



Practice Support Program

## OSCAR: PANEL MANAGEMENT

Empanelment:

Using the PSP Dashboard

Panel Cleanup:

Using the PSP Dashboard

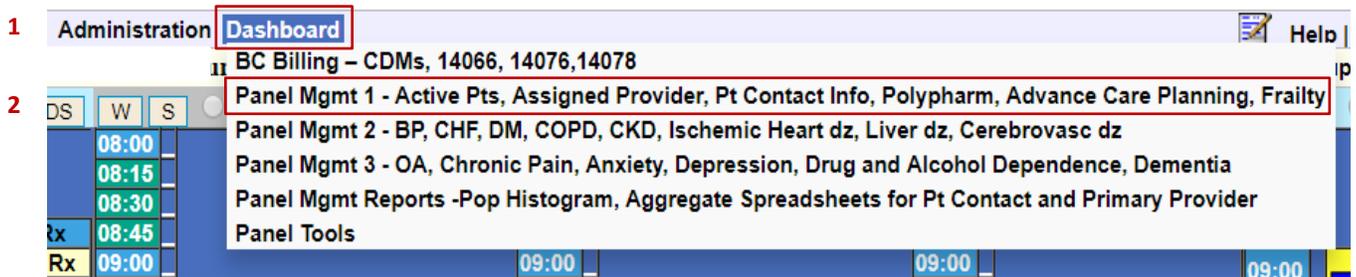
Adding Descriptors to the Titles

# Empanelment (Phase 1) – Using the PSP Dashboard

## Using the PSP Dashboard – Available in OSCAR Version 15 & Higher, Oscar Pro & Juno

If the Dashboard has been installed, you will see it to the right of the Administration button on your main toolbar. If it's not there, contact your OSP to activate it.

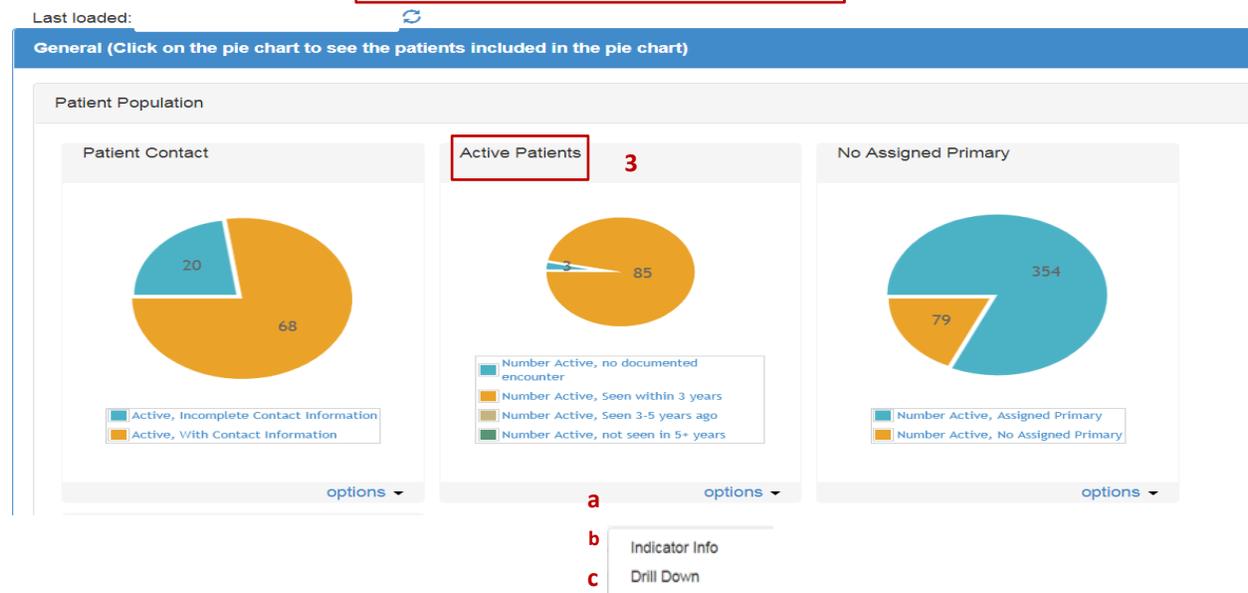
1. Select the Dashboard tab on your main screen
2. Choose Panel Mgmt 1 (if you do not have the descriptions of the panels, instructions follow to add them)



3. Active Patients Pie –In the box below the pie you will see the parameters of the different pie segments.
  - a the options drop-down menu has two selections: b Indicator Info shows you what the query is looking for. c Drill Down takes you to a list of patients. You can also click on the pie to get to the list of patients. **Note** - intuitively you would think if you click on a specific segment of the pie, you would get only that group of patients, unfortunately however, this is not the case you get the whole list and then have to filter it. ☹️



**Note** – if you do not have the option to change the dashboard provider, contact your service provider & they can add it for you.



## Filtering Your Lists

1. Change the number of entries that show on the page – a larger number is easier to scroll through
2. Sort the list by the table heading “Last Encounter” **Note** if there is no date under the last encounter either the pt has not been seen in the office (this search is looking for an encounter note) or it might be a new pt who has not yet been in to the office.

Active Patients :

1 **Show 10** entries

All All Parameter **2** Filter Reset

Actions	Patient Id	Patient Name	Date of Birth (mm-dd-yy)	Age	Last Encounter	Patient Status
1	1	TEST, PATIENT	06-15-1963	55	2019-04-11 19:58:53	AC
2	3			71	2019-04-23 07:08:10	AC
3	4			54	2019-04-18 07:40:01	AC
4	6			53	2019-04-24 09:36:56	AC
5	12			62	2019-03-28 07:39:09	AC

3. Check each box of the patients you want to inactivate
4. **a.** choose Actions drop down menu **b.** Set Status Inactive

**\*\* NOTE \*\*** This function will bog down your system, so it’s best to do it outside of clinic hours. **There is an option under Actions to “select all in view” use with caution as there is no “undo” button!** If you have selected “show 100 entries” & then “select all in view” under actions, it will select all 100, not just what you actually see on your screen.

Active Patients :

Show 10 entries

All All Parameter Filter Reset

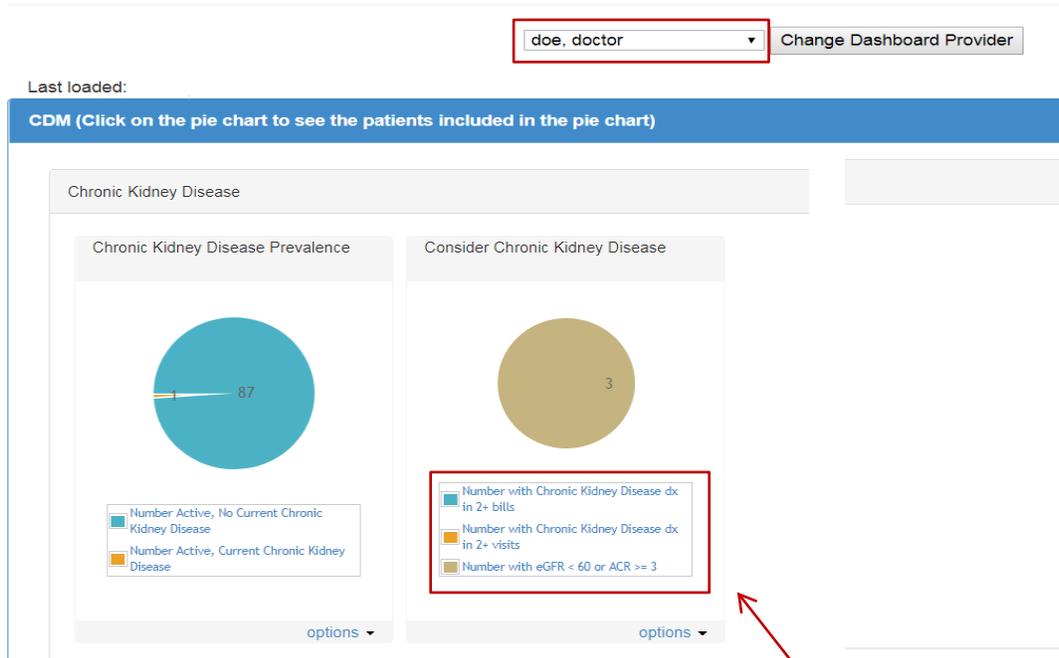
4a **Actions** **3**

Actions	Patient Id	Patient Name	Date of Birth (mm-dd-yy)	Age	Last Encounter	Patient Status
Select All in View Select None	1	TEST, PATIENT	06-15-1963	55	2019-04-11 19:58:53	AC
Assign Ticker	3			71	2019-04-23 07:08:10	AC
4b Set Status Inact	4			54	2019-04-18 07:40:01	AC
4	6			53	2019-04-24 09:36:56	AC
5	12			62	2019-03-28 07:39:09	AC

Don’t forget to check the “No Assigned Primary” pie. Decide how you are going to manage patients that do not have an MRP at your clinic. You might want to consider setting up a provider for “clinic patients” or “temp patients”. It makes it much easier to review those pts down the road & inactivate their files when appropriate.

## Panel Cleanup (Phase 2) – Using the PSP Dashboard

When a doctor is logged in, their panel will come up as the default. To change providers – select from the drop-down menu & click on “Change Dashboard Provider”. If you do not see this option, ask your service provider to add it for you.



The “prevalence” pie shows you the number out of your total active patients that have the indicated condition in the Disease Registry.

The “consider” pie lists patients, who meet the criteria shown in the box below the pie, but do not have that condition listed in their Disease Registry. If there are no patients to consider in a specific category, you will not see a pie. Click on the consider pie to see a list of patients to review. The list populates with pertinent lab results and entries from the measurements section of the EMR if applicable.

You can link to the echart to review as needed – see below for bulk functionality to add the condition to the Disease Registry.

### Consider Chronic Kidney Disease :

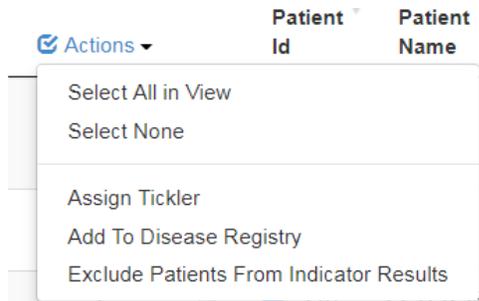
Show 10 entries

All All Parameter Filter Reset

Actions	Patient Id	Patient Name	Date of Birth	Age	Billings	Visits	Last EGFR	EGFR Date (yyyy-mm-dd)	Num. eGFR <60 Last 2yrs	Last ACR	ACR Date (yyyy-mm-dd)	Num. ACR >=3 Last 2yrs
1	98			59	0	0	43	12-18-2018	1	NA	NA	0
2	147			72	0	0	75	02-13-2019	0	5.3	02-13-2019	1
3	226			64	0	0	91	03-15-2019	0	14.8	01-21-2019	1

## Under Actions you have several options:

1. Select All in View – is based on the Show Entries box – not just what is actually showing on your screen. So if you have “show 50 entries” and then “select all in view”, it will select all 50
2. Assign Tickler – bulk assigns the same tickler to all the selected pts
3. Add to disease Registry – bulk assigns the condition to the disease registry for the selected pts
4. Exclude pts from Indicator Results - they will not re-appear on the consider list for one year.
5. In the Active Patients pie, there is an option to bulk inactivate patients.



### Assign Tickler ✕

Assign this Tickler action for each of the selected patients.

**Action:**  
Follow-up Billing

**Assign to:**  **Priority:**

**Service Date:**   **Time:** 5:00 PM 

**Message:**

Additional message.

## Adding Descriptors to the Panel Mgmt Dashboards

If your Dashboard only reads Panel Mgmt 1, Panel Mgmt 2 & Panel Mgmt 3 – you can add descriptors to the titles so it's easier to see which one to select.

In Administration go to Reports, then Dashboard Manager. Then Select "Edit Dashboard". You will just see Panel Mgmt 1, Panel Mgmt 2, etc without the descriptors. Select Panel Mgmt 1

The image shows two parts of a software interface. On the left is a vertical navigation menu with the following items: Administration Panel (with a gear icon), User Management, Billing, Labs/Inbox, Forms/eForms, Reports (highlighted with a blue bar and a red arrow pointing to it), Dashboard Manager (with a red arrow pointing to it), Query By Example, and Report by Template. On the right is a screenshot of the 'Dashboard Manager' interface. At the top, there are buttons for 'Import', 'Indicator XML Template', and 'Browse...'. Below these are 'Create Dashboard' and 'Edit Dashboard' (the latter is highlighted with a red box). A 'Library' section lists several dashboard entries, including 'BC Billing - CDMS, 14066, 14076, 14078', 'Panel Mgmt 1 - Active Pts, Assigned Provider, Pt Contact Info, Polypharm, Advance Care Planning, Frailty', 'Panel Mgmt 2 - BP, CHF, DM, COPD, CKD, Ischemic Heart dz, Liver dz, Cerebrovasc dz', 'Panel Mgmt 3 - OA, Chronic Pain, Anxiety, Depression, Drug and Alcohol Dependence, Dementia', 'Panel Mgmt Reports -Pop Histogram, Aggregate Spreadsheets for Pt Contact and Primary Provider', and 'Panel Tools'.

You are not creating a new dashboard here, only changing the title to include the descriptors. Type in the name descriptors (copy from the above screen shot) & save. Repeat for Panel Mgmt 2 & Panel Mgmt 3.

### Create Dashboard ✕

**Name**

**Description**

Active

**Do not edit or change anything else in this area unless you know exactly what you are doing!!**