

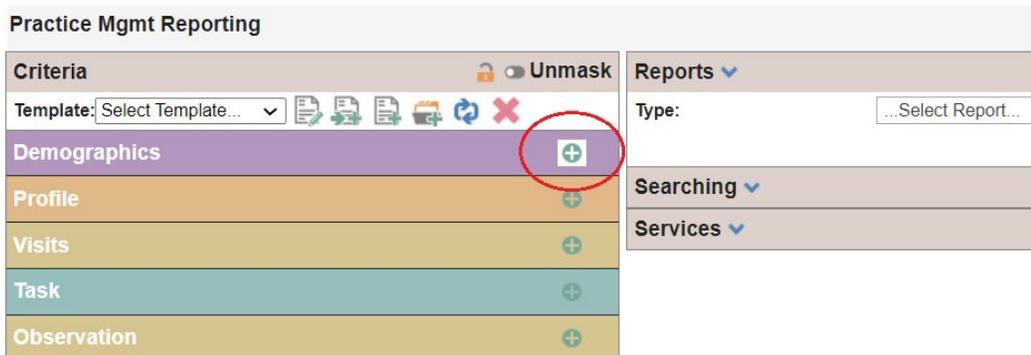
# Small Group Learning Session How To Manage Your Patient Panel with MedAccess

Body Copy style for intro

## Phase 1 – Empanelment (Heading 1)

### Identify patients without a primary provider

- Click on Reports  on your Home Screen
- Click the Green Plus Icon to expand the Demographics search criteria.



Practice Mgmt Reporting

Criteria  Unmask

Template: Select Template...    

Demographics 

Profile 

Visits 

Task 

Observation 

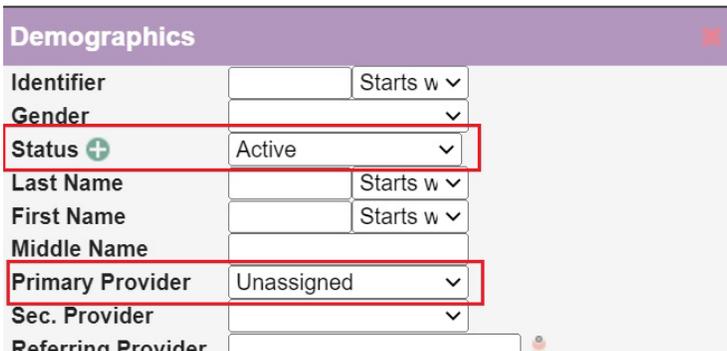
Reports 

Type: ...Select Report...

Searching 

Services 

- Add the Status “Active” and Primary Provider “Unassigned”



Demographics 

Identifier  Starts w 

Gender 

Status  Active 

Last Name  Starts w 

First Name  Starts w 

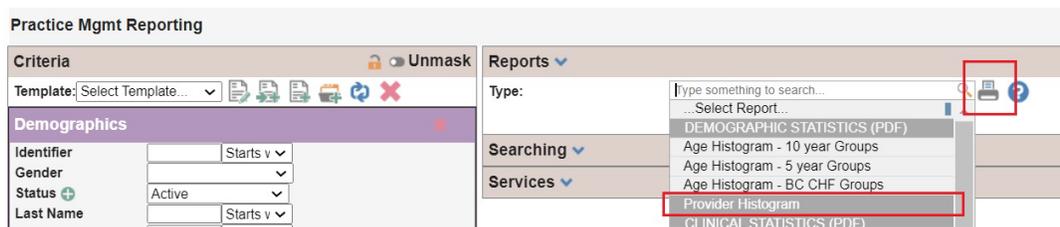
Middle Name

Primary Provider Unassigned 

Sec. Provider 

Referring Provider

- Expand the Report section on the right-hand side of the screen and choose “Provider Histogram” from the drop-down menu and click the print icon to display a PDF with the total number of patients in the EMR that are unassigned.



Practice Mgmt Reporting

Criteria  Unmask

Template: Select Template...    

Demographics 

Identifier  Starts v 

Gender 

Status  Active 

Last Name  Starts v 

Reports 

Type:    

...Select Report...

DEMOGRAPHIC STATISTICS (PDF)

Age Histogram - 10 year Groups

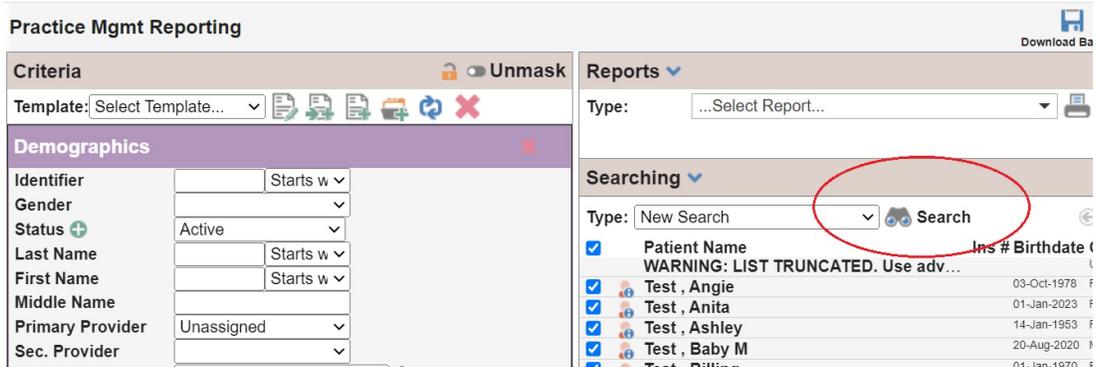
Age Histogram - 5 year Groups

Age Histogram - BC CHF Groups

Provider Histogram

CLINICAL STATISTICS (PDF)

- To see a list of patient names with a link to their charts, expand the Searching section and click Search



**Practice Mgmt Reporting** Download Ba

Criteria Unmask

Template: Select Template...

**Demographics**

Identifier  Starts w

Gender

Status  Active

Last Name  Starts w

First Name  Starts w

Middle Name

Primary Provider  Unassigned

Sec. Provider

**Reports**

Type: ...Select Report...

**Searching**

Type: New Search Search

Patient Name Ins # Birthdate

**WARNING: LIST TRUNCATED. Use adv...**

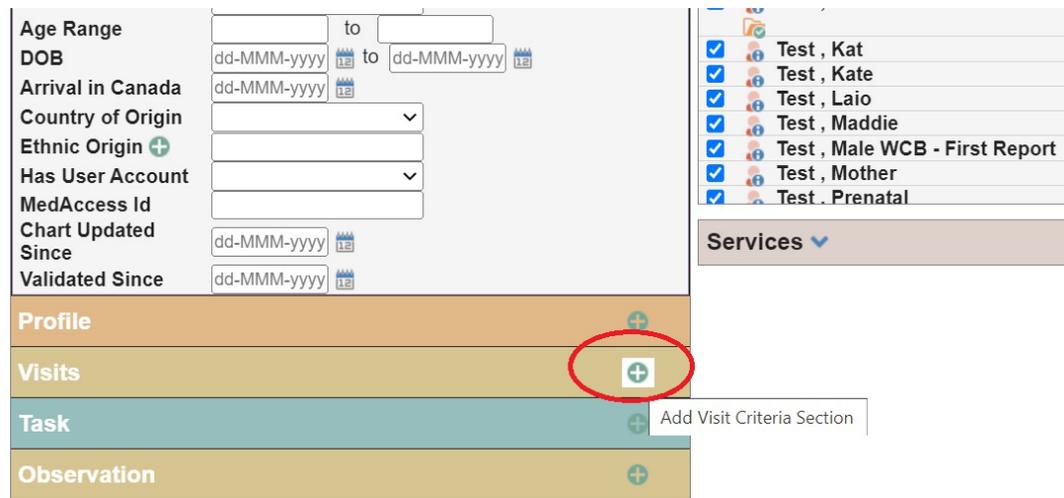
Test , Angie 03-Oct-1978

Test , Anita 01-Jan-2023

Test , Ashley 14-Jan-1953

Test , Baby M 20-Aug-2020

- You can add further criteria to this report to see patients that are more likely to belong to your longitudinal practice by expanding the Visits section in the report criteria on the left.



Age Range  to

DOB  to

Arrival in Canada

Country of Origin

Ethnic Origin

Has User Account

MedAccess Id

Chart Updated Since

Validated Since

**Profile** +

**Visits** + Add Visit Criteria Section

**Task** +

**Observation** +

**Services**

Test , Kat

Test , Kate

Test , Laio

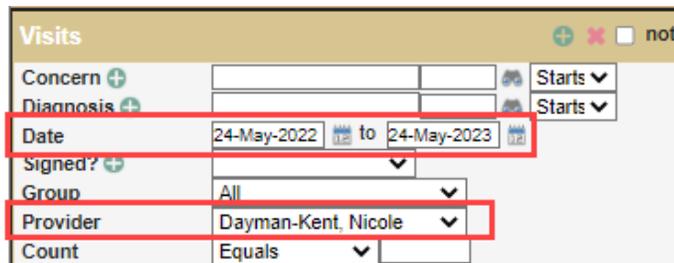
Test , Maddie

Test , Male WCB - First Report

Test , Mother

Test , Prenatal

- Add date range going back one year and (appointment) Provider is yourself.



**Visits** + not

Concern

Diagnosis

**Date**  24-May-2022 to  24-May-2023

Signed?

Group  All

**Provider**  Dayman-Kent, Nicole

Count  Equals

- Click Search again to refresh the results.
- Update a Patient's MRP manually by opening the chart, clicking on the Demographics tab and adding yourself as Primary Provider, then click Update

**Care Assignment & Notes**

Rostered?  Yes  No

Primary Provider: Your Name | Secondary Provider: | Provider Group: |

Referring Provider  | Family Provider  | Effective: dd-MMM-yyyy |

First Appt: 23-Jan-2023 | Last Appt: 25-Jan-2023 | Consent:  Confidential

Update

- Update selected charts as a batch action, by checking off the patients you wish to update, then expanding the Services section. Choose Apply Demographics and select your name from the Primary Provider Drop down menu.

<input type="checkbox"/>	Test, Kate	23-Jan-1972	F
<input checked="" type="checkbox"/>	Test, Laio	19-Jun-1975	F
<input checked="" type="checkbox"/>	Test, Maddie	25-Dec-2022	F
<input checked="" type="checkbox"/>	Test, Male WCB - First Report	01-Jan-1980	M
<input type="checkbox"/>	Test, Mother	23-Jan-1978	F
<input type="checkbox"/>	Test, Prenatal	10-Aug-1988	F
<input type="checkbox"/>	Test, Senior F	01-Jan-1940	F
<input type="checkbox"/>	Test, Support	02-Nov-1971	M

Export options: Excel | PDF | RTF

**Services**

Type: Apply Demographics | Primary Provider: Your Name | Provider Group: | Health Region: | Status: | Notes: |

- Click the Gear Icon to apply this update to all selected charts.
  - Please note that batch actions cannot be undone. You may wish to save this list of patients as a PDF or Excel file before Reassigning them.
- If you would like to save this report as a template for future use, click the icon to **Create New Template from Existing**.

**Practice Mgmt Reporting**

Criteria: NDK Active No MRF | Unmask

Template: NDK Active No MRF | 📄 | 📄 | 📄 | 🔄 | ✖

**Demographics**

Identifier: | Starts: | Gender: | Status: + Active

**Manage patient status options and correct entries**

- If your clinic needs a new status option to represent a specific population of patients separate from your Active Patient list, add a new status option by opening any patient chart and hovering your cursor next to the Patient Status section.
- An icon will appear. Click on it to manage the clinic’s status options.



- Enter a name for the new status in the Description field and click the Add Icon

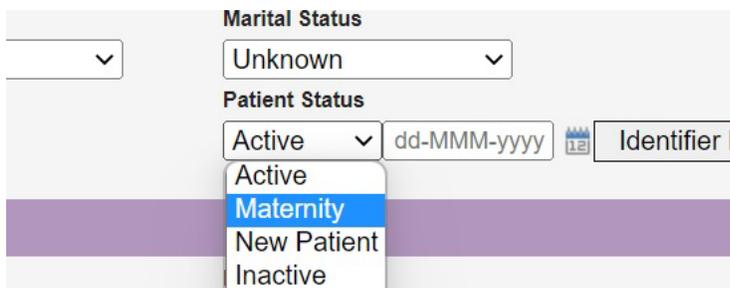
**Patient Status Management**

Name	Code	Active	Sort	Colour	Icon	ActivePatient
Active	active	<input checked="" type="checkbox"/>	0	Light Turquoise	User Information	<input checked="" type="checkbox"/>
New Patient	New Patient	<input checked="" type="checkbox"/>	0	Dark Med Green	Airplane	<input type="checkbox"/>
Inactive	inactive	<input checked="" type="checkbox"/>	1	Light Yellow	User Information	<input type="checkbox"/>
Duplicate	duplicate	<input checked="" type="checkbox"/>	2	Light Yellow	User Information	<input type="checkbox"/>
Deleted	deleted	<input checked="" type="checkbox"/>	3	Light Yellow	User Information	<input type="checkbox"/>

- This new status will now appear on the list. Optionally, you can associate a specific colour or icon with this status from this section.

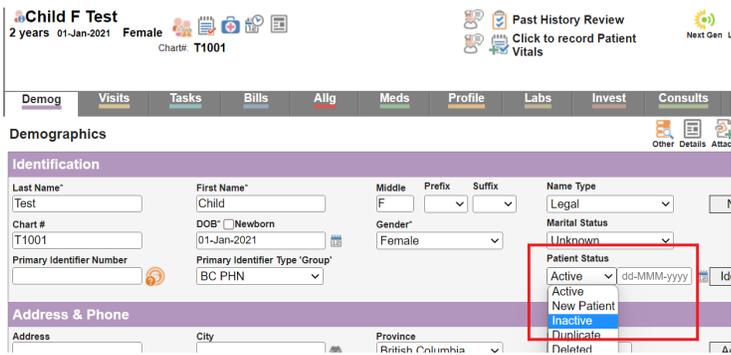


- Click Return **Return** to close this section.
- You will now be able to select this new status in any patient chart.



**Update Status and MRP**

- To change a patient’s status or Provider Assignment, open their chart and click on the Demographics tab.
- Select a different status from the Patient Status dropdown menu (ie Maternity, Inactive, Moved or Deceased)



**Child F Test**  
 2 years 01-Jan-2021 Female Chart#: T1001

Demog Visits Tasks Bills Allg Meds Profile Labs Invest Consults

**Demographics**  
 Identification

Last Name\* First Name\* Middle Prefix Suffix Name Type  
 Test Child F Legal

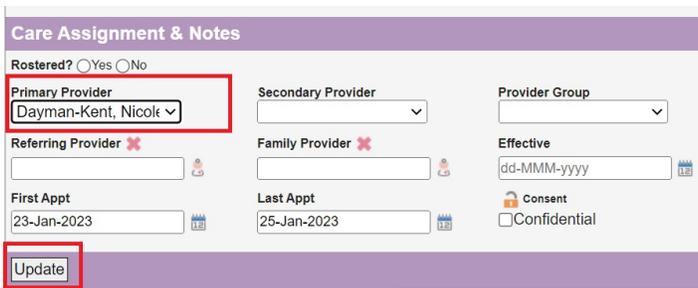
Chart # DOB\*  Newborn  
 T1001 01-Jan-2021

Primary Identifier Number Primary Identifier Type \*Group  
 BC PHN

Address & Phone

Patient Status dropdown menu:  
 Active (selected)  
 Active  
 New Patient  
 Inactive  
 Duplicate

- If patient should be under a different MRP, Choose the appropriate provider from the Primary Provider dropdown menu.



**Care Assignment & Notes**  
 Rostered?  Yes  No

Primary Provider **Dayman-Kent, Nicole** Secondary Provider Provider Group

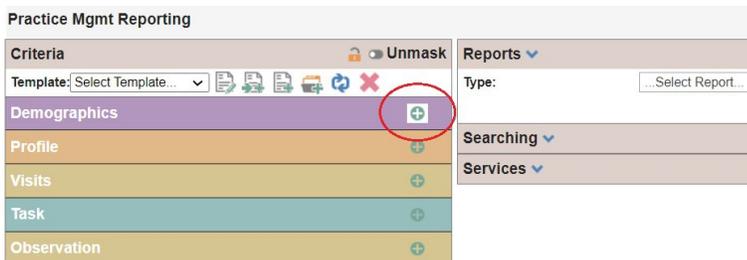
Referring Provider  Family Provider  Effective dd-MMM-yyyy

First Appt 23-Jan-2023 Last Appt 25-Jan-2023 Consent  Confidential

- Click Update to save changes

Display a list of active patients assigned to you

- Click on Reports  on your Home Screen
- Click the Green Plus Icon to expand the Demographics search criteria



**Practice Mgmt Reporting**

Criteria  Reports

Template:

Demographics

Profile

Visits

Task

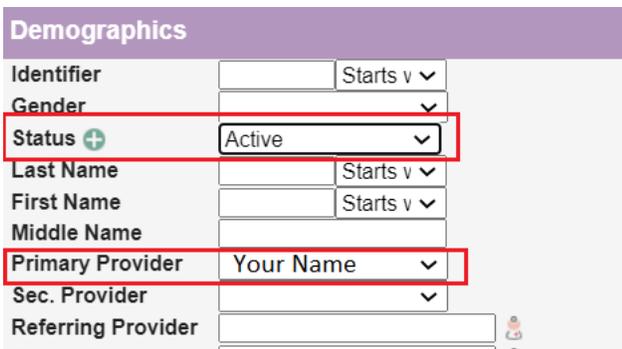
Observation

Type:

Searching

Services

- Add the Status Active and Primary Provider



**Demographics**

Identifier  Starts v

Gender

Status  **Active**

Last Name  Starts v

First Name  Starts v

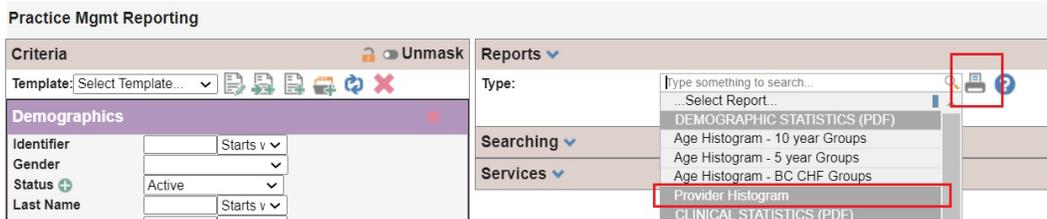
Middle Name

Primary Provider **Your Name**

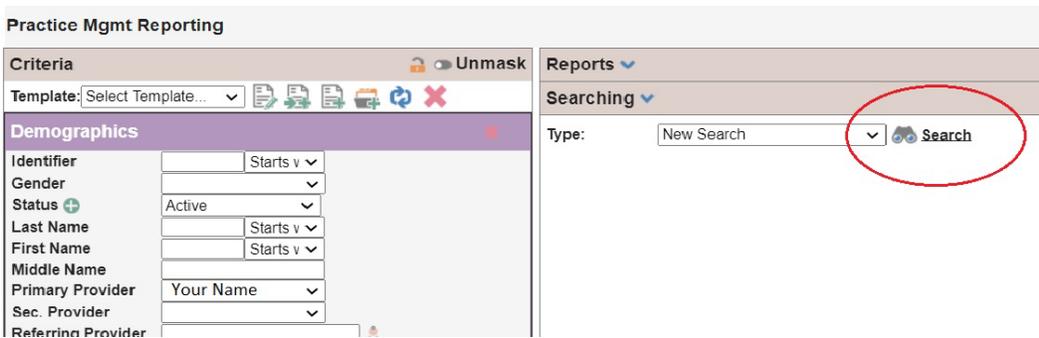
Sec. Provider

Referring Provider

- Now expand the Report section on the right-hand side of the screen and choose “Provider Histogram” from the drop down menu and click the print icon to display a PDF with the total number of patients in your practice.

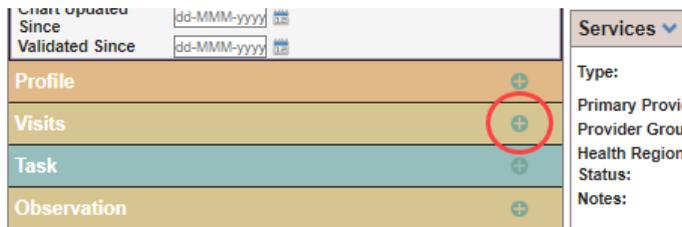


- To see a list of Patient names with a link to their charts, expand the Searching section and click Search

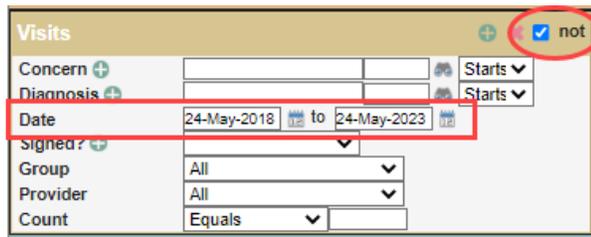


**Deactivate Patients Not Seen in X Years (Using Report Section)**

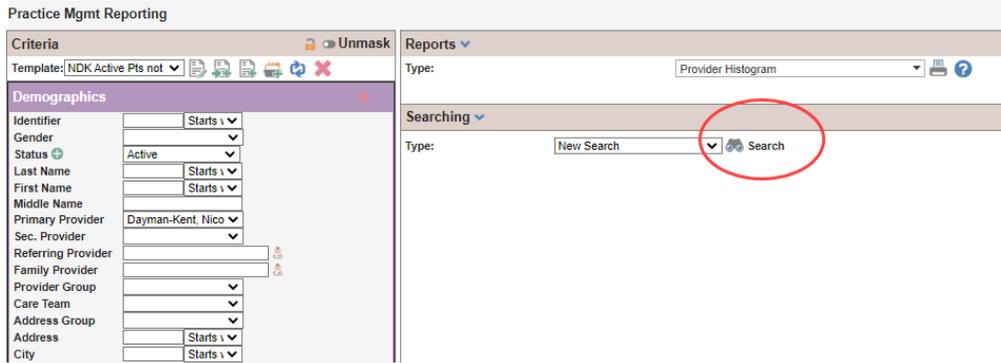
- Using the Active Patient report created in the last step, expand the Visit section by clicking the green plus sign



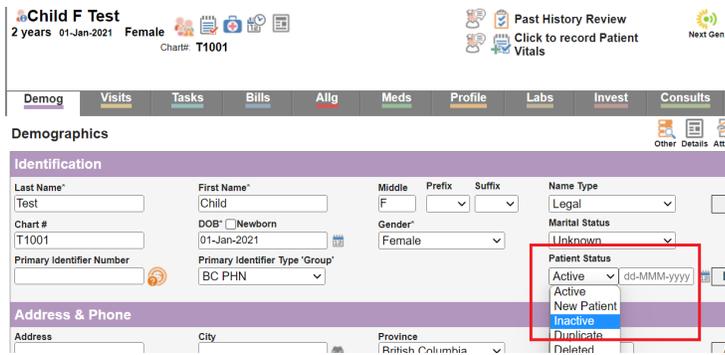
- Check the “NOT” box in this section and choose a date range that is appropriate to include patients you might wish to Inactivate (ie 3-5 years)



- Click “Search” to show the patient names.

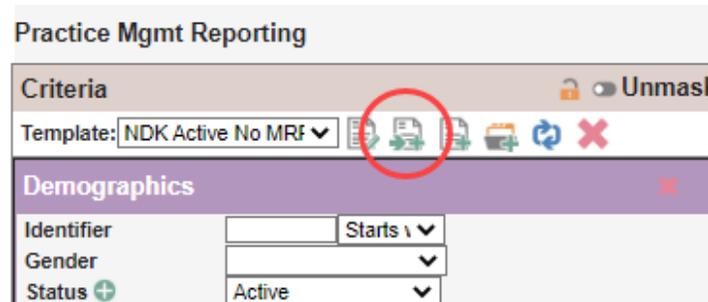


- Manually make changes to Patient status by clicking on a name and opening the Demographics tab. Select a new status (ie-Inactive) and click update.



You can also update multiple charts at once. See “Batch Updating Patient Statuses”

- If you would like to save this report as a template for future use, click the icon to **Create New Template from Existing**.

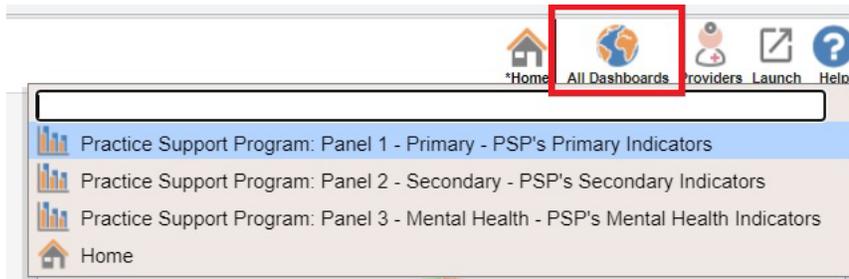


**Deactivate Patients Not Seen in X Years (Using Outcomes Dashboard)**

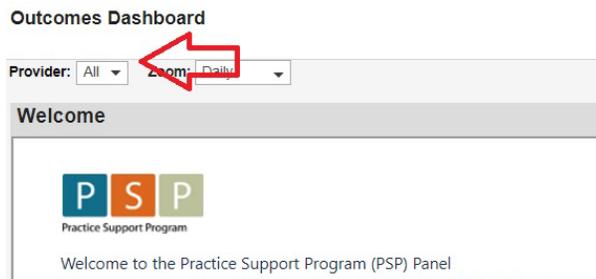
- You can also access an Active Patients Pie chart in the **Outcomes Dashboard** if this has been enabled for your clinic.



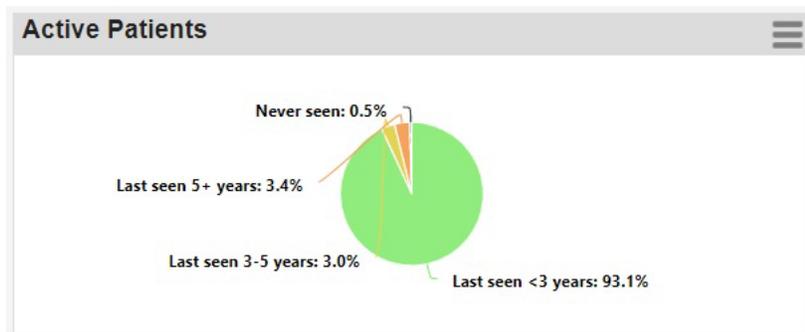
- Click on the Outcomes Logo on your Home Screen
- Click on All Dashboards and Select Practice Support Program Panel 1-Primary.



- If not already defaulted to your practice, choose from the drop down menu on the top left of the dashboard.



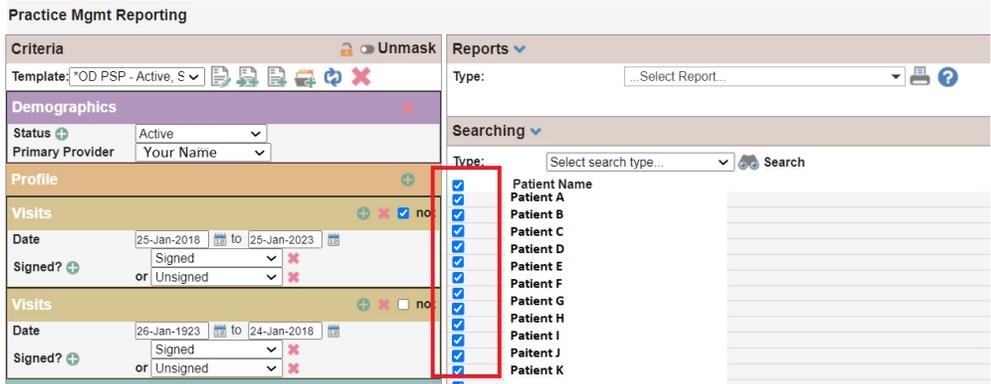
- Find the tile labelled Active Patients. You can hover over each section to see the number of patients in each category.



Select an appropriate timeframe to review (Ie **Never Seen** or **Last seen 5+ Years**) and click on it to open a report with the appropriate parameters already selected.

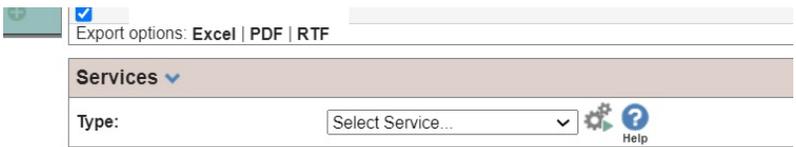
**Batch  
Updating  
Patient  
Statuses**

- To make status updates to this list as a batch action, check off all patients you wish to update.

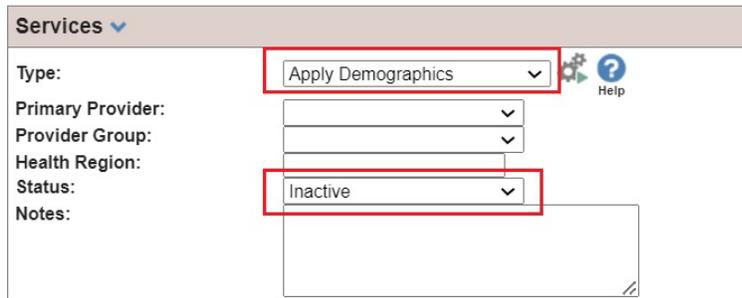


Please note that batch actions cannot be undone. You may wish to save this list of patients as a PDF or Excel file before Inactivating them.

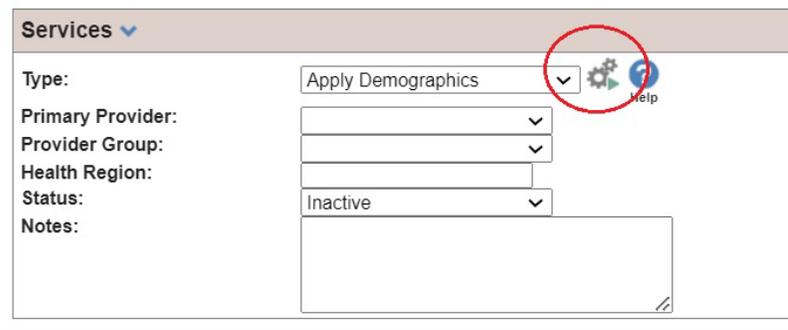
- Then expand the Services section below the list of patient names



- Click on Select Service and choose Apply Demographics. Select a status you wish to apply to all the selected charts. (ie Inactive)



- Click the Gear Icon to execute this update.



- Note that this only applies updates to the patients checked off on a single page of results. If there are multiple pages, click next, confirm patients listed are appropriate to receive the update, then click the gear icon again. You can navigate pages using the green arrows.

Download Batches Reference He

**Reports** ▾

Type:   

**Searching** ▾

Type:   Search

 Pg 1  Limit 10 ▾

<input checked="" type="checkbox"/>	Patient Name	Ins #	Birthdate	Gender	Provider
	WARNING: LIST TRUNCATED. Use adv...				
<input checked="" type="checkbox"/>	 Test , Baby M		20-Aug-2020	M	
<input checked="" type="checkbox"/>	 Test , Billing		01-Jan-1970	F	
<input checked="" type="checkbox"/>	 Test , Inr		01-Jan-1960	M	
<input checked="" type="checkbox"/>	  Test , Karen		17-Jan-1970	F	