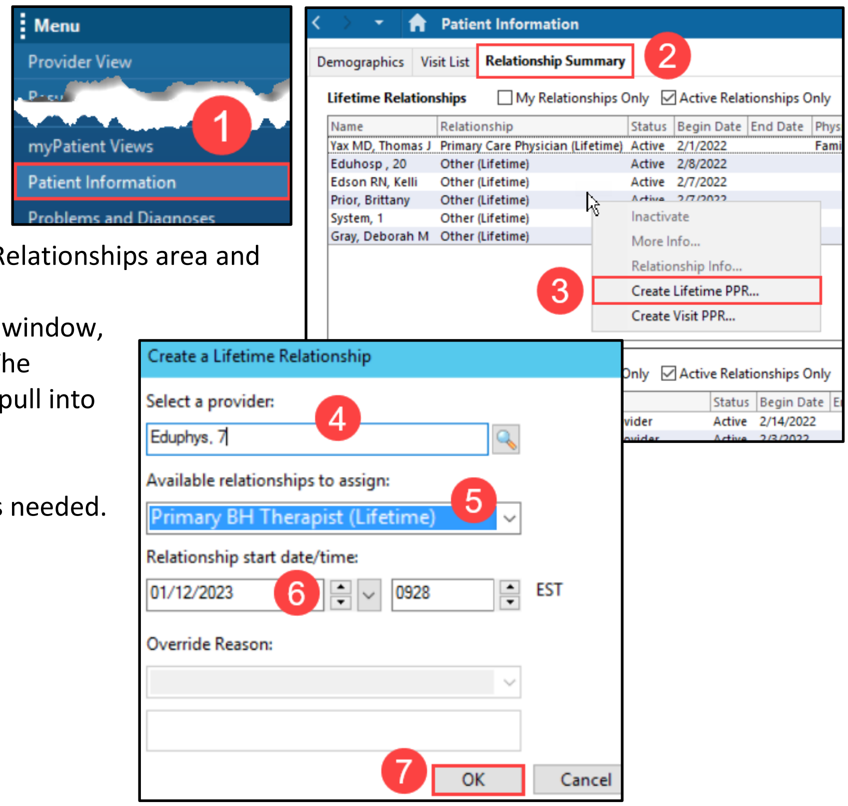
Behavioral Health Relationship Management for Providers

Creating a Lifetime Relationship

When a provider is scheduled for an appointment with a patient, the system automatically assigns that provider as the Primary Therapist to that patient. In addition, when opening a patient's chart for the first time, the system will ask the provider to Assign a Relationship. If Primary Therapist (lifetime) is chosen, this patient will be added to the providers caseload in PowerChart.

To manually create a lifetime relationship with a patient in PowerChart:

1. Navigate to the Patient Information tab within the dark blue Menu.
2. Select the Relationship Summary tab.
3. Right-click anywhere within the Lifetime Relationships area and select Create Lifetime PDR...
4. Within the Create a Lifetime Relationship window, search for and select a provider's name. The current users name should automatically pull into the search field.
5. Assign an available lifetime relationship.
6. Adjust the relationship start date/time, as needed.
7. Click OK to save.



Removing a Lifetime Relationship

If a provider is no longer the patient's therapist, follow the steps below to remove the lifetime relationship:

1. Within the patient's chart, select the Patient Information tab in the dark blue Menu.
2. Select the Relationship Summary tab.
3. Under Lifetime Relationships, select the providers name to highlight the row.
4. Right click on the providers name and select Inactivate.

Removing relationships allows for a more accurate report to be generated of the patients that the provider has a primary therapist lifetime relationship with in PowerChart.