

PANEL PROCESSES

Purpose: To assist primary care clinics in optimizing processes for panel management.
Aim Statement: By X date provider X can produce a confirmed list of their patient panel.
Outcome Measure: # of patients on confirmed panel list to plan proactive care.
Balancing Measure: Team satisfaction with panel process.



High Impact Changes	Potentially Better Practices	Process Measures	Tools
Identify patients on the panel	At every interaction, ask who the patient identifies as their primary provider and confirm demographics	# of patients with unassigned primary provider	Guide to Panel Identification
	Mark the ER (i.e., date stamp) as patient's status (demographic information and primary provider) has been confirmed/updated	# of patients confirmed	STEP Checklist STEP Toolkit STEP Workbook
	Review HQCA Primary Healthcare Panel Report with team members. Suggested section: <ul style="list-style-type: none"> Panel Characteristics 	HQCA Primary Healthcare Panel Report distribution of patient continuity (%) to physician	HQCA Primary Healthcare Panel Report
Maintain panel processes	Establish a process for confirming attachment to practice for patients not seen within the past 3 years	# of patients on panel not seen within the past 3 years	Panel Maintenance Tool
	Assign an EMR status to each patient to isolate active panel		EMR Guide
	Submit panels to CII-CPAR and resolve conflicts	# of patients on CPAR conflict report	CII-CPAR Team Toolkit



High Impact Changes	Potentially Better Practices	Process Measures	Tools
Optimize care management for the panel	Review HQCA Primary Healthcare Panel Report with team members. Suggested sections: <ul style="list-style-type: none"> • Preventive Care • Chronic Conditions 		HQCA Primary Healthcare Panel Report
	Select a clinical focus area to improve care for your patients		Toward Optimized Practice Clinical Practice Guideline Program ACTT Change Packages
	Generate patient lists for planning team-based care	# of patients eligible for care intervention # of offers of care # of completed care activities (e.g. screening maneuvers, interventions)	EMR Guide