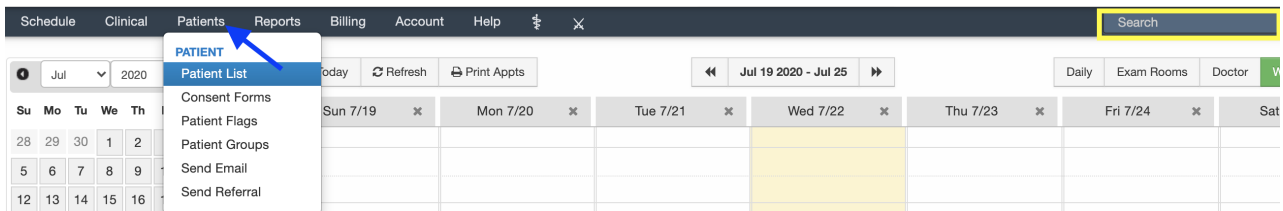


Adding Care Team Members to a Patient's Chart

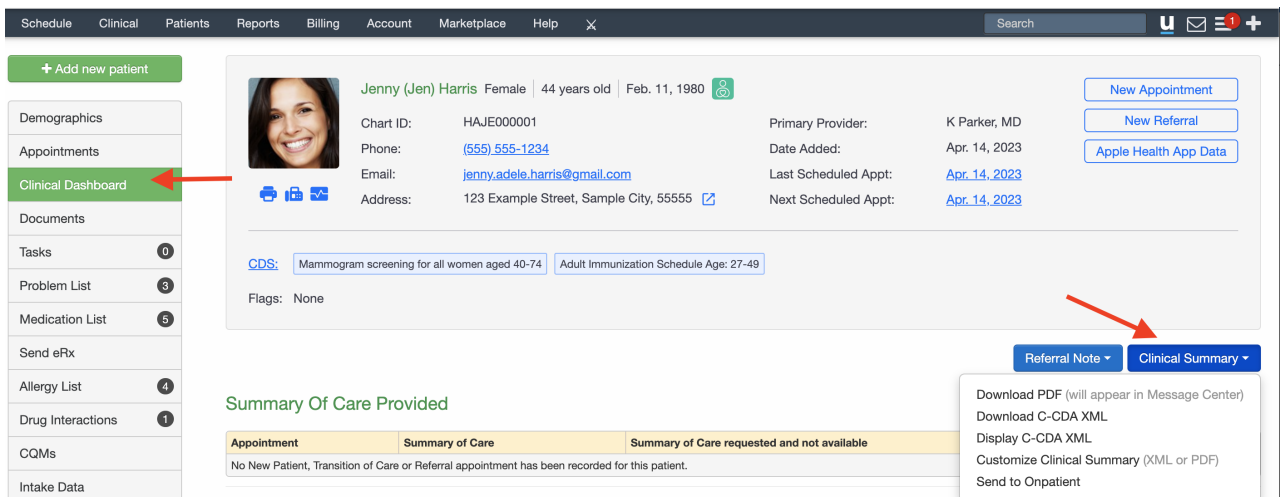
07/08/2024 7:30 pm EDT

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**.

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

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

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:

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

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 Date Added: Oct. 13, 2021

Address: 1001 N Rengstorff Ave Last Scheduled Appt: Mon Apr 25, 2022
Mountain View, CA 94040 Next Scheduled Appt: Thu Aug 04, 2022

CDS: [Adult Immunization Schedule Age: 22-26](#)

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
- Password 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.

The screenshot shows a patient's clinical dashboard for Jenny (Jen) Harris. The 'Clinical Dashboard' menu item is highlighted in the left sidebar. In the main content area, the 'Clinical Summary' dropdown menu is open, showing options like 'Download PDF', 'Download C-CDA XML', and 'Display C-CDA XML'. A red arrow points to the 'Clinical Summary' button, and another red arrow points to the dropdown menu.

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	