

SECTION 0 • DOCUMENT QUICK ACCESS

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SECTION 1 • OVERVIEW

Empanelment in Profile EMR

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

Stored Queries Required

Download the below templates to your computer and then follow the next steps to upload them to your EMR. Please note that once you download the query templates, they will be unopenable until they are imported into your EMR.

[Stored Query Template: Active Patients with NO MRP Seen By Selected FP](#)

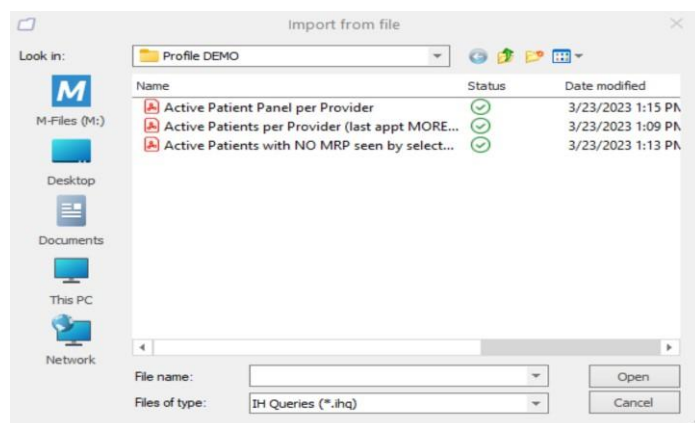
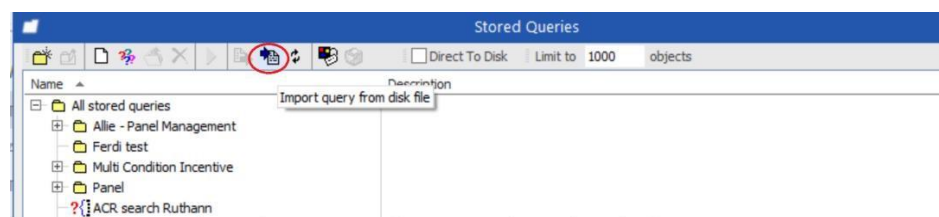
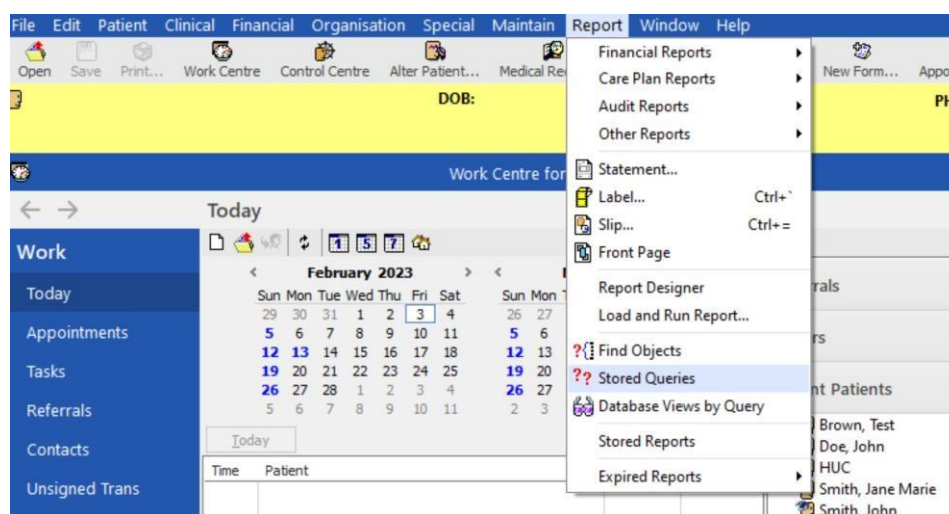
[Stored Query Template: Active Patients Never Seen or Not Seen In Over 5 Years](#)

[Stored Query Template: Active Patient Panel Per Provider](#)

SECTION 2 · PREREQUISITES

How to Import Stored Queries

- Click **Report** on the top menu.
- Select **Stored Queries** from the drop-down menu.
- Click **Import Query from disk file** on the toolbar.
- Find and select the file from your computer.



The **Save Query as** window displays. File details at the bottom might be automatically populated. If not, enter the information:

- Type query **Name**.
- Under **Description**, type short explanation what it does.
- Click **OK**.
- The new query is added to the list of Saved Queries in your EMR.

Name	Description	POS
All stored queries		
WS Patient Seen in Last 5 years		
Patient List for WS		
Matthew Test1		
Hypertension Text Not Coded	Hypertension Related Text Description in probl...	Health Centre
Attachment NorthShore Test 2		Health Centre
Attachment NorthShore Test		
Active Patients with NO MRP seen by sel...	Active pt's who are not assigned to a provider ...	
Active Patients per Provider (last appt M...	Active or Registered Patients for Selected MRP ...	
Active Patient Panel per Provider	ALL Active or registered Patients for Selected ...	
Xtra = all unfiled queries		
Trash Temp		
Panel		
Multi Condition Incentive		
M-files templates to distribute		
IPS		

Name: Active Patient Panel per Provider

Description: ALL Active or registered Patients for Selected MRP

POS: Health Centre

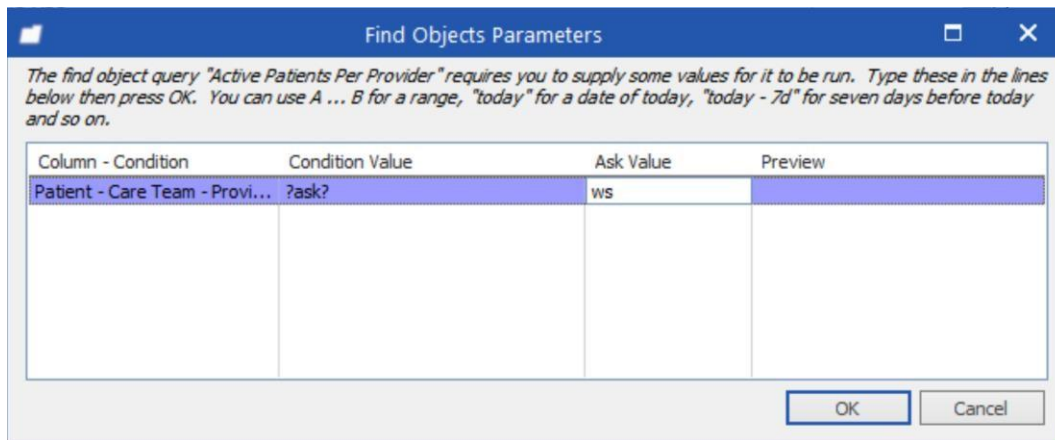
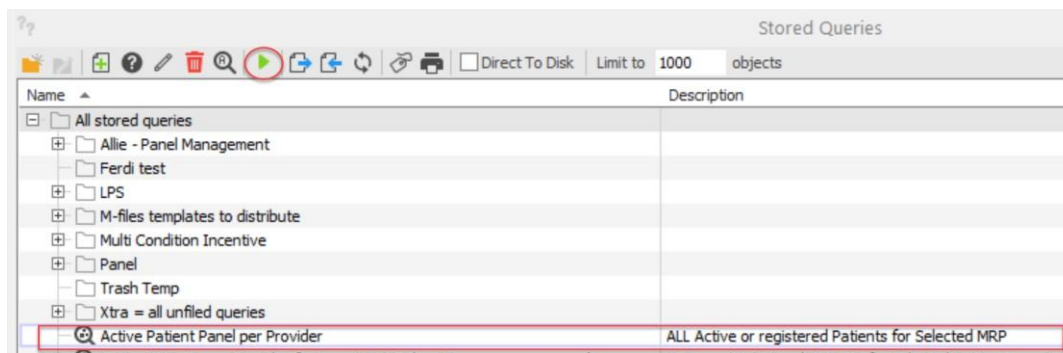
Privacy:

OK Cancel

SECTION 2 • EMR PANEL

Review & Extract Active Patient List

- To **Review** your patient panel, retrieve names of patients assigned to you:
- Click **Report** on the top menu.
- Select **Stored Queries** from the drop-down menu.
- Select the "**Active Patient Panel Per Provider**" template.
- Click the **Execute Query** green button on the toolbar.
- Enter your log in user name as provider name under **Ask Value**.
- Click **OK**.
- To **extract** your patient panel, follow this demo here: [HERE](#)



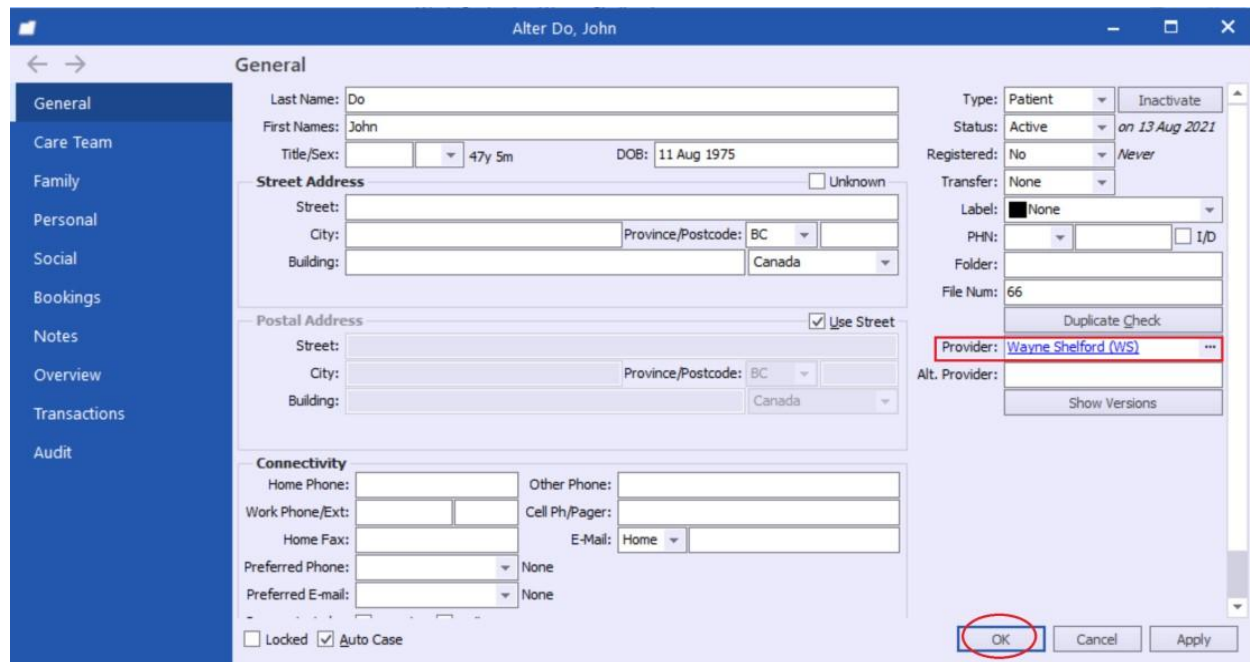
SECTION 3 • ASSIGNING STATUS & MRP

Add/Remove Patient from Panel

You can add or remove patients from your panel by changing patient status from Active to Inactive, Deceased, Moved, etc. as appropriate:

- Select a patient and click on  **Alter Patient...** to open the patient demographic screen
- To Add: click **Status** and select **Active** and add yourself as **Provider**
- To Remove: First click the **Inactivate** button.
- Click on the arrow next to **Status** to display drop-down list.
- Select the appropriate entry.
- The Inactivation window displays.
- Enter the **Inactivation Date**.
- Click the **Ellipses** button to display codes for reasons you wish to inactive the patient.

To Add:



The screenshot shows the 'Alter Patient' window for 'John Do'. The window has a blue header bar with the title 'Alter Do, John'. On the left is a navigation pane with options: General, Care Team, Family, Personal, Social, Bookings, Notes, Overview, Transactions, and Audit. The 'General' tab is selected. The main area contains several sections: 'General' with fields for Last Name (Do), First Names (John), Title/Sex (47y 5m), and DOB (11 Aug 1975); 'Street Address' with fields for Street, City, Province/Postcode (BC), and Building; 'Postal Address' with fields for Street, City, Province/Postcode (BC), and Building; and 'Connectivity' with fields for Home Phone, Work Phone/Ext, Home Fax, Preferred Phone, Preferred E-mail, Other Phone, Cell Ph/Pager, and E-Mail. On the right side, there are dropdown menus for Type (Patient), Status (Active), Registered (No), Transfer (None), Label (None), PHN, Folder, and File Num (66). There is an 'Inactivate' button next to the Status dropdown. Below these are 'Duplicate Check', 'Provider: Wayne Shelford (WS)', and 'Alt. Provider' fields. At the bottom right, there are 'OK', 'Cancel', and 'Apply' buttons. The 'OK' button is highlighted with a red circle.

To Remove:

The screenshot shows the 'Alter Test, Jane' window. The 'General' tab is active. The 'Status' dropdown menu is open, showing options: Active, Inactive, Deceased, Deregistered, Registered, and Transferred. The 'Inactivate' option is highlighted. The 'Status' field currently shows 'Active' with a date 'on 25 Sep 2020'. Other fields include Last Name: Test, First Names: Jane, Title/Sex: F, 72y 4m, DOB: 25 Sep 1950, Street Address: 123 Bee Street, City: Town, Province/Postcode: BC, Building: , Canada, Postal Address: 123 Bee Street, City: Town, Province/Postcode: BC, Building: , Canada, Connectivity: Home Phone: 250 123 4567, Other Phone: , Work Phone/Ext: , Cell Ph/Pager: 250 654 3211, Home Fax: , E-Mail: Home, Preferred Phone: , Preferred E-mail: , Locked: , Auto Case: .

The screenshot shows the 'Inactivation' dialog box. The 'Inactivation Date' is 03 Feb 2023. The 'Inactivation reason' field has a dropdown arrow. The 'Deceased' checkbox is unchecked. The 'Check for future activity and cancel' checkbox is checked. The text below the checkbox reads: 'This cancels any future appointments, interventions and recalls'. The 'Ok' and 'Cancel' buttons are at the bottom.

The screenshot shows the 'Select Short Codes' dialog box. The list of short codes is as follows:

LEFT	Explicitly left
LOST	Lost Contact
MOVE	Moved away
NOACTIVE	No activity
NOT	Not Specified
UNKNOWN	Unknown

The 'NOACTIVE No activity' option is selected. The 'Ok' and 'Cancel' buttons are at the bottom.

SECTION 4 · PANEL CLEAN-UP

Active Patients Without MRP

Start with listing patients with no assigned most responsible provider (MRP).

- Click on **Report** and select **Stored Queries** from the top toolbar.
- Select the previously saved query "**Active Patients with NO MRP Seen by Selected FP**" template.
- Click the green **Execute Query** button on the toolbar.
- Enter your log in username under **Ask Value** for provider's details.
- Click **OK** to execute the query.
- A list of patients with no assigned MRP displays in a new window, along with a list of their encounter dates with you as selected FP.
- Review charts of unassigned patients in order to assign the correct provider.
- Highlight the patient name and click  **Alter Patient...** on the side toolbar to open the patient demographic's window.

Stored Queries	
Name	Description
[-] All stored queries	
[-] Allie - Panel Management	
[-] Ferdi test	
[-] LPS	
[-] M-files templates to distribute	
[-] Multi Condition Incentive	
[-] Panel	
[-] Trash Temp	
[-] Xtra = all unfilled queries	
Active Patient Panel per Provider	ALL Active or registered Patients for Selected MRP
Active Patients per Provider (last appt MORE than 5y ago or never seen)	Active or Registered Patients for Selected MRP not seen in the last 5 years
Active Patients with NO MRP seen by selected FP	Active pt's who are not assigned to a provider but seen by this FP
Attachment NorthShore Test	
Attachment NorthShore Test 2	
Hypertension Text Not Coded	Hypertension Related Text Description in problem summary but not coded as 401
Matthew Test1	
Patient List for WS	
Test Dashboard Disease Registry	quasi "dashboard" demo
WS Patient Seen in Last 5 years	

Active Patients with NO MRP with encounters by

Print... Save Open...

Active Patients with NO MRP seen by selected FP: Active pt's who are not assigned to a provider but seen by this FP

Conditions:
Patient - Usual Doctor - Code is null
and Patient - Status is equal to Active
and Patient - Type is equal to Patient
also Patient - DOB is not null

File#	Last Name	First Name	Sex	Age	Status	Dr.	Encounter
63	Young	Test	F	22	Active	WS	08 Aug 2022
Count	1						

Alter Do, John

General

General

Last Name: Do

First Names: John

Title/Sex: 47y 5m DOB: 11 Aug 1975

Street Address

Street:

City: Province/Postcode: BC Canada

Postal Address

Street:

City: Province/Postcode: BC Canada

Connectivity

Home Phone: Other Phone:

Work Phone/Ext: Cell Ph/Pager:

Home Fax: E-Mail: Home

Preferred Phone: None

Preferred E-mail: None

Type: Patient Inactivate

Status: Active on 13 Aug 2021

Registered: No Never

Transfer: None

Label: None

PHN: I/D

Folder:

File Num: 66

Duplicate Check

Provider: Wayne Shelford (WS)

Alt. Provider:

Show Versions

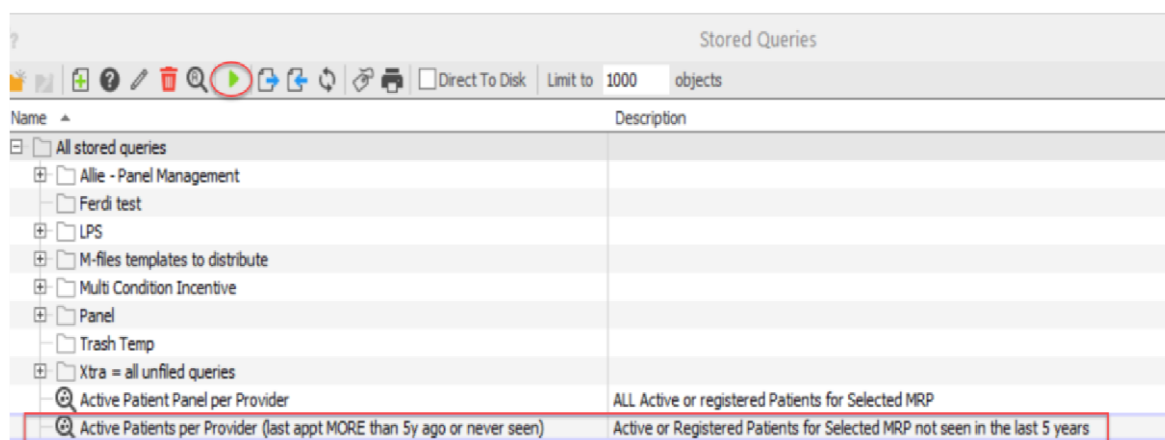
OK Cancel Apply

Active Patients Not Seen In X years

Identify patients with Active status but have not been seen for last few years. In our example, it is 5 years. Discuss with your practice team active patient criteria and how to implement necessary corrections.

Execute search and generate the list:

- Click on **Report** and select **Stored Queries**.
- Select "**Active Patients Per Provider (last appt MORE than 5y ago or never seen)**" template.
- Click the green **Execute Query** button.
- Enter your log in username under the **Ask Value**.
- A new window will appear with your list of patients along with the date they were last seen. If the date is blank it means that these patients were never seen in the EMR.
- Inactive by following the steps above from section **Add/Remove Patient from Panel**



Find Objects Parameters

The find object query "Active Patients Per Provider" requires you to supply some values for it to be run. Type these in the lines below then press OK. You can use A ... B for a range, "today" for a date of today, "today - 7d" for seven days before today and so on.

Column - Condition	Condition Value	Ask Value	Preview
Patient - Care Team - Provi...	?ask?	ws	

OK Cancel

Active Patients without Provider

Print... Save Open...

Active Patients Per Provider Not Seen in Five Years: Active Patients for Selected Provider Not Seen in 5 Years

Conditions:
 Patient - Status is equal to Active
 and Patient - Care Team - Provider - Code is equal to ws
 and Patient - Date Last Seen less than or equal to 03 Feb 2018
 3 object(s) found.

FileNum	Last Name	First Name	DOB	National Num	Code	Date Last S...
65	Smith	Jane Marie	03 Mar 1980		WS	
72	Smith	John	11 Jan 1980		WS	
Count	2					

SECTION 2 • ADMINISTRATION

Managing Patient Status

Not An Available Feature

The only statuses available in Profile are Active, Inactive, Casual, Deceased, Transferred. Discuss with your team criteria for each status. Decide if any changes to current office procedures are necessary to keep the records accurate and up to date.