



TOOL

Panel Management: Steps to Pull a List of Patients



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NOTES FOR ONTARIO HEALTH TEAMS

Relevant for teams in:



Year 1 Implementation

Connecting to RISE:

- [Building Block 6](#): Leadership, accountability and governance (Domain 47 - Proactive provider engagement)

Primary care participation and leadership are an essential cornerstone of Ontario Health Teams. At maturity OHTs will be expected to better support primary care as part of an integrated team and provide access to more robust data and digital tools in their practices.

Primary care physicians will play an important role in supporting integrated care for OHT Year 1 populations. This vision will not be realized without tactical supports for OHTs to effectively engage primary care practices AND on-the-ground assistance for clinicians to introduce positive change in their practices.

The **Panel Management Tool** helps primary care physicians get the most out of their existing EMRs with a step-by-step guide on how to pull a list of patients with particular characteristics.

Proactive identification is the first step to improve management of patient populations. One way to support physicians actively participating in OHTs is to help them identify cohorts of patients within their own practice and get a better understanding of what their full patient population (panel) looks like.

IN A NUTSHELL



Health care providers strive to provide the best possible care to their patients. Faced with competing demands, it can be hard to stay on top of everything and prevent patients from falling through the cracks in the system. Electronic medical records (EMRs) have built-in features that allow primary care providers to pull lists in order to better understand their patient population (panel).

What does this tool help you do?

This tool outlines how to pull a patient list from the most common EMRs used in primary care (Telus PS Suite, Accuro, and OSCAR). This list includes all rostered patients or patients who have visited a particular physician.

ABOUT THIS TOOL



What was the tool developed for?

In speaking to primary care physicians, we heard that there is a need to better leverage the existing capacity of EMRs to support primary care practice and population health. To advance this idea, we developed a short Panel Management Tool to provide guidance on how to pull the list of patients rostered or that have seen a particular family physician from the EMR.



How did we use it?

Being able to pull a list of names helps both physicians and their patients. We used the tool to support primary care physicians to:

- Clarify who is part of the practice population.
- Identify patients who may be overdue for care, require follow-up, or could benefit from additional services.
- Develop processes to make sure patients do not fall through the cracks and get connected to the services they need.

HOW YOU CAN USE THIS TOOL



Build on your list. This tool provides instructions for how to pull a basic list of patients in the EMR. Depending on how information is captured, you can also pull a list based on demographics, clinical conditions, and preventive measures (including immunizations and screening).



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**TOOL
Panel
Management**

Panel Management Tool: Steps to Pull a List of Patients

TELUS PS SUITE EMR:

From the main toolbar, choose **Reports > List > Patient List:**

- This list shows all the patients in the practice and includes name, age, gender, city, phone number, and last billed. It can be filtered by physician.
- You can double-click a patient in the resulting list to open that patient's demographics file.

From the main toolbar, choose **Reports > Analysis > Analysis of Patients:**

- Search by a specific provider and for certain time period (1 year, 5 year, or 10 year).
- This list shows the panel size and a breakdown by age but does not include patient names.

Alternate method (more customizable):

- **Records > Settings** (in the patient's chart view) **> Edit Searches > Add Search >** give a name to new search **> Add Line** (to add required criteria).

ACCURO EMR:

- A **"Definition"** needs to be created. From the main screen, click on **Accuro Logo (left bottom corner) > Reports > Query Builder**. Here you have the option to create a new definition by selecting the green "plus" sign and choosing the criteria from the demographic section.
- To run a report on a previously created definition, click on a **Definition** to select it.
- Click **Run Report**.
- Select the **Provider(s)** whose patients you wish to include in the report or select **All Patients**.
- Choose whether or not you wish to include patients with an alert status of **Unassigned, Assigned, and/or Completed**.
- Click **Run**. This will open the **Alert Matches** dialog with the results of your report. Once the report has been run, you have several options with the Results.

OSCAR EMR:

From the home screen, click the **Report bar** and **"Active Patient List"**.

- This list gives name, age, sex, health card number, date joined, and phone number. It includes options to look at those who are rostered, unrostered, or active. It does not include patients who are marked as inactive or deceased.
- If patients are rostered to yourself as a provider, you can also use the caseload view.
- Other reports are available such as the no-show appointment list.

An alternate option is to use report number 11 **"Demographic Report Tool."** You can select provider, roster, patient status and other combinations.

As you read this list, consider patients who:

- Have missed several appointments or have not been seen in over 3 years
- May benefit from a review of medications
- Are due for preventive screening
- You see frequently or you know are often in the emergency room
- Can be linked with resources (e.g. community services) for social determinants of health

Related Resources

Quick Way to Earn CME Credits:

Reviewing this report can be eligible for 5 certified credits. To report these credits:

- Go to cfpc.ca/cpd/, log-in and when entering a credit, select **Selflearning > Certified > Activity type “Linking Learning to Research.”**
- The questions may seem research-focused but can be answered for quality improvement activities such as these.

Clinical Resources:

- [HQO MyPractice Primary Care Report](#)
- [OntarioMD Peer Leader Program](#)
- [EMR Progress Assessment](#)
- [EMR Practice Enhancement Program](#)
- [OCFP EMR Resources](#)
- [Panel Identification and Panel Management Workbook \[Alberta\]](#)
- [EMR Guide for Patient’s Medical Home \[Alberta\]](#)

EMR Resources:

- [PS Suite EMR User Guide Version 5.8](#), page 177, 384 and 387
- [Accuro EMR User Manual Version 5.0](#), page 224-227
- [OSCAR EMR User Manual Version 2.2](#), pages 95 and 108