Small Group Learning Session How To Manage Your Patient Panel with MOIS





Accurate and up to date patient panel enables you to use the EMR confidently and to provide proactive, datainformed care for patients that you are responsible for.

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 <u>PSP@doctorsofbc.ca</u>.

Phase 1 – Empanelment

After completing Phase 1 actions you will be able to:

- Identify number of patients with no assigned most responsible provider (MRP), number of patients not seen in specific time range, and number of patients with missing demographics.
- Make necessary corrections in your EMR.
- Establish accurate patient panel.

ACTION	ном то			
Display a list of active patients assigned to you	• Click Reports at	tient panel, retrieve name the bottom of the left side tice Management folder. st .		
	Report List # Accounts - Beneral # Accounts - Private (Irv) # Accounts - Private (Irv) # Accounts - Private (Irv) # Accounts - Private (Irv) # Accounts - Private (Irv) # Accounts - Private (Irv) # Bills - Poi Diagnosis # Bills - Fee Code # Clinical - Audits # Clinical - Audits # Clinical - Main # Clinical - Main # Official - Audits # Dynamic Forms # MSP Billing * Practice Management # Practice Management List of patients with care plan elements Consults for Refer or Seen Pract Patient List based on Consult Refer or Sen Dialy Appointments for a pro # Patient Chart Heath Issue Summay by User Heath Issue Summay by User * Norkspace Incertive Claim Patient Registry List of althe patients with paterial bill * Scheduler Cong Tern Medication Erthy Summay by User Heath Issue Summay by User * Maministration Terrivice Claim Patient Registry List of althe patients why potential bill * Metional Erthy Summay by User Heath Issue Summay by User Heath Issue Summay by User * Billing * Maministration Cong Tern Medication Summay by User Heath Issue Summay by User * Billing			

DOCUMENT CODE:





ACTION	ном то				
	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 .				
	TIPS: 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.				
	Report: Practice Management - Patient List				
	Selection Parameter				
	Patient Information Chart Range: to [Inclusive] Last Contact: 0000.00.00 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.				
	Review Excel report and record the total number of currently active patients assigned to				
	you for your baseline measurement. 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.				

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ACTION	ном то			
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 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.			
	□ NOTE: All statuses, other than Active, are considered inactive.			
	 Open Patient Chart. Select patient Demographic folder under Patient Summary. Click Update Status. 			
	Record Modules Views Action Utilities Print Maintenance Help			
	Patient Chart Demographics			
	Patient Summary Patient Summary Patient Summary Patient Summary Patient Summary Patient Soft Health Patient Soft Health Patient Soft Health Patient Detail ID Alias Connections Services Associated Parties WCB Patient Identification Chart No.: 10002 Patient Photo Facility:			
	Interventions Family History Allars (F/L): MICKEY MOUSE Location Allars (F/L): DUCK GOOPY Service: Service Brandle History Allars (F/L): DUCK GOOPY Service Service Current Status: A Date: 2021.03 Update Status Chart Lo BC Health No.: 3030 303 030 Insuran Insuran Insuran			
	MAR Address: box 23 Insuranc Social History Address: 1559 Walk Disney Ave Reveal C			
	Commente Address. Toos wait Uisney Ave Benefit S			

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ACTION	ном то			
	The Change Patient Status window displays.			
	• Click an arrow next to Status Code to expand a drop-down list.			
	• Select the appropriate status option other then Active Patient to inactive this patient.			
	• Date defaults to today's date.			
	Click OK to save changes.			
	Image: Patient Status Image: Patient Status Image: Patient Status Image: Patient Status Image: Patient Status Image: Patient Patient Patient Image: Patient Patient Patient Image: Patient Patient Patient Image: Patient Patient Patient Patient Image: Patient Patient Patient Image: Patient Patient Patient Patient Image: Patient Patient Patient Image: Patient Patient Patient Patient Image: Patient Image: Patient Patient Patient Image: Patient Image: Patient Patient Patient Image: Patient Image: Patient Patient Image: Patient <td< th=""></td<>			

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ACTION	ноw то	ном то				
Identify patients without a primary provider	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					
	• Go to Reports to display the Report List .					
	 Expand Clinical Audits folder. Select Scorecard-Clinical Value. 					
	Record Modules Action Utilities Print Maintenance Help					
	Reports	Report List				
	🗁 Report List	Accounts - General				
		Accounts - MSP				
		Accounts - Private (Inv)				
			Accounts - Private (Trans)			
		😠 Bills - by Diagnosis				
		Bills - Fee Code				
		📃 Clinical - Audits				
		ASTHMA (Excel)	ASTHMA Excel Output			
		CHF (Excel)	CONGESTIVE HEART FAILURE Excel			
		CHRONIC KIDNEY DISEASE (Excel)	CHRONIC KIDNEY DISEASE Excel Out			
		COPD Audit	COPD Audit Excel Output			
		Diabetes (Excel) Hepatitis C (Excel)	Diabetes Excel Output Hepatitis C Excel Output			
		HTN (Excel)	Hypertension Excel Output			
		Mammogram	Mammogram			
		Number of Visits	Number of Visits for a Patient			
		Obesity	Obesity			
		Pap Smear	Pap Smear			
	Search Patient Chart	Polypharmacy	Polypharmacy			
	Workspace	Secrecard	Scorecard			
	Scheduler	Scorecard - Clinical Value	Clinical Value Scorecard			
	E Billing	Clinical - Main				
	Clinical - Pro/Obs					
	Check off box fo	ecard window displays to allow r Unassigned Patients Only. <i>v</i> e button to run report.	v you to select parameters:			
	Clinical Value Scorecard					
	Select Provider: <blank a<="" code(s):="" service="" status="" td=""><td colspan="5">Select Provider: CBlank Service Provider: Image: Comma separated Status Code(s): A Comma separated Scorecard Target: CVM LEVEL 3 - MAR 2014</td></blank>	Select Provider: CBlank Service Provider: Image: Comma separated Status Code(s): A Comma separated Scorecard Target: CVM LEVEL 3 - MAR 2014				
	Expand All Collapse All PROVIDER NUMERATOR DENOMINATOR PERCENTAGE TARGET INVESTIGATE					





ACTION	ноw то				
	Expand MO3 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. 				
	elek the rea sation to open the list of these patients in the chart havigator.				
	Clinical Value Scorecard				
	Select Provider: <				
	Expand All Collapse All PROVIDER NUMERATOR DENOMINATOR P§RCENTAGE TARGET INVESTIGATE				
	HO1 PATIENT INFORMATION 11 11 100.0% 95%				
	HO2 CONTACT INFORMATION 1 11 9.1% 90%				
	□ M03 PATIENT STATUS 11 28568 .0% 80% ■				
	UNASSIGNED 11 28568 .0% 80%				
	·························				
	• M04b PROBLEM LIST/HEALTH CONCERNS (CODED) 5 11 45.5% 30% 0 11 20%				
	 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. 				
	 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. 				
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	 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				
	 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 Patient Summary Demographics Next Patient Search Previous Chart Patient Summary Demographics Undo Refresh Search Previous Chart Description Demographic Instr: 10002 FIRST: MICKEY MIDDLE: LAST: Description Benefit				
	 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 Patient Summary New Record Delete Record Service Previous Chart Next Chart Patient Summary Demographics Undo Refresh Search Previous Chart Next Chart Demographics Virial Delete Record Services MIDDLE: LAST: MOUSE Dob: 1944/01 Demographics Patient Identification Other Claims Incentives Settings Benefits				
	 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 Patient Summary New Record Delte Record Search Previous Chart Next Chart Demographic New Record Delte Record Save Undo Refresh Search Previous Chart Next Chart Demographics Patient Delte Record Save Undo Refresh Search Previous Chart Next Chart Demographics Patient Deltal Dakas Connections Services Associated Parties WCB Claims Intentives Settings Benefits Patient Identification Office Information Office Information Facility: Last Contact				
	 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 T Patient Summary New Record Save Undo Refresh Seach Previous Chart New Record Detect Yourself Patient Summary New Record Save Undo Refresh Seach Previous Chart New Chart Demographics Flastini 10002 FIRST: MICKEY MIDDLE: LAST: MOUSE Dol: 1944/01 Demographics Patient Identification Office Information Last Contact Patient Identification Patient Photo Facily: Last Contact Patient Identification Patient Photo Facily: Last Contact Patient Identification Patient Photo Facily: Last Contact Patient Identification Patient Identification Vick GOOPY Seguire Patient Photo				
	 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 Patient Chart Demographics MICKEY MOUSE 79 YR OLD M Chart Patient Summary New Record Delete Record Save Undo Refresh Search Previous Chart Next Chart Patient Summary Demographics Virtual Delete Record Save Undo Refresh Search Previous Chart Next Chart Demographics Patient Identification Virtual Delete Information Def: 1944/01 Def: 1944/01 Def: 1944/01 Masing / Indolerances Family History Patient Identification Office Information Escritor Virvoice Bala Alser (F/L) UUCK UUCK GOOPY Service Provider: Service Provider: Virvoice Bala				
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	 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 Patient Chart Demographics MICKEY MOUSE 79 YR OLD M Chart 1 Patient Summay New Record Save Undo Refresh Patient Summay New Record Save Undo Refresh Newt Chart Demographic New Record Delete Record Save Undo Refresh Newt Chart Patient Summay New Record Delete Record Save Undo Refresh Newt Chart Patient Chart New Record Delete Record Save Undo Refresh Newt Chart Heating in gaing Demographic Patient Identification Office Information Lest Contact Procedures Patient Record Risks Dole: 10002 Rescience Alegy / Indeleances Bith Date: 10002 Patient Mouse Device Provide: Newt Contact Procedures Fereinplicins Contact Information Invaince Information Invaince Information Invainc				
	 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 Save Undo Refresh Search Previous Chart Next Chart Demographic Patient Detail D Alass Connections Services Associated Paties WCB Claims Other Claims Incentives Settings Benefits Interventions Frainly Histop Consults (MCKEY MOUSE) Patient Identification Patient Detail D Alass Connections Services Associated Paties WCB Claims Other Claims Incentives Settings Benefits Interventions Frainly Histop Consults (MCKEY MOUSE) Patient Identification Patient Detail D Alass Connections Services Associated Paties VCB Claims Other Claims Incentives Settings Benefits (MCKEY MOUSE) Patient Identification Patient Detail D Alass Connections Services Associated Paties (MCB Claims Incentives Settings Benefits) Patient Identification (Chart No: 1000 (17/8) Gender. M (1000 (17/8) Gender. M (1000 (1				
	 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. Petient Chart version versi				
	 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 patient Summary Demographics Undo Refresh Search Previous Chart Next Chart Delete Record Save Undo Refresh Search Previous Chart Next Chart Denographics Patient Detail ID Alias Connections Services Associated Paties WCB Claims Dither Claims Incentives Settings Benefits Undo Refresh Procedues Instrumer FAULT I 10002 FIRST: MICKEY MIDLE: LAST: MOUSE Details Details ID Alias Connections Services Associated Paties WCB Claims Dither Claims Incentives Settings Benefits Patient Identification Undo Services Associated Paties WCB Claims Dither Claims Incentives Between Benefits I 1944.01.01 (78) Gender. M W W W W W W W W W W W W W W W W W W				



ACTION	ном то			
Inactivate patients not seen by 3 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.			
	Perced Medules Asian Ukiking Drink Maintenang Ukla			
	Record Modules Action Utilities Print Maintenance Help Reports Report List			
	Peport List	Accounts - General		
		Accounts - MSP		
		Accounts - Private (Inv)		
		Accounts - Private (Trans)		
		Bills - by Diagnosis		
		Bills - Fee Code		
		Clinical - Audits		
		ASTHMA (Excel)	ASTHMA Excel Output	
		CHF (Excel)	CONGESTIVE HEART FAILURE Excel I	
		CHRONIC KIDNEY DISEASE (Excel)	CHRONIC KIDNEY DISEASE Excel Out	
		COPD Audit	COPD Audit Excel Output	
		Diabetes (Excel)	Diabetes Excel Output	
		Hepatitis C (Excel)	Hepatitis C Excel Output	
		HTN (Excel)	Hypertension Excel Output	
		Mammogram	Mammogram	
		Number of Visits	Number of Visits for a Patient	
		Obesity	Obesity	
	Detient Chart	Pap Smear	Pap Smear	
	Search Patient Chart	Polypharmacy	Polypharmacy	
	Workspace	Scorecard	Scorecard	
	Scheduler	Scorecard - Clinical Value	Clinical Value Scorecard	
		Clinical Main		
		Clinical - Pro/Obs		
	Under Select Provi	der select your name from drop-o	down list.	
	□ Assisting practice team can select a different most responsible provider.			
	Leave blank to display all providers and unassigned patients.			
	• Click Retrieve to ge	enerate the report.		
	Clinical Value Scorecard			
	Select Provider:	Hereiner d Battack Oak Look Bark 2		
	Status Code(o):	Unassigned Patients Only Look Back: 3 (comma separated) Scorecard Target: CVM LEV		
	Expand All Collapse All			
	PROVIDER NUMERATOR DENOMINATOR PERCENTAGE TARGET INVESTIGATE			
1	1			





ACTION	ном то					
	• Expand MO3 Patient Status. to display	 Expand MO3 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.	seen in 3 years.				
	 Clinical Value Scorecard 					×
	Select Provider: 🔄 🔲 Unassigned Patients Only		Year(s) 💌			trieve
		Scorecard Target: CVM L	EVEL 3 - MAR 20	14	Provider	Help?
	Expand All Collapse All PROVIDER	NUMERATOR DEN	OMINATOR	ERCENTAGE	TARGET INVESTIG	SATE
	M01 PATIENT INFORMATION	13	13	100.0%	95%	
	+ MO2 CONTACT INFORMATION	3	13	23.1%	90% 🦲	
	B MO3 PATIENT STATUS	13	28567	.0%	80%	
		1	2	50.0%	80%	
		1	1	100.0%	80%	ŏ
		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%	
	Review these patients status to see if the accordingly.	ey are still ac	tive and	l update	patient's stat	us
Manage patient	To maintain your panel effectively, you n	To maintain your panel effectively, you may consider adding patient statuses other than			r than	
status options	Active, Inactive, and Deceased to identify patient populations, e.g., for walk-in,			or walk-in,		
	maternity, or cosmetic treatment. Discus	s with you t	eam crit	eria for	different statu	uses
	that will remove patients from your activ	•				
		that will remove patients non your active patients panel.				
	See steps on the following page.					

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ACTION	ном то					
	To change patient status options:					
	Click Administration on the top toolbar.					
	Click Prompt / Selection List Mgt.					
	Select Selection Lists underneath.					
	Choose Patient – Status Code on the right side.					
	Administration Selection List Management					
	Address Book					
	Prompt / Selection List Description					
	MAR - Immunization Consent Immunization Consent Immunization Consent List					
	Celection Lists MAR - Immunization Consent By Immunization Consent By Immunization Consent Form Immunization Consent Form Immunization Consent Form					
	Addorphate Guildes Model minimulation Reason for Immunitation Reason for Immunitation Reason for Immunitation					
	C Snippet MAR - Reason Not Given Reason Not Given List					
	Consigner Section Measure - Status Code Measure Status Code List					
	Concept Mapping MSP - Location Code Location Code as defined by MSP.					
	Constant Control Control MSP - Submission Code Submission Code as defined by MSP.					
	Panel Setup E Order Action Code Order Action Code List.					
	Measurement Inputs Order - Priority Code Order Priority Code Letter Templates Order - Drive Code					
	Paper (PDF) Forms Urder - Status Lode Urder - Status Lode Urder - Status Lode List.					
	Care Plan Templates Urg Role Category Urganizational Role Categories					
	Task Set Templates Organization Category Organization Categories					
	External Service Providers Paper Forms - Group Paper Form Group Clinics Paper Forms - Unpe Paper Form Type					
	Clinics Paper Forms - Type Paper Form Type Providers Providers Patient - Status Code Patient - Status Code					
	Urganizations					
	Static Recipients Postal Code Postal Code Postal Code					
	Preference Reason Preference Reason Code List					
	Patient Chart Preference Subject Preference Subject Code List					
	Referral Source Referral Sources					
	Workspace					
	 Click New Record to add a status. Selection List Manager Patient - Status Code 					
	New Record Delete Record Save and Close Cancel and Close					
	Code Description Default Order					
	> A Active Patient V 1					
	CD Changed Doctors 99					
	DE Deceased Patient 99					
	IA Inactive Patient 99					
	MV Moved Away 🔲 99					
	TR Transient Patient 99					
Outcome	After completing these activities, you can report up-to-date correct 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.					