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 Oscar electronic medical record (EMR). If you need assistance, please contact Practice Support Program at PSP@doctorsofbc.ca.

Oscar version 15 and higher, Oscar Pro, and Oscar Juno use dashboards to manage patient panel. Check your main toolbar: if you see Dashboard to the right of the Administration button, this functionality has been installed. If it is not there, contact your Oscar service provider to activate it.

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**
--- | ---
Display a list of active patients assigned to you | To analyze your patient panel, retrieve names of patients assigned to you:
  - Select the Dashboard tab on your opening screen main toolbar.
  - Choose Panel Mgmt 1 from the drop-down list.
How To Manage Your Patient Panel with OSCAR

**ACTION**

Click on the **Active Patients** pie chart to list active patients under your name as the assigned provider.

A list of all your Active Patients is displayed as one long list. You can filter this list using the drop-down menus at the top of the table to narrow this list.
**How To Manage Your Patient Panel with OSCAR**

### ACTION

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You can customize the number of entries to show per screen.

- Click **Next** to advance through pages of results.

#### The total number of patients currently active and assigned to you is displayed at the bottom of the screen. Record this number for your measurement baseline.

- Review the patient list displayed. 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.
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| 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, etc. as appropriate:  
  - Click on patient File Number to open their chart.  
  - Click Edit to update their Master Record  
    ![Screen Shot](https://example.com/screenshot.png)  
    - Change the Patient Status as appropriate.  
    - Then scroll to the bottom and click Update Record. |
### How To Manage Your Patient Panel with OSCAR

#### ACTION

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<td>Your current patient panel will be updated.</td>
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**Identify patients without a primary provider**

Run a report for unassigned patients and add yourself as most responsible provider (MRP). Discuss with your practice team if there are any patients requiring investigation prior to adding or removing the assigned provider.

- Click on **Dashboard** on your toolbar and select **Panel Mgmt 1** from the drop-down list.

- Click on the **No Assigned Primary** pie chart to open the list.

Review the list and manually update patient’s primary provider as appropriate.

- Click on their **Demographic Number** to open their Master Record.
- Click **Edit**.
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|        | ![Image](image1.png) | Choose your name from the drop-down list under **Physician/MRP**.  
Click **Update Record** to save the change. |
|        | ![Image](image2.png) | **Deactivate patients not seen by x years**  
Identify patients with ‘Active’ status but have not been seen for last few years. Decide what date range for active patients suits your practice. Discuss with your team how they can help with necessary updates if needed.  
Click on **Dashboard** and select **Panel Mgmt 1** from the drop-down list. |

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**Note:** The screenshots and images are placeholders and the actual content may vary. The text provides guidance on managing patient panels with OSCAR.
### Action

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- Click on the **Active Patients** pie chart to display list of patients.

![Pie chart with active patients](image1)

- Change the number of entries per screen to show – a larger number is easier to scroll through.

![Screen showing active patients](image2)

- Click the column heading **Last Encounter** to sort the list by most recent visit.

![Table showing last encounter](image3)

- Scroll down to identify patients with last encounter outside of the date range that you have specified for active patients.

  - **NOTE**: This search is looking for an encounter note. If there is no date under the last encounter, either the patient has not been seen in the office or it might be a new patient who has not yet had their first appointment.
To narrow the list, you can also use additional filters. For example, search for patients older than 20 years to remove them from the view.

- Select criteria from drop-down menus at the top of the page, for our example select **Age**
  - select **greater than**
  - type **20**
- Click **Filter** to execute the search.

Click patient id number to open master record and review patient’s e-chart.

- Check off the patient you want to deactivate.
- Click **Actions to display options**.
- Select **Set Status Inactive**.

Inactive patients will not be listed in the next search.

To update more than one patient at a time, use **batch** action. Check off all the patients you want to deactivate.

**NOTE:** This action cannot be undone. You may wish to print or save a list of these patients prior to inactivating.
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.

To create a new status, locate the patient for whom this new status applies.

- Open **Master Record** for this patient.
- Click **Edit**.

![Master Record Screenshot](image)

- Locate the **Patient Status** field and click **Add New**.

![Add New Status Screenshot](image)

- Type the name for the new status, then click **OK**.
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<td>The new status will now be available in the Patient Status drop-down list in all charts:</td>
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<td><img src="image.png" alt="Image" /></td>
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<td></td>
<td><strong>NOTE</strong>: New statuses can’t be edited later. You can only inactivate the status you no longer need. Apply a different status to all patients with the status you wanted to change. Then, the unwanted and not used status will no longer appear on the drop-down list.</td>
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| Outcome | After completing this section, 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. |