



# 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.

The screenshot shows two panels from a patient's storyboard. The left panel, titled 'Testa Medicare', displays patient information: 'Female, 69 y.o., 05/26/1954', phone number '555-999-6666', MRN '20000022632', and 'GWUH MRN: No Value Set'. It includes a 'MyChart: Inactive' status and a red-bordered button labeled 'Care Team: No PCP'. The right panel shows 'GWUH MRN: No Value Set' and 'Code: Assume Full (no ACP docs)'. It features a search bar, 'Isolation: None', a yellow 'PHQ-2 screening' button, and a profile card for 'Diana McQueenie, MD' with the role 'PCP - General'. A hand cursor is pointing at the MD's name. Below the profile card, it says 'Primary Cvg: Generic Commercial...' and '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**.

The screenshot shows the 'Patient Care Team' form. It has a header 'Patient Care Team' in a green box. Below it are two input fields: 'Add PCP:' with the text 'aberdenn,drew' and a magnifying glass icon, and 'Add Team Member:' with an empty field and a magnifying glass icon. To the right of these fields is a yellow box with the text 'Search current and past team members by name, role, etc.' and a 'Got It' button. Below this is a search bar with the placeholder text '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

Specialty

Start  
8/15/2023

End

Comments

Receive Result Notifications?

- 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
<b>PCPs</b>			
	Aberdeen, Drew-Cad	General	8/15/2023 <input checked="" type="button" value="End"/>

## 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.

- 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>.

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

Team Member	Address	Start
<b>PCPs</b>		
 Diana McQueenie, MD General (Family Medicine)		4/23/2016
<b>Additional Team Members</b>		
 William Whitecoat ☎ 202-867-5309 📠 202-741-3636 (Endocrinology)		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**.

PCPs

DA Aberdeen, Drew-Cad General 8/15/2023 ✖ 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.

ABERDEEN, DREW-CAD

Primary Location  
Foggy Bottom

PCP  
ABERDEEN, DREW-CAD [CAD21000]

PCP Type  
General

Specialty

Start  
2/15/2023

End  
8/15/2023

Comments

Change Requested By  
Member

Reason For Change  
Patient Moved

Receive Result Notifications?  
All results Abnormal results only No results

Delete Accept Cancel

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.

✔ Show Past Members

Select to show past team members. Got It

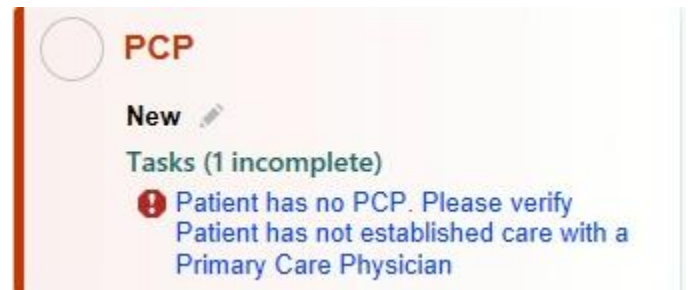
Past Team Members

Team Member	Role	Specialty	Start	End
Aberdeen, Drew-...	PCP: General		2/15/2023	8/14/2023

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.