Empanelment in ACCURO

An accurate and up-to-date patient panel enables you to use the EMR confidently and to provide proactive, data-informed care for patients that you are responsible for.

This “How-to” document guides through phase 1 of panel management using ACCURO electronic medical record (EMR).

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.

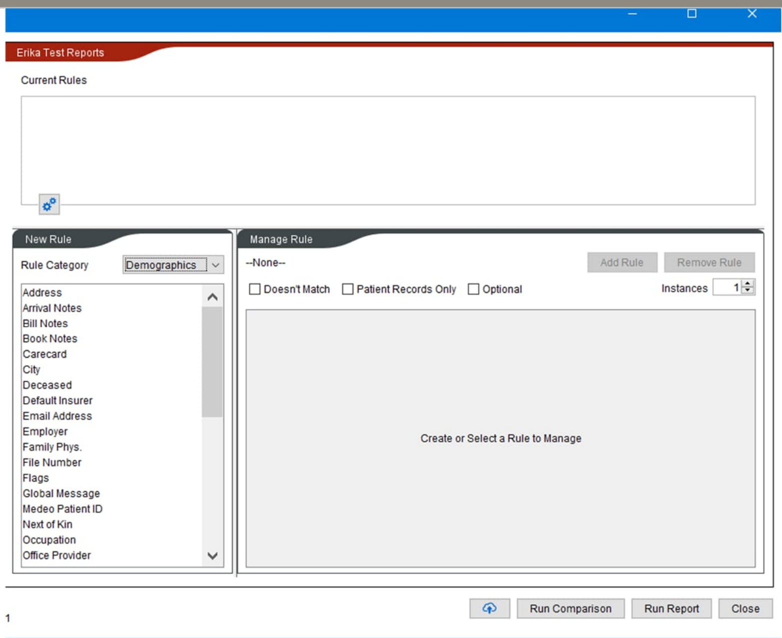
- ☐ Panel Management actions require some changes in your EMR settings. Ensure your staff has an appropriate level of administrative privileges.

Empanelment

After completing Phase 1 actions you will be able to:

- Establish baseline measures for unassigned patients, patients not seen for x years, and patients with missing demographics to assess your progress.
- Make necessary corrections in your EMR.
- Establish your accurate patient panel.

ACTION	HOW TO
Display a list of active patients assigned to you	To analyze your patient panel, retrieve names of active patients assigned to you: • Click the  icon on the **Home** screen. • Click Reports → Query Builder • This will open a blank search page.

ACTION	HOW TO
	

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<tr><th>ACTION</th><th>HOW TO</th></tr>
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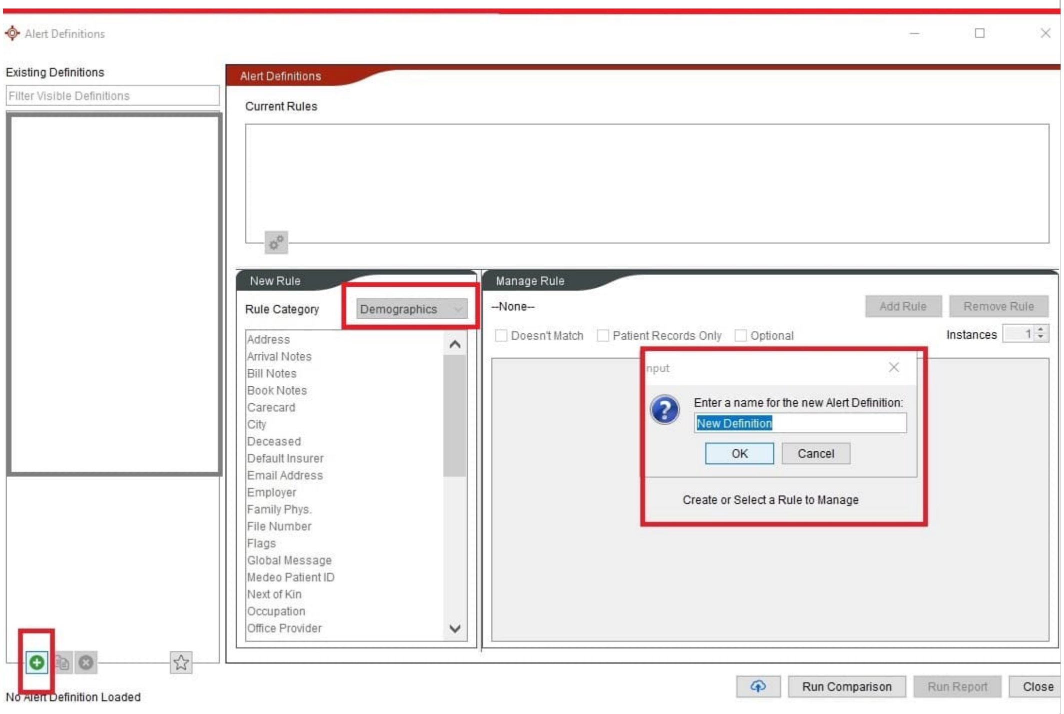
- Click on the GREEN + to create New Query and title your query. Click OK.



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- From Rule Category -> Demographics scroll down until you find Patient Statuses.
- Double Click on Patient Status and a New Constraint automatically populates.
- Click on New

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	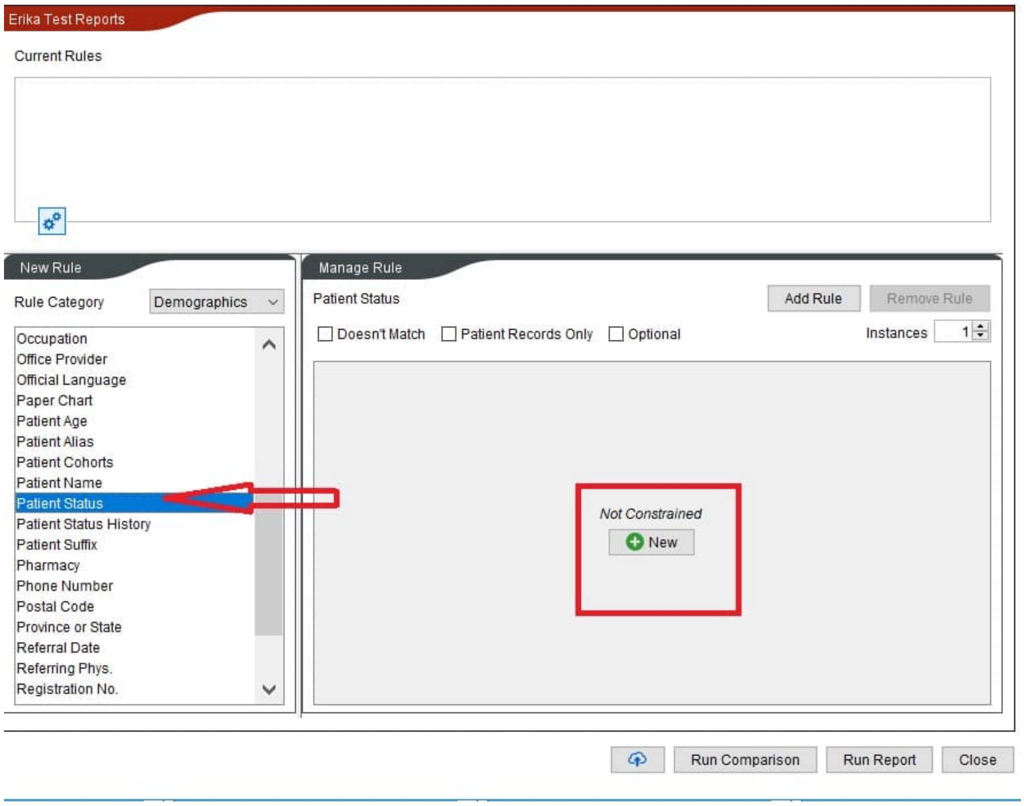

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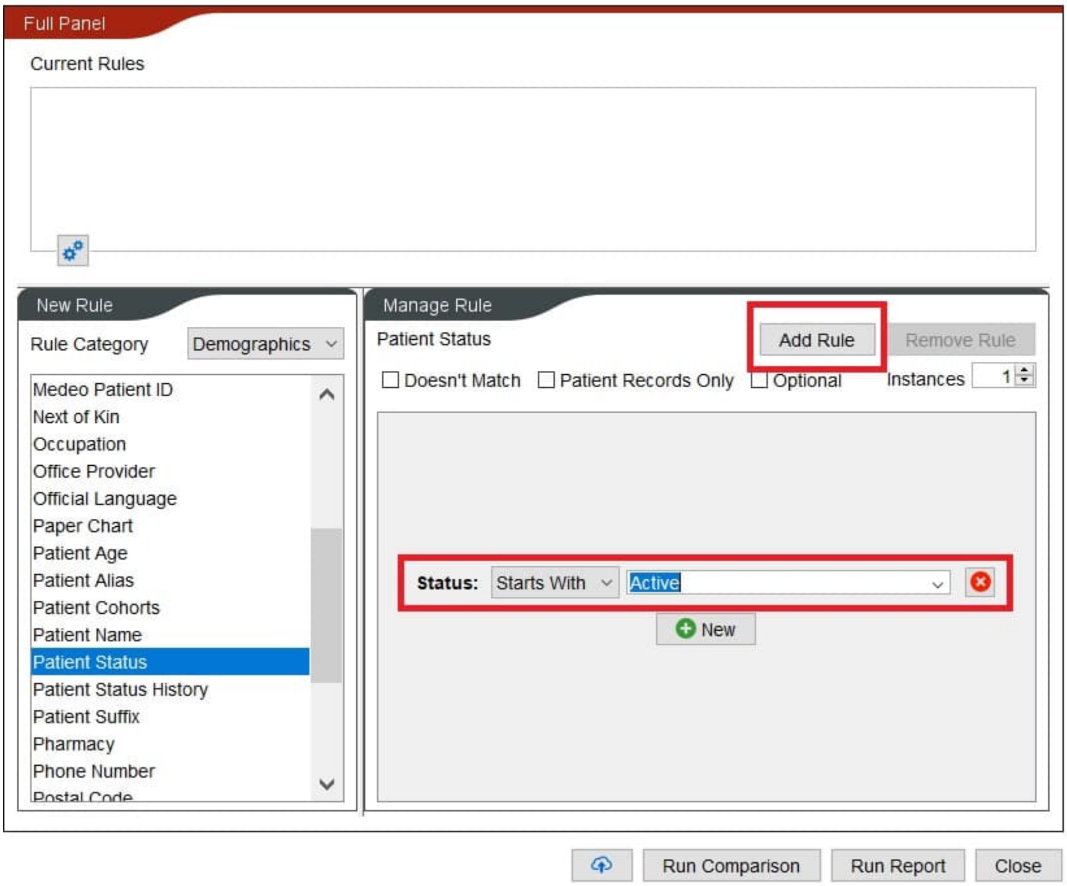

- Ensure the **Status** is set to “Starts With” **Active** and select your name under **Select Office Provider**.

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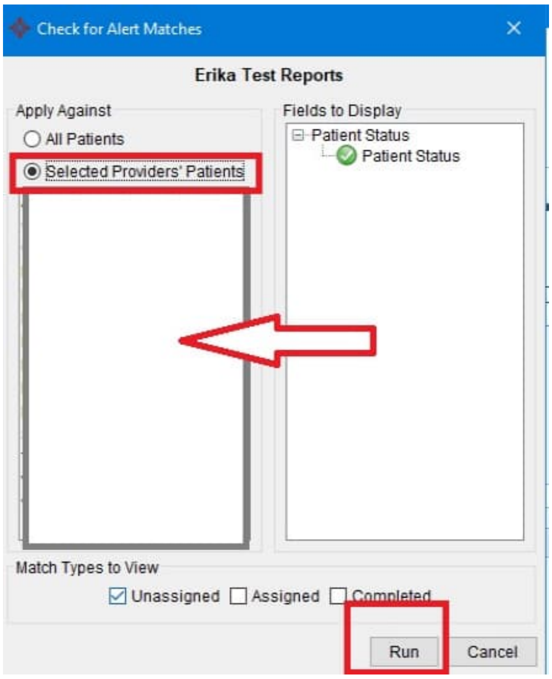

Select the Office Provider → Run
This will generate a list of your active patient population.

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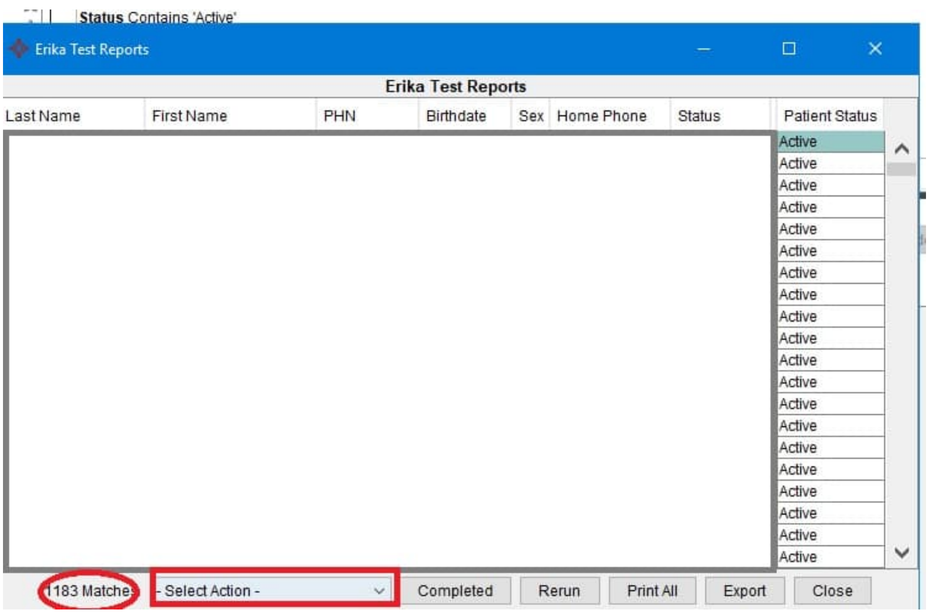

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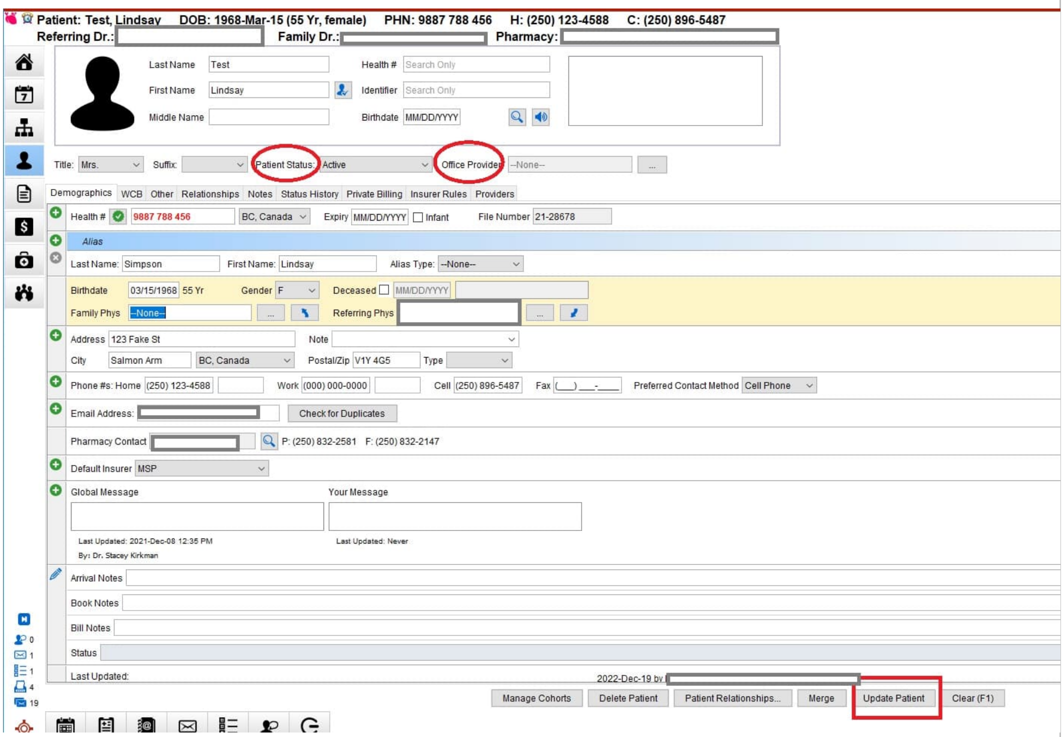
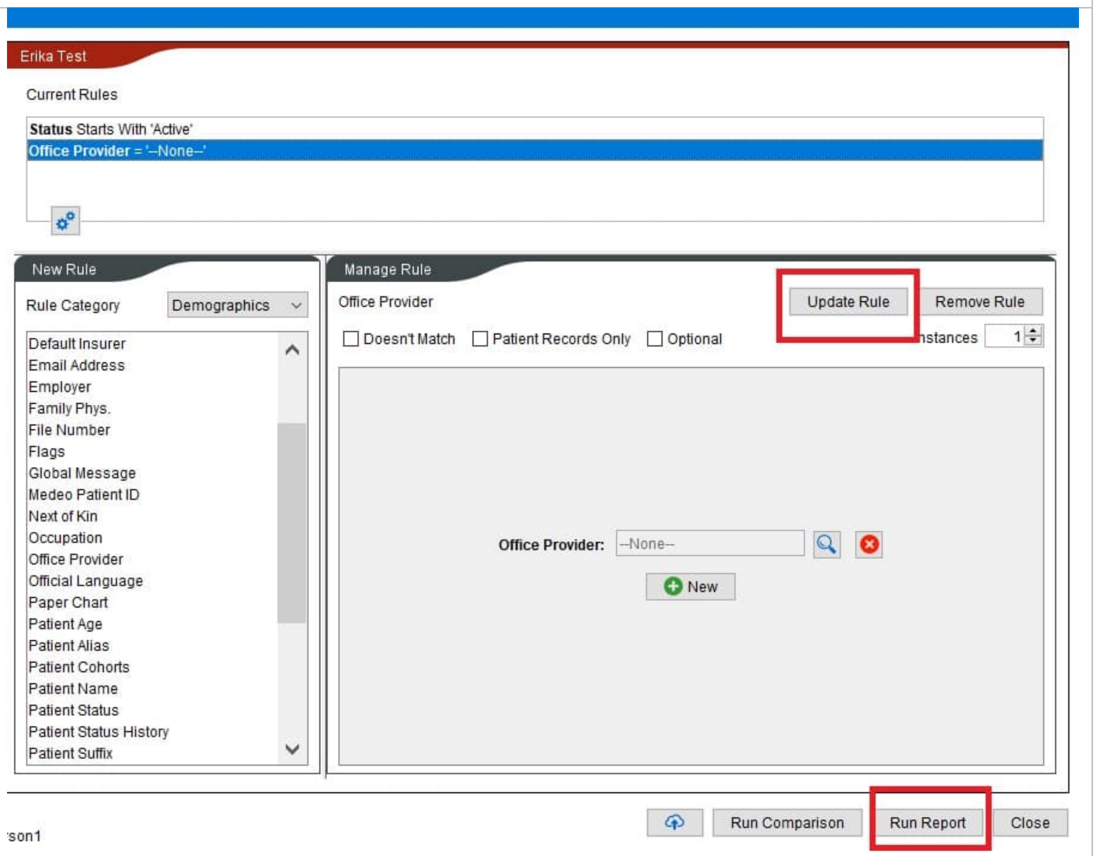
ACTION	HOW TO
	Consider what errors apply to your practice and what needs to be changed in your EMR. Identify areas for improvement and corrections needed in your EMR and discuss the process with your team. Next sections of this document provide instruction on how to correct most common errors in EMR.
Remove patients from your panel	There might be many reasons why in your EMR patients are not assigned correctly. Discuss with your team any trends and different status needs. You can remove patient's name that should not be on your list of patients by changing patient status from Active to Inactive, Deceased, Moved, Duplicate etc. 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.



ACTION	HOW TO
	• Choose your name from the **Office Provider** list. • Click **Update** to save changes. Your current patient panel will be updated.
Identify patients without a primary provider	Run a report for unassigned patients and add yourself as primary provider. Discuss with your practice team if there are any patients requiring investigation prior to adding or removing the assigned provider. • Click the  icon on the **Home** screen. • Click Reports → Query Builder
	

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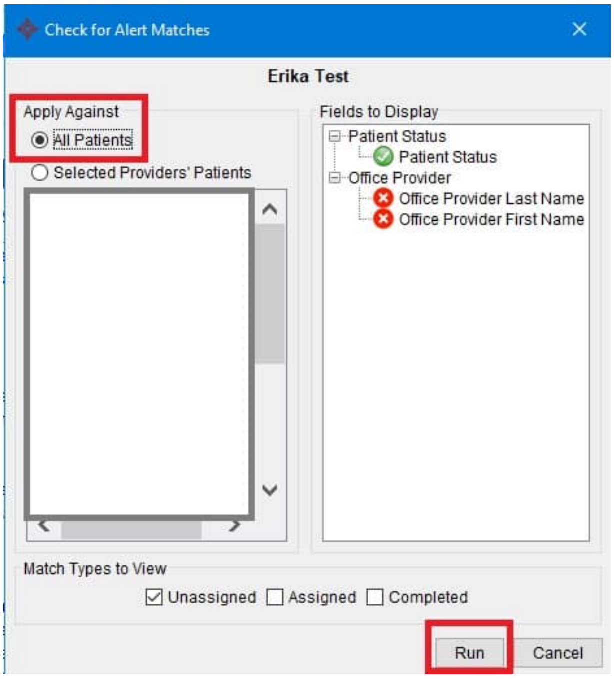
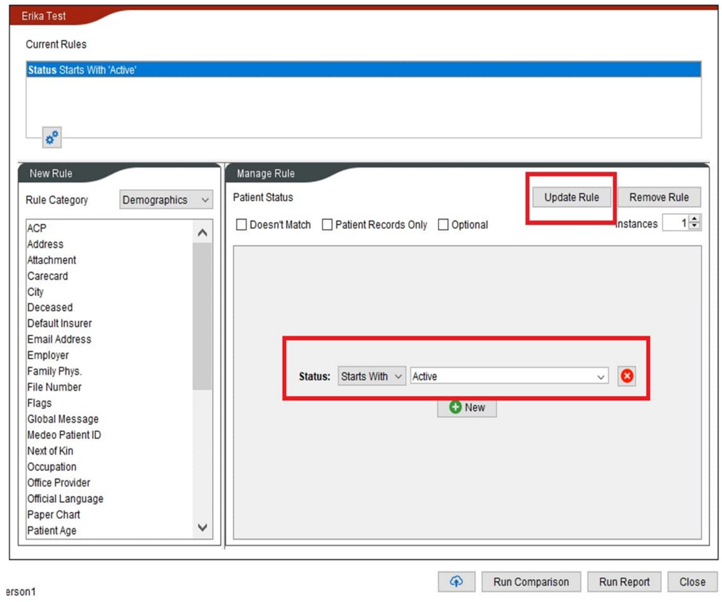
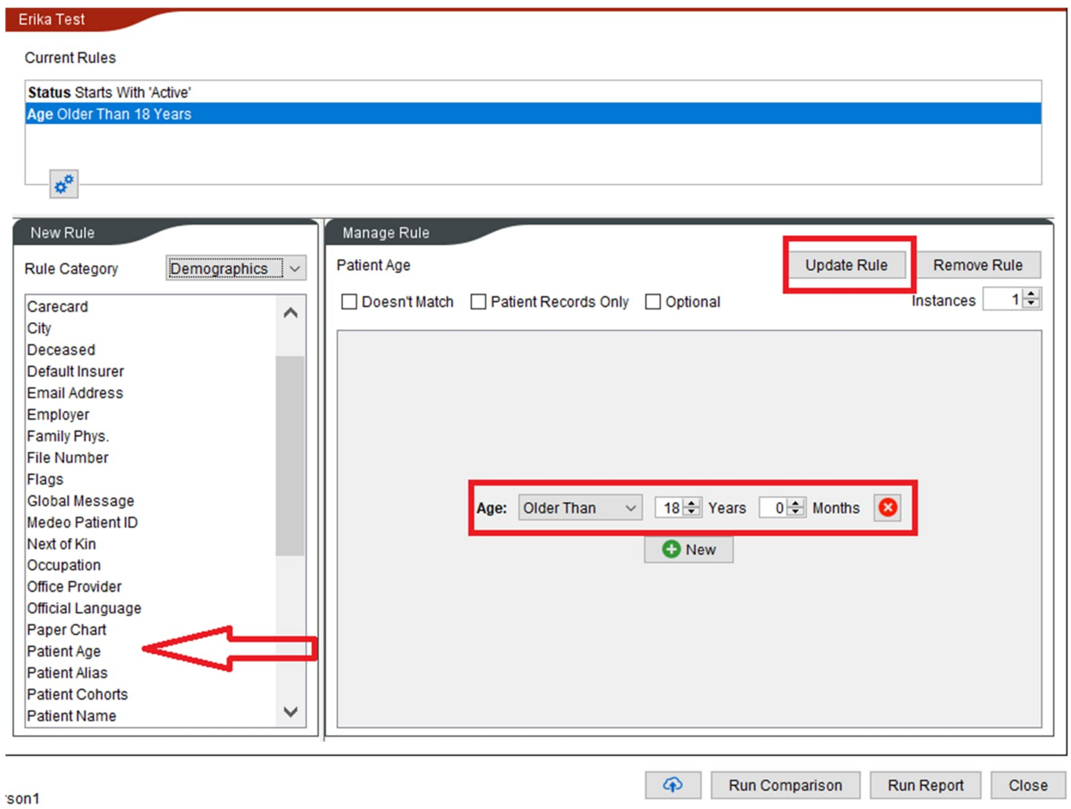
	 Because this list will most likely produce a large patient population it is best to run the report outside of office hours so that it does not slow down the EMR.
	Deactivate patients not seen by x years Identify patients with 'Active' status but have not been seen for the last few years. Decide on the process that suits your practice and discuss with your team any necessary updates. • Click the  icon on the **Home** screen. • Click Reports → Query Builder • Below is each step to build the Query for **Patient Panel Not in 3 years or Future Appointment**. The criteria of this search can be adjusted to suit your parameters.

DTO Doctors Technology Office

PSP Practice Support Program

ACTION	HOW TO
	
	

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	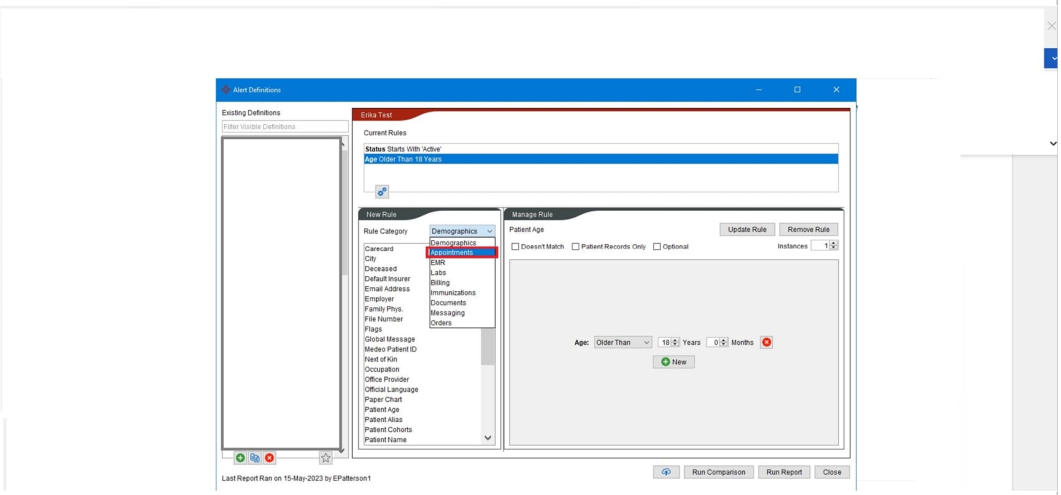
	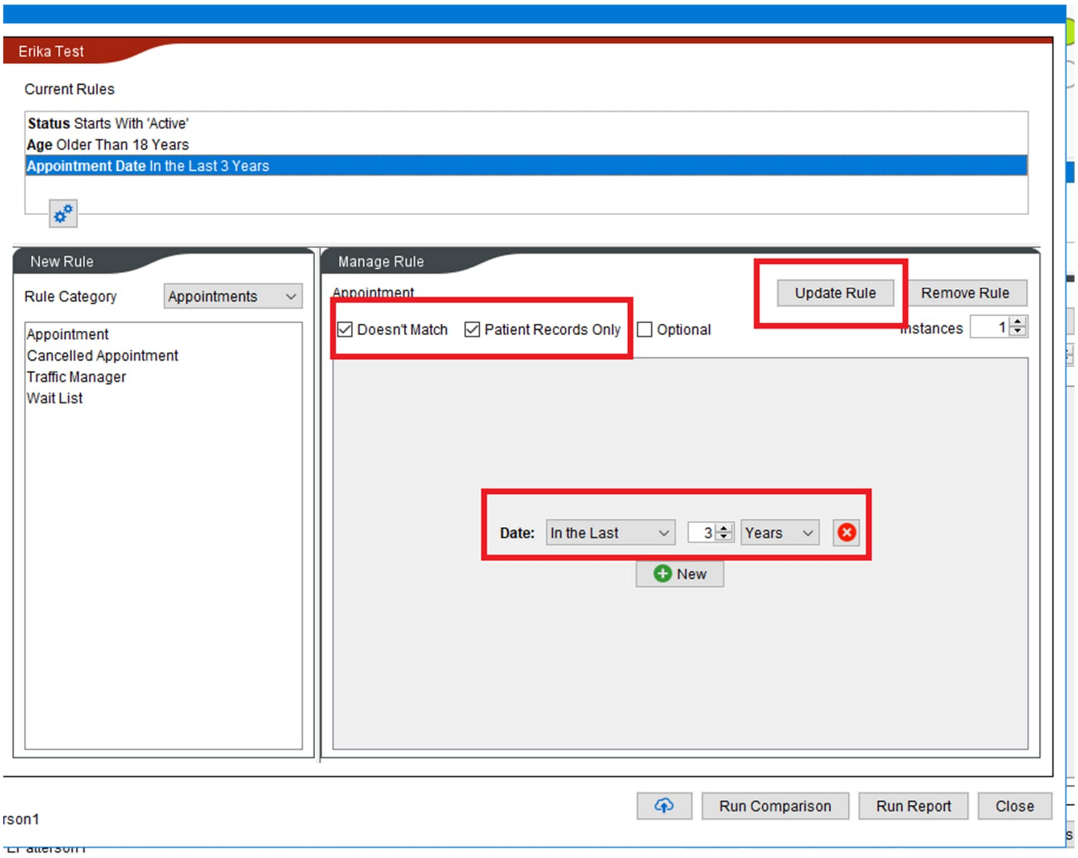

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	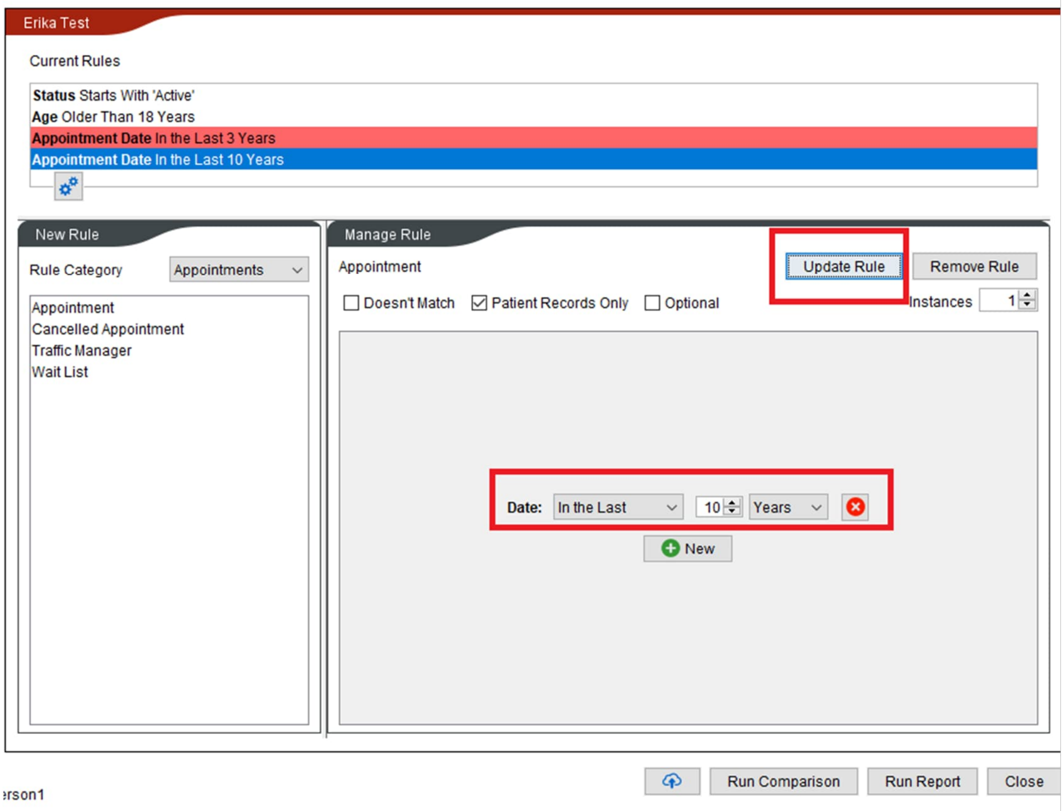

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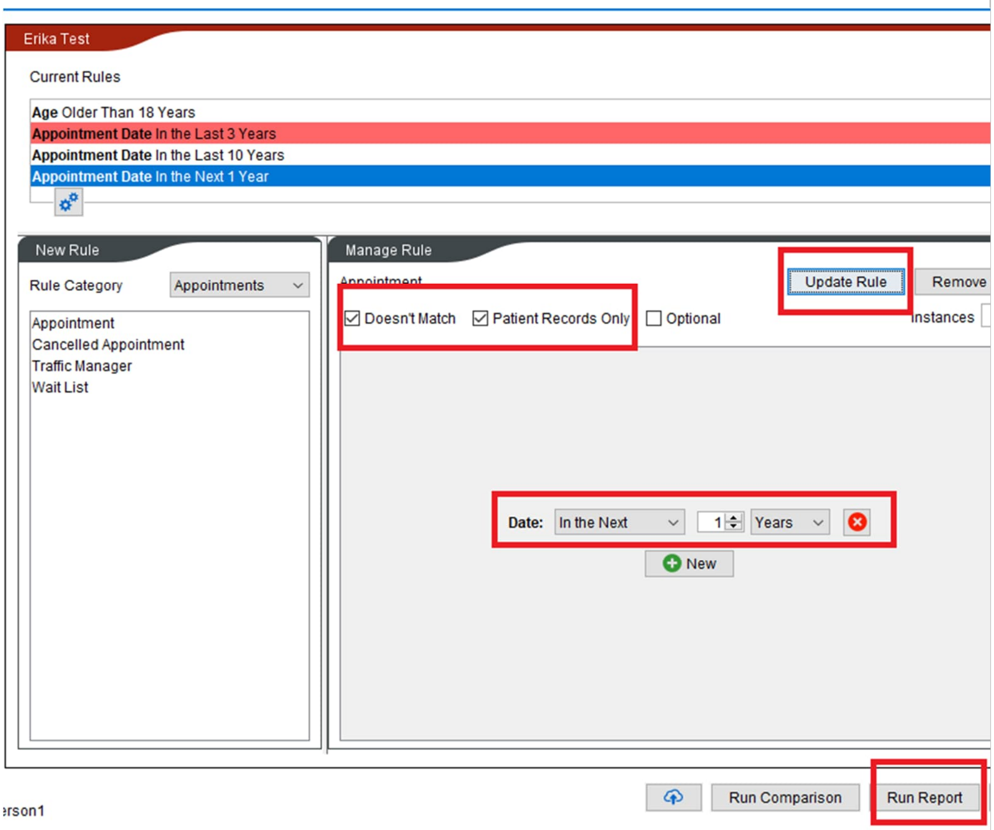
<tr><td></td><td>
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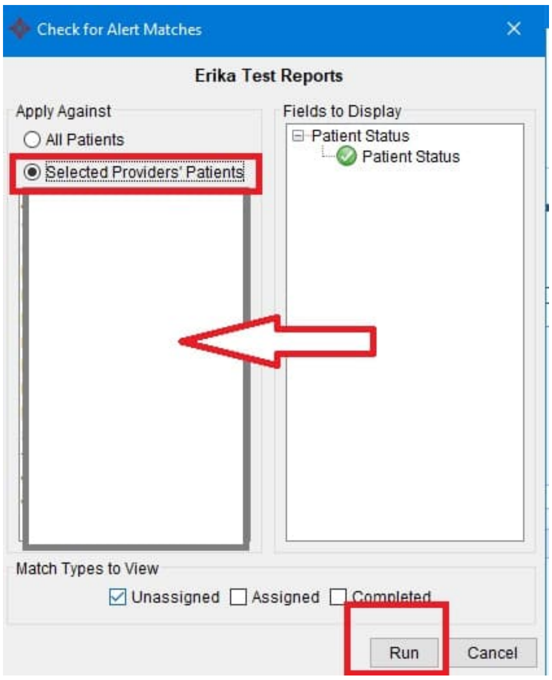
<tr><td></td><td>
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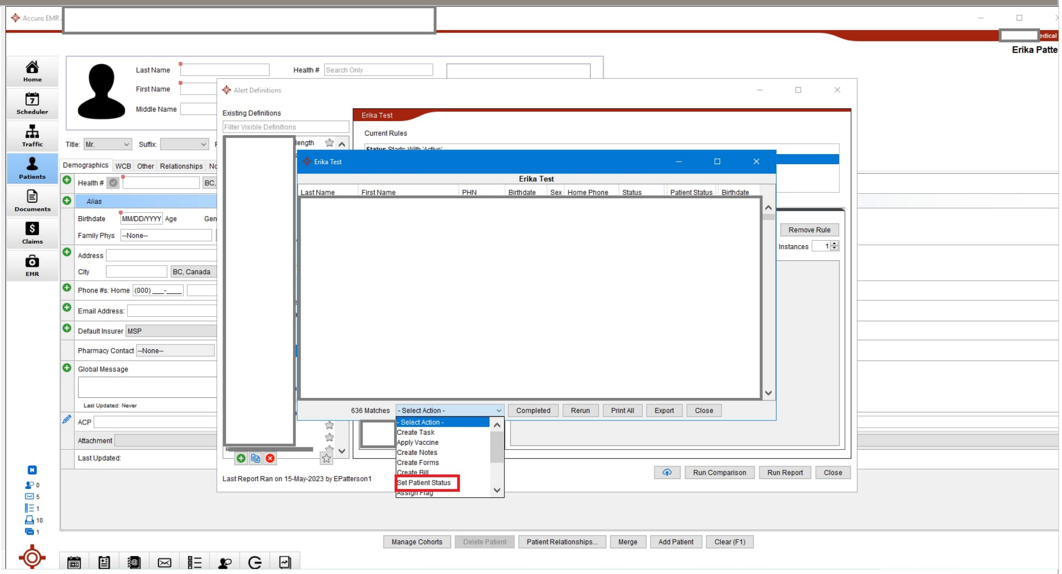
<tr><td></td><td></td></tr>
<tr><td>Update missing demographics</td><td>
Start by assessing the accuracy of your EMR demographic records. Address, phone numbers, and email are most likely to need updating. This action can be time-consuming and include administrative tasks. Plan for administrative support 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

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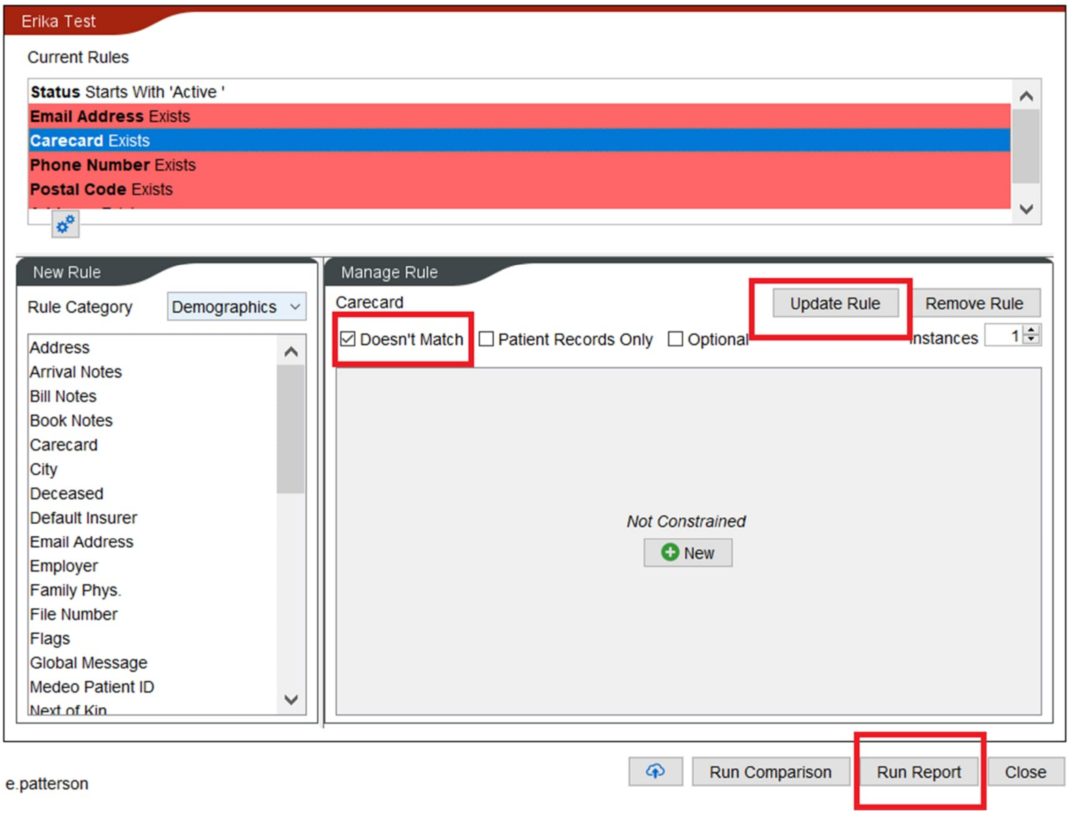

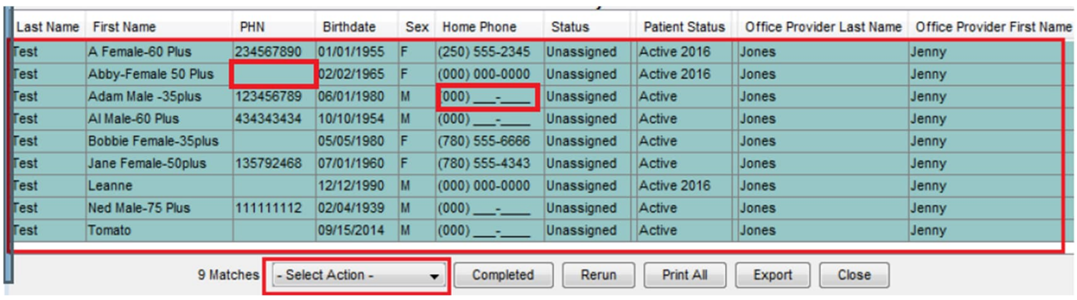

From your report you can toggle between the report and the patient's chart to update PHN, phone number etc.

Select Action allows you to Bulk change patient status.

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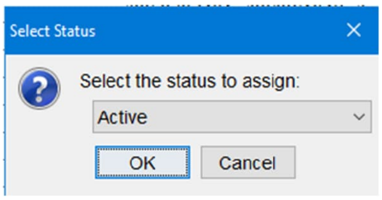
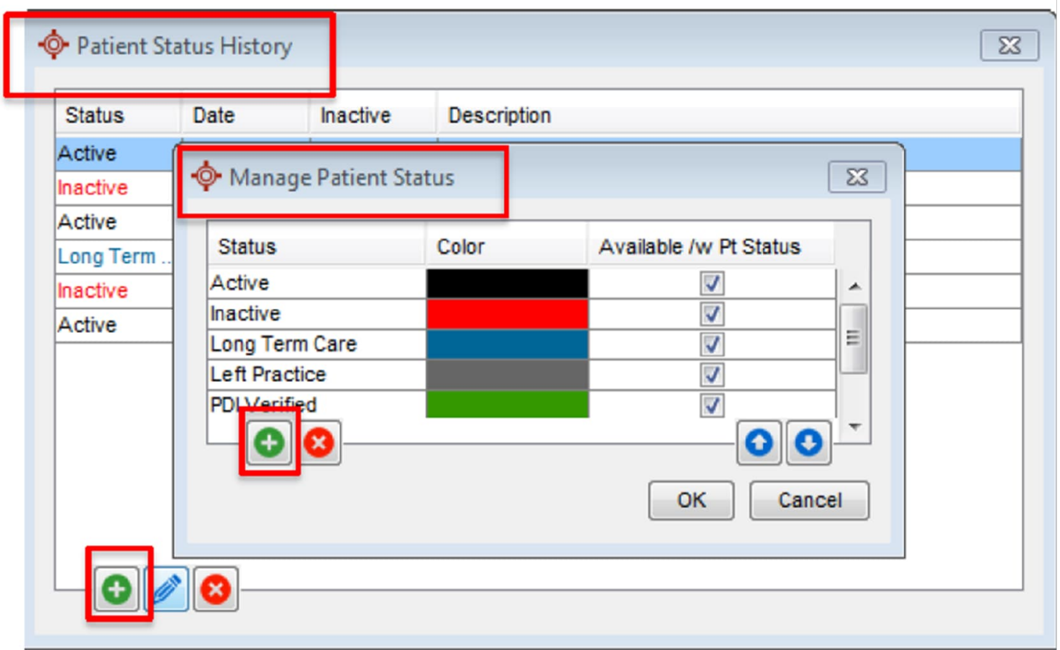
<tr><td></td><td>
</td></tr>
<tr><td>Manage patient status options</td><td>To maintain your panel effectively, you may consider adding patient statuses other than Active, Inactive, and Deceased to identify patient populations, e.g., for walk-in, maternity, or cosmetic treatment. Discuss with your team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

☐ EMR Administrative privileges are necessary to customize settings for patient status. Ensure your team has the appropriate level of access.

• 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.</td></tr>
<tr><td></td><td>
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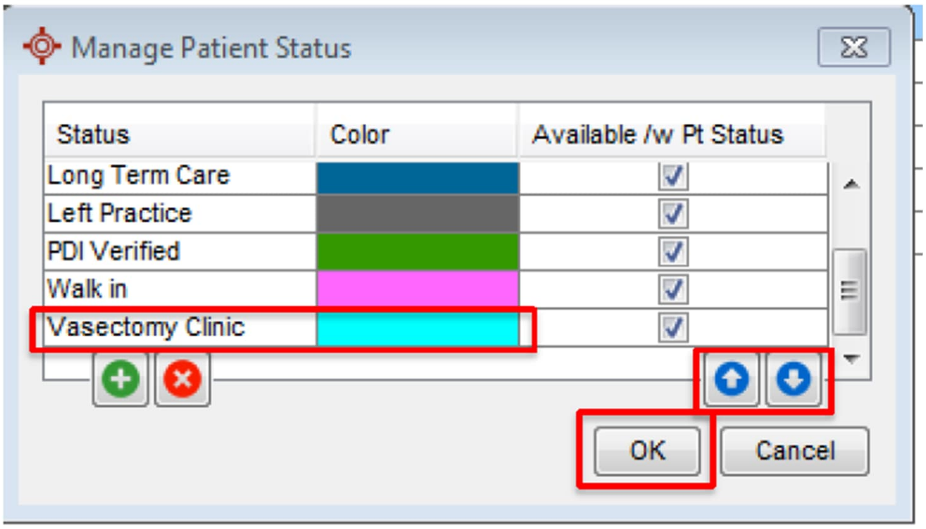

Double clicking on the Status column allows naming the status.
Clicking on the Color column allows selection of a color unique to that status.

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<tr><td>Outcome</td><td>
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.
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