LFP: SUBMITTING A PATIENT PANEL

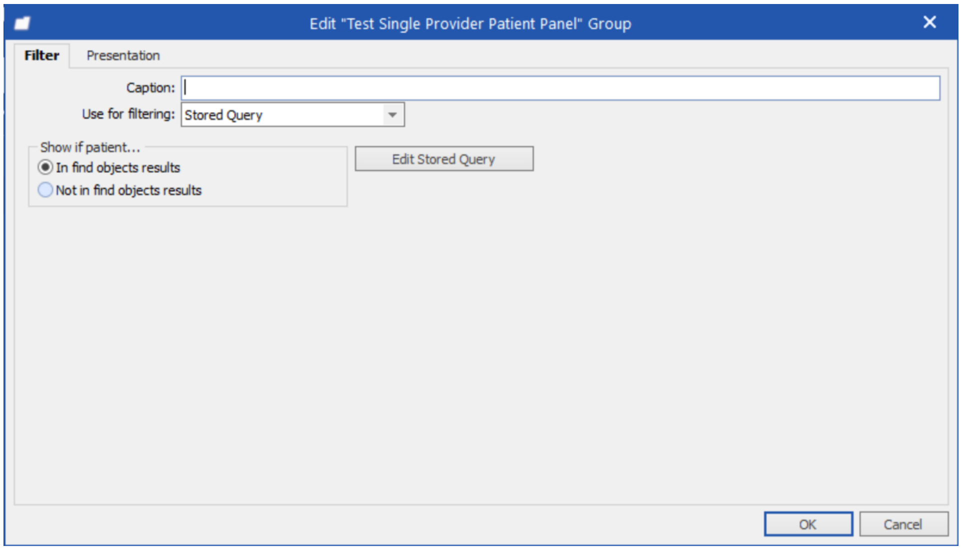
Pre-configuration Checklist

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.

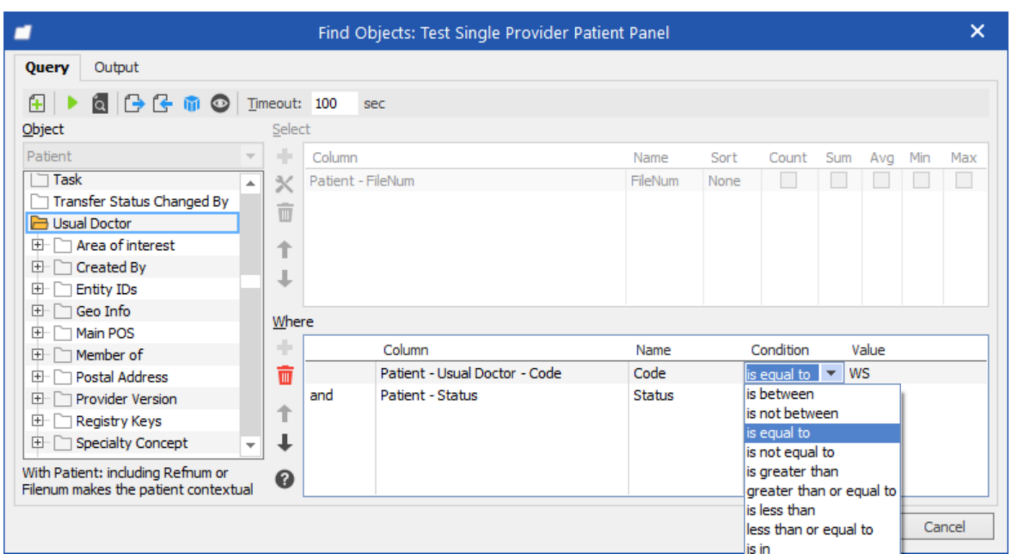
Single Provider Patient Panel Group Configuration

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.

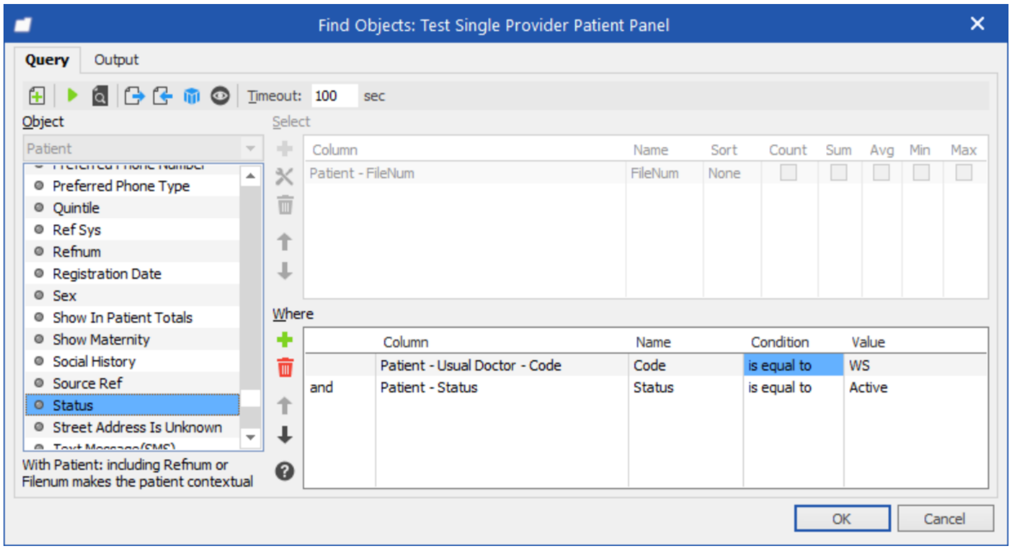
1. In **Work Centre** > **Clinical** > **Groups** view, create a dynamic group for the patient panel by clicking **New Dynamic Group** in the Groups view toolbar.
2. In the **New Dynamic Group** window, enter the following information:
   - In the **Name** field, type an appropriate name for the individual 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



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



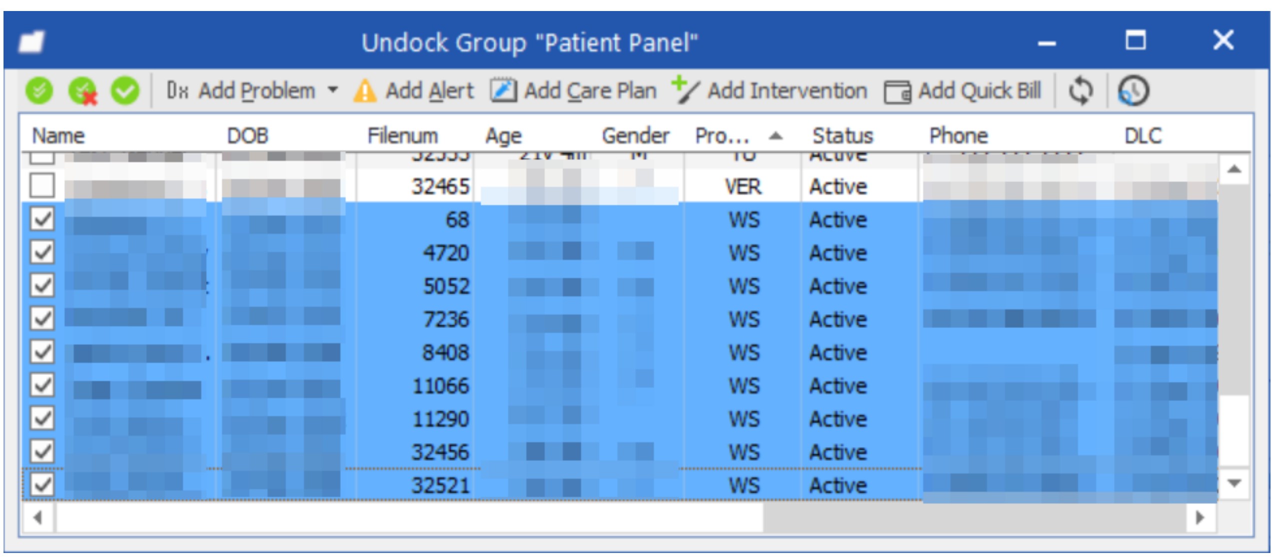
- In the **Patient** object, drag and drop the **Status** property into the **Where** panel and enter the following information:
    i. Click the **Condition** dropdown and select the **is equal to** option
    ii. Click **Value** field and enter **Active**



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** 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.



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**.