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ONGOING PANEL UPDATES FOLLOWING BULK UPLOAD

Please refer to the Information on submitting and updating panel lists for the most up to date news.

It is important to keep your PAS data up to date and aligned with your EMR on an ongoing basis. Updated panels will help everyone involved in primary care have a better picture of attachment in BC, as we work together to ensure people have access to a primary care provider.

Updated panel lists in the PAS will also be critical to ensure payments accurately reflect panel size when the new method is developed for calculating CLFP payments, or panel payments under the LFP Payment Model.

How to Update Panels in PAS

HOW TO ADD PATIENTS TO YOUR PANEL REGISTRY:

Send a $0 attachment code 98990 to MSP/Teleplan through your EMR for each new patient. This will be reflected in the PAS within a few days. This code and process is only to be used after your full panel is submitted. **You should only submit your entire panel as a bulk upload one time.**

If you are adding a patient that you have previously removed from your panel within PAS, you will need to contact the PAS support team for assistance. Refer here for contact information.

The attachment code must contain the following information:

- MSP payee number
- Practitioner number (also known as billing number)
- Patient's Personal Health Number (PHN)
- Patient's full name
- Date
- Service code: 98990 (Primary Care Panel Report)
- ICD-9 code: (1 code mandatory, 3 maximum)
- Location code (most likely L-Longitudinal Primary Care Practice)
- Facility number

HOW TO REMOVE PATIENTS FROM YOUR PANEL:

In your PAS panel registry, select the patient on your panel and click on the "remove" button. Removing a patient in PAS will not update your panel in your EMR, so you will want to ensure the patient has also been updated in your EMR with the relevant status (e.g. Inactive, Deceased). Work is underway to integrate these systems in the future.

HOW OFTEN TO UPDATE PANELS:

Physicians are encouraged to incorporate these steps for adding and removing patients into your daily workflow. Physicians can delegate responsibilities in the PAS to someone in their clinic who is not a doctor or registered nurse practitioner by completing the endorsement process outlined here.

Review panel lists in the PAS regularly, and no less than on a quarterly basis, to ensure it is up to date and to correct any possible errors along the way.

GENERAL WORKFLOW CONSIDERATIONS:

- Refer to the *How to Maintain an Accurate Panel* (*Empanelment*) guides on the Doctors of BC site.
- Ensure clinic is updating "panel last confirmed" field (*shown below*) **within PAS** to ensure reports and queries are being run for the correct timeframe.

ADDING PATIENTS: USING REGULAR BILLING METHODS

- Add new patients by confirming attachment, assigning MRP, and setting Active status within the EMR, and then submitting 98990 attachment code with usual billings.

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REMOVING PATIENTS: PERFORMED DIRECTLY WITHIN PAS

- Determine frequency in which the physician or delegate will sign into PAS to manually remove patients (e.g. weekly, monthly, quarterly).
- Continue to remove patients from your panel in your EMR by updating the status (e.g. Inactive, Deceased).
- Login to PAS to search for patients on your panel registry and use the 'remove' button to update your panel list.

KEEPING YOUR PAS PANEL UP TO DATE

- Periodically review any patients that have been attached but may not have been submitted to PAS using the 98990 attachment code.
- Periodically review any patients that are no longer part of your panel (e.g. updated to Inactive or Deceased) but may not have been removed from PAS.
- The following resources have been developed to help you keep your PAS panel list up to date and aligned with your EMR, including identifying which patients need to be added to PAS and removed from PAS:
  - ♦ Watch a demo of how to reconcile your EMR panel with your panel registry in PAS using a spreadsheet template.
  - ♦ Excel Template (shown in the video) - works in Excel and Open Office on both Windows and Mac.
  - ♦ Numbers Template - works in Numbers on Mac only.
  - ♦ NOTE: If panel management was not completed and panels were selected for upload using a specific criteria (e.g. seen in the last 3 or 5 years), this same criteria could be used for creating the EMR report which is used in the reconciliation process above.
- PSP can work with you to determine the best workflow for your specific EMR and clinic workflow to keep PAS up to date (e.g. setting up tasks within the EMR, utilizing the notes section, alternate tracking processes, etc.)

Where to access hands on support:

For support implementing customized workflows and keeping your panel registry up to date, or if you have not yet completed the phases of panel management and are interested in getting started, please reach out to the Practice Support Program at PSP@doctorsofbc.ca or submit a service request here.

Additional information online:

- **Doctors of BC:** doctorsofbc.ca/managing-your-practice/provincial-attachment-system
- **Doctors Technology Office:** doctorsofbc.ca/managing-your-practice/doctors-technology-office-dto/managing-your-emr/emr-resources-panel-clean
- **PAS:** https://www.bchealthprovider.ca/s/article/Update-Your-Panel (login required)