

Small Group Learning Session

How to Manage Your Patient Panel with OSCAR

Accurate and up to date patient panel enables you to use the EMR confidently and to provide proactive, data-informed care for patients that you are responsible for.

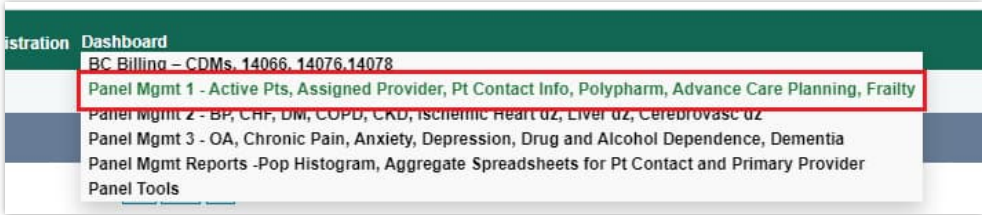
This “How-to” document guides through the phase 1 of panel management using Oscar electronic medical record (EMR). If you need assistance, please contact Practice Support Program at PSP@doctorsofbc.ca.

Oscar version 15 and higher, Oscar Pro, and Oscar Juno use dashboards to manage patient panel. Check your main toolbar: if you see **Dashboard** to the right of the **Administration** button, this functionality has been installed. If it is not there, contact your Oscar service provider to activate it.

Phase 1 – Empanelment

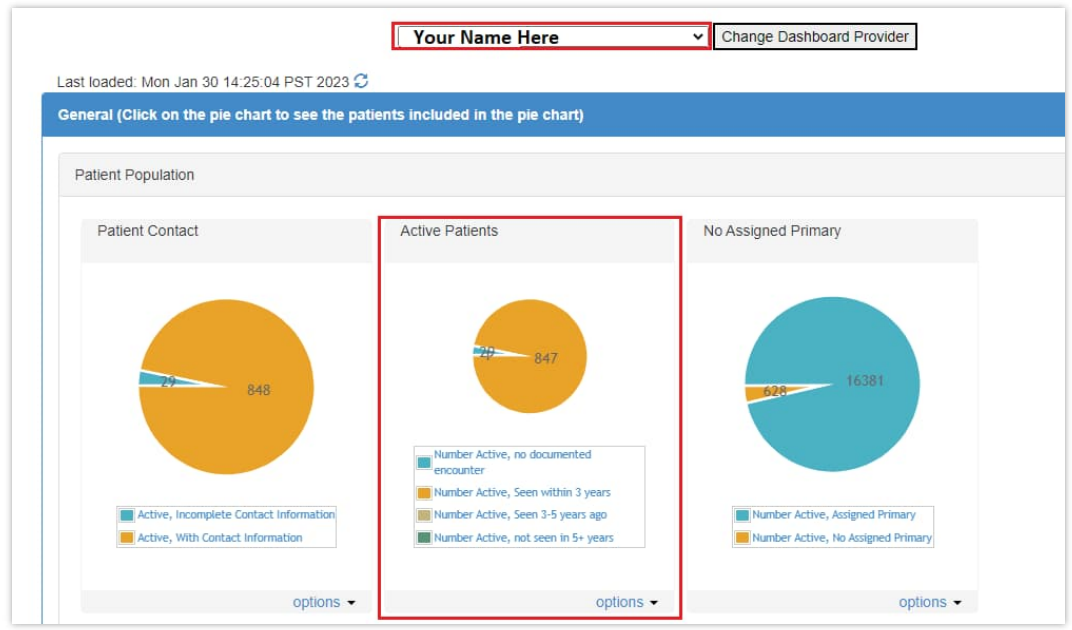
After completing Phase 1 actions you will be able to:

- Identify number of patients with no assigned most responsible provider (MRP), number of patients not seen in specific time range, and number of patients with missing demographics.
- Make necessary corrections in your EMR.
- Establish accurate patient panel.

ACTION	HOW TO
<p>Display a list of active patients assigned to you</p>	<p>To analyze your patient panel, retrieve names of patients assigned to you:</p> <ul style="list-style-type: none"> • Select the Dashboard tab on your opening screen main toolbar. • Choose Panel Mgmt 1 from the drop-down list. 

ACTION	HOW TO
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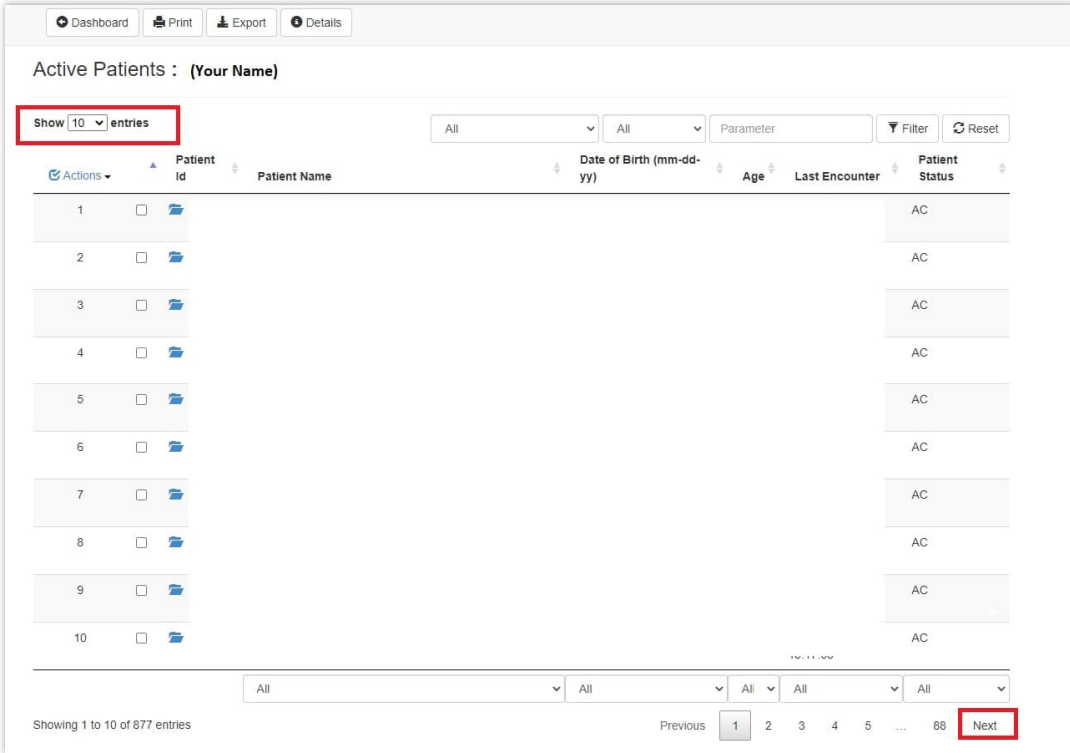
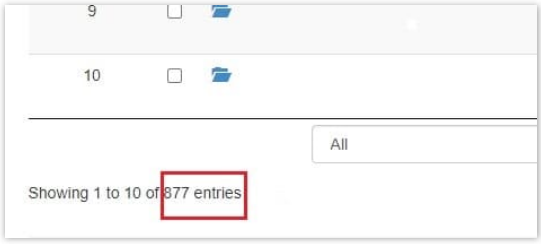
- Click on the **Active Patients** pie chart to list active patients under your name as the assigned provider.






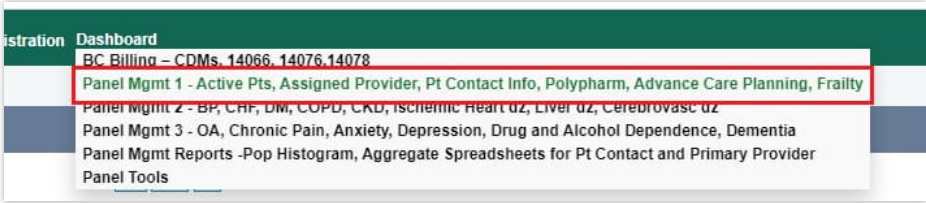
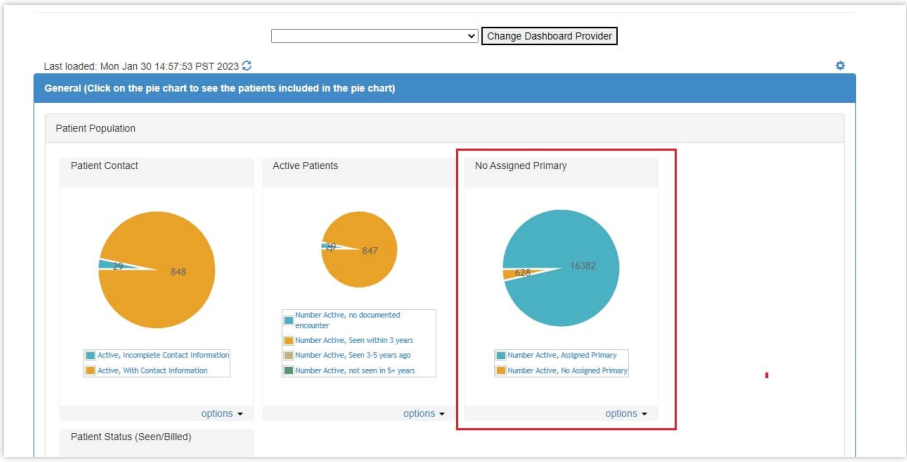
A list of all your Active Patients is displayed as one long list. You can filter this list using the drop-down menus at the top of the table to narrow this list.

The screenshot shows a table titled "Active Patients" with the following columns: Actions, Patient Id, Patient Name, Date of Birth (mm-dd-yy), Age, Last Encounter, and Patient Status. A filter dropdown menu is open over the "Last Encounter" column, showing options: All, Patient Id, Patient Name, Date of Birth (mm-dd-yy), Age, Last Encounter, and Patient Status. The "Last Encounter" option is highlighted in blue.

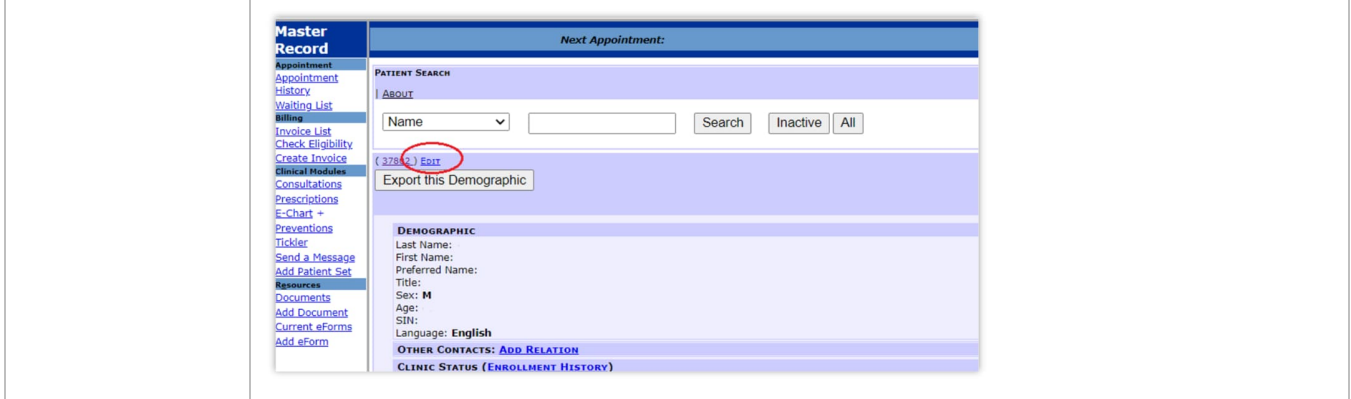
Actions	Patient Id	Patient Name	Date of Birth (mm-dd-yy)	Age	Last Encounter	Patient Status
1				58		AC
2				66		AC

ACTION	HOW TO
	<p>You can customize the number of entries to show per screen.</p> <ul style="list-style-type: none"> Click Next to advance through pages of results. 
	<ul style="list-style-type: none"> The total number of patients currently active and assigned to you is displayed at the bottom of the screen. Record this number for your measurement baseline. 
	<p>Review the patient list displayed. Consider what errors apply to your practice and what needs to be changed in your EMR. Identify areas for improvement and corrections needed in your EMR and discuss the process with your team.</p> <p>Next sections of this document provide instruction on how to correct most common errors in EMR.</p>

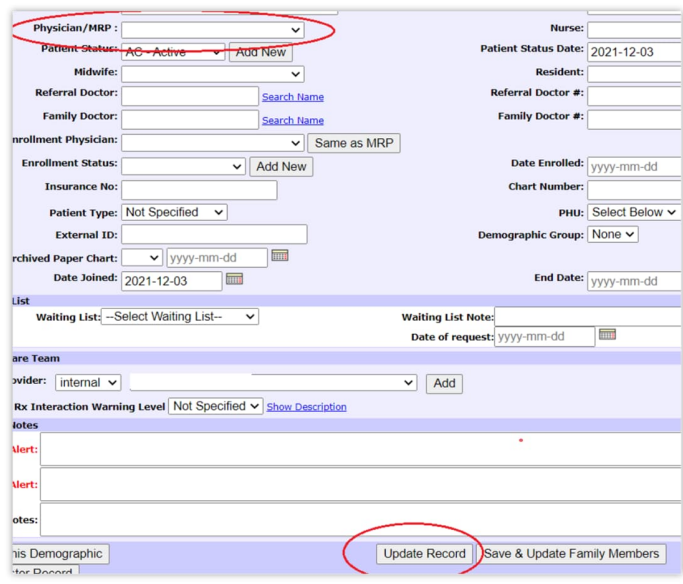
ACTION	HOW TO
<p>Remove patients from your panel</p>	<p>There might be many reasons why in your EMR patients are not assigned correctly. Discuss with your team any trends and different status needs.</p> <p>You can remove patient's name that should not be on your list of patients by changing patient status from Active to Inactive, Deceased, Moved, etc. as appropriate:</p> <ul style="list-style-type: none"> • Click on patient File Number to open their chart. • Click Edit to update their Master Record 
	<ul style="list-style-type: none"> • Change the Patient Status as appropriate. 
	<ul style="list-style-type: none"> • Then scroll to the bottom and click Update Record.

ACTION	HOW TO
	 <p>Your current patient panel will be updated.</p>
<p>Identify patients without a primary provider</p>	<p>Run a report for unassigned patients and add yourself as most responsible provider (MRP). Discuss with your practice team if there are any patients requiring investigation prior to adding or removing the assigned provider.</p> <ul style="list-style-type: none"> Click on Dashboard on your toolbar and select Panel Mgmt 1 from the drop-down list. 
	<ul style="list-style-type: none"> Click on the No Assigned Primary pie chart to open the list. 
	<p>Review the list and manually update patient's primary provider as appropriate.</p> <ul style="list-style-type: none"> Click on their Demographic Number to open their Master Record. Click Edit.

ACTION HOW TO



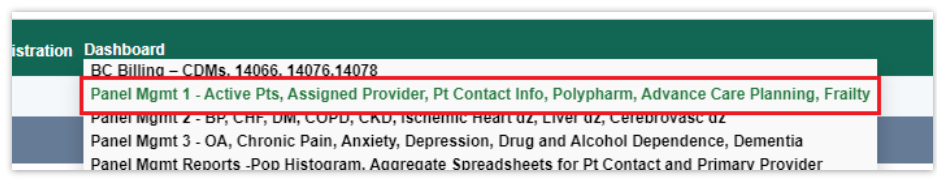
- Choose your name from the drop-down list under **Physician/MRP**.
- Click **Update Record** to save the change.

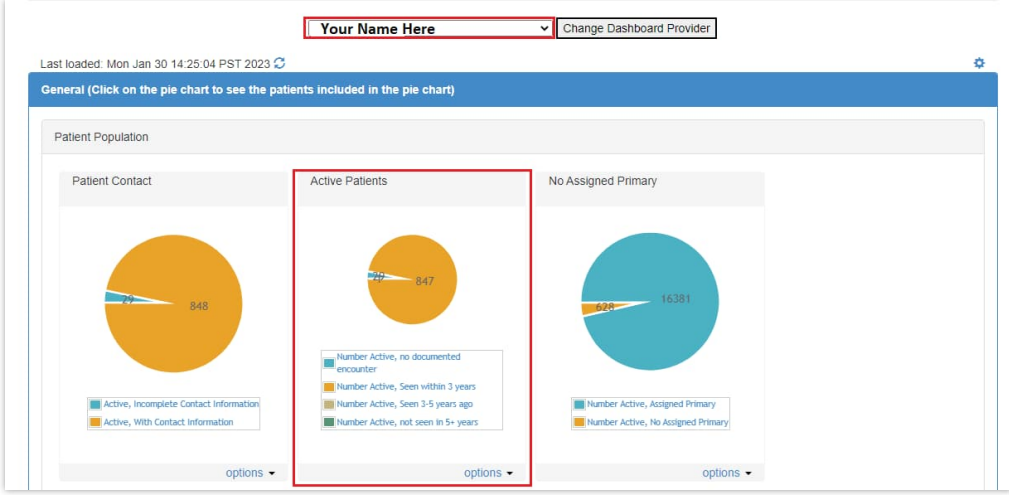

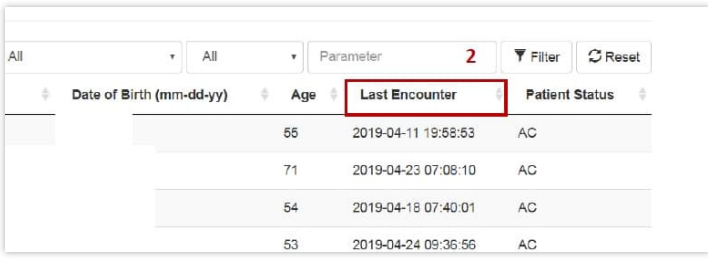


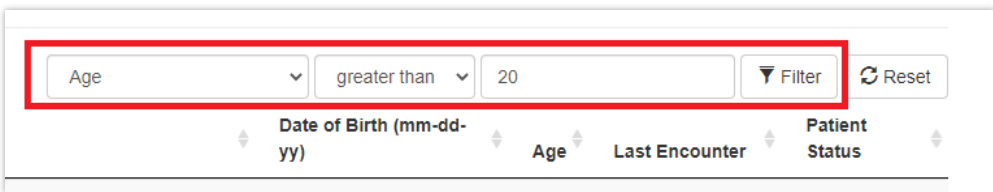
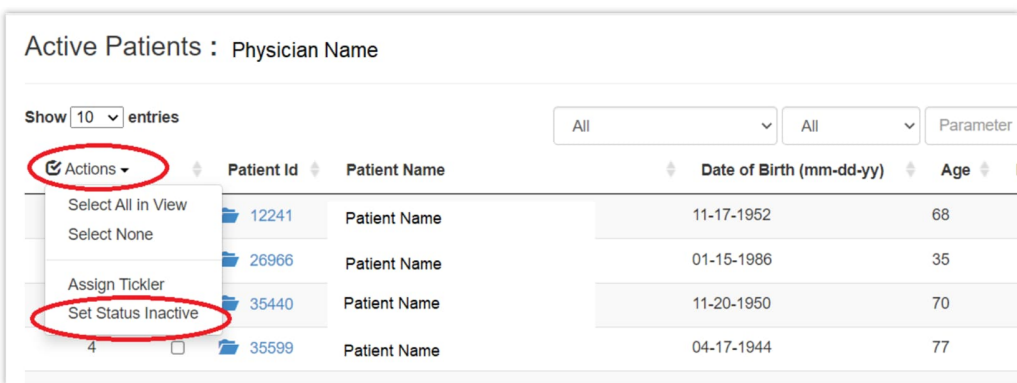
Deactivate patients not seen by x years

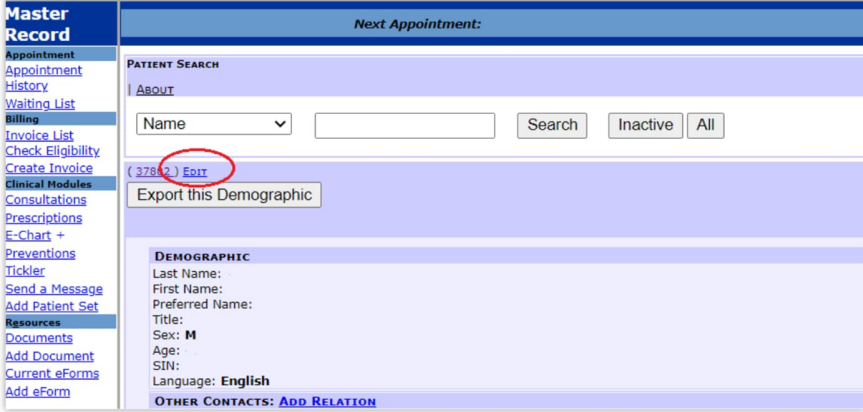
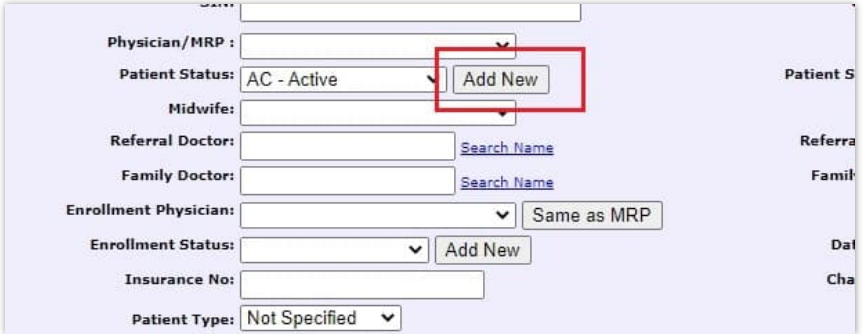
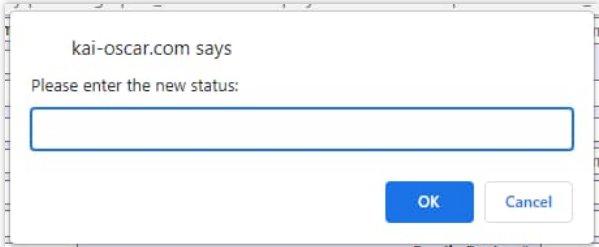
Identify patients with 'Active' status but have not been seen for last few years. Decide what date range for active patients suits your practice. Discuss with your team how they can help with necessary updates if needed.


- Click on **Dashboard** and select **Panel Mgmt 1** from the drop-down list.



ACTION	HOW TO
	<ul style="list-style-type: none"> Click on the Active Patients pie chart to display list of patients. 
	<ul style="list-style-type: none"> Change the number of entries per screen to show – a larger number is easier to scroll through. 
	<ul style="list-style-type: none"> Click the column heading Last Encounter to sort the list by most recent visit.  <ul style="list-style-type: none"> Scroll down to identify patients with last encounter outside of the date range that you have specified for active patients. <ul style="list-style-type: none"> NOTE: This search is looking for an encounter note. If there is no date under the last encounter, either the patient has not been seen in the office or it might be a new patient who has not yet had their first appointment.

ACTION	HOW TO
	<p>To narrow the list, you can also use additional filters. For example search for patients older than 20 years to remove them from the view.</p> <ul style="list-style-type: none"> • Select criteria from drop-down menus at the top of the page, for our example select Age select greater than type 20 • Click Filter to execute the search. Patients 
	<p>Click patient id number to open master record and review patient’s e-chart.</p> <ul style="list-style-type: none"> • Check off the patient you want to deactivate. • Click Actions to display options. • Select Set Status Inactive. <p>Inactive patients will not be listed in the next search.</p>  <p>To update more than one patient at a time, use batch action. Check off all the patients you want to deactivate.</p> <p>□ NOTE: This action cannot be undone. You may wish to print or save a list of these patients prior to inactivating.</p>

ACTION	HOW TO
<p>Manage patient status options and correct entries</p>	<p>To maintain your panel effectively, you may consider adding patient statuses other than Active, Inactive, and Deceased to identify patient populations, e.g., for walk-in, maternity, or cosmetic treatment. Discuss with you team criteria for different statuses that will remove patients from your active patients' panel.</p> <p>To create a new status, locate the patient for whom this new status applies.</p> <ul style="list-style-type: none"> • Open Master Record for this patient. • Click Edit. 
	<ul style="list-style-type: none"> • Locate the Patient Status field and click Add New. 
	<ul style="list-style-type: none"> • Type the name for the new status, then click OK. 

ACTION	HOW TO
	<p>The new status will now be available in the Patient Status drop-down list in all charts:</p>  <p>NOTE: New statuses can't be edited later. You can only inactivate the status you no longer need. Apply a different status to all patients with the status you wanted to change. Then, the unwanted and not used status will no longer appear on the drop-down list.</p>
<p>Outcome</p>	<p>After completing this section, you can report current and accurate number of active patients assigned to you.</p> <p>Plan the process with your team and assign responsibilities to ensure the accuracy of entries from this point forward.</p>