Adding Care Team Members to a Patient's Chart

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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**.

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

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

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	