

# Small Group Learning Session

## How to Manage Your Patient Panel with Profile



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 LFP Empanelment Process using Profile electronic medical record (EMR).

Reports in Profile are generated by query templates available under Reports > Stored Queries.

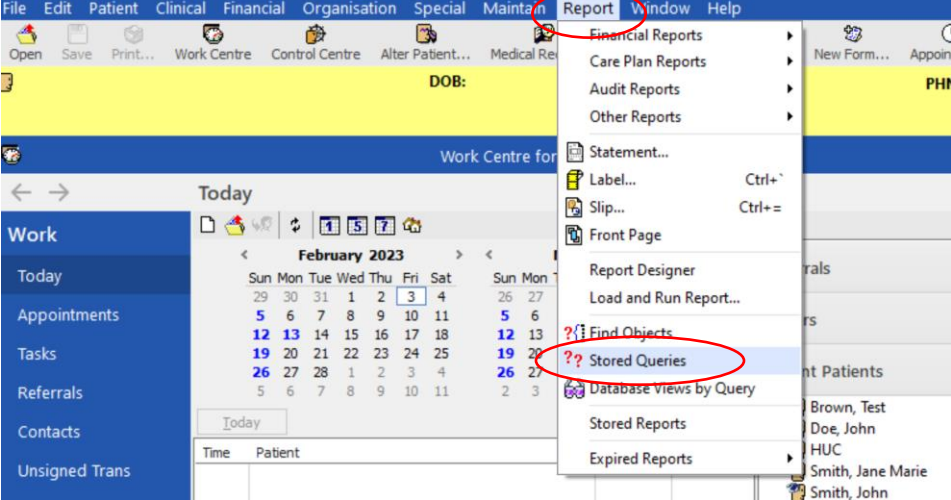
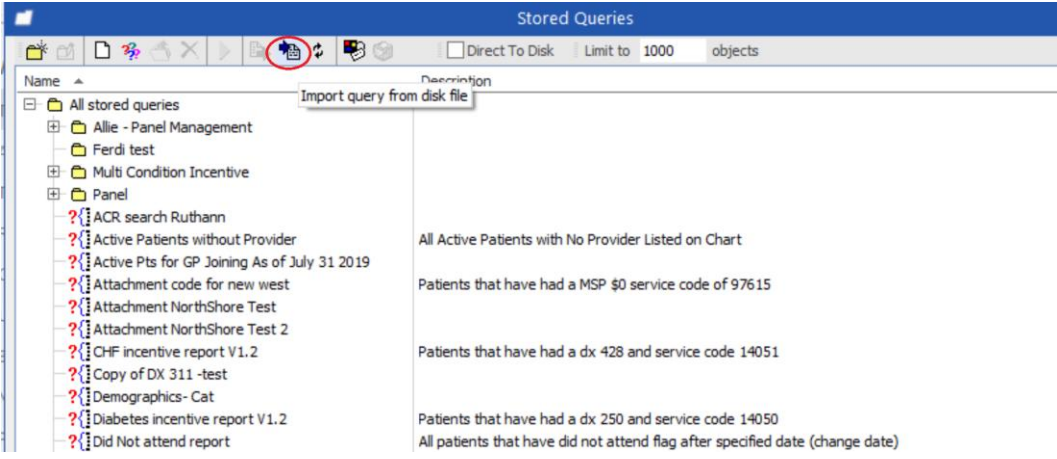
Step-by-step instructions for importing queries are included below. If you need assistance, please contact Practice Support Program at [PSP@doctorsofbc.ca](mailto:PSP@doctorsofbc.ca).

### Empanelment

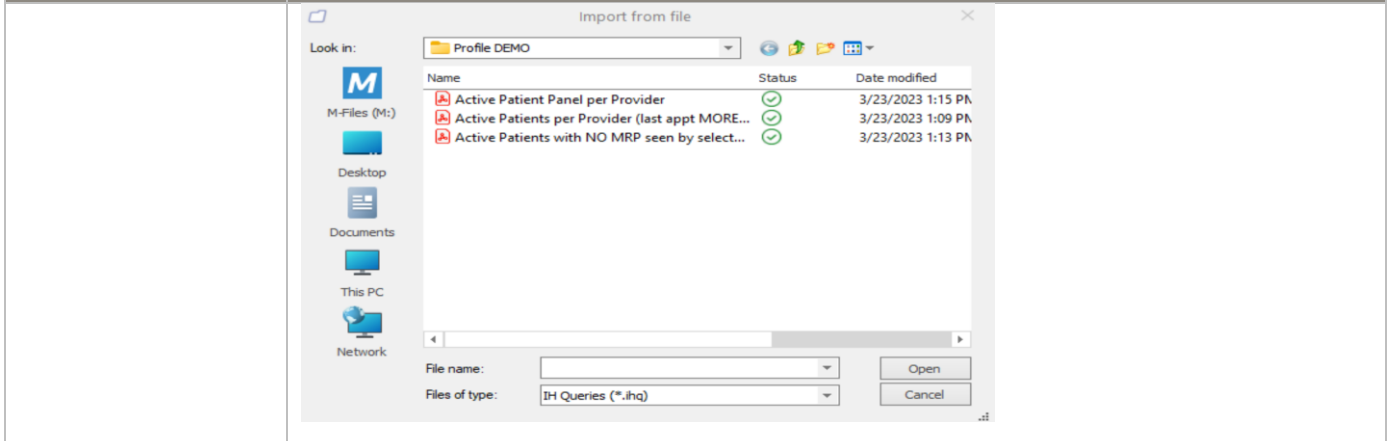
After completing the empanelment process you will be able to:

- Review unassigned patients in the system who may have been seen by you as well as inactivate patients not seen for x years
- Make necessary corrections in your EMR.
- Establish your accurate patient panel.

ACTION	HOW TO
<b>Import queries</b>	<p>Before you start the import, download the below templates to your computer and then follow the next steps to upload them to your EMR. <b>Please note that once you download the query templates, they will be unopenable until they are imported into your EMR.</b> You can find them in your downloads folder and then drag them onto your desktop.</p> <p><a href="#">Stored Query Template: Active Patients with NO MRP Seen By Selected FP</a></p> <p><a href="#">Stored Query Template: Active Patients Never Seen or Not Seen In Over 5 Years</a></p> <p><a href="#">Stored Query Template: Active Patient Panel Per Provider</a></p>
	<ul style="list-style-type: none"><li>• Click <b>Report</b> on the top menu.</li><li>• Select <b>Stored Queries</b> from the drop-down menu.</li></ul>

ACTION	HOW TO
	
	<p>The <b>Stored Queries</b> window with list of all stored queries displays.</p> <ul style="list-style-type: none"> <li>Click <b>Import Query from disk file</b> on this window toolbar.</li> </ul> 
	<p>The <b>Import from file</b> window opens. Navigate to the location where you stored the query templates to display the list of query templates. In our example here, templates are stored on Desktop.</p> <ul style="list-style-type: none"> <li>Click on the file name to select the template you wish to import.</li> <li>Ensure the <b>File name</b> box shows the correct name and click <b>Open</b>.</li> </ul>

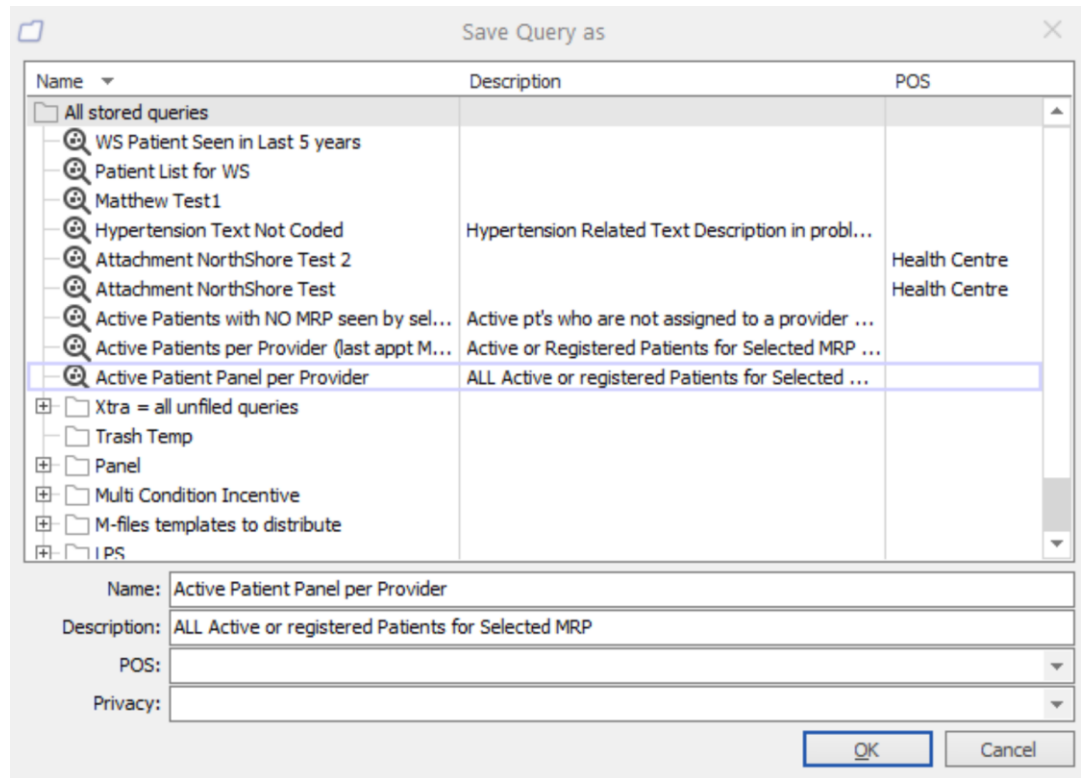
ACTION	HOW TO
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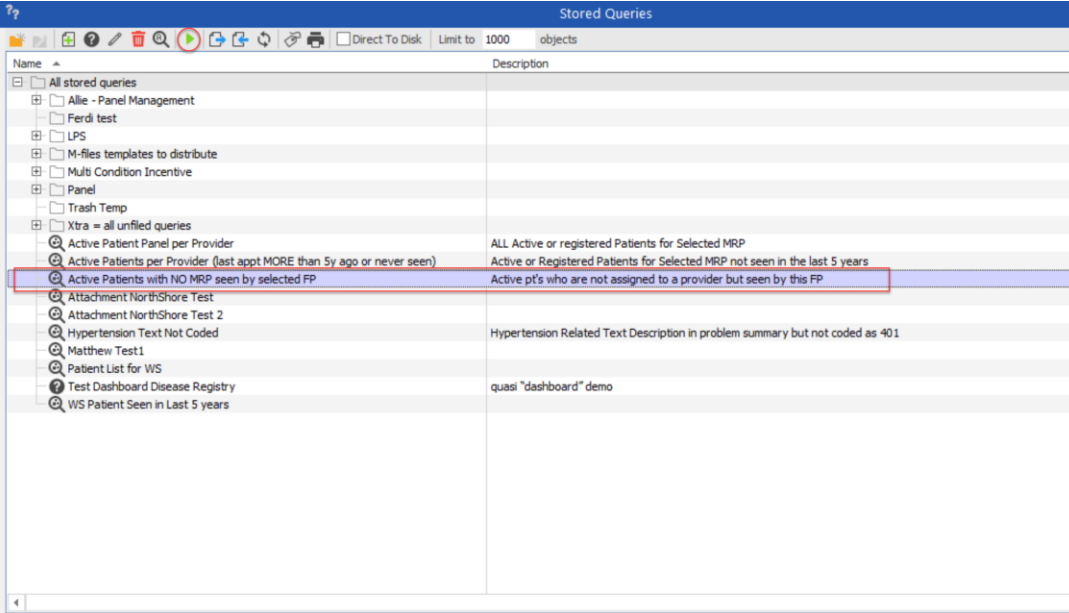
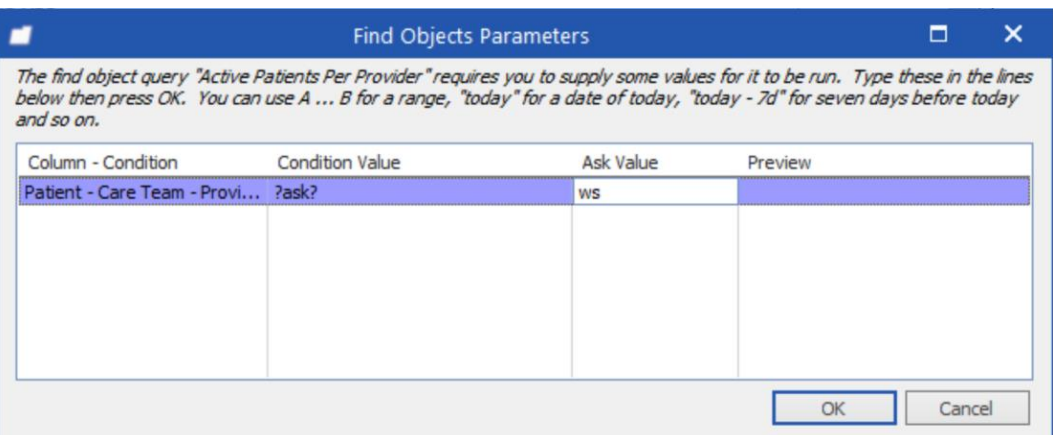


The **Save Query as** window displays. File details at the bottom might be automatically populated. If not, enter the information:

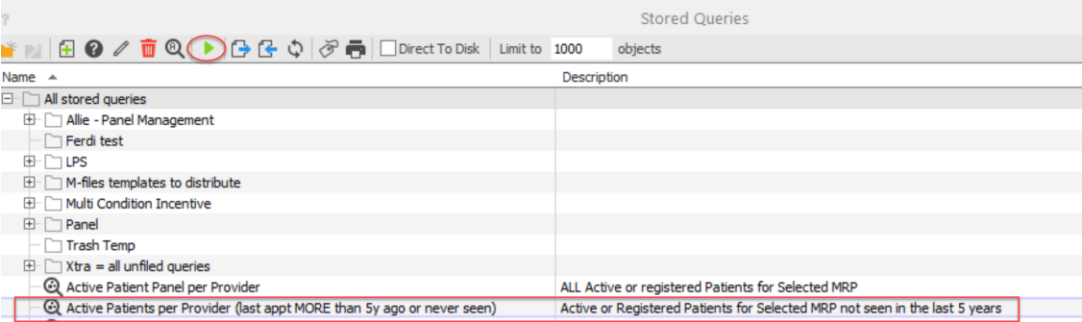
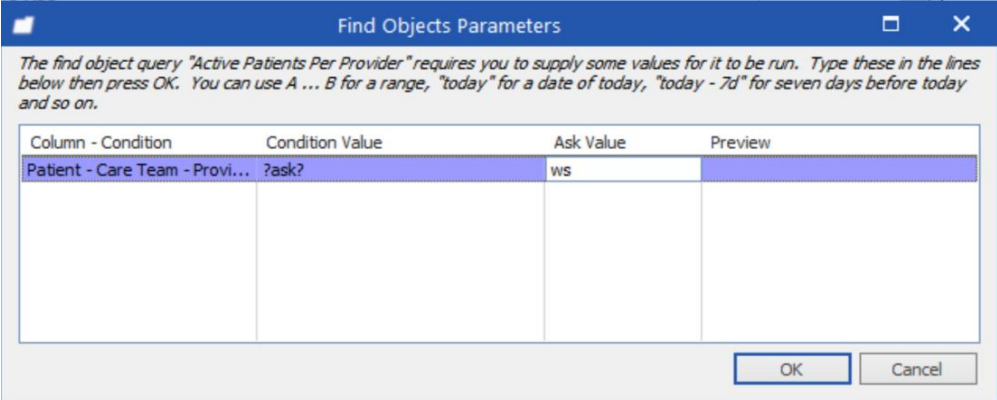
- Type query **Name**.
- Under **Description**, type short explanation what it does.
- Click **OK**.

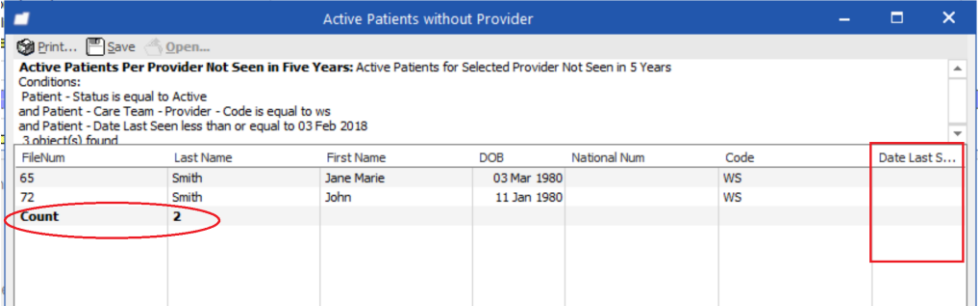

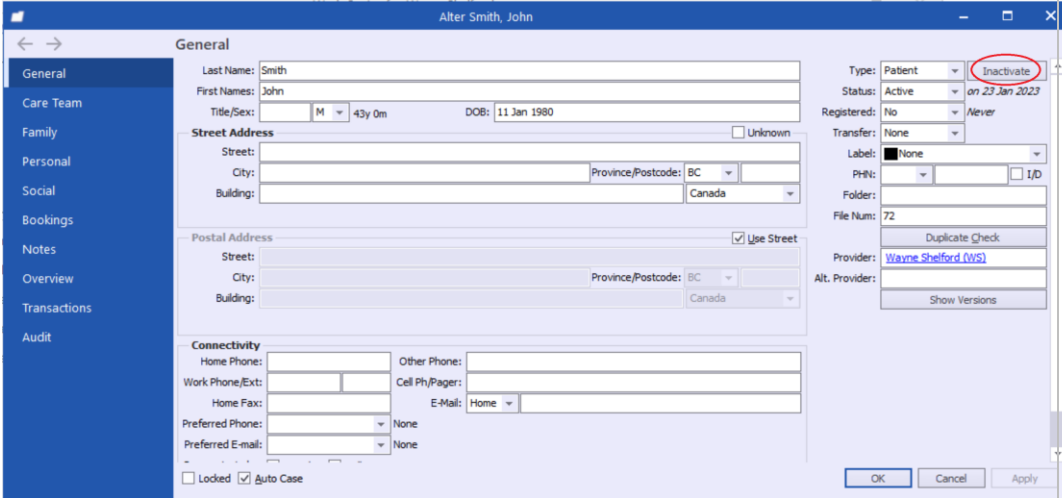
The new query is added to the list of Saved Queries in your EMR.

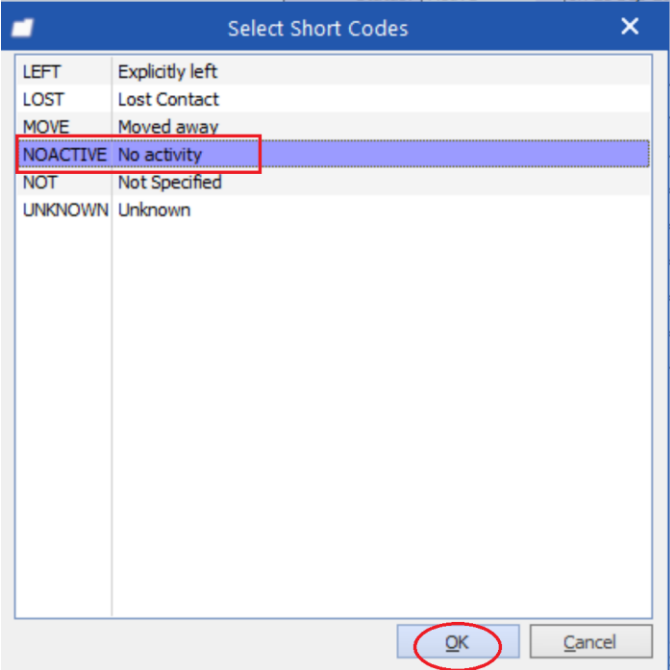
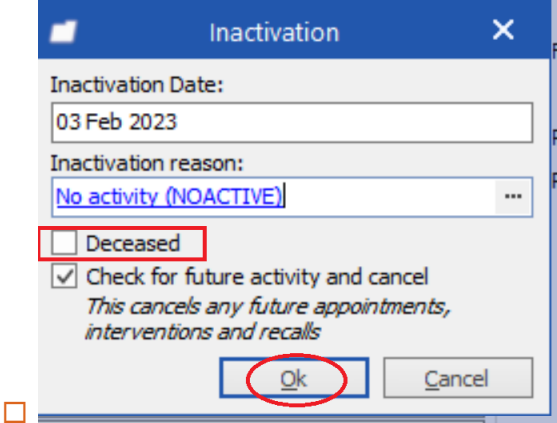


ACTION	HOW TO
	<p>Repeat these steps to import all queries that are downloaded from the first step of this guide</p>
<p><b>Identify patients without a primary provider</b></p>	<p>Start with listing patients with no assigned most responsible provider (MRP).</p> <ul style="list-style-type: none"> <li>Click on <b>Report</b> and select <b>Stored Queries</b> from the top toolbar.</li> <li>Select the previously saved query “<b>Active Patients with NO MRP Seen by Selected FP</b>” template.</li> <li>Click the green <b>Execute Query</b> button on the toolbar.</li> </ul> 
	<ul style="list-style-type: none"> <li>Enter your log in username under <b>Ask Value</b> for provider’s details.</li> <li>Click <b>OK</b> to execute the query.</li> </ul> 

ACTION	HOW TO																								
	<p>A list of patients with no assigned MRP displays in a new window, along with a list of their encounter dates with you as selected FP.</p> <table border="1" data-bbox="422 588 1477 903"> <thead> <tr> <th>File#</th> <th>Last Name</th> <th>First Name</th> <th>Sex</th> <th>Age</th> <th>Status</th> <th>Dr.</th> <th>Encounter</th> </tr> </thead> <tbody> <tr> <td>63</td> <td>Young</td> <td>Test</td> <td>F</td> <td>22</td> <td>Active</td> <td>WS</td> <td>08 Aug 2022</td> </tr> <tr> <td><b>Count</b></td> <td><b>1</b></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	File#	Last Name	First Name	Sex	Age	Status	Dr.	Encounter	63	Young	Test	F	22	Active	WS	08 Aug 2022	<b>Count</b>	<b>1</b>						
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	<p>Review charts of unassigned patients in order to assign the correct provider.</p> <p>Highlight the patient name and click <b>Alter Patient...</b> on the side toolbar to open the patient demographic's window.</p>																								
<ul style="list-style-type: none"> <li>• Enter correct name into the <b>Provider</b> field</li> <li>• Click <b>OK</b> to save patient record.</li> </ul>																									

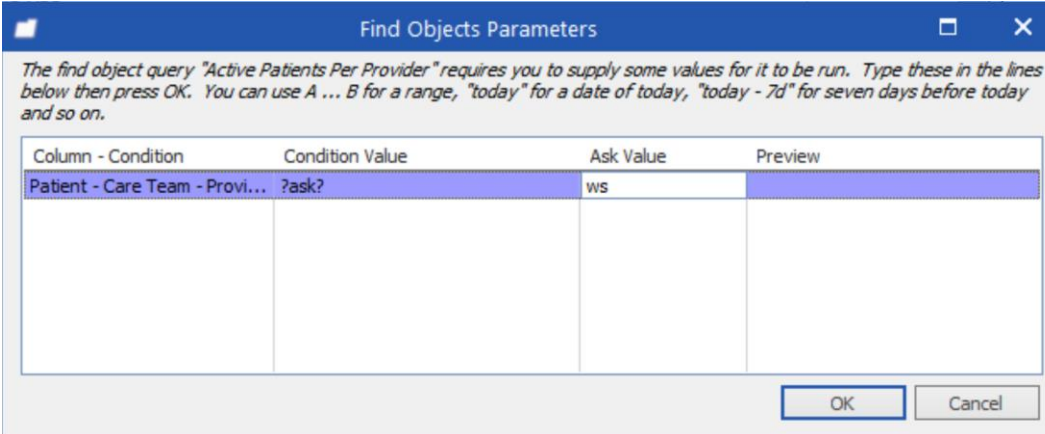
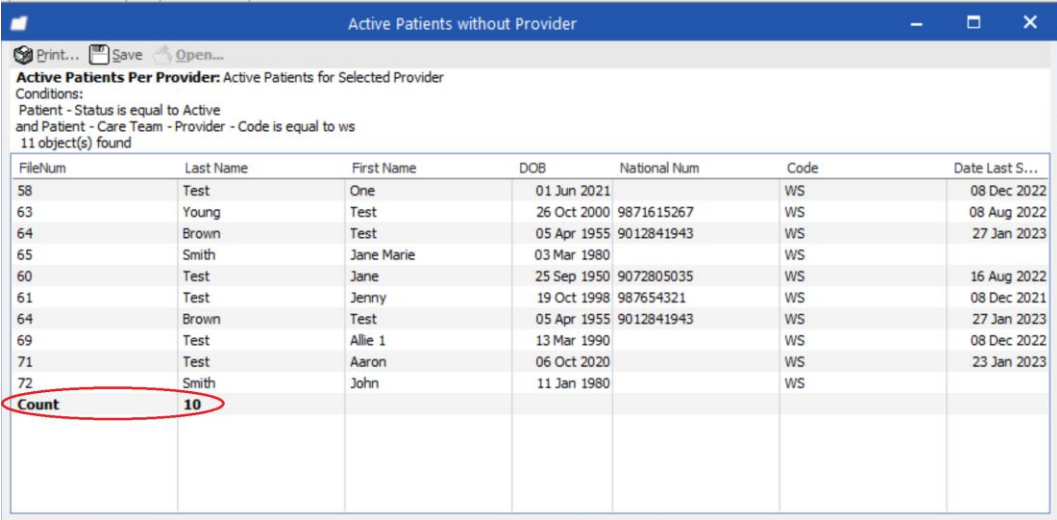

ACTION	HOW TO
<p><b>Inactivate patients not seen by x years</b></p>	<p>Identify patients with Active status but have not been seen for last few years. In our example, it is 5 years. Discuss with your practice team active patient criteria and how to implement necessary corrections.</p> <p>Execute search and generate the list:</p> <ul style="list-style-type: none"> <li>• Click on <b>Report</b> and select <b>Stored Queries</b>.</li> <li>• Select <b>“Active Patients Per Provider (last appt MORE than 5y ago or never seen)”</b> template.</li> <li>• Click the green <b>Execute Query</b> button.</li> </ul>  <ul style="list-style-type: none"> <li>• Enter your log in username under the <b>Ask Value</b>.</li> </ul> 

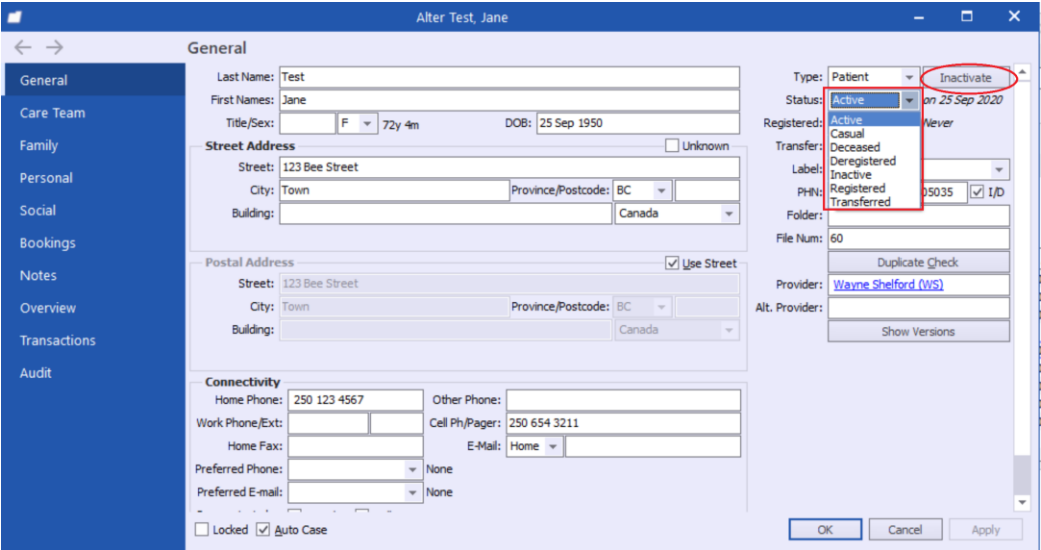
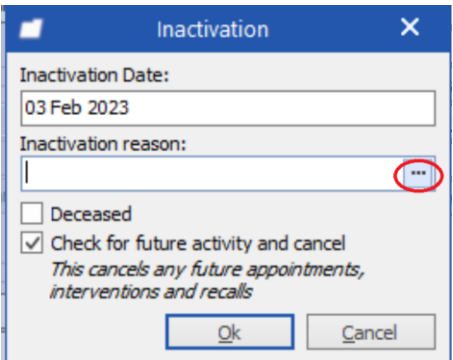
ACTION	HOW TO
	<p>A new window will appear with your list of patients along with the date they were last seen. If the date is blank it means that these patients were never seen in the EMR.</p> 
	<p>Review patients and, if needed, inactivate a patient,</p> <ul style="list-style-type: none"> <li>Highlight the patient, name and click  <b>Alter Patient...</b> to open the patient demographic's window</li> <li>Click on <b>Inactivate</b>.</li> </ul> 

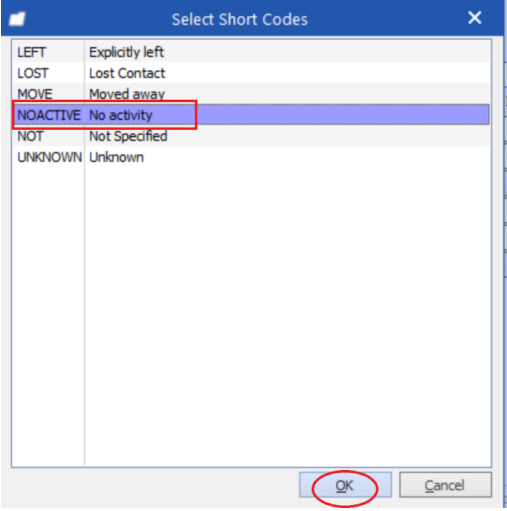
ACTION	HOW TO
	<ul style="list-style-type: none"> <li>• Select <b>Reason</b> why you are making this patient inactive.</li> <li>• Click <b>OK</b>.</li> </ul> 
	<ul style="list-style-type: none"> <li>• If a patient is deceased, make sure to click on the <b>Deceased</b> checkbox.</li> <li>• Click <b>OK</b>.</li> </ul> 
	<p>Patient demographic window displays with <b>Status Inactive</b> and inactivation date.</p> <ul style="list-style-type: none"> <li>□ <b>NOTE: Activate</b> option in the right top corner is now available so you can activate patient record back if necessary.</li> <li>• Click <b>OK</b> to save changes and exit Alter Patient window.</li> </ul>



ACTION	HOW TO
	<p>Continue to review your list and make changes for any other patients needing to be made inactive.</p> <p>NOTE: There is no option to make these corrections in batch. This must be done individually for each patient.</p>
<p><b>Display a list of active patients assigned to you</b></p>	<p>To analyze your patient panel, retrieve names of patients assigned to you:</p> <ul style="list-style-type: none"> <li>• Click <b>Report</b> on the top menu.</li> <li>• Select <b>Stored Queries</b> from the drop-down menu.</li> <li>• Select the “<b>Active Patient Panel Per Provider</b>” template.</li> <li>• Click the <b>Execute Query</b> green button on the toolbar.</li> </ul>

ACTION	HOW TO
	<ul style="list-style-type: none"> <li>• Enter your log in user name as provider name under <b>Ask Value</b>.</li> <li>• Click <b>OK</b>.</li> </ul> 
	<p>A list of active patients assigned to you displays.</p> <ul style="list-style-type: none"> <li>• <b>Total Count</b> is displayed at the bottom of your list</li> </ul> 
<p><b>Remove patients from your panel</b></p>	<p>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:</p> <p>Select a patient and click on  <b>Alter Patient...</b> to open the patient demographic screen.</p>

ACTION	HOW TO
	<ul style="list-style-type: none"> <li>• First click the <b>Inactivate</b> button.</li> <li>• Click on the arrow next to <b>Status</b> to display drop-down list.</li> <li>• Select the appropriate entry.</li> </ul> 
	<p>The Inactivation window displays.</p> <ul style="list-style-type: none"> <li>• Enter the <b>Inactivation Date</b>.</li> </ul> <p>Click the <b>Ellipses</b> button to display codes for reasons you wish to inactivate the patient.</p>
	

ACTION	HOW TO
	
	<p>NOTE: Check off the box to cancel all future activities for inactive patient.</p>
<p><b>Manage patient status options</b></p>	<p>The only statuses available in Profile are Active, Inactive, Casual, Deceased, Transferred. Discuss with your team criteria for each status. Decide if any changes to current office procedures are necessary to keep the records accurate and up to date.</p>
<p><b>Outcome</b></p>	<p>After completing this section and re-running your report after any updates, you can report up-to-date correct number of active patients assigned to you.</p>