



# 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.




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



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


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 


☐ Nick Riviera

☐ Lab Tech 

☐ Test Staff 

☐ Manager Sample 

☐ Sample Nurse 

☐ Walk Me 

☐ 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	<a href="#">Edit</a>
Oct 16, 2021 09:00	Jane Smith	None selected	<a href="#">Edit</a>
Oct 16, 2021 09:45	Jane Smith	None selected	<a href="#">Edit</a>
Oct 17, 2021 13:30	Jane Smith	None selected	<a href="#">Edit</a>
Oct 18, 2021 13:15	Jane Smith	Jane Smith, Dr. James Smith	<a href="#">Edit</a>
Oct 19, 2021 14:00	Jane Smith	Jane Smith	<a href="#">Edit</a>

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

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