Adding & Updating the Patient's PCP and Care Team

It's important to update the patient's PCP to ensure communication with the specialty care team. It should never be left blank, even if the patient doesn't have a PCP. When updating a patient's Care Team from the Storyboard, you can add MFA providers by searching for their names. You can add many external providers the same way, but not all exist in the database. You can add these providers using the Provider on the fly tool.

Add an MFA Provider as PCP/Care Team Member

1. To access the Care Team activity, click on the **Care Team: No PCP** or the **PCP's name** in the patient's Storyboard.
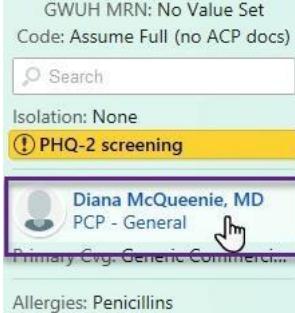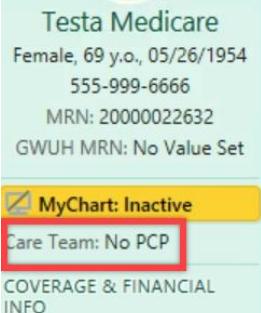
2. Search for the provider's name in the **Add PCP** field. To search by location and filter search results, click the 🔍 **magnifying glass**.

> ⓘ Use the **Add Team Member** field to add a specialist or other provider to the patient's Care Team who is not their PCP.

3. Fill out as much information as possible about the provider. The **Name** and **Start Date** (the date the patient began seeing them) are the minimum requirements. If the patient doesn't know the exact date, a "fuzzy date" such as the first of a month will suffice.
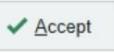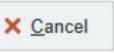
4. Click ✔**Accept**. The provider will now be listed as the PCP on the patient's Care Teams page and Storyboard.

Add an External Provider as PCP/Care Team Member

1. Search the **Add PCP** or **Add Team Member** field for the outside provider. Try searching for possible alternate names, e.g. "Bill" instead of "William."
2. Click on the 👤 **Provider on the fly** icon to the right of the Add PCP field. This will prompt you to once again search for the provider in the system.

3. If there is still no matching provider found, click ✖ **Cancel**. This will allow you to manually enter their information.

4. Enter as much information as possible on the outside provider. Entering a **fax number** will make it easier for electronic communications to be sent to this provider.

! The NPI number is a required field when adding a new provider record. To search the NPI registry for the appropriate number, visit https://npiregistry.cms.hhs.gov/search.

5. Click ✔**New**. The provider and their information will now be displayed on the Care Teams page.

End & Update a PCP Assignment

If a patient stops seeing their listed PCP (or other Care Team provider), the assignment should be ended before assigning a new one.

1. On the patient's Care Team page, select the appropriate provider and click ✖ **End**.
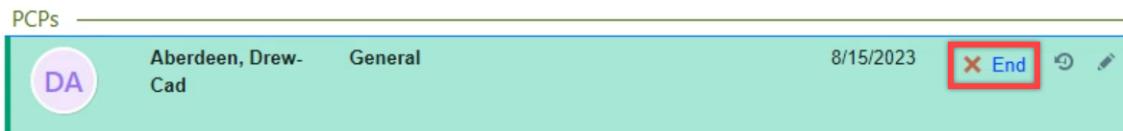
2. The **End** date will default to today's date, but can be changed if necessary. You can also add the reason for the change using the **Change Requested By** and **Reason for Change** fields.
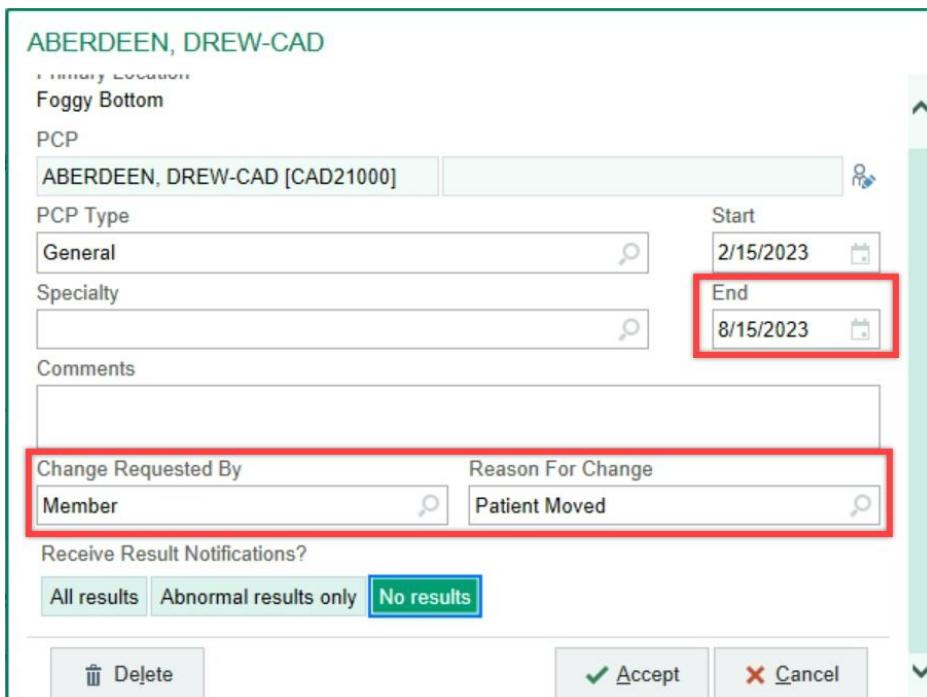
3. Click ✔**Accept**. Once the End Date is past, the former PCP will be hidden on the Care Teams page by default. Click the **Show Past Members** checkbox to view details for past team members.

4. Follow the steps in the previous sections to add the new PCP.

Patient Does Not Have a PCP

If a patient does not have a primary care provider, it is important to offer to schedule a PCP visit with the MFA to establish care. In the meantime, there is a special 'No PCP' provider record that can be used as a placeholder. You will be prompted by the Registration Checklist to use this placeholder record in order to confirm that a patient does not have a PCP.
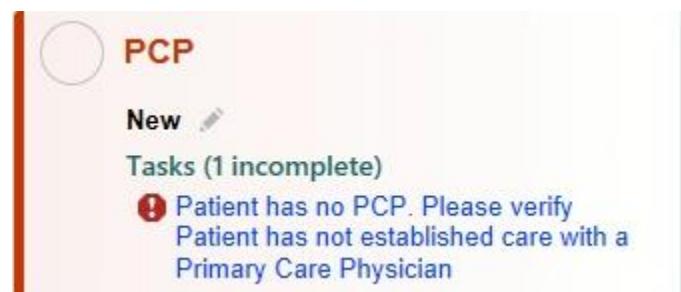
1. In the **Add PCP** field on the patient's Care Team activity, enter **"No PCP."**

2. The provider listed in the Add New Assignment window will be "NO, PCP [1221834]." Click ✔**Accept**.

3. The patient will now have the 'No PCP' placeholder in their Care Team and Storyboard. The placeholder assignment can be ended once an actual PCP is established.