

Small Group Learning Session

How To Manage Your Patient Panel with MOIS

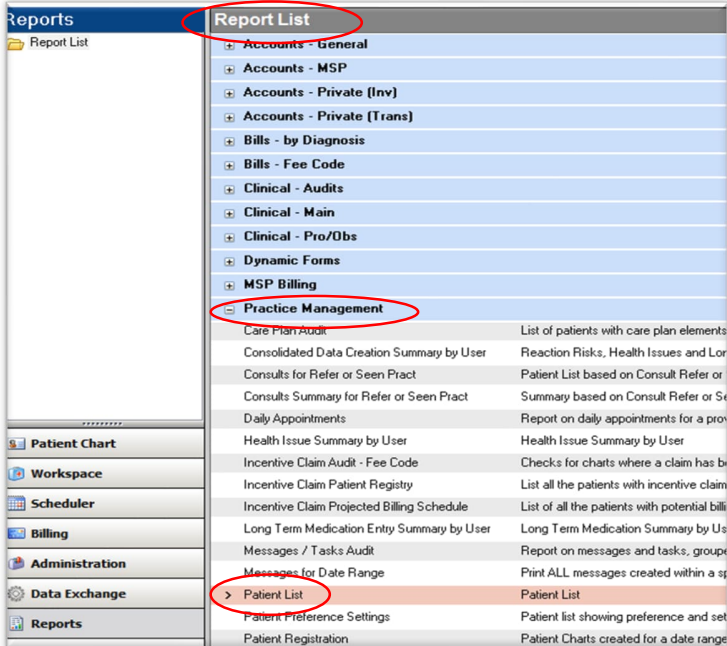
Accurate and up to date patient panel enables you to use the EMR confidently and to provide proactive, data-informed care for patients that you are responsible for.

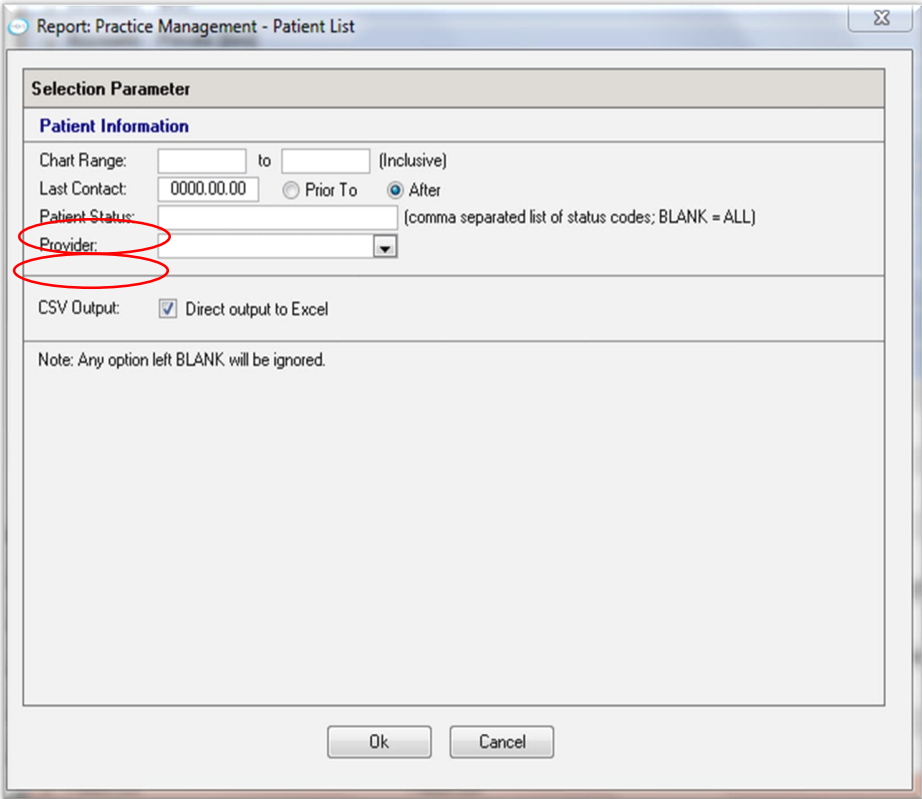
This “How-to” document guides through the phase 1 of panel management using MOIS electronic medical record (EMR). If you need assistance, please contact Practice Support Program at PSP@doctorsofbc.ca.

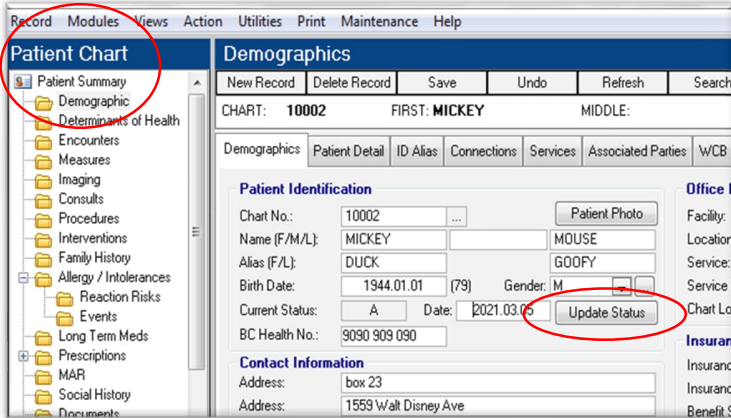
Phase 1 – Empanelment

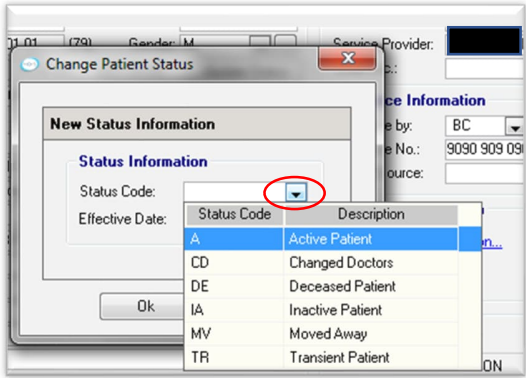
After completing Phase 1 actions you will be able to:

- 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	HOW TO
<p>Display a list of active patients assigned to you</p>	<p>To analyze your patient panel, retrieve names of patients assigned to you:</p> <ul style="list-style-type: none"> • Click Reports at the bottom of the left side menu to display the Report List. • Expand the Practice Management folder. • Select Patient List.  <p>The screenshot shows the 'Reports' menu with 'Report List' selected. The 'Practice Management' folder is expanded, and 'Patient List' is highlighted. Red circles highlight 'Report List' and 'Practice Management' in the original image.</p>

ACTION	HOW TO
	<p>The Selection Parameter window displays.</p> <ul style="list-style-type: none"> • 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. <p>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.</p> 
	<p>Review Excel report and record the total number of currently active patients assigned to you for your baseline measurement.</p> <p>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.</p>

ACTION	HOW TO
<p>Remove patients from your panel</p>	<p>There might be many reasons why in your EMR patients are not assigned correctly. Discuss with your team any trends and different status needs.</p> <p>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.</p> <p>NOTE: All statuses, other than Active, are considered inactive.</p> <ul style="list-style-type: none"> • Open Patient Chart. • Select patient Demographic folder under Patient Summary. • Click Update Status. 

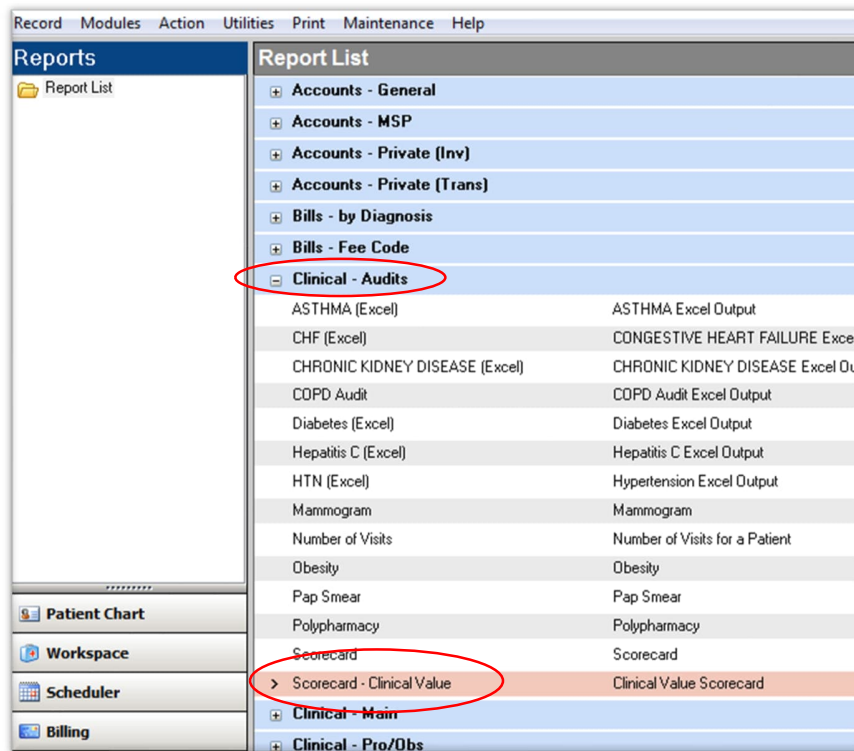
ACTION	HOW TO
	<p>The Change Patient Status window displays.</p> <ul style="list-style-type: none">• Click an arrow next to Status Code to expand a drop-down list.• Select the appropriate status option other than Active Patient to inactive this patient.• Date defaults to today's date.• Click OK to save changes. 
	<p>Your current patient panel will be updated.</p>

ACTION	HOW TO
--------	--------

Identify patients without a primary provider

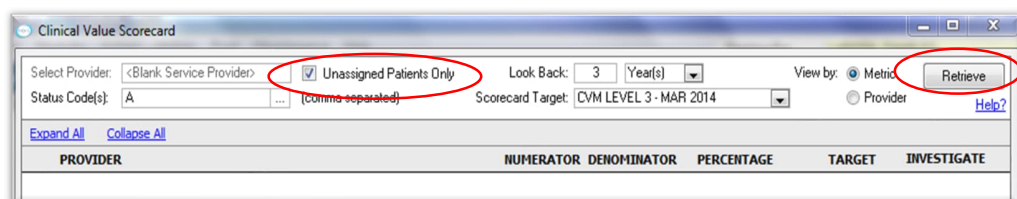
Run a report for unassigned patients and add yourself as primary provider to add a patient to your panel.
 Discuss with your practice team if there are any patients requiring investigation prior to adding or removing the assigned provider.

- Go to **Reports** to display the **Report List**.
- Expand **Clinical Audits** folder.
- Select **Scorecard-Clinical Value**.



Clinical Value Scorecard window displays to allow you to select parameters:

- Check off box for **Unassigned Patients Only**.
- Click the **Retrieve** button to run report.



ACTION | **HOW TO**

- 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.

PROVIDER	NUMERATOR	DENOMINATOR	PERCENTAGE	TARGET	INVESTIGATE
M01 PATIENT INFORMATION	11	11	100.0%	95%	
M02 CONTACT INFORMATION	1	11	9.1%	90%	
M03 PATIENT STATUS	11	28568	.0%	80%	
UNASSIGNED	11	28568	.0%	80%	● ●
M04a PROBLEM LIST/HEALTH CONCERNS (ALL)	5	11	45.5%	40%	
M04b PROBLEM LIST/HEALTH CONCERNS (CODED)	5	11	45.5%	30%	

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.

Patient Chart | **Demographics** | MICKEY MOUSE 79 YR OLD M | Chart 1

CHART: 10002 | FIRST: MICKEY | MIDDLE: | LAST: MOUSE | DoB: 1944/01/

Patient Identification

Chart No.: 10002 | Name (F/M/L): MICKEY | MOUSE | Alias (F/L): DUCK | GOOFY | Birth Date: 1944.01.01 (79) | Gender: M | Current Status: A | Date: 2021.03.05 | BC Health No.: 9090 909 090

Office Information

Facility: | Location: | Service Provider: ▼ | Chart Loc.: | Last Contact: 2023.02.18 | Invoice Balan: |

Contact Information

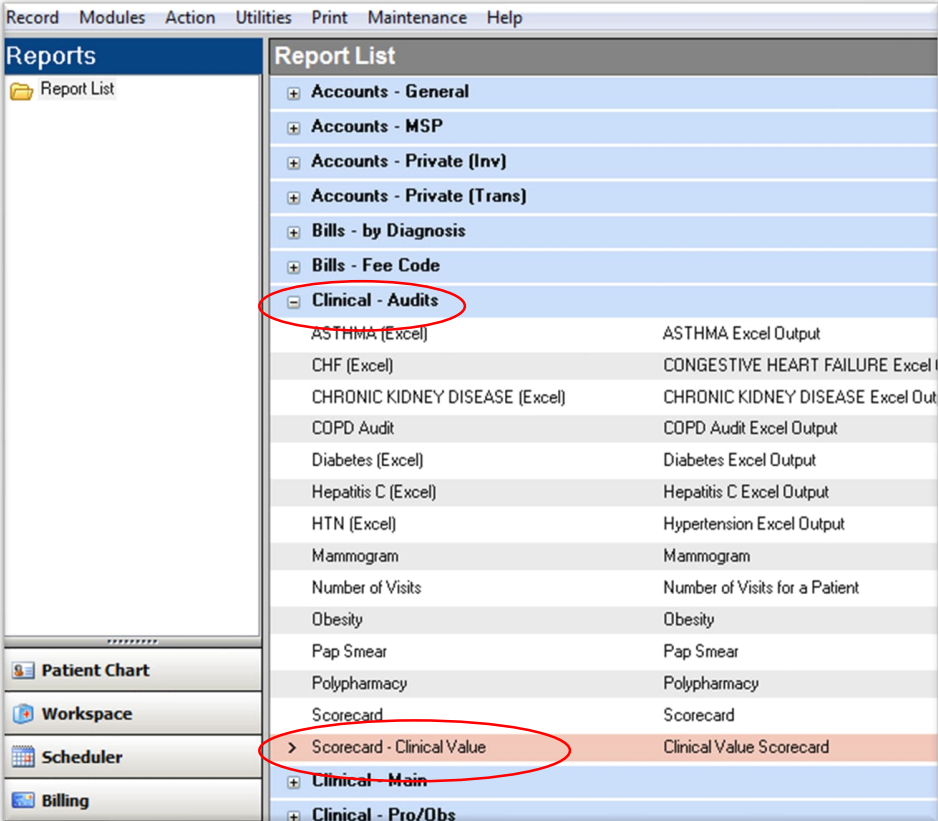
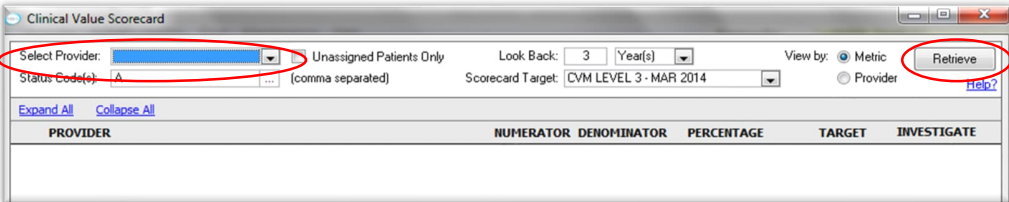
Address: box 23 | 1559 Walt Disney Ave | City: prince george | Province: BC | Postal Code: V2N 6R5 | Country: CANADA | Home: 250-888-7792 | Leave Message:

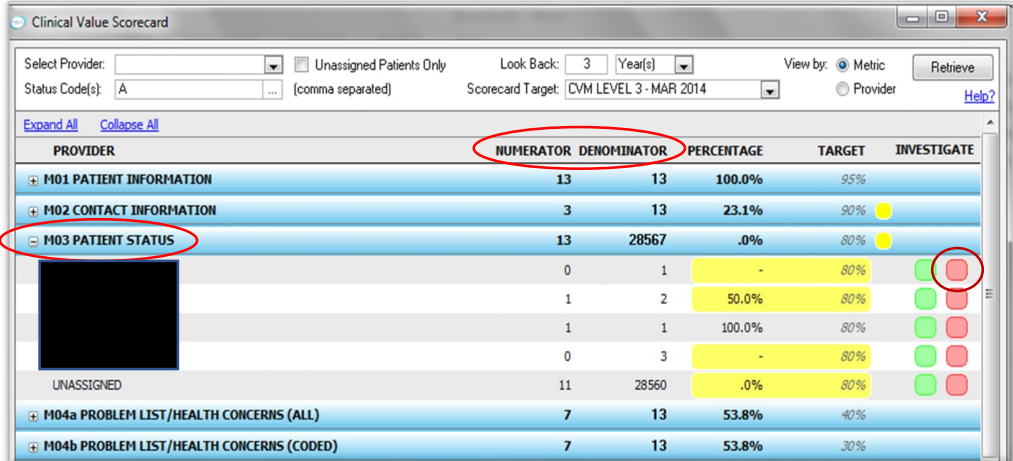
Insurance Information

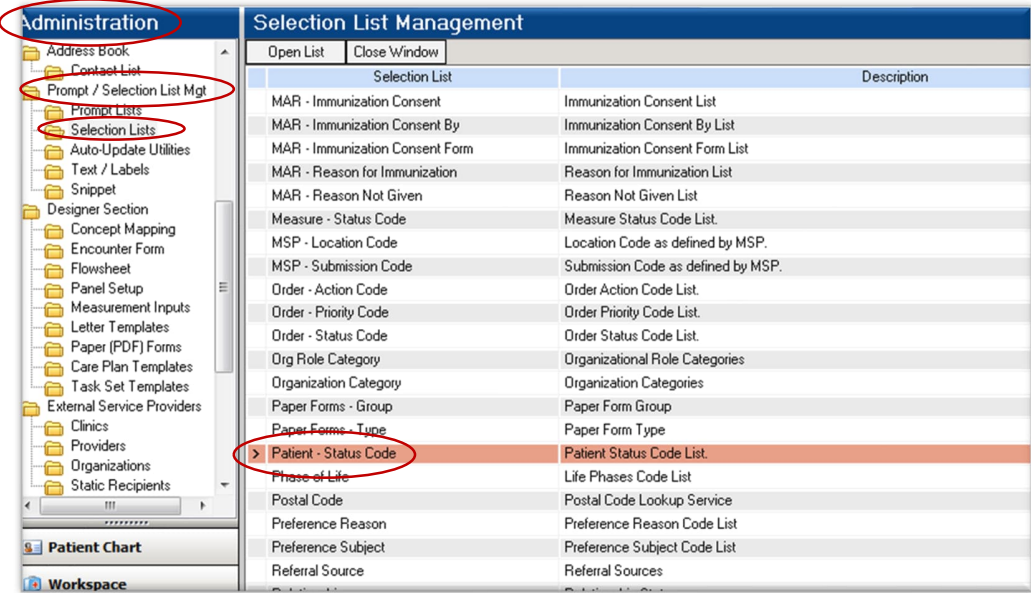
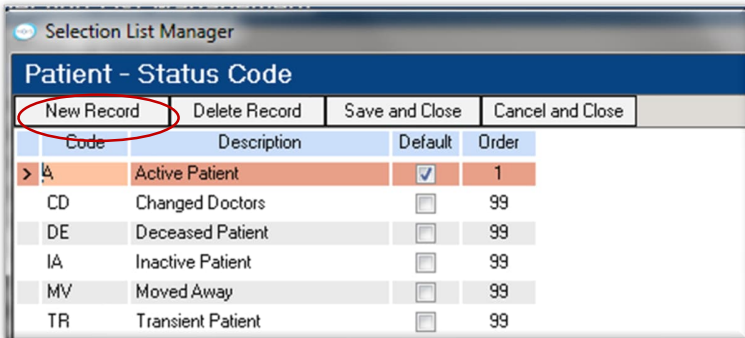
Insurance by: BC | Insurance No.: 9090 909 090 | Check | Dep. No.: 00 | Benefit Source: |

Pharmacy Information

Add Pharmacy Information...

ACTION	HOW TO
<p>Inactivate patients not seen by 3 years</p>	<p>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.</p> <ul style="list-style-type: none"> Go to Reports, expand Clinical Audits, select Scorecard-Clinical Value. 
	<ul style="list-style-type: none"> Under Select Provider select your name from drop-down list. <ul style="list-style-type: none"> <input type="checkbox"/> Assisting practice team can select a different most responsible provider. <input type="checkbox"/> Leave blank to display all providers and unassigned patients. Click Retrieve to generate the report. 

ACTION	HOW TO																																																																		
	<ul style="list-style-type: none"> Expand MO3 Patient Status. to display a list of patients. <p>The Numerator is the number of active patients seen in the last 3 years.</p> <p>The Denominator is the number of active patients with assigned MRP.</p> <ul style="list-style-type: none"> Select the red button to get a list of active patients assigned to you that have not been seen in 3 years.  <table border="1" data-bbox="427 678 1444 1137"> <thead> <tr> <th>PROVIDER</th> <th>NUMERATOR</th> <th>DENOMINATOR</th> <th>PERCENTAGE</th> <th>TARGET</th> <th>INVESTIGATE</th> </tr> </thead> <tbody> <tr> <td>M01 PATIENT INFORMATION</td> <td>13</td> <td>13</td> <td>100.0%</td> <td>95%</td> <td></td> </tr> <tr> <td>M02 CONTACT INFORMATION</td> <td>3</td> <td>13</td> <td>23.1%</td> <td>90%</td> <td></td> </tr> <tr> <td>M03 PATIENT STATUS</td> <td>13</td> <td>28567</td> <td>.0%</td> <td>80%</td> <td></td> </tr> <tr> <td></td> <td>0</td> <td>1</td> <td>-</td> <td>80%</td> <td></td> </tr> <tr> <td></td> <td>1</td> <td>2</td> <td>50.0%</td> <td>80%</td> <td></td> </tr> <tr> <td></td> <td>1</td> <td>1</td> <td>100.0%</td> <td>80%</td> <td></td> </tr> <tr> <td></td> <td>0</td> <td>3</td> <td>-</td> <td>80%</td> <td></td> </tr> <tr> <td>UNASSIGNED</td> <td>11</td> <td>28560</td> <td>.0%</td> <td>80%</td> <td></td> </tr> <tr> <td>M04a PROBLEM LIST/HEALTH CONCERNS (ALL)</td> <td>7</td> <td>13</td> <td>53.8%</td> <td>40%</td> <td></td> </tr> <tr> <td>M04b PROBLEM LIST/HEALTH CONCERNS (CODED)</td> <td>7</td> <td>13</td> <td>53.8%</td> <td>30%</td> <td></td> </tr> </tbody> </table>	PROVIDER	NUMERATOR	DENOMINATOR	PERCENTAGE	TARGET	INVESTIGATE	M01 PATIENT INFORMATION	13	13	100.0%	95%		M02 CONTACT INFORMATION	3	13	23.1%	90%		M03 PATIENT STATUS	13	28567	.0%	80%			0	1	-	80%			1	2	50.0%	80%			1	1	100.0%	80%			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%	
PROVIDER	NUMERATOR	DENOMINATOR	PERCENTAGE	TARGET	INVESTIGATE																																																														
M01 PATIENT INFORMATION	13	13	100.0%	95%																																																															
M02 CONTACT INFORMATION	3	13	23.1%	90%																																																															
M03 PATIENT STATUS	13	28567	.0%	80%																																																															
	0	1	-	80%																																																															
	1	2	50.0%	80%																																																															
	1	1	100.0%	80%																																																															
	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%																																																															
	<p>Review these patients status to see if they are still active and update patient’s status accordingly.</p>																																																																		
<p>Manage patient status options</p>	<p>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 you team criteria for different statuses that will remove patients from your active patients’ panel.</p> <p>See steps on the following page.</p>																																																																		

ACTION	HOW TO																												
	<p>To change patient status options:</p> <ul style="list-style-type: none"> • Click Administration on the top toolbar. • Click Prompt / Selection List Mgt. • Select Selection Lists underneath. • Choose Patient – Status Code on the right side. 																												
	<ul style="list-style-type: none"> • Click New Record to add a status.  <table border="1" data-bbox="434 1487 1182 1697"> <thead> <tr> <th>Code</th> <th>Description</th> <th>Default</th> <th>Order</th> </tr> </thead> <tbody> <tr> <td>IA</td> <td>Active Patient</td> <td><input checked="" type="checkbox"/></td> <td>1</td> </tr> <tr> <td>CD</td> <td>Changed Doctors</td> <td><input type="checkbox"/></td> <td>99</td> </tr> <tr> <td>DE</td> <td>Deceased Patient</td> <td><input type="checkbox"/></td> <td>99</td> </tr> <tr> <td>IA</td> <td>Inactive Patient</td> <td><input type="checkbox"/></td> <td>99</td> </tr> <tr> <td>MV</td> <td>Moved Away</td> <td><input type="checkbox"/></td> <td>99</td> </tr> <tr> <td>TR</td> <td>Transient Patient</td> <td><input type="checkbox"/></td> <td>99</td> </tr> </tbody> </table>	Code	Description	Default	Order	IA	Active Patient	<input checked="" type="checkbox"/>	1	CD	Changed Doctors	<input type="checkbox"/>	99	DE	Deceased Patient	<input type="checkbox"/>	99	IA	Inactive Patient	<input type="checkbox"/>	99	MV	Moved Away	<input type="checkbox"/>	99	TR	Transient Patient	<input type="checkbox"/>	99
Code	Description	Default	Order																										
IA	Active Patient	<input checked="" type="checkbox"/>	1																										
CD	Changed Doctors	<input type="checkbox"/>	99																										
DE	Deceased Patient	<input type="checkbox"/>	99																										
IA	Inactive Patient	<input type="checkbox"/>	99																										
MV	Moved Away	<input type="checkbox"/>	99																										
TR	Transient Patient	<input type="checkbox"/>	99																										
<p>Outcome</p>	<p>After completing these activities, you can report up-to-date correct number of active patients assigned to you.</p> <p>Plan the process with your team and assign responsibilities to ensure the accuracy of entries from this point forward.</p>																												