

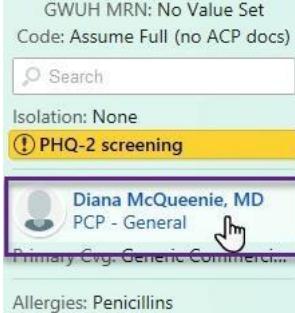
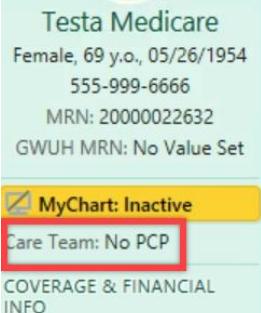


Adding & Updating the Patient's PCP and Care Team

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.



Testa Medicare
Female, 69 y.o., 05/26/1954
555-999-6666
MRN: 20000022632
GWUH MRN: No Value Set

MyChart: Inactive

Care Team: No PCP

COVERAGE & FINANCIAL INFO

GWUH MRN: No Value Set
Code: Assume Full (no ACP docs)

Search

Isolation: None

① PHQ-2 screening

Diana McQueenie, MD
PCP - General 

Primary Cog. Generic Commercial...

Allergies: Penicillins

2. Search for the provider's name in the **Add PCP** field. To search by location and filter search results, click the  magnifying glass.



Patient Care Team

Add PCP: aberdeen,drew  

Add Team Member:  

① Search current and past team members by name, role, etc.

Search by team member details



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

- 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.

Add New Assignment

Primary Location
Foggy Bottom

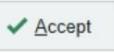
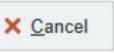
PCP
ABERDEEN, DREW-CAD [CAD21000] 

PCP Type
General  Start  8/15/2023

Specialty  End 

Comments 

Receive Result Notifications?
All results  Abnormal results only  No results 

- Click  **Accept**. The provider will now be listed as the PCP on the patient's Care Teams page and Storyboard.

Team Member	Address	Start	End
PCPs			
DA Aberdeen, Drew-Cad	General	8/15/2023	  

Add an External Provider as PCP/Care Team Member

- 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."
- 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.

Patient Care Team

Add PCP:  

Add Team Member:  

Provider Lookup

Name WHITECOAT, WILLIAM	Sex Male
 	

- 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.

Provider Lookup

Name: WHITECOAT, WILLIAM Sex: Male

Create Provider

Select Provider ID Generation Method:

Credentials:

NPI: !

Specialty: !

Practice Name:

Phone: !

Fax: !

Address: !

City (or ZIP): !

State: ZIP:

County:

Country:

Access To EHR:

! 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>.

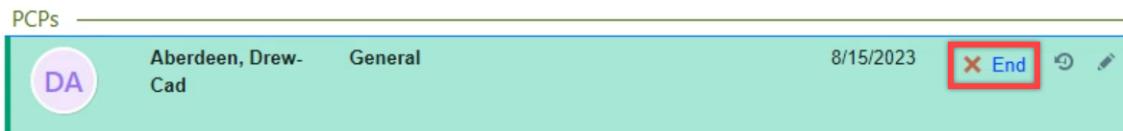
5. Click ✓ **New**. The provider and their information will now be displayed on the Care Teams page.

Team Member	Address	Start
PCPs		
Diana McQueenie, MD 	General (Family Medicine)	4/23/2016
<hr/>		
Additional Team Members		
William Whitecoat 	(Endocrinology) 202-867-5309 202-741-3636	3/1/2021

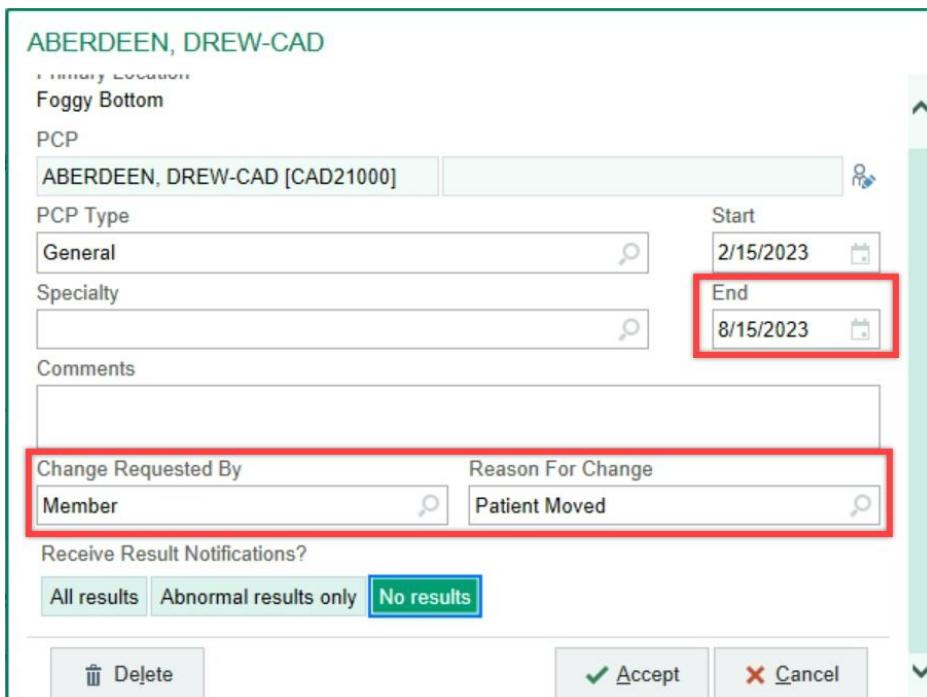
End & Update a PCP Assignment

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.



A screenshot of a 'Edit PCP' dialog box. The provider is listed as 'ABERDEEN, DREW-CAD'. The 'PCP Type' is 'General' and the 'Start' date is '2/15/2023'. The 'End' date is '8/15/2023', which is highlighted with a red box. Below the provider information, there are fields for 'Change Requested By' (set to 'Member') and 'Reason For Change' (set to 'Patient Moved'), both of which are also highlighted with red boxes. At the bottom of the dialog, there are buttons for 'Delete', 'Accept' (with a green checkmark icon), and 'Cancel' (with a red 'X' icon).

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.

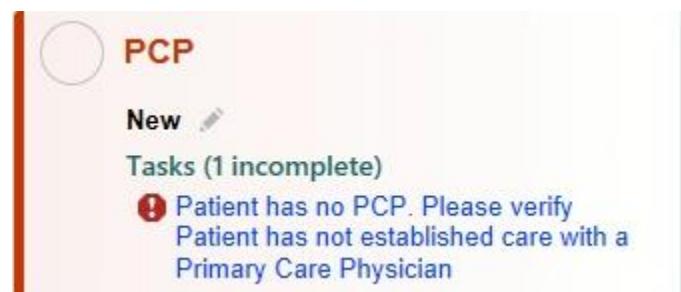


A screenshot of a 'Past Team Members' table. The table has columns for 'Team Member', 'Role', 'Specialty', 'Start', and 'End'. There is one entry: 'Aberdeen, Drew-Cad' with 'PCP: General' role, 'General' specialty, 'Start' date '2/15/2023', and 'End' date '8/14/2023'. Below the table, there is a green checked checkbox labeled 'Show Past Members' and a 'Select to show past team members.' button with a 'Got It' link.

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."

A screenshot of the 'Patient Care Team' activity. The 'Add PCP' field contains the text 'no pcp'. There are search and add icons next to the input field.

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

A screenshot of the 'Add New Assignment' window. The 'PCP' field is populated with 'NO, PCP [1221834]'. Other fields include 'Primary Location' (West End), 'PCP Type' (General), 'Start' date (8/15/2023), and 'Comments'. At the bottom are 'Accept' and 'Cancel' buttons.

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.