# 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.

2. When submitting your patient panel claim to MSP, please ensure your Profile instance has the latest LFP billing macro jaffa file. This jaffa file can be found in this solution article: Billing with a Facility Number Using Place of Service (POS) and instructions are provided in the **Non-BCP Macro Configuration** section. If you cannot access this article, please contact our support team.

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.
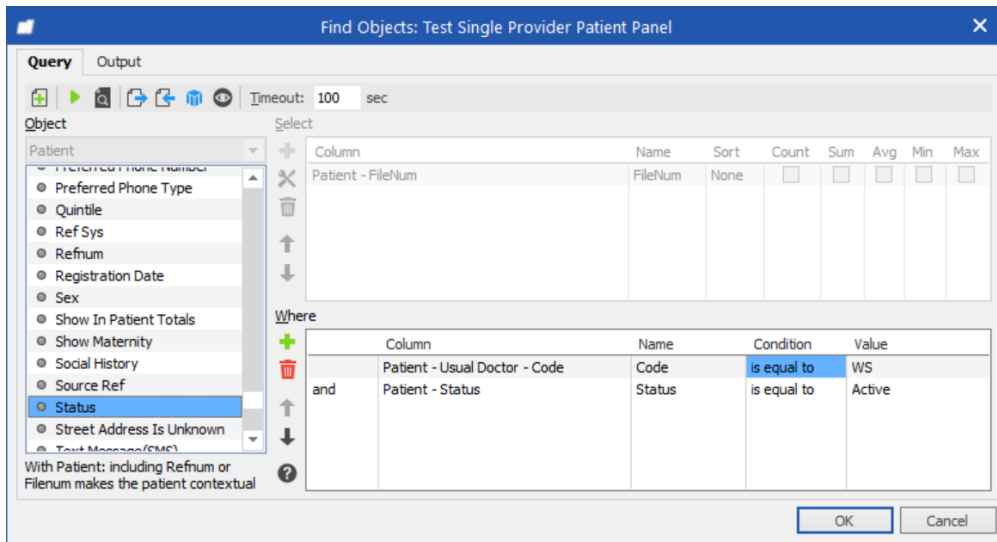
1. In **Work Centre** > **Clinical** > **Groups** view, create a dynamic group for the patient panel by clicking **New Dynamic Group** in the Groups view toolbar.

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
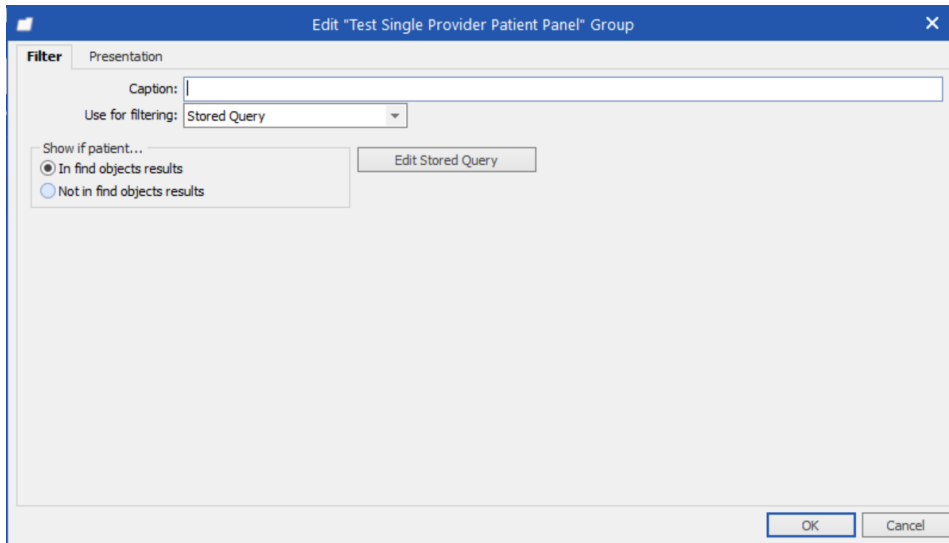
5. Click the **Edit Stored Query** button to display the **Find Objects** window.

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**
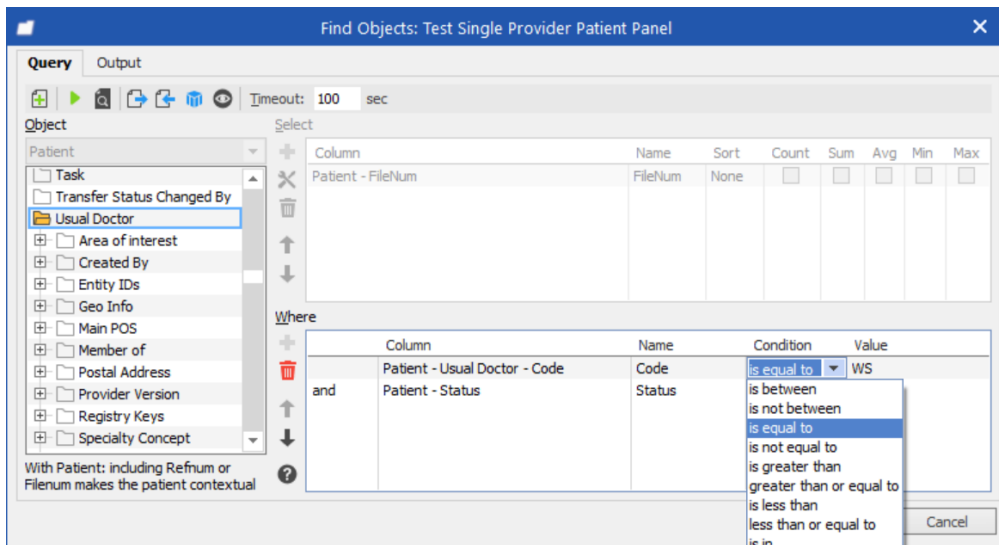

- In the **Patient** object, drag and drop the **Status** property into the **Where** panel and enter the following information:

  i. Click the **Condition** dropdown and select the **is equal to** option
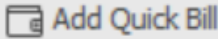
  ii. Click **Value** field and enter **Active**

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.
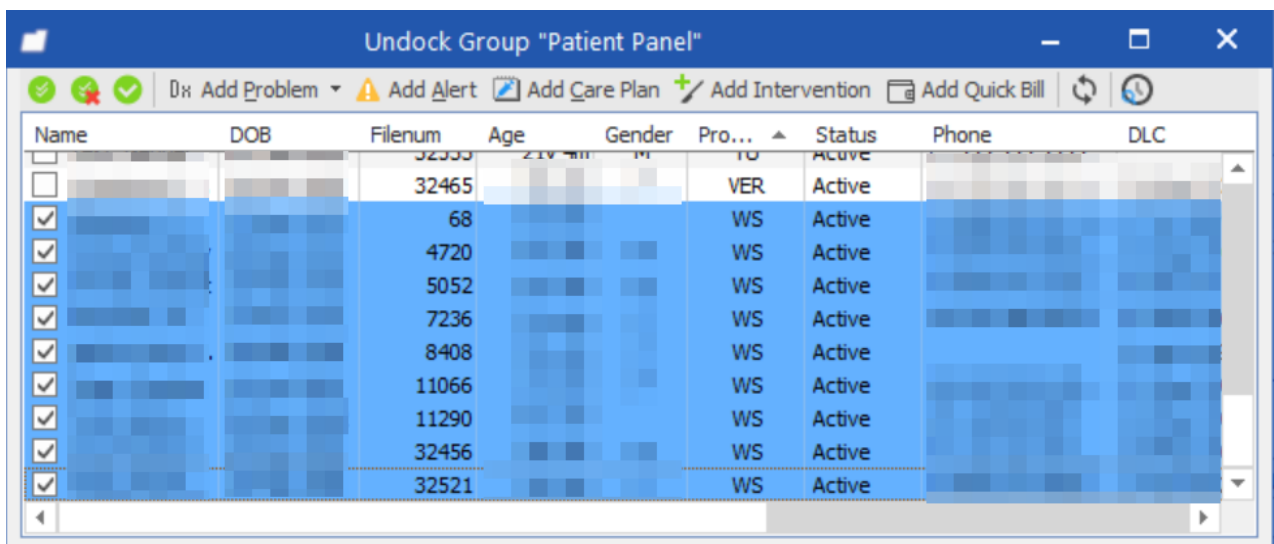
6) Use the **Quick Bill** functionality to start the patient panel submittal.

a) In Profile versions 8.8+, the user can click [Add Quick Bill] in the **Undock Group** window to display the **Quick Bill** window.

b) In previous Profile versions, the user can either click the **Quick Bill** button on the main toolbar or use **Financial > Quick Bill**.
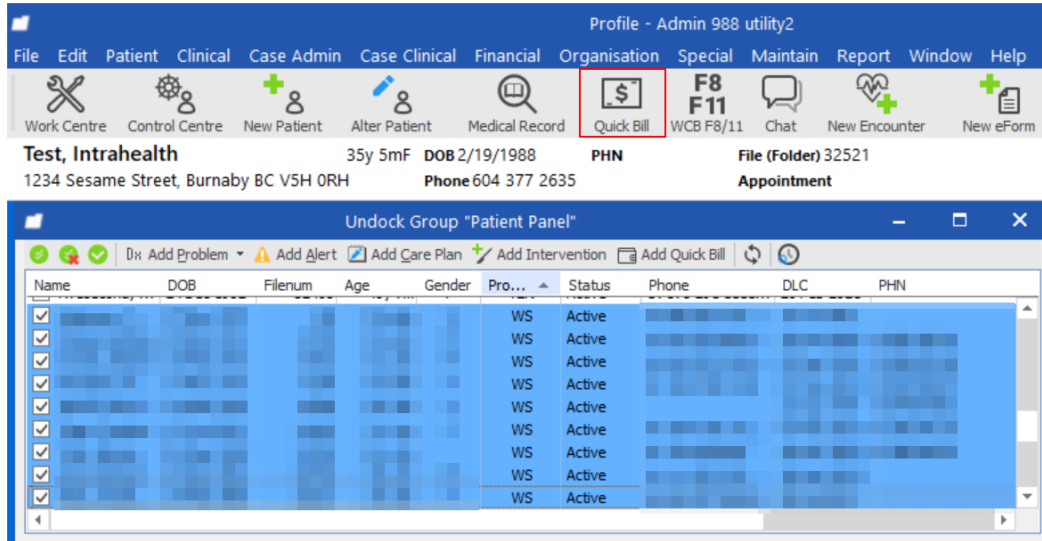
7) In the **Quick Bill** window, enter the following information:

a) In the **Provider** field, enter the usual provider if it isn't auto-populated already

b) In the **Service** field, enter **98990 – PRIMARY CARE PANEL REPORT**

c) In the **Diagnosis 1:** field, enter **L23** (Longitudinal Family Physician (LFP) Claim)

d) In the **Location** field, enter **L**

8) Click **OK**.