2. **SHALL** contain exactly one [1..1] **@moodCode**="EVN" (CodeSystem: HL7ActMood urn:oid:2.16.840.1.113883.5.1001 **STATIC**) (CONF:4435-25).

3. **SHALL** contain exactly one [1..1] **templateId** (CONF:4435-12) such that it
   a. **SHALL** contain exactly one [1..1] **@root**="2.16.840.1.113883.10.20.22.4.500.3" (CONF:4435-18).
   b. **SHALL** contain exactly one [1..1] **@extension**="2019-07-01" (CONF:4435-19).

4. **SHALL** contain exactly one [1..1] **code** (CONF:4435-13).
   a. This code **SHALL** contain exactly one [1..1] **@code**="57203-2" Episode Timing [CMS Assessment] (CONF:4435-20).
   b. This code **SHALL** contain exactly one [1..1] **@codeSystem**="2.16.840.1.113883.6.1" LOINC (CONF:4435-21).

5. **SHALL** contain exactly one [1..1] **text** (CONF:4435-15).
   a. This text **SHALL** contain exactly one [1..1] **reference** (CONF:4435-16).
      i. This reference **SHALL** contain exactly one [1..1] **@value** (CONF:4435-26).

6. **SHALL** contain exactly one [1..1] **statusCode** (CONF:4435-11).
   a. This statusCode **SHALL** contain exactly one [1..1] **@code**="completed" Completed (CodeSystem: HL7ActStatus urn:oid:2.16.840.1.113883.5.14 **STATIC**) (CONF:4435-17).

7. **SHALL** contain exactly one [1..1] **value** with @xsi:type="TS" (CONF:4435-14).

2.4 Care Team Organizer

```
[organizer: identifier urn:hl7ii:2.16.840.1.113883.10.20.22.4.500:2019-07-01
(open)]
```

Table 10: Care Team Organizer Contexts

Contained By:	Contains:
Care Teams Section (optional)	Note Activity (optional) Care Team Member Act (required) Care Team Type Observation (optional)

This organizer template contains information about a single care team.

The author of the organizer is the person who documented the care team information.

The participants of the organizer are the care team lead(s) and the care team organization.

The components of the organizer contain the following information:

- The encounter that caused the care team to be formed

- Narrative information about the care team

- The care team members

- Reasons for the care team

- The care team type(s) - a care team can have multiple care team types

Appendix A: Templates defined in C-CDA R2.1 Companion Guide

Table 11: Care Team Organizer Constraints Overview

XPath	Card.	Verb	Data Type	CONF#	Value
organizer (identifier: urn:hl7ii:2.16.840.1.113883.10.20.22.4.500:2019-07-01)					
@classCode	1..1	SHALL		4435-124	urn:oid:2.16.840.1.113883.5.6 (HL7ActClass) = CLUSTER
@moodCode	1..1	SHALL		4435-125	urn:oid:2.16.840.1.113883.5.1001 (HL7ActMood) = EVN
templateId	1..1	SHALL		4435-112	
@root	1..1	SHALL		4435-117	2.16.840.1.113883.10.20.22.4.500
@extension	1..1	SHALL		4435-118	2019-07-01
id	1..*	SHALL		4435-126	
code	1..1	SHALL		4435-114	
@code	1..1	SHALL		4435-120	86744-0
@codeSystem	1..1	SHALL		4435-121	urn:oid:2.16.840.1.113883.6.1 (LOINC) = 2.16.840.1.113883.6.1
originalText	1..1	SHALL		4435-154	
reference	1..1	SHALL		4435-155	
@value	1..1	SHALL		4435-156	
statusCode	1..1	SHALL		4435-113	
@code	1..1	SHALL		4435-119	urn:oid:2.16.840.1.113883.1.11.15933 (ActStatus)
effectiveTime	1..1	SHALL		4435-127	
low	1..1	SHALL		4435-157	
high	0..1	MAY		4435-158	
author	0..*	SHOULD		4435-116	Author Participation (identifier: urn:oid:2.16.840.1.113883.10.20.22.4.119
participant	0..*	SHOULD		4435-128	
@typeCode	1..1	SHALL		4435-129	urn:oid:2.16.840.1.113883.5.90 (HL7ParticipationType) = PPRF
sdtc:functionCode	0..1	MAY		4435-130	urn:oid:2.16.840.1.113762.1.4.1099.30 (Care Team Member Function)
participantRole	1..1	SHALL		4435-131	
id	1..*	SHALL		4435-132	
participant	0..*	MAY		4435-134	
@typeCode	1..1	SHALL		4435-137	urn:oid:2.16.840.1.113883.5.90 (HL7ParticipationType) = LOC
participantRole	1..1	SHALL		4435-135	

XPath	Card.	Verb	Data Type	CONF#	Value
id	1..*	SHALL		4435-138	
addr	0..1	SHOULD		4435-139	
telecom	0..*	SHOULD		4435-140	
playingEntity	1..1	SHALL		4435-136	
@classCode	1..1	SHALL		4435-141	urn:oid:2.16.840.1.113883.5.41 (HL7EntityClass) = PLC
name	1..1	SHALL		4435-142	
component	0..*	MAY		4435-110	
observation	1..1	SHALL		4435-163	Care Team Type Observation (identifier: urn:hl7ii:2.16.840.1.113883.10.20.22.4.500.2:2019-07-01
component	0..*	MAY		4435-146	
act	1..1	SHALL		4435-147	Entry Reference (identifier: urn:oid:2.16.840.1.113883.10.20.22.4.122
component	0..*	MAY		4435-148	
encounter	1..1	SHALL		4435-164	
id	1..*	SHALL		4435-165	
component	0..1	MAY		4435-150	
act	1..1	SHALL		4435-151	Note Activity (identifier: urn:hl7ii:2.16.840.1.113883.10.20.22.4.202:2016-11-01
component	1..*	SHALL		4435-152	
act	1..1	SHALL		4435-166	Care Team Member Act (identifier: urn:hl7ii:2.16.840.1.113883.10.20.22.4.500.1:2019-07-01

1. **SHALL** contain exactly one [1..1] **@classCode**="CLUSTER" CLUSTER (CodeSystem: HL7ActClass urn:oid:2.16.840.1.113883.5.6 **STATIC**) (CONF:4435-124).
2. **SHALL** contain exactly one [1..1] **@moodCode**="EVN" Event (CodeSystem: HL7ActMood urn:oid:2.16.840.1.113883.5.1001 **STATIC**) (CONF:4435-125).
3. **SHALL** contain exactly one [1..1] **templateId** (CONF:4435-112) such that it
    a. **SHALL** contain exactly one [1..1] **@root**="2.16.840.1.113883.10.20.22.4.500" (CONF:4435-117).
    b. **SHALL** contain exactly one [1..1] **@extension**="2019-07-01" (CONF:4435-118).
4. **SHALL** contain at least one [1..*] **id** (CONF:4435-126).
5. **SHALL** contain exactly one [1..1] **code** (CONF:4435-114).
    a. This code **SHALL** contain exactly one [1..1] **@code**="86744-0" Care Team (CONF:4435-120).

b. This code **SHALL** contain exactly one [1..1] **@codeSystem**="2.16.840.1.113883.6.1" LOINC (CodeSystem: LOINC urn:oid:2.16.840.1.113883.6.1) (CONF:4435-121).

c. This code **SHALL** contain exactly one [1..1] **originalText** (CONF:4435-154) such that it

    i. **SHALL** contain exactly one [1..1] **reference** (CONF:4435-155).

The value attribute references the narrative in section.text where the care team name is rendered.

    1. This reference **SHALL** contain exactly one [1..1] **@value** (CONF:4435-156).

6. **SHALL** contain exactly one [1..1] **statusCode** (CONF:4435-113).

   a. This statusCode **SHALL** contain exactly one [1..1] **@code**, which **SHALL** be selected from ValueSet **ActStatus** urn:oid:2.16.840.1.113883.1.11.15933 **STATIC** (CONF:4435-119).
   Note: When statusCode has a value set, its value MAY be rendered in the narrative.

7. **SHALL** contain exactly one [1..1] **effectiveTime** (CONF:4435-127).

   a. This effectiveTime **SHALL** contain exactly one [1..1] **low** (CONF:4435-157).

   b. This effectiveTime **MAY** contain zero or one [0..1] **high** (CONF:4435-158).

8. **SHOULD** contain zero or more [0..*] Author Participation (identifier: urn:oid:2.16.840.1.113883.10.20.22.4.119) (CONF:4435-116).

9. **SHOULD** contain zero or more [0..*] **participant** (CONF:4435-128) such that it

   a. **SHALL** contain exactly one [1..1] **@typeCode**="PPRF" Primary Performer (CodeSystem: HL7ParticipationType urn:oid:2.16.840.1.113883.5.90) (CONF:4435-129).

   b. **MAY** contain zero or one [0..1] **sdtc:functionCode**, which **SHOULD** be selected from ValueSet **Care Team Member Function** urn:oid:2.16.840.1.113762.1.4.1099.30 **DYNAMIC** (CONF:4435-130).
   Note: Describes the person's, caregiver's or health care provider's functional role on the care team.

   c. **SHALL** contain exactly one [1..1] **participantRole** (CONF:4435-131).

      i. This participantRole **SHALL** contain at least one [1..*] **id** (CONF:4435-132).

         1. This id **SHALL** match at least one of the member's id in the Care Team Member act template (CONF:4435-133).

10. **MAY** contain zero or more [0..*] **participant** (CONF:4435-134) such that it

    a. **SHALL** contain exactly one [1..1] **@typeCode**="LOC" Location (CodeSystem: HL7ParticipationType urn:oid:2.16.840.1.113883.5.90) (CONF:4435-137).

    b. **SHALL** contain exactly one [1..1] **participantRole** (CONF:4435-135).

       i. This participantRole **SHALL** contain at least one [1..*] **id** (CONF:4435-138).

       ii. This participantRole **SHOULD** contain zero or one [0..1] **addr** (CONF:4435-139).

       iii. This participantRole **SHOULD** contain zero or more [0..*] **telecom** (CONF:4435-140).

       iv. This participantRole **SHALL** contain exactly one [1..1] **playingEntity** (CONF:4435-136).

> 1. This playingEntity **SHALL** contain exactly one [1..1] **@classCode**="PLC" Place (CodeSystem: HL7EntityClass `urn:oid:2.16.840.1.113883.5.41`) (CONF:4435-141).
> 2. This playingEntity **SHALL** contain exactly one [1..1] **name** (CONF:4435-142).

11. **MAY** contain zero or more [0..*] **component** (CONF:4435-110) such that it
    a. **SHALL** contain exactly one [1..1] <u>**Care Team Type Observation**</u> (identifier: `urn:hl7ii:2.16.840.1.113883.10.20.22.4.500.2:2019-07-01`) (CONF:4435-163).

The following components represent the reasons for the existence of the care team. These entry references are typically a health concern, risk concern or problem but can also be some other entry present in the document.

12. **MAY** contain zero or more [0..*] **component** (CONF:4435-146) such that it
    a. **SHALL** contain exactly one [1..1] Entry Reference (identifier: `urn:oid:2.16.840.1.113883.10.20.22.4.122`) (CONF:4435-147).

13. **MAY** contain zero or more [0..*] **component** (CONF:4435-148) such that it
    a. **SHALL** contain exactly one [1..1] **encounter** (CONF:4435-164).
        i. This encounter **SHALL** contain at least one [1..*] **id** (CONF:4435-165). Note: 1. If the id does not match an encounter/id from an encounter elsewhere within the same document and the id does not contain @nullFlavor=NA, then this entry SHALL conform to the Encounter Activity (V3) (identifier: urn:hl7ii:2.16.840.1.113883.10.20.22.4.49:2015-08-01) (CONF:4435-145).

14. **MAY** contain zero or one [0..1] **component** (CONF:4435-150) such that it
    a. **SHALL** contain exactly one [1..1] <u>**Note Activity**</u> (identifier: `urn:hl7ii:2.16.840.1.113883.10.20.22.4.202:2016-11-01`) (CONF:4435-151).

15. **SHALL** contain at least one [1..*] **component** (CONF:4435-152) such that it
    a. **SHALL** contain exactly one [1..1] <u>**Care Team Member Act**</u> (identifier: `urn:hl7ii:2.16.840.1.113883.10.20.22.4.500.1:2019-07-01`) (CONF:4435-166).

Figure 5: Care Team Organizer Example 1

```
<!--Care Team Organizer-->
        <entry>
          <organizer classCode="CLUSTER" moodCode="EVN">
              <templateId root="2.16.840.1.113883.10.20.22.4.500" extension="2019-07-
01"/>
              <!--NEW Care Team Organizer Entry Template ID and extension-->
              <id root="1.1.1.1.1.1"/>
              <code code="86744-0" codeSystem="2.16.840.1.113883.6.1"
codeSystemName="LOINC" displayName="Care Team">
                  <originalText><reference value="#CareTeamName1"></reference></originalText>
              </code>
              <!--Care Team Status -
https://vsac.nlm.nih.gov/valueset/2.16.840.1.113883.1.11.15933/expansion-->
              <statusCode code="active"/>
              <effectiveTime>
                  <low value="201810081426-0500"/>
              </effectiveTime>
              <!-- This participant is the Care Team Lead (1..1)-->
              <!-- Care Team Lead is one of the contained care team members in the list of
care team members-->
              <!--<participant typeCode="PPRF">
              <!-\-<This id matches at least one of the member's id in the Care Team
Member act template>-\->
                  <participantRole>
                    <id root="1.5.5.5.5.5.5"/>
                  </participantRole>
              </participant>-->
              <!-- #1 Care Team Member Act - This component is a care team member who is a
provider -->
              <component>
                <act classCode="PCPR" moodCode="EVN">
                    <templateId root="2.16.840.1.113883.10.20.22.4.500.1" extension="2019-
07-01"/>
                    <id root="1.5.5.5.5.5.5"/>
                    <code code="85847-2" codeSystem="2.16.840.1.113883.6.1"
codeSystemName="LOINC" displayName="Care Team Information"/>
                    <!--Care Team Member Status -
https://vsac.nlm.nih.gov/valueset/2.16.840.1.113883.1.11.15933/expansion-->
                    <statusCode code="active"/>
                    <effectiveTime xsi:type="IVL_TS">
                      <low value="201810081426-0500"/>
                    </effectiveTime>
                    <!--Attributes about the provider member - name-->
                    <performer typeCode="PRF">
                        <functionCode xmlns="urn:hl7-org:sdtc" code="PCP"
displayName="primary care physician"
                            codeSystem="2.16.840.1.113883.5.88"
codeSystemName="ParticipationFunction">
                            <originalText xmlns="urn:hl7-org:v3">
                                <reference value="#CT1_M01"></reference>
                            </originalText>
                        </functionCode> <!-- A care team member role -->
                      <assignedEntity>
                          <id root="B00B14E8-CDE4-48EA-8A09-01BC4945122A" extension="1"/>
                          <id root="1.5.5.5.5.5.5"/>
```

```
                    <assignedPerson>

<name><given>John</given><given>D</given><family>Smith</family>,<suffix>MD</suffix> </name>
                    </assignedPerson>
                  </assignedEntity>
                </performer>
              </act>
            </component>
          </organizer>
        </entry>
```

2.5   Care Team Type Observation

```
[observation: identifier urn:hl7ii:2.16.840.1.113883.10.20.22.4.500.2:2019-
07-01 (open)]
```

Table 12: Care Team Type Observation Contexts

Contained By:	Contains:
Care Team Organizer (optional)	

This template is used to express the care team type. A care team can have multiple care team types. Examples include but are not limited to:

- Condition focused, longitudinal care team

- Event focused, Home & Community Based Services care team

- Condition focused, clinical research care team

- Public health focused, Longitudinal care-coordination care team