



Panel Processes

Purpose:
To assist primary care clinics in optimizing processes for panel management.

Outcome Measure:
The number of patients on a confirmed panel list to plan proactive care.

Prerequisite Tools

Aim Statement:
By a specific date, the provider can produce a confirmed list of their patient panel.

Balancing Measure:
The clinic team's satisfaction with the panel process.

Prerequisite Change Packages



Search our collection of premium tools in [AMA's Resource Centre](#).

High Impact Changes

Potentially Better Practices (PBPs)

Process Measures

Searchable Tools

1. Identify patients on the panel

1.1 At every interaction, ask who the patient identifies as their primary provider and confirm their demographics.

1.2 Mark the EMR (i.e., date stamp) as the patient's status, demographic information and primary provider, have been confirmed and updated.

1.3 Review HQCA Primary Healthcare Panel Report with team members. Suggested section:

- Panel Characteristics

The number of patients with unassigned primary provider

The number of patients with confirmed demographic and primary provider information.

HQCA Primary Healthcare Panel Report distribution of patient continuity (%) to physician

- Guide to Panel Identification
- STEP Checklist
- STEP Toolkit
- STEP Workbook
- HQCA Primary Healthcare Panel Report


2. Maintain panel processes

2.1 Establish a process for confirming attachment to practice for patients not seen within the past 3 years

2.2 Assign an EMR status to each patient to isolate active panel

The number of patients on the panel that have not been seen within the past three years.

- Panel Maintenance Tool
- EMR Resources

High Impact Changes	Potentially Better Practices (PBPs)	Process Measures	 Searchable Tools
2. Maintain panel processes (cont.)	2.3 Submit panels to CII/CPAR and resolve conflicts	The number of patients on CPAR conflict report	<ul style="list-style-type: none"> • CII/CPAR Team Toolkit
3. Optimize care management for the panel	3.1 Review HQCA Primary Healthcare Panel Report with team members. Suggested sections: <ul style="list-style-type: none"> • Preventive Care • Chronic Conditions 		<ul style="list-style-type: none"> • HQCA Primary Healthcare Panel Report
	3.2 Select a clinical focus area to improve care for your patients		<ul style="list-style-type: none"> • Clinical Practice Guidelines • Change Packages
	3.3 Generate patient lists for planning team-based care	The number of: <ul style="list-style-type: none"> • patients eligible for care intervention • offers of care • completed care activities (e.g. screening maneuvers, interventions) 	<ul style="list-style-type: none"> • EMR Resources

