

SECTION 0 • DOCUMENT QUICK ACCESS

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SECTION 1 • OVERVIEW

Empanelment in Accuro EMR

This “How-to” document guides through phase 1 of panel management using ACCURO electronic medical record (EMR). If you need assistance, please contact Practice Support Program at PSP@doctorsofbc.ca.

ACCURO uses Advanced Reporting to manage patient panels. The fee is paid by Doctors of BC so there is no fee for physicians for installation. Register with QHR to ensure Advanced Reporting/Outcomes Dashboard is available to regularly review and update patient profiles.

After completing the Empanelment phase, you can report current and accurate number of active patients assigned to you. Plan the process with your team and assign responsibilities to ensure the accuracy of entries from this point forward.

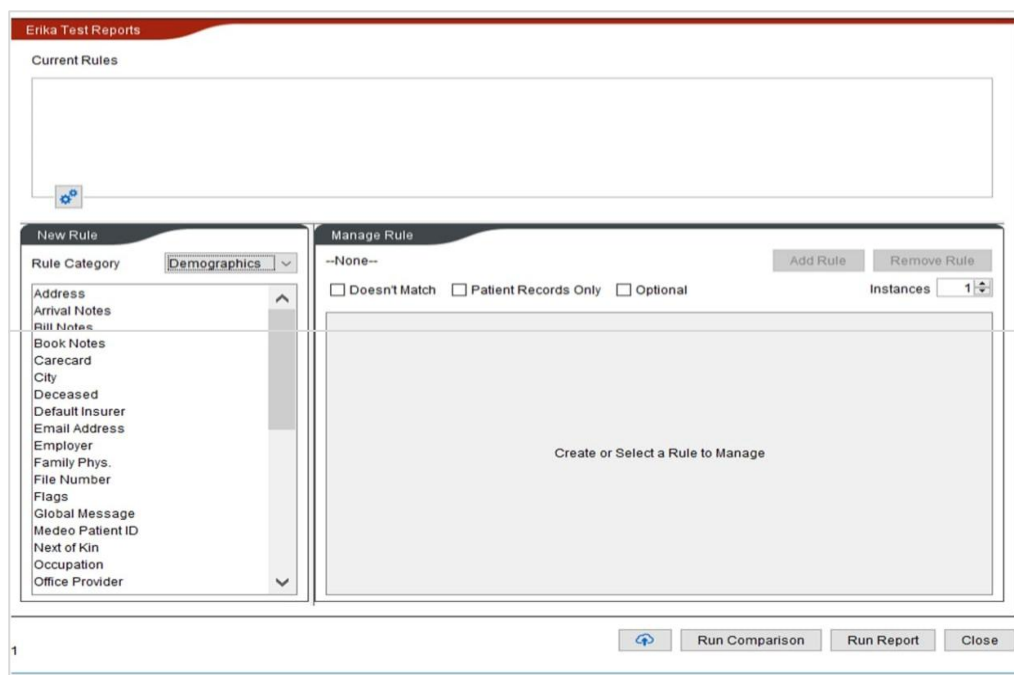
Administrative Settings May Be Requires

Panel Management actions require some changes in your EMR settings. Ensure your staff has an appropriate level of administrative privileges.

SECTION 2 • EMR PANEL

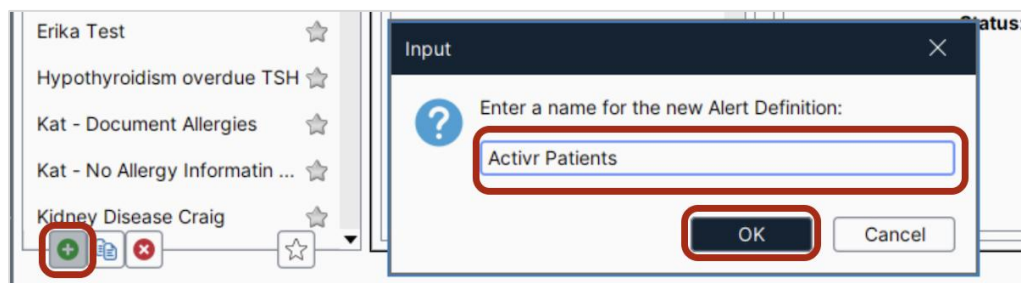
Review & Extract Active Patient List

- Click the  icon on the Home screen.
- Click Reports → **Query Builder (Alerts)**
- This will open a blank search page.



The screenshot shows the 'Erika Test Reports' interface. At the top, there's a 'Current Rules' section. Below it, the 'New Rule' panel is active, showing a list of 'Rule Category' options under 'Demographics', including Address, Arrival Notes, Bill Notes, Book Notes, Carecard, City, Deceased, Default Insurer, Email Address, Employer, Family Phys., File Number, Flags, Global Message, Medeo Patient ID, Next of Kin, Occupation, and Office Provider. To the right, the 'Manage Rule' panel shows options like 'Add Rule', 'Remove Rule', and checkboxes for 'Doesn't Match', 'Patient Records Only', and 'Optional'. The 'Instances' are set to 1. A large grey area in the center says 'Create or Select a Rule to Manage'. At the bottom, there are buttons for 'Run Comparison', 'Run Report', and 'Close'.

- Click on the green '[+]' to create New Query
- Name Your Query
- Click **OK**.



The screenshot shows the 'Erika Test Reports' interface with a list of test results on the left, including 'Erika Test', 'Hypothyroidism overdue TSH', 'Kat - Document Allergies', 'Kat - No Allergy Informatin ...', and 'Kidney Disease Craig'. A green '[+]' button is highlighted at the bottom of the list. An 'Input' dialog box is open, prompting the user to 'Enter a name for the new Alert Definition:'. The text 'Activr Patients' is entered in the input field. The 'OK' button is highlighted with a red box.

- From Rule Category: **Demographics** → scroll down until you find **Patient Status**.
- Click on **Patient Status**.
- Click on '+ New'

- Ensure the **Status** is set to "Starts With" **Active**
- Click on **Add Rule**
- Then, click on **Run Report**

- Select 'Selected Provider's Patient's' option
- Select a Office Provider
- Click on **Run**

Check for Alert Matches

Active Patients

Apply Against

☐ All Patients

☒ Selected Providers' Patients

Gosselin, Kat [01010]

Williams, Craig [12345]

Fields to Display

▼ Patient Status

✓ Patient Status

Match Types to View

☒ Unassigned ☐ Assigned ☐ Completed

Run **Cancel**

- Result will display with total number of matches
- Select all patients (**CTRL + A** or **Command+ A**). All patient rows will highlight teal.
- To extract this list, copy (**CTRL + C** or **Command + C**) and paste (**CTRL + V** or **Command + V**) it in a spreadsheet tool (Excel).

Alert Matches

Last Name	First Name	PHN	Birthdate	Sex	Home Phone	Status	Patient Status
Uzumaki	Naruto		01/22/1996	M	(000) __-__	Unassigned	Active
Uzumaki	Naruto	7897328938		F	(000) 000-0000	Unassigned	Active

2 Matches --Select Action-- Completed Rerun Print All Export Close

SECTION 3 · ASSIGNING STATUS & MRP

Add/Removing Patients from Panel

You can remove or add patients from your panel by changing patient status from Active to Inactive, Deceased, Moved, Duplicate etc. and updating the Most Responsible Provider, as appropriate:

- To change a patient's **Status** or **Office Provider** open their chart and click on the **Patients** tab.
- Select a different status from the **Patient Status** drop-down menu, for example Inactive, Moved, or Deceased.
- To be reportable, Patient Status must be **Active**, and **Office Provider** must not be blank.

The screenshot shows a patient management interface with the following fields and controls:

- Demographics Tab:**
 - Last Name: Uzumaki
 - First Name: Naruto
 - Middle Name:
 - Health #: Search Only
 - Identifier: Search Only
 - Birthdate: MM/DD/YYYY
 - Title: Mr.
 - Suffix:
 - Patient Status: Active** (highlighted)
 - Office Provider: Gosselin, Kat [01010]** (highlighted)
- Demographics Section:**
 - Health #: ☒ BC, Canada
 - Expiry: MM/DD/YYYY
 - Infant: ☐
 - File Number:
- Alias Section:**
 - Birthdate: 01/22/1996
 - 30 Yr Gender: M
 - Deceased: ☐
 - MM/DD/YYYY:
 - Family Phys: --None--
 - Referring Phys: --None--
- Address Section:**
 - Address:
 - City:
 - BC, Canada
 - Postal/Zip:
 - Type:
- Phone Section:**
 - Phone #s: Home (000) ___-___
 - Work (000) ___-___
 - Cell (000) ___-___
 - Fax (000) ___-___
 - Preferred Contact Meth:
- Email Section:**
 - Email Address:
 - Check for Duplicates
- Bottom Buttons:**
 - Manage Cohorts
 - Delete Patient
 - Patient Relationships...
 - Merge
 - Update Patient** (highlighted)
 - Clear (F1)

SECTION 4 • PANEL CLEAN-UP

Active Patients Without MRP

Run a report for unassigned patients and add yourself as primary provider, where appropriate. Because this list will most likely produce a large patient population it is best to run the report outside of office hours so that it does not slow down the EMR.

- Click the  icon on the **Home** screen.
- Click Reports → **Query Builder (Alerts)**
- New Rule → Rule Category: Demographics
- **Patient Status** → '+ New' → "Starts With" **Active** → Add Rule
- New Rule → Rule Category: Demographics
- **Office Provider** → '+ New' = '**-None-**' → Add Rule
- Click **Run Report**

Active Patients - No MRP

Current Rules

Status Starts With 'Active'



New Rule

Rule Category: Demographics

Fit test not eligible

Flags

Global Message

Next of Kin

Occupation

Office Provider

Official Language

Paper Chart

Patient Age

Patient Alias

Patient Cohorts

Manage Rule

Office Provider

Add Rule Remove Rule

☐ Doesn't Match ☐ Patient Records Only ☐ Optional

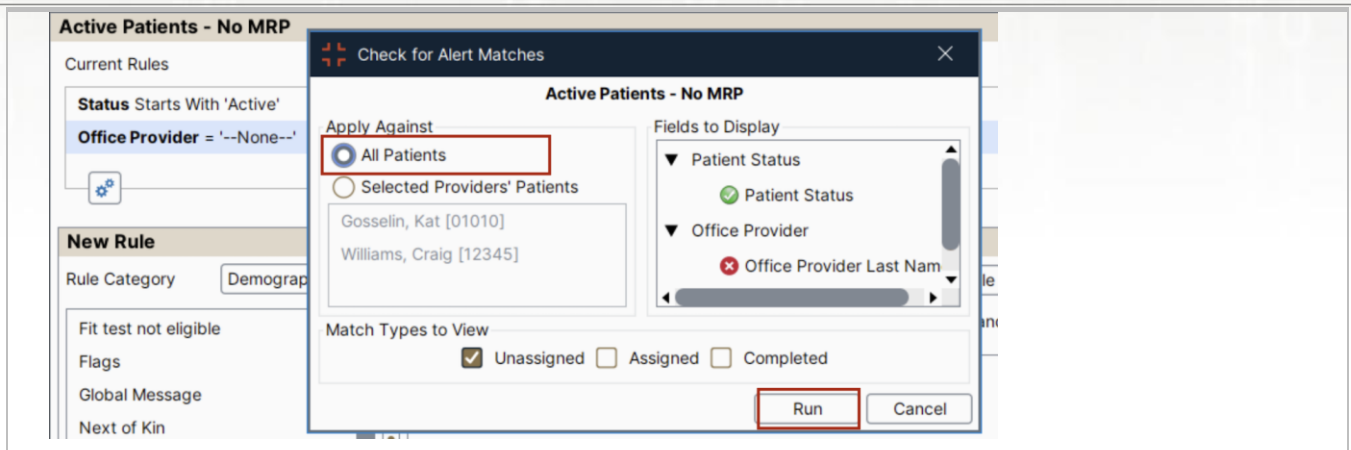
Instances: 1

Office Provider: --None--

 New

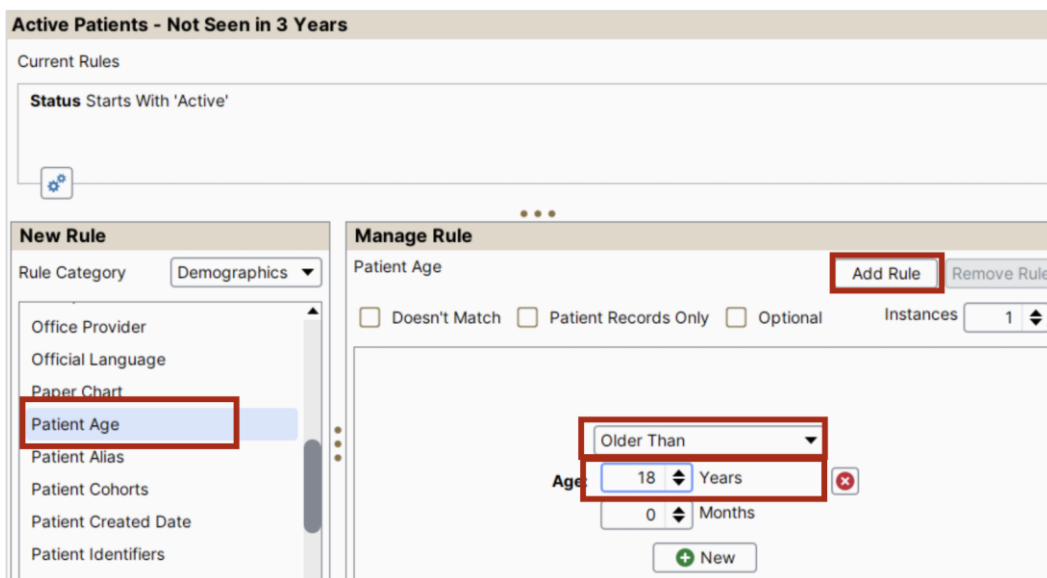
 Run Comparison Run Report Close



Active Patients Not Seen In X years

Identify patients with 'Active' status but have not been seen for the last few years. Decide on the process that suits your practice and discuss with your team any necessary updates.

- Click the  icon on the **Home** screen.
- Click Reports → Query Builder (Alerts)
- New Rule → Rule Category: Demographics
- Click **Patient Status** → '+ New' → "Starts With" **Active** → Add Rule
- New Rule → Rule Category: Demographics
- Click **Patient Age** → '+ New' → **Older Than - 18** → Add Rule



- New Rule → Rule Category: Appointments
- Click on **Appointment** → '[+] New' → **Date** → "In the Last" - **3 Years**

- Check: **Doesn't Match** & **Patient Records Only**
- **Add Rule**

Active Patients - Not Seen in 3 Years

Current Rules

Status Starts With 'Active'

Age Older Than 18 Years

New Rule

Rule Category: Appointments

Appointment

Cancelled Appointment

Traffic Manager

Wait List

Manage Rule

Appointment

☒ Doesn't Match ☒ Patient Records Only ☐ Optional

Instances: 1

Add Rule

Date: In the Last 3 Years

New

- Any rule that has 'Doesn't Match' will highlight red
- Click on **Run Report**
- Select 'Selected Provider's Patient's' option → Select a Office Provider
- Click on **Run**

Active Patients - Not Seen in 3 Years

Current Rules

Status Starts With 'Active'

Age Older Than 18 Years

Appointment Date In the Last 3 Years

New Rule

Rule Category: Appointments

Appointment

Cancelled Appointment

Traffic Manager

Wait List

Manage Rule

Patient Age

☐ Doesn't Match ☒ Patient Records Only ☐ Optional

Instances: 1

Update Rule **Remove Rule**

Age: Older Than 18 Years 0 Months

New

Run Comparison **Run Report** **Close**

Check for Alert Matches

Active Patients - Not Seen in 3 Years

Apply Against

☐ All Patients

☒ Selected Providers' Patients

Gosselin, Kat [01010]

Williams, Craig [12345]

Fields to Display

▼ Patient Status

☒ Patient Status

▼ Patient Age

☒ Birthdate

Match Types to View

☒ Unassigned ☐ Assigned ☐ Completed

Run **Cancel**

- Select patients where appropriate (**CTRL + Click** or **Command + Click**) or select all patients (**CTRL + A** or **Command + A**)
- Click on **'--Select Action--'** → 'Update Patient Status'
- Select status of your choosing (Inactive, Moved etc).
- Click **Ok**

Alert Matches

Last Name	First Name	PHN	Birthdate	Sex	Home Phone	Status	Pa
Bear	Yves	0000000000	04/09/1954	M	(000) 000-0000	Unassigned	Ac
Boop			05/06/1950	F	(000) 000-0000	Unassigned	Ac
Cat			12/11/1983	M	(000) 000-0000	Unassigned	Ac
Cat			07/23/1969	M	(000) 000-0000	Unassigned	Ac
Chipmunk			03/11/1942	M	(000) 000-0000	Unassigned	Ac
Dog			12/22/1934	F	(000) 000-0000	Unassigned	Ac
Dog			03/11/1942	M	(604) 222-2312	Unassigned	Ac
Dog			07/04/1953	M	(000) 000-0000	Unassigned	Ac
Duck			02/15/1965	M	(000) __-__	Unassigned	Ac
Duck			01/25/1965	M	(778) 111-1111	Unassigned	Ac
Fake			02/21/2006	UK	(000) __-__	Unassigned	Ac

24 Matches --Select Action--

Update Patient Status

Completed Rerun Print All Export Close

SECTION 2 · DEMOGRAPHIC COMPLETENESS

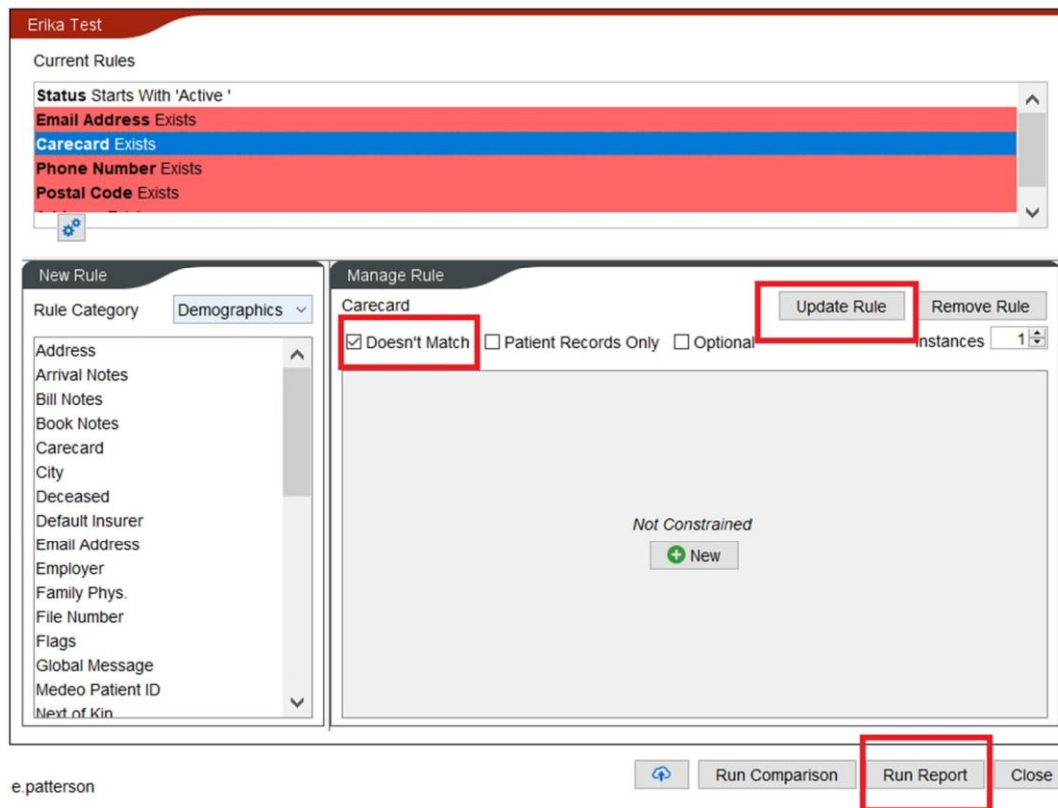
Updating Missing Demographic

Start by assessing the accuracy of your EMR demographic records. Address, phone numbers, and email are most likely to need updating. This action can be time consuming and include administrative tasks. Plan for administrative support to complete corrections.

Run the EMR report to be exported to Excel where you can identify missing information and keep track of updates.

- Click on Accuro icon  on the **Home** screen.
- Click on Reports → Query Builder (Alerts)
- Add rules as shown in screenshot (red is 'Doesn't Match')

From your report, you will be able to see patient's missing information. Toggle between the report and the patient's chart to update PHN, phone number etc.



The screenshot shows the Accuro Query Builder interface. At the top, the title bar reads "Erika Test". Below it, the "Current Rules" section lists several rules: "Status Starts With 'Active'", "Email Address Exists", "Carecard Exists", "Phone Number Exists", and "Postal Code Exists". The "Email Address Exists", "Carecard Exists", and "Phone Number Exists" rules are highlighted in red. Below the current rules, there is a "New Rule" section. The "Rule Category" is set to "Demographics". A list of demographic fields is shown on the left, including Address, Arrival Notes, Bill Notes, Book Notes, Carecard, City, Deceased, Default Insurer, Email Address, Employer, Family Phys., File Number, Flags, Global Message, Medeo Patient ID, and Next of Kin. The "Manage Rule" section is active, showing the "Carecard" rule. The "Doesn't Match" checkbox is checked, and the "Update Rule" button is highlighted. The "Instances" field is set to 1. The "Run Report" button is highlighted at the bottom right.

Last Name	First Name	PHN	Birthdate	Sex	Home Phone	Status	Patient Status	Office Provider Last Name	Office Provider First Name
Test	A Female-60 Plus	234567890	01/01/1955	F	(250) 555-2345	Unassigned	Active 2016	Jones	Jenny
Test	Abby-Female 50 Plus		02/02/1965	F	(000) 000-0000	Unassigned	Active 2016	Jones	Jenny
Test	Adam Male -35plus	123456789	06/01/1980	M	(000) 000-0000	Unassigned	Active	Jones	Jenny
Test	Al Male-60 Plus	434343434	10/10/1954	M	(000) 000-0000	Unassigned	Active	Jones	Jenny
Test	Bobbie Female-35plus		05/05/1980	F	(780) 555-6666	Unassigned	Active	Jones	Jenny
Test	Jane Female-50plus	135792468	07/01/1960	F	(780) 555-4343	Unassigned	Active	Jones	Jenny
Test	Leanne		12/12/1990	M	(000) 000-0000	Unassigned	Active 2016	Jones	Jenny
Test	Ned Male-75 Plus	111111112	02/04/1939	M	(000) 000-0000	Unassigned	Active	Jones	Jenny
Test	Tomato		09/15/2014	M	(000) 000-0000	Unassigned	Active	Jones	Jenny

9 Matches - Select Action - Completed Rerun Print All Export Close

SECTION 2 · ADMINISTRATION

Managing Patient Status

To maintain your panel effectively, you may consider adding patient statuses other than Active, Inactive, and Deceased to identify patient populations, e.g., for walk-in, maternity, or cosmetic treatment. Discuss with your team criteria for different statuses that will remove patients from your active patients' panel.

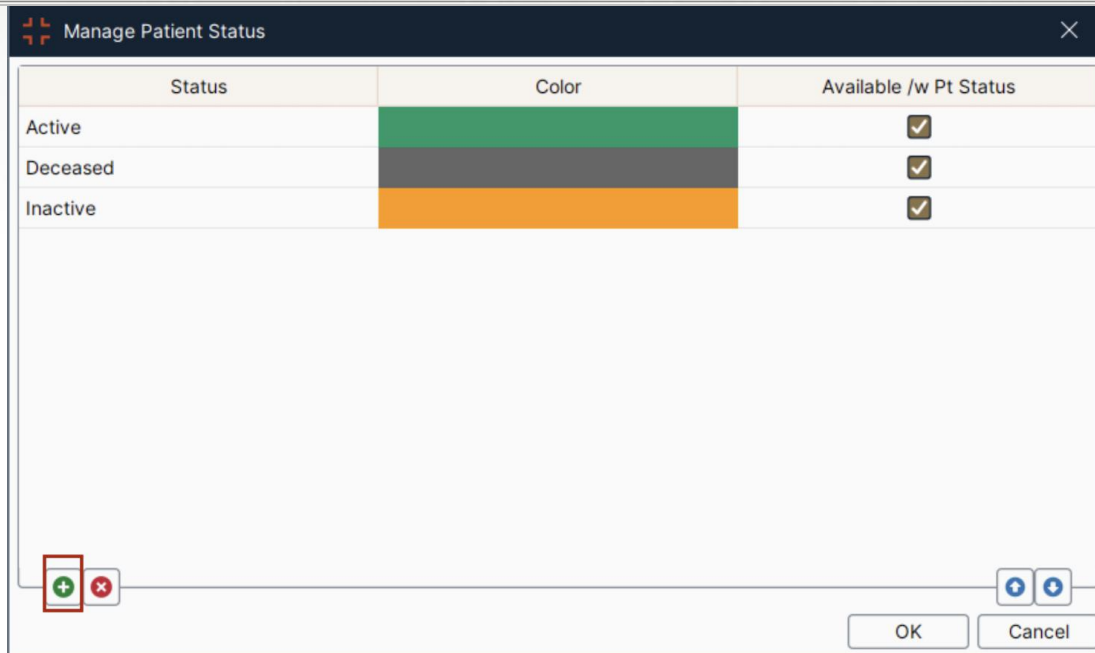
Administrative Settings May Be Requires

Panel Management actions require some changes in your EMR settings. Ensure your staff has an appropriate level of administrative privileges.

- Select a test patient.
- Press **F8** to open the **Patient Status History** window.
- Click on the Pencil icon to **Manage Patient Status** window.
- Click the green plus icon, which will add a row to the end of the status lists.
- Double clicking on the **Status** column allows naming the status.
- Clicking on the **Color** column allows selection of a color unique to that status.

Status	Date	Inactive	Description
Inactive	2026-Aug-21	Inactive	
Active	2026-Aug-21		

+ ✎ ×



The dialog box titled "Manage Patient Status" contains a table with three columns: Status, Color, and Available /w Pt Status. The table lists three statuses: Active (green), Deceased (grey), and Inactive (orange). Each status has a corresponding color bar and a checked checkbox in the "Available /w Pt Status" column. At the bottom left, there are two small buttons: a green plus sign and a red minus sign. At the bottom right, there are two blue plus signs and two buttons labeled "OK" and "Cancel".

Status	Color	Available /w Pt Status
Active		☒
Deceased		☒
Inactive		☒

Status	Color	Available /w Pt Status
Active		☒
Deceased		☒
Inactive		☒
Maternity		☒