

SECTION 0 • DOCUMENT QUICK ACCESS

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SECTION 1 • OVERVIEW

Empanelment in MOIS

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

After completing Phase 1 actions you will be able to:

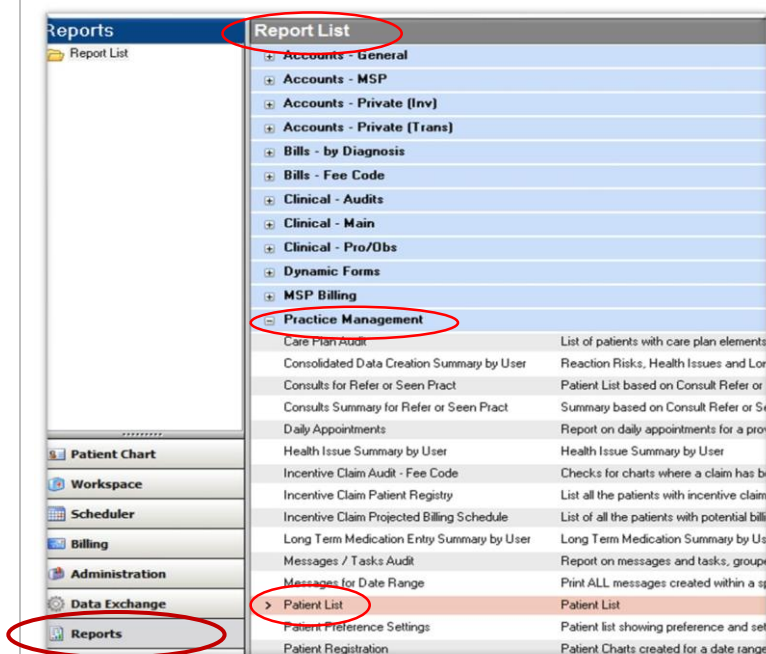
- Find Your Active Patients in your EMR
- Identify number of patients with no assigned most responsible provider (MRP) and number of patients not seen in specific time range.
- Make necessary corrections in your EMR.
- Establish an accurate patient panel.

SECTION 2 • EMR PANEL

Review & Extract Active Patient List

To analyze your patient panel, retrieve names of patients assigned to you:

- Click **Reports** at the bottom of the left side menu to display the **Report List**.
- Expand the **Practice Management** folder.
- Select **Patient List**
- The **Selection Parameter** window displays.
- Under the **Patient Status** enter **A** to list active patients.
- For the **Provider** select your name. For this report, leave other fields blank.
- Note that the box **Direct output to Excel** is checked in. This means the report will automatically generate in Excel.
- Click **OK**.



Report: Practice Management - Patient List

Selection Parameter

Patient Information

Chart Range: to (Inclusive)

Last Contact: ☐ Prior To ☒ After

Patient Status: (comma separated list of status codes; BLANK = ALL)

Provider:

CSV Output: ☒ Direct output to Excel

Note: Any option left BLANK will be ignored.

Ok Cancel

Patient Status

Leaving the Patient Status blank will list patients with all statuses that can be filtered later in Excel to see for example unassigned patients. Later on, you can add other criteria to narrow your list.

SECTION 3 · ASSIGNING STATUS & MRP

Add/Removing Patients from Panel

You can remove patients that should not be on your list of patients by changing their status from Active to Inactive, Deceased, Moved, etc. as appropriate. Discuss with your team any trends.

- Open Patient Chart.
- Select patient **Demographic** folder under **Patient Summary**.
- Click **Update Status**.
- Click an arrow next to **Status Code** to expand a drop-down list.
- Select the appropriate status option.
- Date defaults to today's date.
- Click **Ok** to save changes

The screenshot shows the 'Patient Chart' window. On the left, the 'Patient Summary' pane has the 'Demographic' folder selected. The main area shows patient information for 'MICKEY'. The 'Update Status' button is circled in red.

The screenshot shows the 'Change Patient Status' dialog box. The 'Status Code' dropdown menu is open, showing options: A (Active Patient), CD (Changed Doctors), DE (Deceased Patient), IA (Inactive Patient), MV (Moved Away), and TR (Transient Patient). The 'A' option is highlighted.

Patient Status

All statuses, other than Active, are considered inactive.

SECTION 4 • PANEL CLEAN-UP

Active Patients Without MRP

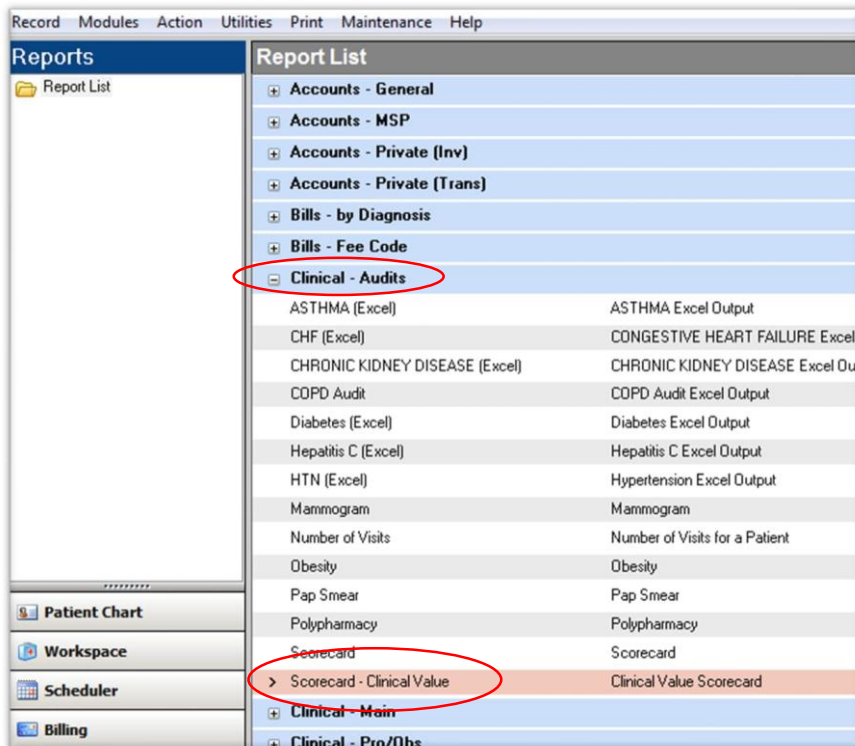
Run a report for unassigned patients and add yourself as primary provider to add a patient to your panel.

Discuss with your practice team if there are any patients requiring investigation prior to adding or removing the assigned provider.

- Go to **Reports** to display the **Report List**.
- Expand **Clinical Audits** folder
- Select **Scorecard-Clinical Value**

Clinical Value Scorecard window displays to allow you to select parameters:

- Check off box for **Unassigned Patients Only**.
- Click the **Retrieve** button to run report.



Clinical Value Scorecard

Select Provider: <Blank Service Provider> ☒ Unassigned Patients Only Look Back: 3 Year(s) View by: Metric ☒ Metric ☐ Provider Retrieve

Status Code(s): A (comma separated) Scorecard Target: CVM LEVEL 3 - MAR 2014

Expand All Collapse All

PROVIDER	NUMERATOR	DENOMINATOR	PERCENTAGE	TARGET	INVESTIGATE
----------	-----------	-------------	------------	--------	-------------

- Expand **M03 Patient Status** folder.
- The **Numerator** shows the number of active unassigned patients seen in the last 3 years. You can change this number if you want to make corrections gradually.
- Click the **green button** to open list of these patients in chart navigator.
- The **Denominator** shows the number of active unassigned patients that have **not** been seen in 3 years.
- Click the **red button** to open the list of these patients in the chart navigator.

Clinical Value Scorecard

Select Provider: <Blank Service Provider> ☒ Unassigned Patients Only Look Back: 3 Year(s) View by: Metric ☒ Metric ☐ Provider Retrieve

Status Code(s): A (comma separated) Scorecard Target: CVM LEVEL 3 - MAR 2014

Expand All Collapse All

PROVIDER	NUMERATOR	DENOMINATOR	PERCENTAGE	TARGET	INVESTIGATE
M01 PATIENT INFORMATION	11	11	100.0%	95%	
M02 CONTACT INFORMATION	1	11	9.1%	90%	
M03 PATIENT STATUS	11	28568	.0%	80%	
UNASSIGNED	11	28568	.0%	80%	Green Red
M04a PROBLEM LIST/HEALTH CONCERNS (ALL)	5	11	45.5%	40%	
M04b PROBLEM LIST/HEALTH CONCERNS (CODED)	5	11	45.5%	30%	
M05 ALLERGIES/INTOLERANCES (ALL)	0	11	0.0%	0%	

Add yourself as provider to unassigned patient.

- Open patient's chart and click **Demographic** folder under **Patient Summary**.
- Click the arrow to expand drop-down under **Service Provider**.
- Select yourself and save patient record.

Patient Chart

Demographics MICKEY MOUSE 79 YR OLD M Chart 1

New Record Delete Record Save Undo Refresh Search Previous Chart Next Chart

CHART: 10002 FIRST: MICKEY MIDDLE: LAST: MOUSE DOB: 1944/01/01

Demographics Patient Detail ID Alias Connections Services Associated Parties WCB Claims Other Claims Incentives Settings Benefits

Patient Identification

Chart No.: 10002 Patient Photo

Name (F/M/L): MICKEY MOUSE

Alias (F/L): DUCK GOOFY

Birth Date: 1944.01.01 (79) Gender: M

Current Status: A Date: 2021.03.05 Update Status

BC Health No.: 9090 909 090

Contact Information

Address: box 23

Address: 1559 W/alt Disney Ave

City: prince george Province: BC

Postal Code: V2N 6R5 Country: CANADA

Home: 250-888-7792 Leave Message

Office Information

Facility: Last Contact: 2023.02.16

Location: Invoice Balance

Service Provider:

Chart Loc:

Insurance Information

Insurance by: BC

Insurance No.: 9090 909 090 Check Dep. No.: 00

Benefit Source:

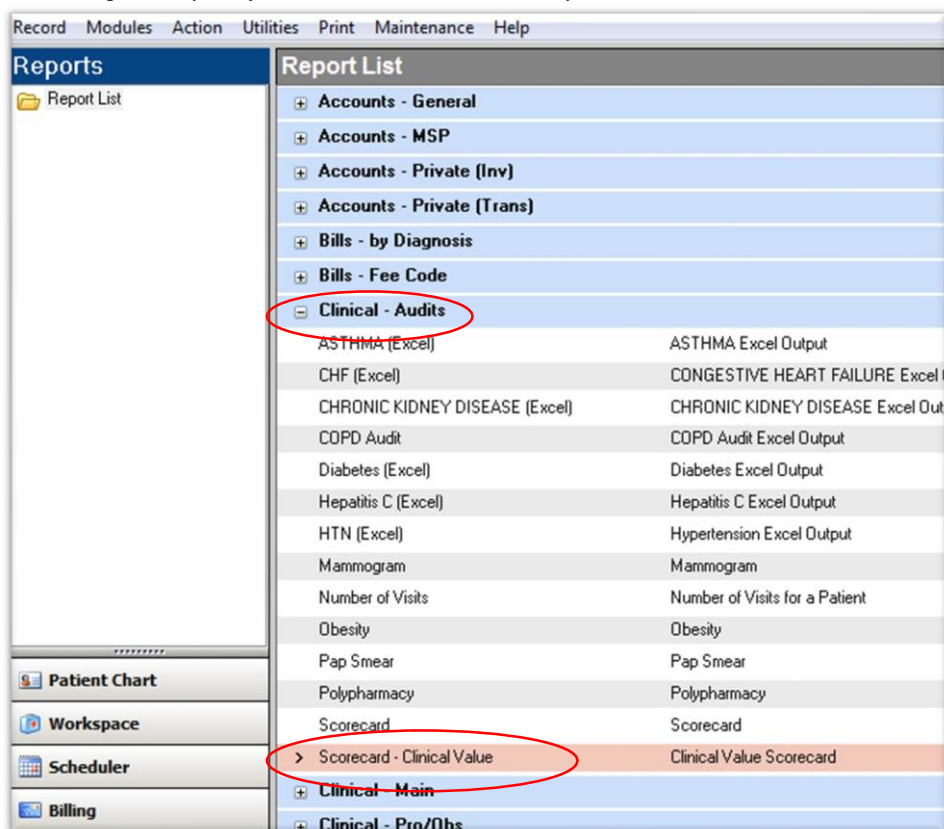
Pharmacy Information

Add Pharmacy Information

Active Patients Not Seen In X years

Identify patients with active status that you have not seen for last few years. Decide on the process that suits your practice and discuss with your team possible assistance with necessary updates.

- Go to **Reports**, expand **Clinical Audits**, select **Scorecard-Clinical Value**.



- Under **Select Provider** select your name from drop-down list.
 - ☐ Assisting practice team can select a different most responsible provider.
 - ☐ Leave blank to display all providers and unassigned patients.
- Click **Retrieve** to generate the report.

Clinical Value Scorecard

Select Provider: [dropdown] Unassigned Patients Only [checkbox] Look Back: 3 Year(s) View by: Metric [radio] Retrieve [button]

Status Code(s): A (comma separated) Scorecard Target: CVM LEVEL 3 - MAR 2014 [dropdown] Provider [radio] Help?

Expand All Collapse All

PROVIDER	NUMERATOR	DENOMINATOR	PERCENTAGE	TARGET	INVESTIGATE
----------	-----------	-------------	------------	--------	-------------

- Expand **M03 Patient Status**. to display a list of patients.
- The **Numerator** is the number of active patients seen in the last 3 years.
- The **Denominator** is the number of active patients with assigned MRP.
- Select the red button to get a list of active patients assigned to you that have not been seen in 3 years.

Clinical Value Scorecard

Select Provider: [dropdown] Unassigned Patients Only [checkbox] Look Back: 3 Year(s) View by: Metric [radio] Retrieve [button]

Status Code(s): A (comma separated) Scorecard Target: CVM LEVEL 3 - MAR 2014 [dropdown] Provider [radio] Help?

Expand All Collapse All

PROVIDER	NUMERATOR	DENOMINATOR	PERCENTAGE	TARGET	INVESTIGATE
M01 PATIENT INFORMATION	13	13	100.0%	95%	
M02 CONTACT INFORMATION	3	13	23.1%	90%	
M03 PATIENT STATUS	13	28567	.0%	80%	
	0	1	-	80%	
	1	2	50.0%	80%	
	1	1	100.0%	80%	
	0	3	-	80%	
UNASSIGNED	11	28560	.0%	80%	
M04a PROBLEM LIST/HEALTH CONCERNS (ALL)	7	13	53.8%	40%	
M04b PROBLEM LIST/HEALTH CONCERNS (CODED)	7	13	53.8%	30%	

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 you team criteria for different statuses that will remove patients from your active patients' panel.

- Click **Administration** on the top toolbar.
- Click **Prompt / Selection List Mgt.**
- Select **Selection Lists** underneath.
- Choose **Patient – Status Code** on the right side.
- Click **New Record** to add a status.

