

## LFP: SUBMITTING A PATIENT PANEL

## **Pre-configuration Checklist**

1. Please request the clinic run the MSP fee update process ahead of time to ensure that we have the most up-to-date service code list in their environment.

## Single Provider Patient Panel Group Configuration

NOTE: For best practices, it is recommended to create a separate patient panel group for each provider within the organization. Please keep in mind, the single provider patient group only needs to be configured once.

- In Work Centre > Clinical > Groups view, create a dynamic group for the patient panel by clicking New Dynamic Group in the Groups view toolbar.
- 2. In the New Dynamic Group window, enter the following information:
  - In the Name field, type an appropriate name for the individual provider panel group
  - The Category field displays the category in which the groups belong. You can click on
     to change it.
  - Remove the tick from the **Shared** box if you do not want this group to be available to all other providers
  - In the Status field, select Active status as the option
  - In the **Privacy** field, select the required option from the drop-down menu if you only want this group to be available to a specific compound role
- 3. Click OK. The Edit Dynamic Group window will subsequently display.
- 4. In the **Edit Dynamic Group** > **Filter** tab, enter the following information.
  - In the Use for filtering field, select Stored Query as the option
  - In the **Show if patient...** field, the **In find objects results** option is selected as the default option



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- 5. Click the Edit Stored Query button to display the Find Objects window.
- 6. In the Find Objects window, drag and drop the following Patient object properties.
  - In Patient Usual Doctor object folder, drag and drop the Code property into the Where
    panel and enter the following information:
    - i. Click the Condition dropdown and select the is equal to option

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ii. Click Value field and enter the usual provider's Code

- In the Patient object, drag and drop the Status property into the Where panel and enter the following information:
  - i. Click the Condition dropdown and select the is equal to option
  - ii. Click Value field and enter Active



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- 7. Click OK.
- 8. In the Edit Dynamic Group window, click OK to save and complete group changes.

## **Submitting Patient Panel Workflow**

- 1. In Work Centre > Clinical > Groups, select the patient panel group that was created.
- 2. Click the **Run** button to start the group query and display the query results in the panel table.
- 3. Click **Undock Patient Group** II in the Groups view toolbar.
- 4. Multi-select (shift + select) the patients that are assigned to the usual provider.
- 5. Click **Tick/Untick a Patient** to place a check on the selected patients.

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6. Click Add Quick Bill to display the Quick Bill window.



- 7. In the **Quick Bill** window, enter the following information:
  - In the **Provider** field, enter the usual provider if it isn't auto-populated already
  - In the Service field, enter 98990 PRIMARY CARE PANEL REPORT
  - In the **Diagnosis 1:** field, enter **L23** (Longitudinal Family Physician (LFP) Claim)
  - In the Location field, enter L
- 8. Click OK.