EMPANELMENT—HOW TO GUIDE

MODIFYING CARE TEAM ASSIGNMENTS

1. Navigate to the care team form. To open it as a standalone note, start from CLINICAL LISTS UPDATE

![Image of CLINICAL LISTS UPDATE form]

Open a CLINICAL LISTS UPDATE note. It does not need to be associated with an appointment.

2. Select the appropriate options and sign or route as appropriate

![Image of available selections]

Available selections are dynamic. Informatics can assist if the list requires updates.

- “Outside Provider” - Client is getting care with an external provider
- “Unassigned” - Client is engaged in care with unempaneled providers only and should not be assigned to a care team.
- “Null” - Client has not engaged with care long enough to determine if they will be empaneled. No action required.
WHERE TO FIND PANEL DETAILS

1. On the banner (you may need to scroll)

2. On the encounter form

3. On the flowsheet (care team view)
4. In the care team histories view

5. On the care team form
   a. Already part of some notes
   b. Can be opened as a standalone note ("Clinical Lists Update")
   c. May be added to another note