Northern Light Health

From the Office of Clinical Informatics

Quick Reference Guide (QRG)
Document Care Teams

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This Quick Reference Guide (QRG) reviews the steps for documenting Care Teams

Common Buttons & Icons

	Add drop-down arrow
Assign	**Assign** button
Assign & Add Another	**Assign & Add Another** button
Modify	**Modify** button
Remove	**Remove** button
Apply	**Apply** button
	Component Refresh icon

Assign Yourself

➢ From the Provider View workflow page:

STEP 1: Navigate to the **Care Team** component.

STEP 2: Click the **Add** drop-down arrow; then click **Assign Myself**.

STEP 3: Click **Cross-Visits Provider**.

Assign a Provider

➢ From the Care Team component:

STEP 1: Click the **Add** drop-down arrow; then click **Assign Provider**.

STEP 2: Enter the provider's name in the **Search** field.

STEP 3: Click the appropriate provider.

STEP 4: Click the appropriate role.

STEP 5: Click **Assign**.

NOTE: **If you have another provider to add, click Assign & Add Another to save this provider and start a new search.**

Assign a Non-Provider

- **From the Care Team component:**

STEP 1: Click the **Add** drop-down arrow; then click **Assign Non-Provider** .

NOTE: Fields with the red asterisks indicate required documentation.

STEP 2: Enter the non-provider's first name in the **First Name** field.

STEP 3: Enter the non-provider's last name in the **Last Name** field.

STEP 4: Enter their phone number in the **Phone Numbers** field.

STEP 5: Click the **Relationship To Patient** drop-down arrow.

STEP 6: Click the appropriate relationship.

STEP 7: Click **Assign**.

NOTE: If you have another non-provider to add, click Assign & Add Another to save this non-provider and start a new search.

Modify a Care Team Member

- **From the Care Team component:**

STEP 1: Click the member you wish to modify. A details pane displays on the right.

STEP 2: Click **Modify**.

STEP 3: Update the fields, as needed.

STEP 4: Click **Apply**.

NOTE: To remove a member from the care team, click the member; then click Remove in the details pane.