

SECTION 0 • DOCUMENT QUICK ACCESS

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SECTION 1 • OVERVIEW

Empanelment in OSCAR

This “How-to” document guides through the phase 1 of panel management using Oscar 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.

Oscar Versions

Oscar version 15 and higher, Oscar Pro, OpenOSP and JUNO use dashboards to manage patient panel. If you see **Dashboard** to the right of the **Administration** button, this functionality has been installed.

If it is not there, contact your Oscar service provider to activate it.

SECTION 2 • EMR PANEL

Review & Extract Active Patient List

- Navigate to the **Reports** tab
- Click on **11 Demographic Report Tool**
- Select columns (Last Name, First Name, PHN)
- Select **Provider No** = Yourself, or the MRP.
- Select Patient Status = **'AC'**
- Scroll down, click on **Run Query**

The screenshot shows the 'WELL EMR Group' interface. The 'Report' tab is selected in the top navigation bar. A dropdown menu is open, displaying a list of reports. The report '11 Demographic Report Tool' is highlighted with a red box. Other reports in the list include 'EDD List 07', 'Active Patient List', 'Day Sheet', 'All appointments', 'Print Day Sheet for only new appointments', 'Lab Day Sheet', 'Billing Day Sheet', 'Tabular-style Daysheet', 'Bad Appt Sheet', 'Patient Chart List', 'Old Patient List', 'No Show Appointment List', 'Consultation Report', and 'Laboratory Requisition Report'.

Time	W	DS	S	Harry Lagzdin(0) *
8:00				
8:10				
8:20				
8:30				
8:40				
8:50				
9:00	0			
9:10	0			
9:20	0			
9:30	0			
9:40	0			
9:50	0			
10:00	0			

Search For
☐ Demographic #
☒ Last Name
☒ First Name
☐ Address
☐ City
☐ Province
☐ Postal Code
☐ Phone
☐ Phone 2
☐ Email
☐ Year of Birth
☐ Month of Birth
☐ Date of Birth
☒ HIN
☐ Version Code
☐ Roster Status
☐ Patient Status
☐ Date Joined
☐ Chart #
☐ Provider #
☐ Provider Name
☐ Sex
☐ End Date
☐ Eff. Date
☐ Pcn Indicator
☐ Health Card Type
☐ HC Renew Date
☐ Family Doctor
☐ Newsletter

Where
 AGE: ---NO AGE SPECIFIED---
 First Name: Last Name:
 Roster Status: ☐ CARE COORDINATOR ☐ Interpreter Needed ☐ LCHC PC ☐ LCHCP/OAT ☐ OAT-PC ☐ RAD/PC ☐ RO
 Sex: ---NO SEX SPECIFIED---
 Provider No: ☐ Dubois, Lynn ☐ Pascual, Joy ☐ User3, Generic ☐ User7, Generic ☐ Love, Stephanie ☐ Dayman-Kent, Nicole ☐ Zhou, Danielle ☐ WALK-IN, Doctor ☐
☐ Patterson, Erika ☐ Chang, Herb ☐ Goretzky, Heather ☐ Freder, Matthew ☐ Moran, Ashley ☐ Bjerke, Licia ☐ Schur, Wil ☐ Pod, A ☐ Lagzdin, Harry ☐
☒ Gosselin, Kat
 Patient Status: ☒ AC ☐ Addictions ☐ DE ☐ FI ☐ MA - Maternity
 Demographic ID(s):
 Order By: ---NO ORDER---
 Limit Results to: ---NO LIMIT---

- This will return the list and number of active patients.
- Select all the patients by dragging your mouse to the last row.
- To extract this list, copy (**CTRL + C** or **Command + C**) and paste (**CTRL + V** or **Command + V**) it in a spreadsheet tool (Excel).

Search Returned : 16 Results

Last Name	First Name	HIN
BOB	UNCLE	72837298327389
COFFEE	BORUTO	
COFFEE	LOVER	464342544243
COFFEE	ENTHUSIAST	23424242432
GOSSELIN	TINY	17171717
GOSSELIN	SMALL	
HIBINO	KAFKA	888888888888
KAMADO	TANJIRO	800000000
KRITIKOU	ANDREIA	123456789
RUNNER	TRACKSTAR	4545234
SAKURA	PINK	000000290
SNAPE	SEVERUS	82982917843
TEA	CONNOISSEUR	1353423
TESTING	FILE	0977854534534
UZUMAKI	NARUTO	0090990000
UZUMAKI	BORUTO	000000000009

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 **Patient Status** or **Physician/MRP** open Master Demographic, and click on **Edit**.
- 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 **Physician/MRP** must not be blank.

Check Eligibility
Create Invoice
Clinical Modules
Consultations
Prescriptions

(27852) **Edit**
Export this Demographic

SIN:

Physician/MRP : Gosselin, Kat
Patient Status: AC - Active Add New

Midwife:

Referral Doctor: Search Name
Family Doctor: Search Name

Enrollment Physician: Same as MRP
Enrollment Status: Add New
Insurance No:

Patient Type: Not Specified
External ID:

Archived Paper Chart: yyyy-mm-dd
Date Joined: 2024-07-03

Cytology #:

Nurse:

Patient Status Date: 2024-11-18
Resident:

Referral Doctor #:

Family Doctor #:

Date Enrolled: 2026-04-22
Chart Number:

PHU: Select Below
Demographic Group: Kat Patients

End Date: yyyy-mm-dd

Waiting List
Waiting List: --Select Waiting List--
Waiting List Note:
Date of request: yyyy-mm-dd

Health Care Team
add a provider: internal AHP, PCN (AHP) Add

Minimum Rx Interaction Warning Level Not Specified Show Description

Patient Notes
Booking Alert:
Chart Alert:
Notes:

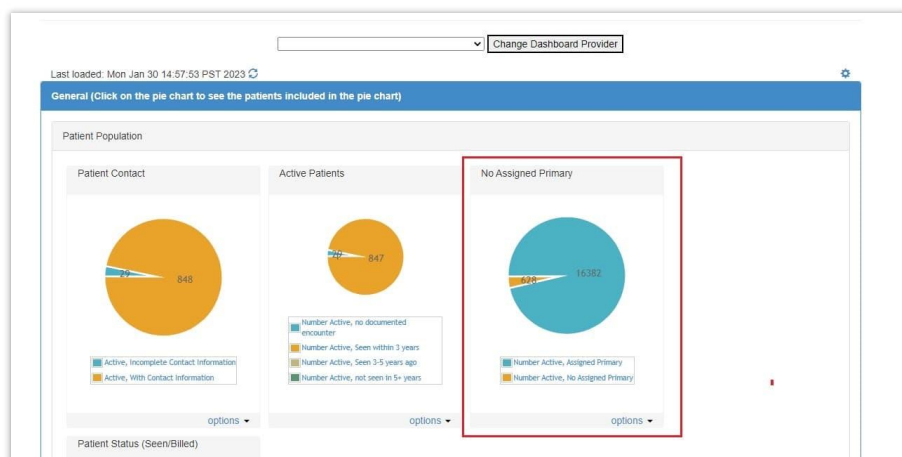
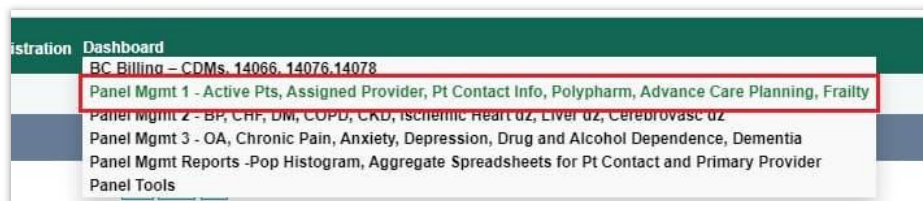
Export this Demographic Update Record Save & Update Family Members

SECTION 4 · PANEL CLEAN-UP

Active Patients Without MRP

Run a report for unassigned patients and add yourself as most responsible provider (MRP). Discuss with your practice team if there are any patients requiring investigation prior to adding or removing the assigned provider.

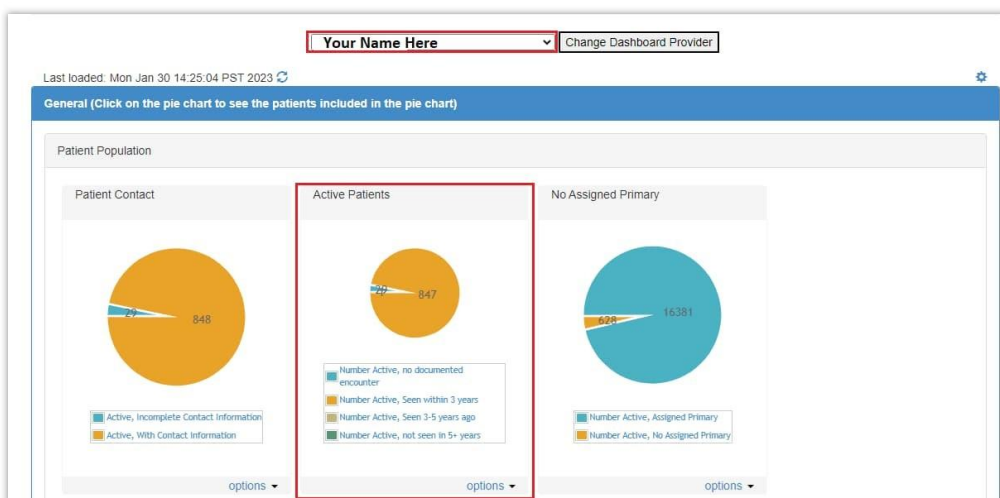
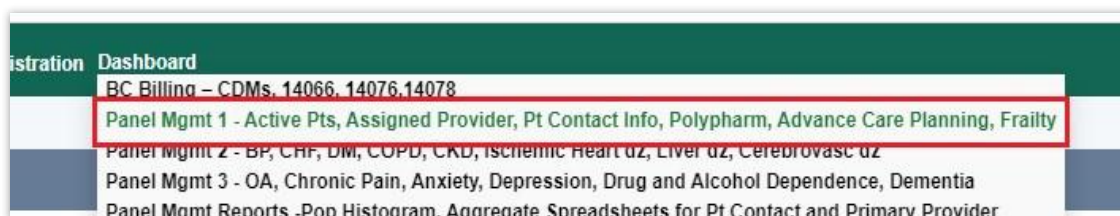
- Click on **Dashboard** on your toolbar and select **Panel Mgmt 1** from the drop-down list.
- Click on the **No Assigned Primary** pie chart to open the list.
- Review the list and manually update patient's primary provider as appropriate.
- Click on their **Demographic Number** to open their Master Record.
- Click **Edit**.



Active Patients Not Seen In X years

Identify patients with 'Active' status but have not been seen for last few years. Decide what date range for active patients suits your practice. Discuss with your team how they can help with necessary updates if needed.

- Click on **Dashboard** and select **Panel Mgmt 1** from the drop-down list.
- Click on the **Active Patients** pie chart to display list of patients.
- Change the number of entries per screen to show – a larger number is easier to scroll through.
- Click the column heading **Last Encounter** to sort the list by most recent visit.
- Scroll down to identify patients with last encounter outside of the date range that you have specified for active patients.



All	All	Parameter 2	Filter	Reset
Date of Birth (mm-dd-yy)	Age	Last Encounter	Patient Status	
	66	2019-04-11 19:58:53	AC	
	71	2019-04-23 07:08:10	AC	
	54	2019-04-18 07:40:01	AC	
	53	2019-04-24 09:36:56	AC	

Last Encounter

This search is looking for an encounter note. If there is no date under the last encounter, either the patient has not been seen in the office or it might be a new patient who has not yet had their first appointment.

To narrow the list, you can also use additional filters. For example search for patients older than 20 years to remove them from the view. Select criteria from drop-down menus at the top of the page, for our example select:

- **Age** select **greater than** type **20**
- Scroll down to identify patients with last encounter outside of the date range that you have specified for active patients.

Click patient id number to open master record and review patient's e-chart.

- Check off the patient you want to deactivate.
- Click **Actions to display options.**
- Select **Set Status Inactive.**
- Inactive patients will not be listed in the next search.
- To update more than one patient at a time, use batch action. Check off all the patients you want to deactivate.

Active Patients : Physician Name

Show 10 entries

	Patient Id	Patient Name	Date of Birth (mm-dd-yy)	Age
☒ Actions	12241	Patient Name	11-17-1952	68
Select All in View	26966	Patient Name	01-15-1986	35
Select None	35440	Patient Name	11-20-1950	70
Assign Tickler	35599	Patient Name	04-17-1944	77
Set Status Inactive				

IMPORTANT!

This action cannot be **undone**. You may wish to print or save a list of these patients prior to inactivating.

Any bulk actions using the dashboards creates linked Messages in your Message inbox and all patient charts. The message includes ALL patients. Consider unlinking the messages for privacy and security purposes.

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 Required

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

- Open Master Record for test patient.
- Click **Edit**
- Find **Patient Status** and click **Add New**
- Type the name for the new status, then click OK.

The screenshot shows a sidebar menu on the left with options like 'Waiting List', 'Billing', 'Invoice List', 'Check Eligibility', 'Create Invoice', 'Clinical Modules', 'Consultations', 'Prescriptions', and 'Patient'. The main area has a 'Name' dropdown, a search box, and buttons for 'Search', 'Inactive', and 'All'. Below these, the '(378) Edit' button is circled in red, along with an 'Export this Demographic' button.

The screenshot shows a form for patient information. Fields include 'Physician/MRP', 'Patient Status' (set to 'AC - Active'), 'Midwife', 'Referral Doctor', 'Family Doctor', 'Enrollment Physician', 'Enrollment Status', 'Insurance No.', and 'Patient Type' (set to 'Not Specified'). The 'Add New' button next to the 'Patient Status' dropdown is highlighted with a red box.

The screenshot shows a small dialog box titled 'kai-oscar.com says'. It contains the text 'Please enter the new status:' followed by a text input field. At the bottom are 'OK' and 'Cancel' buttons.