#### 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, datainformed 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 <u>PSP@doctorsofbc.ca</u>.

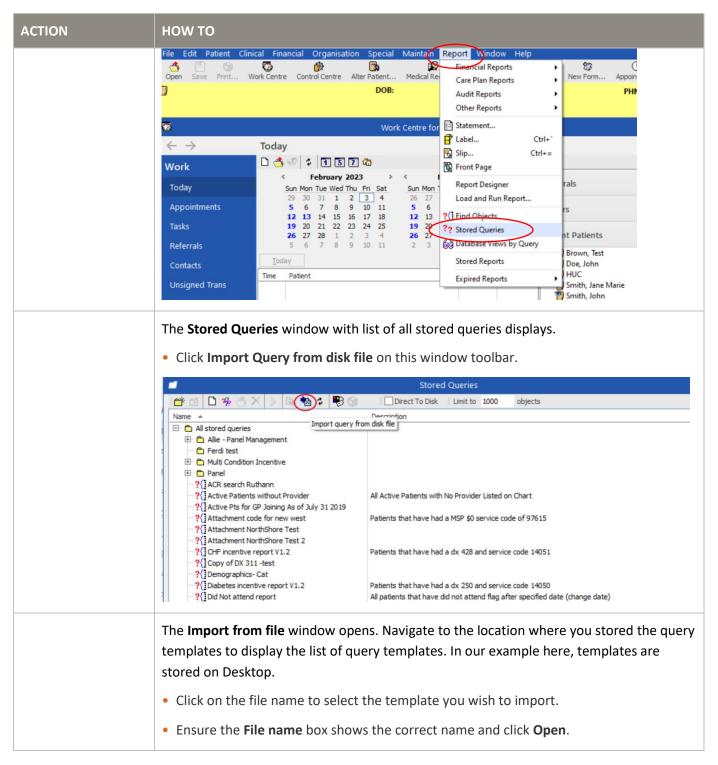
#### Empanelment

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	ном то
Import queries	Before you start the import, download the below templates to your computer and then follow the next steps to upload them to your EMR. Please note that once you download the query templates, they will be unopenable until they are imported into your EMR. You can find them in your downloads folder and then drag them onto your desktop.
	<u>Stored Query Template: Active Patients with NO MRP Seen By Selected FP</u> <u>Stored Query Template: Active Patients Never Seen or Not Seen In Over 5 Years</u> Stored Query Template: Active Patient Panel Per Provider
	<ul> <li>Click Report on the top menu.</li> <li>Select Stored Queries from the drop-down menu.</li> </ul>







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		Status         Date modified           Image: Status         3/23/2023 1:15 PN           Image: Status         3/23/2023 1:09 PN	
	<ul> <li>The Save Query as window displays.</li> <li>populated. If not, enter the informat</li> <li>Type query Name.</li> <li>Under Description, type short exp</li> <li>Click OK.</li> <li>The new query is added to the list of</li> </ul>	ion: lanation what it does.	utomatically
		Save Query as	×
	Name 🔻	Description	POS
	All stored queries	Compton	× 100
		<ul> <li>Hypertension Related Text Description in probl</li> <li>Active pt's who are not assigned to a provider</li> <li>Active or Registered Patients for Selected MRP</li> <li>ALL Active or registered Patients for Selected</li> </ul>	Health Centre Health Centre
	C Xtra = all unfiled queries     Trash Temp     Ponel     Multi Condition Incentive     M-files templates to distribute     P- 1PS		×
	Name: Active Patient Panel per Provider	· · · · · · · · · · · · · · · · · · ·	
	Description: ALL Active or registered Patients		
	POS:		
	Privacy:		
		<u>O</u> K	Cancel



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	Repeat these steps to import all queries that are downloaded from the first step of this guide
Identify patients without a primary provider	<ul> <li>Start with listing patients with no assigned most responsible provider (MRP).</li> <li>Click on Report and select Stored Queries from the top toolbar.</li> <li>Select the previously saved query "Active Patients with NO MRP Seen by Selected FP" template.</li> <li>Click the green Execute Query button on the toolbar.</li> </ul>
	Name     Description       All =-Panel Management     Feed test       Pred test     Feed test       Panel     Feed test       Panel     All - Active Patents provider       Autio Condition Incentive     All Active or registered Patents for Selected MRP       Active Patent Brend per Provider     Active Patents per Provider       Active Patent Brend per Provider     Active Patents for Selected MRP       Active Patent Brend per Provider     Active Patents for Selected MRP       Active Patent Brend per Provider     Active Patents for Selected MRP       Active Patent Brend per Provider     Active Patents for Selected MRP       Active Patent Brend per Provider     Active Patents for Selected MRP       Active Patent Brend Perioder (List appt MORE than Sy ago or never seen)     Active Patents for Selected MRP       Active Patent Brend Perioder (List appt MORE than Sy ago or never seen)     Active Patents for Selected MRP       Active Patent Brend Perioder (List appt MORE than Sy ago or never seen)     Active Patent Selected MRP       Active Patent Brend Perioder (List appt MORE than Sy ago or never seen)     Active Patent Brend Test System       Active Patent Brend Perioder (List appt MORE than Sy ago or never seen)     Active Patent Brend Test System       Active Patent Brend Test Not Coded     Hypertension Related Test Description in problem summary but not coded as 401       Active Patent Seen in Last S years     Gashboard" demo
	Enter your log in username under Ask Value for provider's details.     Click OK to execute the query.     Find Objects Parameters     Interfind object query "Active Patients Per Provider" requires you to supply some values for it to be run. Type these in the lines below then press OK. You can use A B for a range, "today" for a date of today, "today - 7d" for seven days before today and so on.     Column - Condition Condition Value Ask Value Preview     Patient - Care Team - Provi ?ask?     ws
	OK Cancel



A list of patient						
encounter date	-	ned MRP displays elected FP.	in a new wind	ow, alon <sub>ł</sub>	g with a lis	st of their
-	Active Patier	nts with NO MRP with enc	ounters by		-	□ ×
Active Patients with N Conditions: Patient - Usual Doctor - C and Patient - Status is equ and Patient - Type is equa	D MRP seen by selected ode is null al to Active I to Patient	FP: Active pt's who are not as	signed to a provider but se	en by this FP		* *
File# Last Name		First Name	Sex	Age	Status Dr.	Encounter
63 Young Count 1		Test	F	22	Active WS	08 Aug 2022
Highlight the pa demographic's Enter correct	ntient name and window. name into the	d click Alter Patient	-	-		e patient
-		Alter Do, John				– 🗆 X
<ul> <li>← →</li> <li>General</li> <li>Care Team</li> <li>Family</li> <li>Personal</li> <li>Social</li> <li>Bookings</li> <li>Notes</li> <li>Overview</li> <li>Transactions</li> <li>Audit</li> </ul>	General Last Name: Do First Names: John Title/Sex: Street: City: Building: Postal Address Street: City: Building: Connectivity Home Phone: Work Phone/Ext: Home Fax: Preferred Phone: Preferred E-mail: Locked V Auto Case	Pr Pr Other Phone: Cell Ph/Pager: E-Mail: Ht V None	vince/Postcode: BC   Canada   vult vovince/Postcode: BC   Canada   vult Canada  vult Canada	se Street	tatus: Active tered: No nsfer: None Label: None PHN:   IMUN:  IMU	
		Active Patients with NO HRP seen by selected Conditions: Patient - Usual Doctor - Code is null and Patient - Type is equal to Patient also Patient - DOB is not null File# Last Name 63 Young Count 1 Review charts of unassigned patient Atighlight the patient name and lemographic's window. Enter correct name into the Click OK to save patient reco Click OK to save patient reco Click OK to save patient reco Street is bolin Family Social Bookings Notes Overview Transactions Audit Counce Free Freed Final: Connectivity Home Phone: Work Phone/Ett: Home Fax: Preferred Final: Connectivity Home Final: Connectivity Home Final: Care Team Audit	Cint. Seve Open   Active Patients with NO MRP seen by selected FP: Active pt's who are not as Conditors:   Patent - Usual Doctor - Code is null and Patient - Status is equal to Active and Patient - Stroke is equal to Active and Patient - NOR is not null   File# Last Name   File# Last Name   Count   1   Review charts of unassigned patients in order to Alter Patient law Patient - Nor is null and Patient - Stroke is equal to Active and Patient - Nor is null and Patient null and Patient - Nor is null and Patient set null and patient set null and patient null and patient set null and patient set null and patient set null and patient null and patient set null an	Active Patients with NO MRP with encounters by Ent Save @ Dec Active Patients with NO MRP scen by selected FP. Active pt's who are not assigned to a provider but second on an order to a solution to the Provider of the enternal of	Active Patients with NO MRP with encounters by         Center, Sere Concern         Active Patients with NO MRP seen by selected FP.Active pt's who are not assigned to a provider but seen by this PP.         Patients with NO MRP seen by selected FP.Active pt's who are not assigned to a provider but seen by this PP.         Patients with NO MRP seen by selected FP.Active pt's who are not assigned to a provider but seen by this PP.         Patients with NO MRP seen by selected FP.Active pt's who are not assigned to a provider but seen by this PP.         Patients with NO MRP seen by selected FP.Active pt's who are not assigned to a provider but seen by this PP.         Patients with NO MRP seen by selected FP.Active pt's who are not assigned to a provider but seen by this PP.         Patients with NO MRP seen by selected FP.Active pt's who are not assigned to a provider but seen by this PP.         Patients with NO MRP seen by selected FP.Active pt's who are not assigned by a provider but seen by this PP.         File Lust Name       Sex Age         Count       Image: Sex Age         File Lust Name       Sex Age         Count       Image: Sex Age         Count       Image: Sex Age         File Lust Name       Sex Age         Count       Image: Sex Age         Count       Image: Sex Age         Count       Image: Sex Age         Count       Image: Sex Age         Count       I	Active Patients with NO MRP with encounters by     Active Patients with NO MRP scene by selected PP. Active pt's who are not assigned to a provider but seen by this PP.     Active Patients with NO MRP scene by selected PP. Active pt's who are not assigned to a provider but seen by this PP.     Active Patient's with NO MRP scene by selected PP. Active pt's who are not assigned to a provider but seen by this PP.     Active Patient's with NO MRP scene by selected PP. Active pt's who are not assigned to a provider but seen by this PP.     Active patient provider to a science but seen by this PP.     Active patient in the Patient in order to assign the correct provider.      Active Patient's window.      Enter correct name into the Provider field      Click OK to save patient record.      Active De Active Patient in the provider field      Click OK to save patient record.      Active De Active Patient in the provider field      Active De Active Patient in the patient record.      Active De Active Patient in the Provider field      Click OK to save patient record.      Active De Active Patient in the Provider field      Click OK to save patient record.      Active De Active Patient in the Provider field      Active De Active Patient in the Provider field      Click OK to save patient record.      Active De Active Patient in the Provider field      Click OK to save patient record.      Active De Active Patient in the Provider field      Click OK to save patient record.      Active Patient Patient in the Provider field      Active Patient Active Patient in the Patient Patien



ACTION	HOW TO			
Inactivate patients not seen by x years		s. Discuss with your prac		en for last few years. In our tive patient criteria and how to
	Execute search and	generate the list:		
	• Click on <b>Report</b> ar	nd select Stored Queries		
	• Select "Active Pat template.	ients Per Provider (last a	appt MORE 1	than 5y ago or never seen)"
	• Click the green <b>Ex</b>	ecute Query button.		
	?		Store	d Queries
	🎽 🖬 🗄 🛛 🖊 💼 🍳 🕩 🖸	ት 🔂 🗳 👼 🗖 🗌 Direct To Disk 🛛 Limit	to 1000 objects	
	Name 🔺		Description	
	All stored queries     Allie - Panel Management			
	Ferdi test			
	E LPS			
	H M - files templates to distribute			
	Condition Incentive     Denel			
	- Trash Temp			
	Xtra = all unfiled queries			
	Active Patient Panel per Provi			ered Patients for Selected MRP
	Q Active Patients per Provider (	ast appt MORE than 5y ago or never seen)	Active or Registered	Patients for Selected MRP not seen in the last 5 years
	• Enter your log in u	username under the <b>Ask</b> Find Objects Paramet		□ ×
				: for it to be run. Type these in the lines day - 7d" for seven days before today
	Column - Condition	Condition Value	Ask Value	Preview
	Patient - Care Team - Provi	. ?ask?	WS	
				OK Cancel



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		ow will appear with y late is blank it means		-	
	Conditions: Patient - Status is equal to At and Patient - Care Team - Pro and Patient - Date Last Seen I <u>3.obiect(s) fnund</u> FileNum Li 65 Sr	Ven der Not Seen in Five Years: Active Patie ctive ovider - Code is equal to vs less than or equal to 03 Feb 2018 ast Name First Name mith Jane Marie mith John	without Provider  Ints for Selected Provider Not Seen in 5 Ye  DOB National Num  03 Mar 1980  11 Jan 1980	Code WS WS	Date Last S
		s and, if needed, ina e patient, name and o tivate.	3	o open the patie	ent demographic's
	General General Care Team Family Personal Social Bookings Notes Overview Transactions Audit	General Last Name: Smth First Names: John Title/Sex: M  439 0m Street Address Street: City: Building: Postal Address Street: City: Building: Connectivity Home Phone: Work Phone,Ext: Home Fax:		e/Postcode: BC V Canada V Canada V Lise Street ee/Postcode: BC V	Type:     Patient <ul> <li>(inactivate)</li> <li>(inactivate)</li> <li>(inactivate)</li> </ul> <ul> <li>(inactivate)</li> <li>(inactiv</li></ul>



ACTION	ном то
	<ul> <li>Select Reason why you are making this patient inactive.</li> <li>Click OK.</li> </ul>
	Select Short Codes      S
	<ul> <li>If a patient is deceased, make sure to click on the <b>Deceased</b> checkbox.</li> <li>Click <b>OK</b>.</li> </ul>
	Inactivation       ×         Inactivation Date:       03 Feb 2023         Inactivation reason:       •         No activity (NOACTIVE)       •••         Deceased       •••         Check for future activity and cancel       This cancels any future appointments, interventions and recalls         Ok       Cancel
	<ul> <li>Patient demographic window displays with Status <i>Inactive</i> and inactivation date.</li> <li>NOTE: Activate option in the right top corner is now available so you can activate patient record back if necessary.</li> <li>Click OK to save changes and exit Alter Patient window.</li> </ul>



ACTION	ноw то				
	-	Alter Smith, John		– 🗆 ×	
		General			
	General	Last Name: Smith		Type: Patient 👻 Activate	
		First Names: John		Status: Inactive  on 23 Jan 2023	
	Care Team	Title/Sex: M v 43y 0m DOB: 11 Jan 1980		gistered: No - Never	
	Family	Street Address	Unknown T	Transfer: None 👻	
	Personal	City: Province/Po	stcode: BC 👻	PHN: v I/D	
	Social	Building:	Canada 👻	Folder:	
	Bookings		F	File Num: 72	
	Notes	Postal Address Street:	✓ <u>U</u> se Street	Provider: Wayne Shelford (WS)	
	Overview	City: Province/Po		Provider: Wayne Shelford (WS) Provider:	
		Building:	Canada 👻	Show Versions	
	Transactions				
	Audit	Connectivity			
		Home Phone:         Other Phone:           Work Phone/Ext:         Cell Ph/Pager:			
		Home Fax: E-Mail: Home v			
		Preferred Phone: Vone			
		Preferred E-mail: Vone		v	
		□ Locked ✓ Auto Case		OK Cancel Apply	
	inactive.	view your list and make changes for any s no option to make these corrections in r each patient.		-	
Display a list of active patients assigned to you	<ul> <li>Click Report</li> <li>Select Store</li> <li>Select the "A</li> </ul>	ar patient panel, retrieve names of patie : on the top menu. d Queries from the drop-down menu. Active Patient Panel Per Provider" temp ecute Query green button on the toolba	plate.	<i>י</i> ou:	
	?? Stored Queries				
		🛅 🍳 🜔 🗗 🤂 💠 🧭 🖶 🗆 Direct To Disk   Limit to			
	Name 🔺		Description		
	E- All stored queri				
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	E Panel	ANT INCENTIVE			
	Trash Temp				
	⊕ ∑ Xtra = all ur				
		ent Panel per Provider	ALL Active or registered Pa	atients for Selected MRP	



ACTION	но	W TO				
	• E	• Enter your log in user name as provider name under Ask Value.				
	• (	Click <b>OK</b> .				
		-	Find Obj	ects Parameters		□ ×
				equires you to supply some valu e, "today" for a date of today, "		
		Column - Condition	Condition Value	Ask Value	Preview	
		Patient - Care Team - Pro	vi ?ask?	WS		
					OK	Cancel
	Act Con Pat	Print Essave <u>Open</u> tive Patients Per Provider: Active iditions: ient - Status is equal to Active Patient - Care Team - Provider - Cod		thout Provider		- • ×
		object(s) found Num Last Name	First Name	DOB National Num	Code	Date Last S
	58	Test	One	01 Jun 2021	WS	08 Dec 2022
	63	Young	Test	26 Oct 2000 9871615267	WS	08 Aug 2022
	64	Brown	Test	05 Apr 1955 9012841943	WS	27 Jan 2023
	65 60	Smith	Jane Marie Jane	03 Mar 1980	WS	16 Aug 2022
	61	Test	Jenny	25 Sep 1950 9072805035 19 Oct 1998 987654321	WS	16 Aug 2022 08 Dec 2021
	64	Brown	Test	05 Apr 1955 9012841943	WS	27 Jan 2023
	69	Test	Allie 1	13 Mar 1990	WS	08 Dec 2022
	71	Test	Aaron	06 Oct 2020	WS	23 Jan 2023
	72	Smith	John	11 Jan 1980	WS	
	Col	unt 10				
Remove patients from your panel		•		ould not be on your lis eceased, Moved, etc.	•	
	S	Select a patient and	l click on Alter Patie	ent to open the patie	ent demograph	nic screen.



ACTION	ноw то
	<ul> <li>First click the Inactivate button.</li> <li>Click on the arrow next to Status to display drop-down list.</li> </ul>
	Select the appropriate entry.
	🖬 Alter Test, Jane — 🗆 🗙
	← → General
	General         Last Name:         Test         Type:         Patient         Cinactivate           First Names:         Jane         Status:         Active         on 25 Sep 2020
	Care Team Title/Sex: F 🔻 72y 4m DOB: 25 Sep 1950 Registered: Active Casual
	Family         Street Address         Unknown         Transfer:         Deceased           Personal         Street:         123 Bee Street         Label:         Deregistered         Label:         Transfer:         Vergistered         Vergistereed         Vergistereee         Vergisteree<
	City: Town Province/Postcode: BC ~ P+N: Registered 05035 V I/D
	Social     Building:     Canada     Folder:       Bookings     File Num: 60
	Postal Address Uplicate Check
	Notes         Street:         123 Bee Street         Provider:         Wave Shelford (WS)           Overview         Oty:         Town         Province/Postcode:         BC         V         Alt. Provider:
	Transactions Building: Canada - Show Versions
	Audit Connectivity
	Home Phone:         250 123 4567         Other Phone:
	Work Phone,Ext:         Cell Ph,Pager:         250 654 3211         I           Home Fax:         E-Hall:         Home I +         I
	Preferred Phone:
	Preferred E-mail:
	□ Locked ✓ Auto Case OK Cancel Apply
	<ul> <li>The Inactivation window displays.</li> <li>Enter the Inactivation Date.</li> <li>Click the Ellipses button to display codes for reasons you wish to inactive the patient.</li> </ul>
	Inactivation ×
	Inactivation Date:
	03 Feb 2023
	Inactivation reason:
	Deceased
	Check for future activity and cancel
	This cancels any future appointments, interventions and recalls



ACTION	ном то
	Select Short Codes     X       LEFT     Explicitly left       LOST     Lost Contact       MOVE     Moved away       NOACTIVE No activity     NOT       NOT     Not Specified       UNKNOWN     Unknown
	NOTE: Check off the box to cancel all future activities for inactive patient.
Manage patient status options	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.
Outcome	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.