

Empanelment in ACCURO



An 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 phase 1 of panel management using ACCURO electronic medical record (EMR).


ACCURO uses Advanced Reporting to manage patient panels. The fee is paid by Doctors of BC so there is no fee for physicians for installation. Register with QHR to ensure Advanced Reporting/Outcomes Dashboard is available to regularly review and update patient profiles.

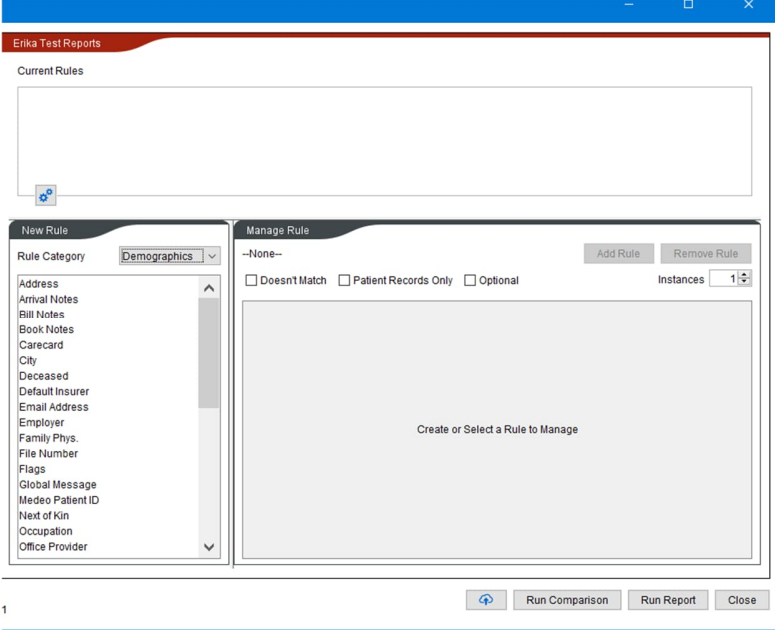
- Panel Management actions require some changes in your EMR settings. Ensure your staff has an appropriate level of administrative privileges.

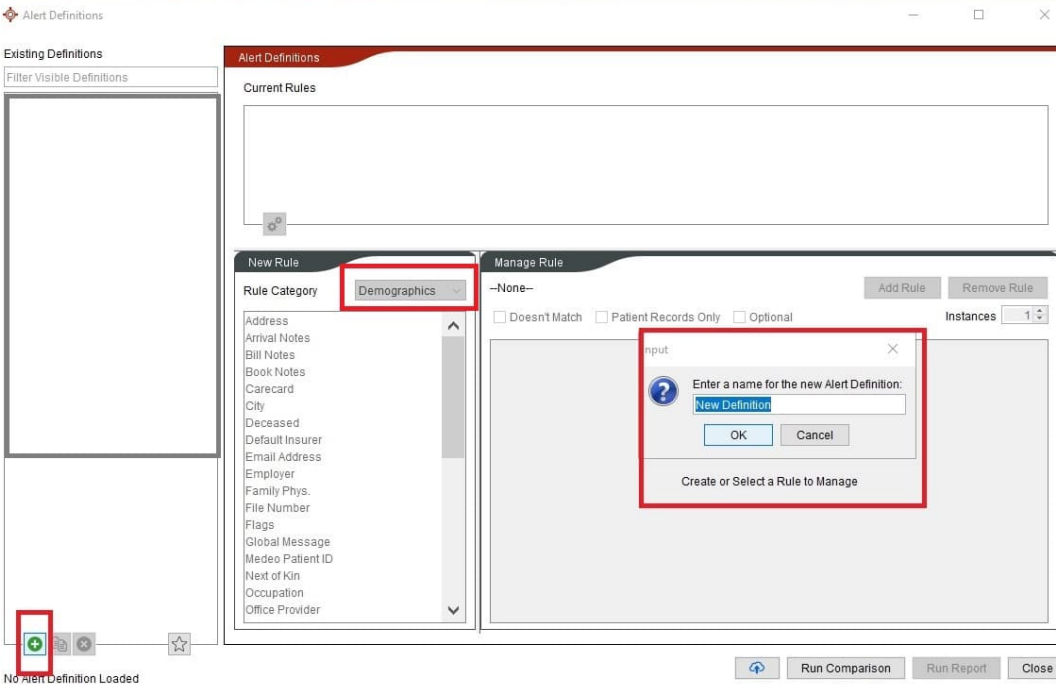
Empanelment

After completing Phase 1 actions you will be able to:

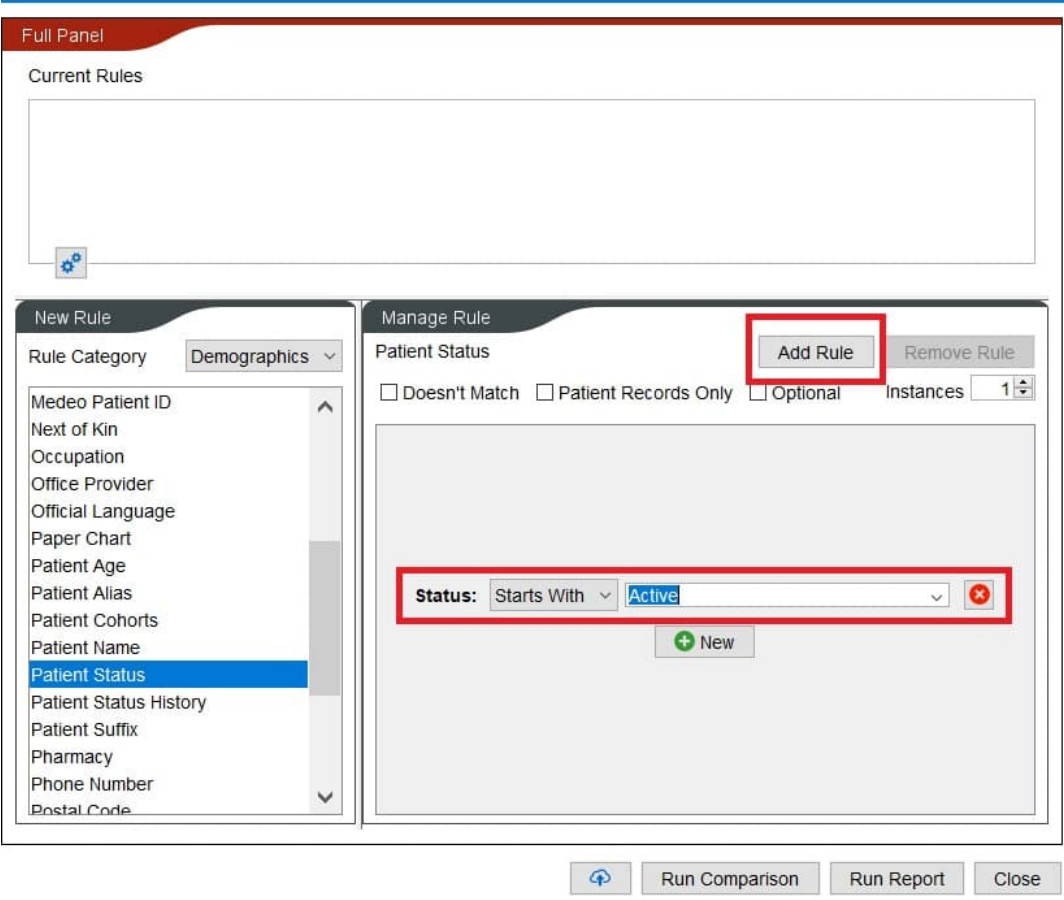
- Establish baseline measures for unassigned patients, patients not seen for x years, and patients with missing demographics to assess your progress.
- Make necessary corrections in your EMR.
- Establish your accurate patient panel.

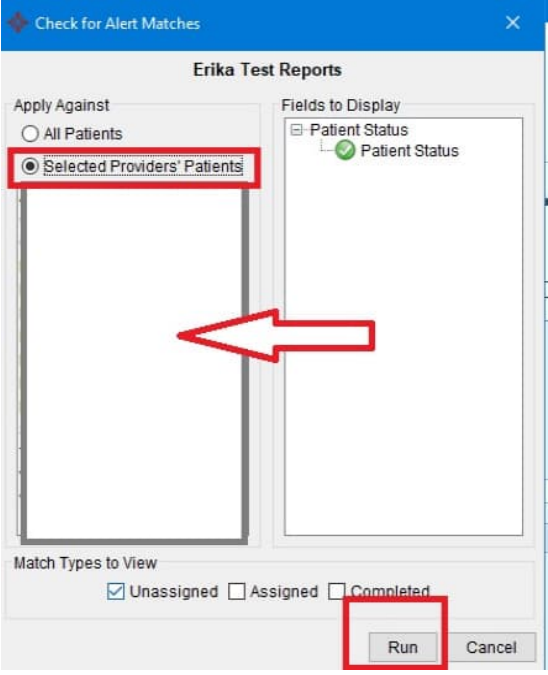
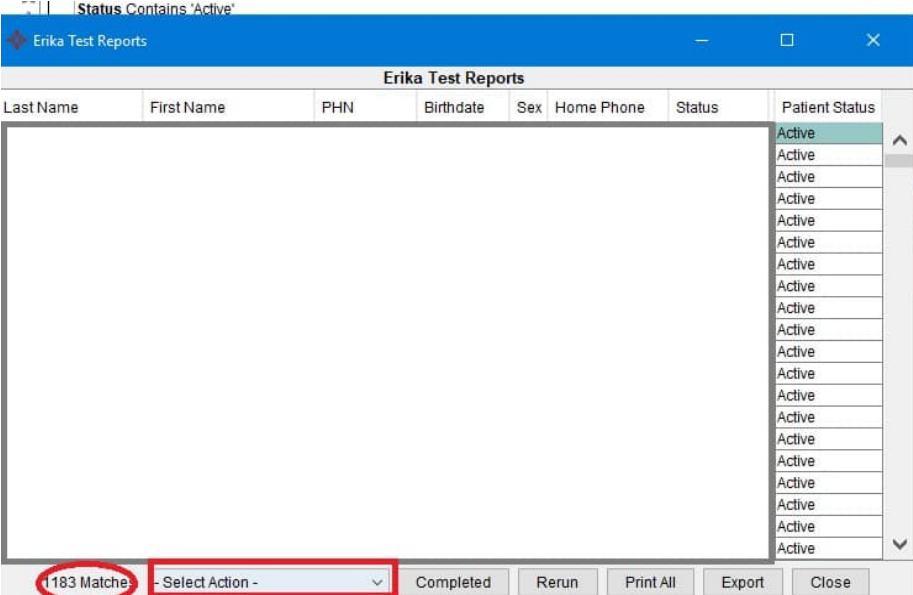
ACTION	HOW TO
Display a list of active patients assigned to you	To analyze your patient panel, retrieve names of active patients assigned to you: <ul style="list-style-type: none">• Click the  icon on the Home screen.• Click Reports → Query Builder• This will open a blank search page.

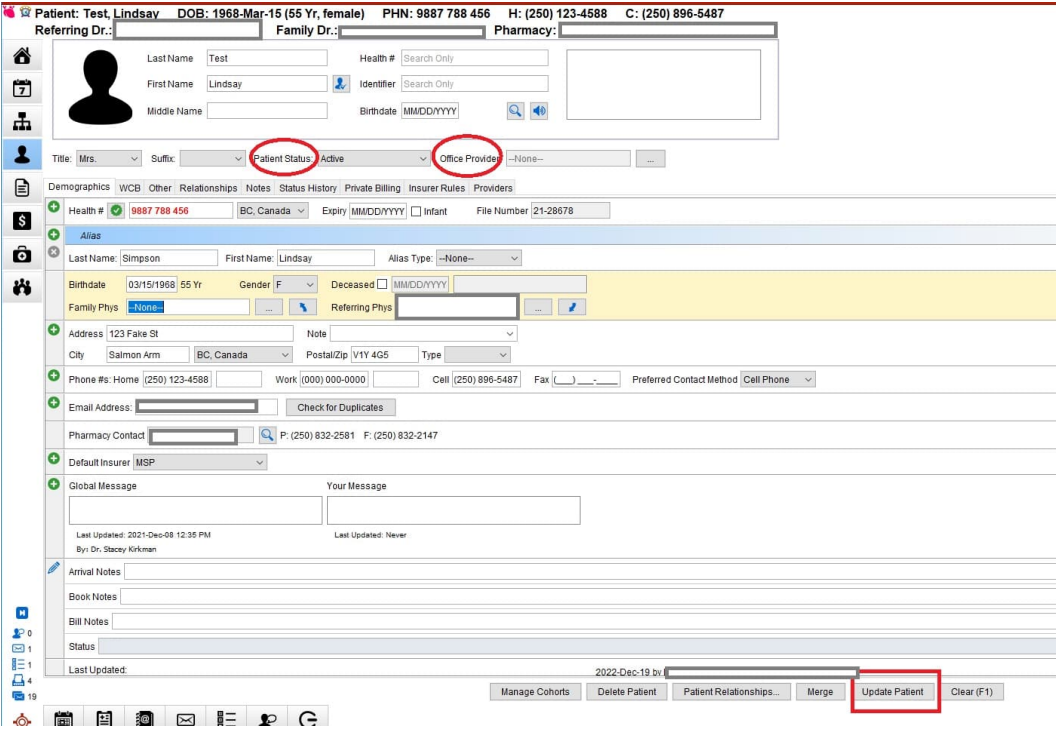
ACTION	HOW TO
	 <p>The screenshot displays the 'Erika Test Reports' application window. At the top, there is a 'Current Rules' section with an empty list and a plus icon. Below this, two dialog boxes are open. The 'New Rule' dialog has a 'Rule Category' dropdown set to 'Demographics' and a list of fields including Address, Arrival Notes, Bill Notes, Book Notes, Carecard, City, Deceased, Default Insurer, Email Address, Employer, Family Phys, File Number, Flags, Global Message, Medco Patient ID, Next of Kin, Occupation, and Office Provider. The 'Manage Rule' dialog shows a '-None-' selection, 'Add Rule' and 'Remove Rule' buttons, checkboxes for 'Doesn't Match', 'Patient Records Only', and 'Optional', and an 'Instances' dropdown set to '1'. At the bottom of the dialog, there are 'Run Comparison', 'Run Report', and 'Close' buttons.</p>


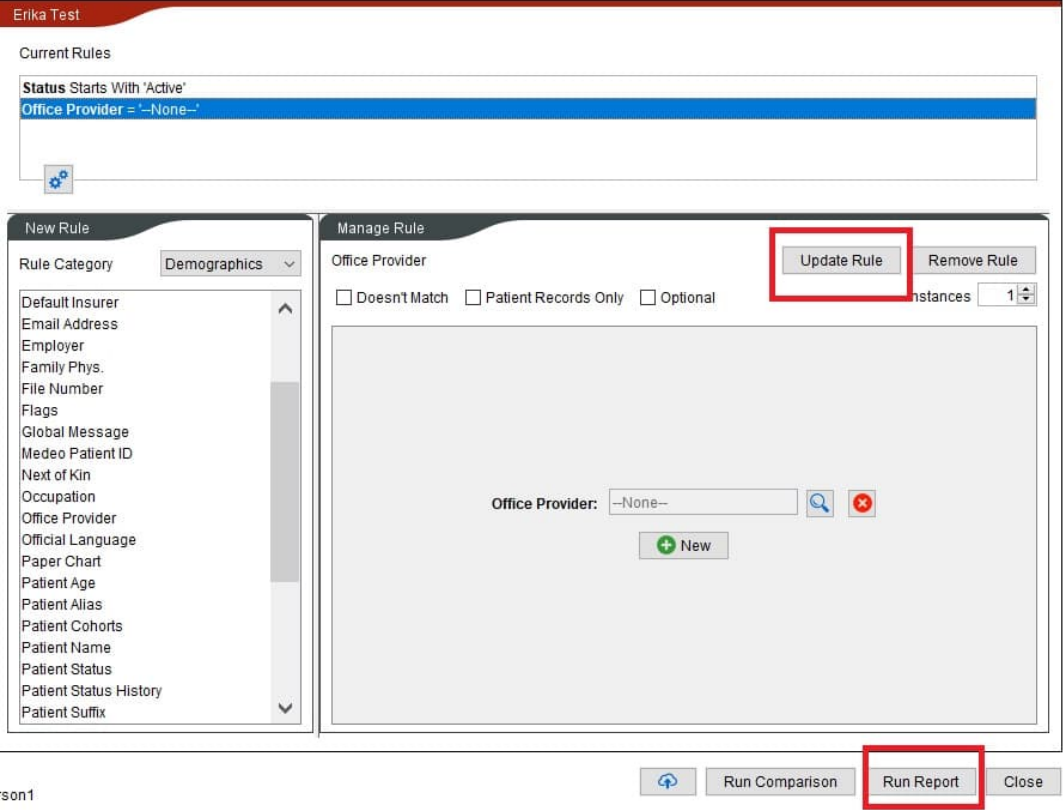
ACTION	HOW TO
	<ul style="list-style-type: none"> Click on the GREEN + to create New Query and title your query. Click OK. 
	<ul style="list-style-type: none"> From Rule Category -> Demographics scroll down until you find Patient Statuses. Double Click on Patient Status and a New Constraint automatically populates. Click on New

ACTION	HOW TO
	<div data-bbox="383 403 1396 1198"><p>Erika Test Reports</p><p>Current Rules</p><div data-bbox="391 481 1372 627"></div><div data-bbox="383 649 1388 1131"><p>New Rule</p><p>Rule Category: Demographics</p><ul style="list-style-type: none">OccupationOffice ProviderOfficial LanguagePaper ChartPatient AgePatient AliasPatient CohortsPatient NamePatient StatusPatient Status HistoryPatient SuffixPharmacyPhone NumberPostal CodeProvince or StateReferral DateReferring Phys.Registration No.<p>Manage Rule</p><p>Patient Status</p><p><input type="checkbox"/> Doesn't Match <input type="checkbox"/> Patient Records Only <input type="checkbox"/> Optional</p><p>Instances: 1</p><div data-bbox="694 761 1372 1108"><p>Not Constrained</p><p></p></div><p><input type="button" value="Add Rule"/> <input type="button" value="Remove Rule"/></p></div></div> <div data-bbox="989 1142 1396 1176"><p> <input type="button" value="Run Comparison"/> <input type="button" value="Run Report"/> <input type="button" value="Close"/></p></div>

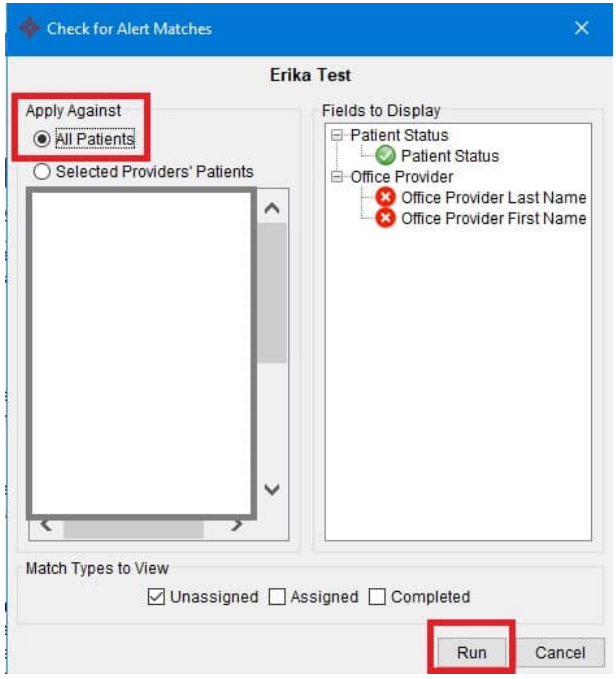
ACTION	HOW TO
	 <p>The screenshot shows a software interface for managing rules. At the top is a 'Full Panel' header. Below it is a 'Current Rules' section with a gear icon. The main area is split into two panes: 'New Rule' and 'Manage Rule'. The 'New Rule' pane shows a list of categories under 'Demographics', with 'Patient Status' selected. The 'Manage Rule' pane shows 'Patient Status' with 'Add Rule' and 'Remove Rule' buttons. Below these are checkboxes for 'Doesn't Match', 'Patient Records Only', and 'Optional', and an 'Instances' dropdown set to '1'. A red box highlights the 'Add Rule' button. Another red box highlights the 'Status' field, which is set to 'Starts With' and 'Active'. A '+ New' button is below the status field. At the bottom of the interface are buttons for 'Run Comparison', 'Run Report', and 'Close'.</p> <ul style="list-style-type: none">• Ensure the Status is set to “Starts With” Active and select your name under Select Office Provider.

ACTION	HOW TO
	 <ul style="list-style-type: none"> • Select the Office Provider → Run • This will generate a list of your active patient population.
	


ACTION	HOW TO
	<p>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. Next sections of this document provide instruction on how to correct most common errors in EMR.</p>
<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, Duplicate etc. as appropriate:</p> <ul style="list-style-type: none"> • To change a patient's Status or Office Provider open their chart and click on the Patients tab. • Select a different status from the Patient Status drop-down menu, for example Inactive, Moved, or Deceased. • To be reportable, Patient Status must be "Active", and Office Provider must not be blank. 

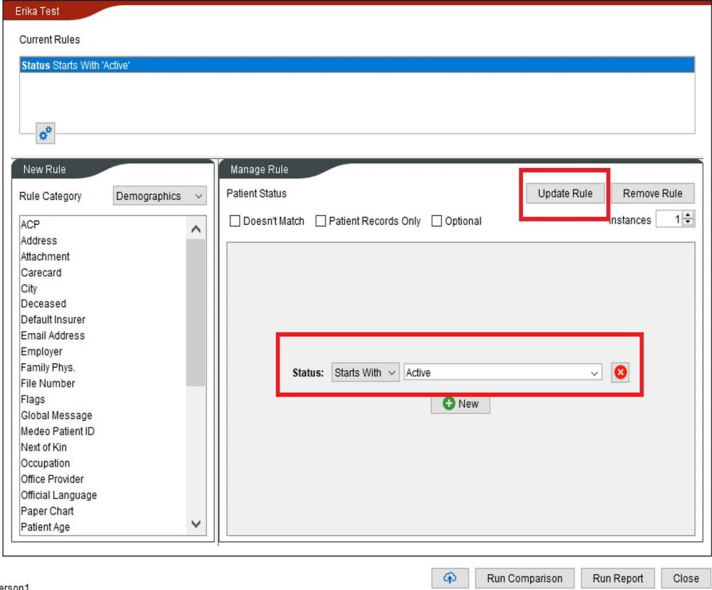
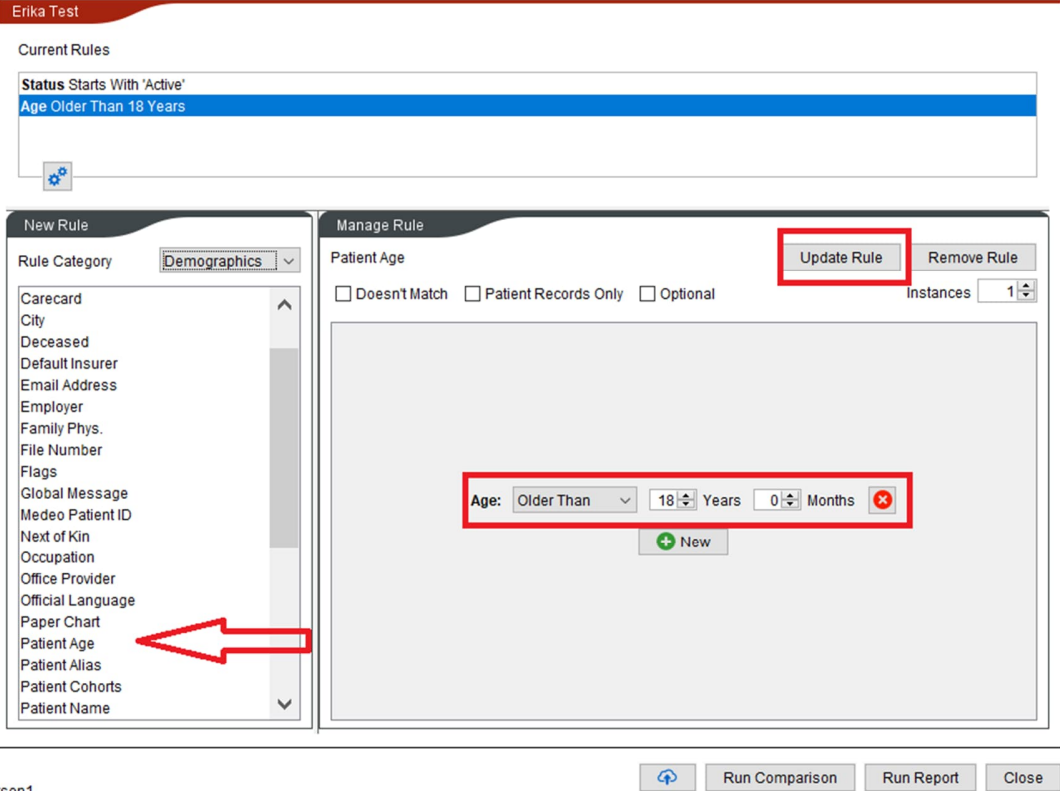
ACTION	HOW TO
	<ul style="list-style-type: none"> Choose your name from the Office Provider list. Click Update to save changes. <p>Your current patient panel will be updated.</p>
<p>Identify patients without a primary provider</p>	<p>Run a report for unassigned patients and add yourself as primary provider.</p> <p>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 the  icon on the Home screen. Click Reports → Query Builder
	 <p>The screenshot shows the 'Erika Test' interface. At the top, there's a 'Current Rules' section with two rules: 'Status Starts With 'Active'' and 'Office Provider = --None--'. Below this is a 'New Rule' section with a list of categories under 'Demographics', including 'Office Provider'. To the right is a 'Manage Rule' section for 'Office Provider' with options like 'Doesn't Match', 'Patient Records Only', and 'Optional'. The 'Update Rule' button is highlighted with a red box. At the bottom, the 'Run Report' button is also highlighted with a red box.</p>

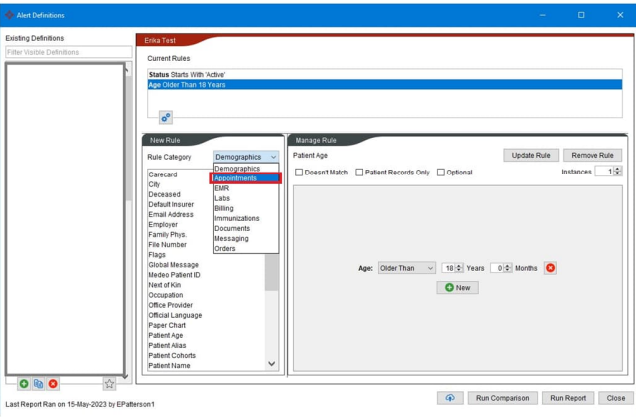
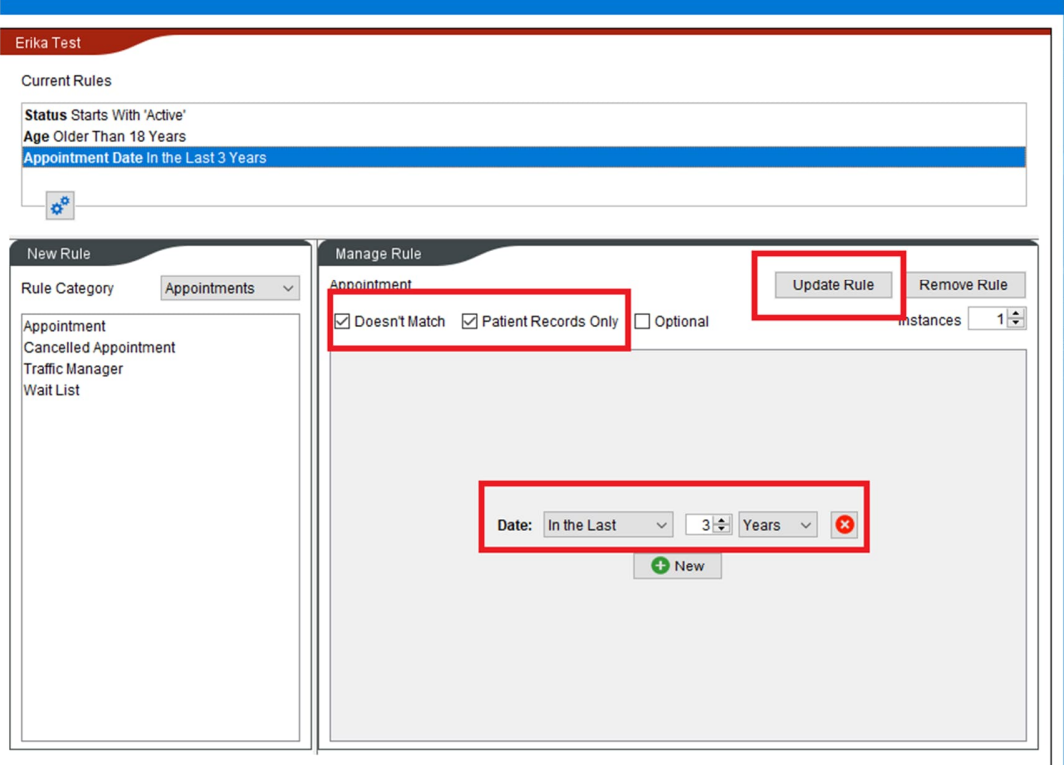
ACTION	HOW TO
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Because this list will most likely produce a large patient population it is best to run the report outside of office hours so that it does not slow down the EMR.

	<p>Deactivate patients not seen by x years</p>	<p>Identify patients with 'Active' status but have not been seen for the last few years. Decide on the process that suits your practice and discuss with your team any necessary updates.</p> <ul style="list-style-type: none"> • Click the  icon on the Home screen. • Click Reports → Query Builder • Below is each step to build the Query for Patient Panel Not in 3 years or Future Appointment. The criteria of this search can be adjusted to suit your parameters.
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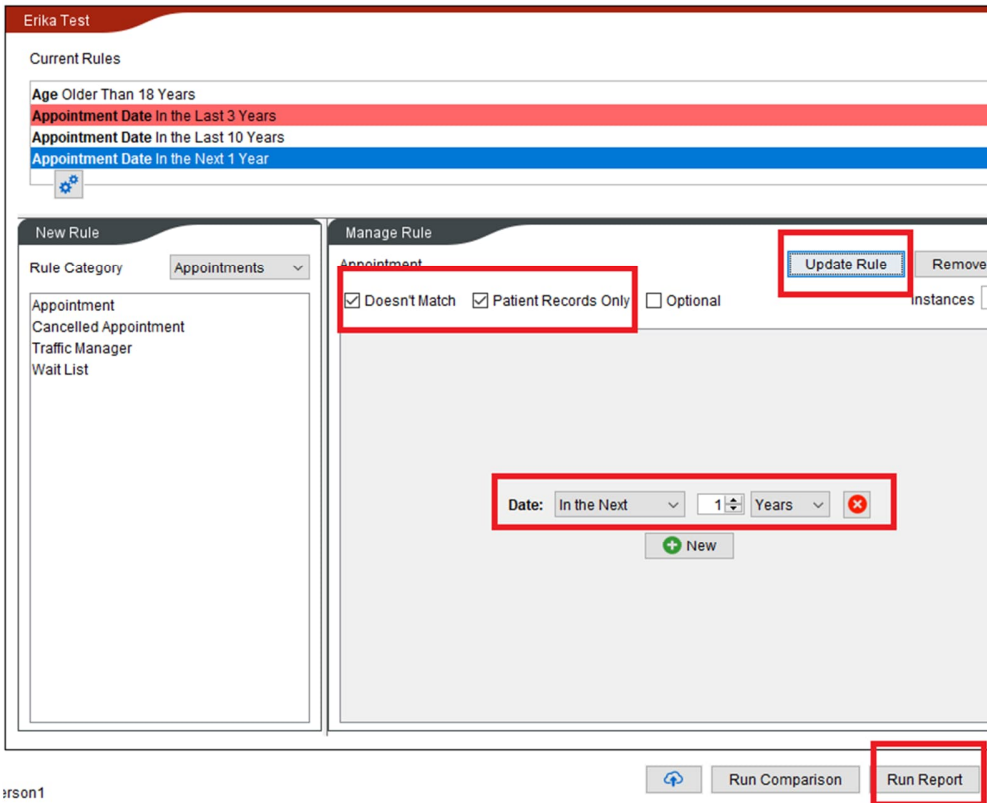
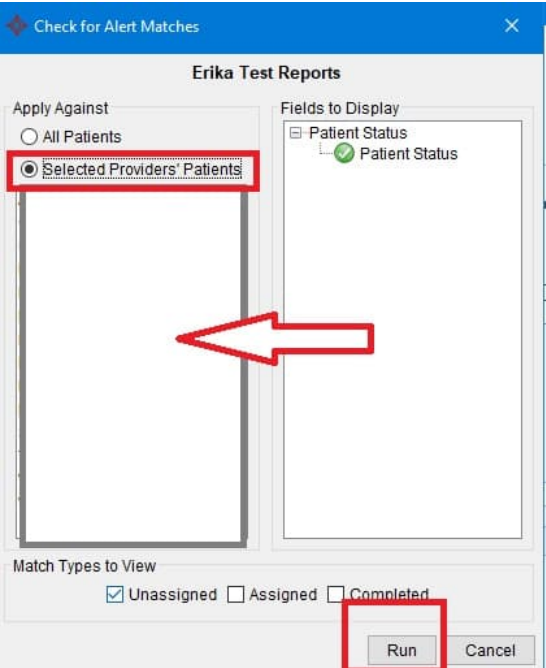
ACTION	HOW TO
	 <p>The screenshot shows the 'Erika Test' interface. Under 'Current Rules', there is one rule: 'Status Starts With 'Active''. Below this is a 'New Rule' dialog with 'Demographics' selected as the 'Rule Category'. The 'Manage Rule' section shows 'Patient Status' with options for 'Doesn't Match', 'Patient Records Only', and 'Optional'. The rule is set to 'Status: Starts With Active'. There are 'Update Rule' and 'Remove Rule' buttons. At the bottom, there are 'Run Comparison', 'Run Report', and 'Close' buttons.</p>
	 <p>The screenshot shows the 'Erika Test' interface. Under 'Current Rules', there are two rules: 'Status Starts With 'Active'' and 'Age Older Than 18 Years'. Below this is a 'New Rule' dialog with 'Demographics' selected as the 'Rule Category'. The 'Manage Rule' section shows 'Patient Age' with options for 'Doesn't Match', 'Patient Records Only', and 'Optional'. The rule is set to 'Age: Older Than 18 Years 0 Months'. There are 'Update Rule' and 'Remove Rule' buttons. A red arrow points to 'Patient Age' in the 'New Rule' list. At the bottom, there are 'Run Comparison', 'Run Report', and 'Close' buttons.</p>

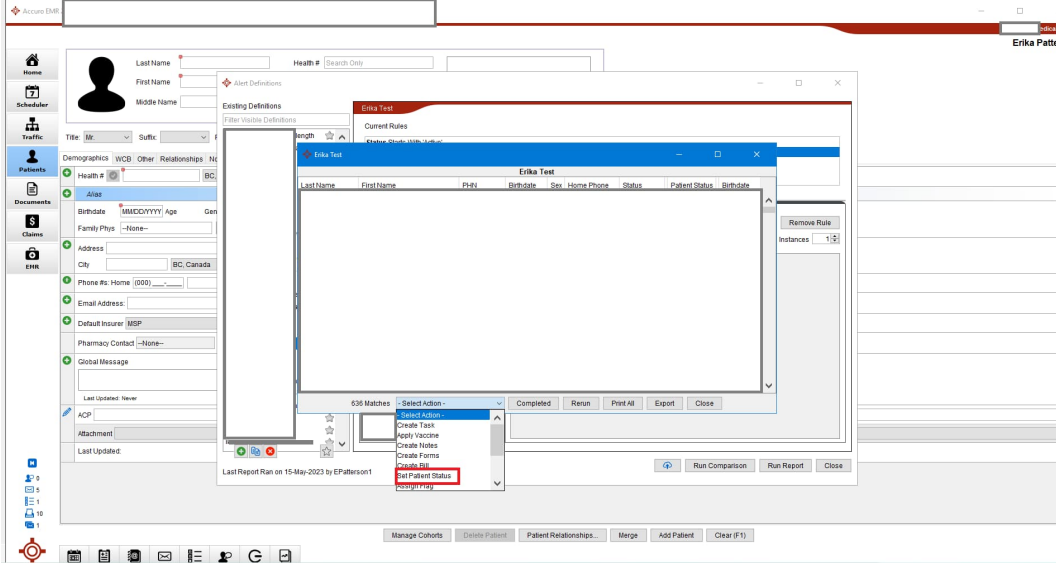

ACTION	HOW TO
	
	

ACTION	HOW TO
	<div data-bbox="411 421 1465 1160"><p>Erika Test</p><p>Current Rules</p><ul style="list-style-type: none">Status Starts With 'Active'Age Older Than 18 YearsAppointment Date In the Last 3 YearsAppointment Date In the Last 10 Years<p>New Rule</p><p>Rule Category: Appointments</p><ul style="list-style-type: none">AppointmentCancelled AppointmentTraffic ManagerWait List<p>Manage Rule</p><p>Appointment</p><p><input type="checkbox"/> Doesn't Match <input checked="" type="checkbox"/> Patient Records Only <input type="checkbox"/> Optional</p><p>Update Rule Remove Rule</p><p>Instances: 1</p><p>Date: In the Last 10 Years</p><p>New</p></div>

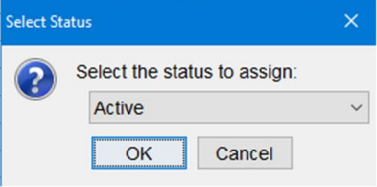


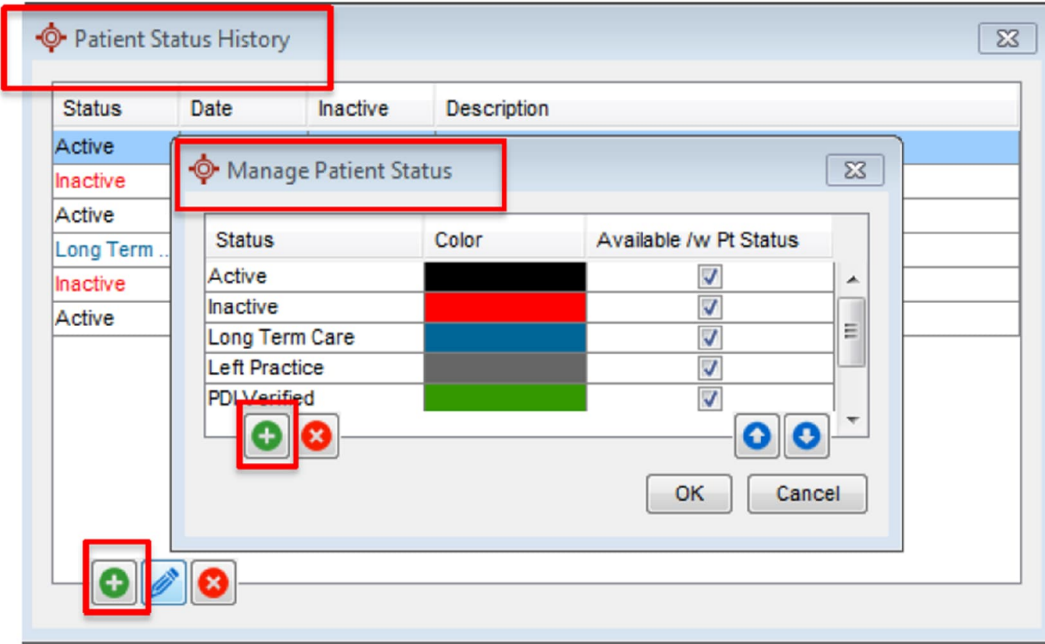
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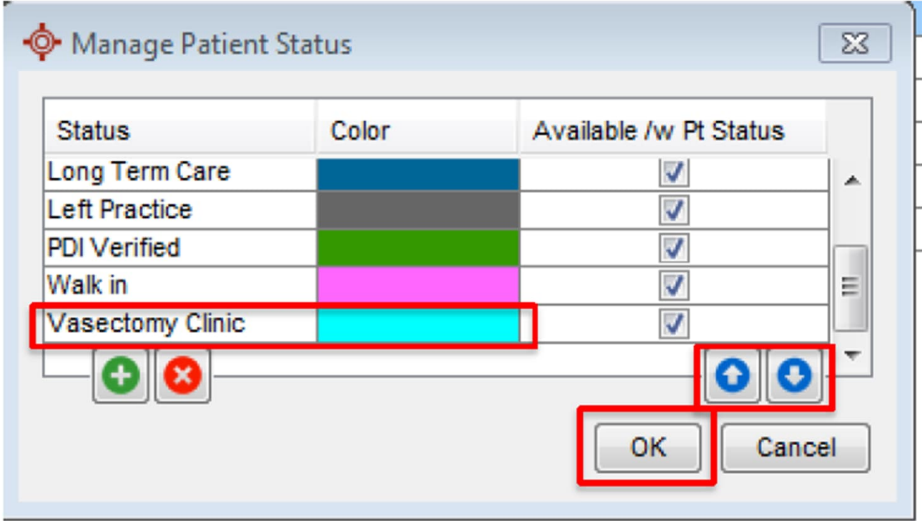
Run Comparison Run Report Close

ACTION	HOW TO
	 <p>Erika Test</p> <p>Current Rules</p> <ul style="list-style-type: none"> Age Older Than 18 Years Appointment Date in the Last 3 Years Appointment Date in the Last 10 Years Appointment Date in the Next 1 Year <p>New Rule</p> <p>Rule Category: Appointments</p> <ul style="list-style-type: none"> Appointment Cancelled Appointment Traffic Manager Wait List <p>Manage Rule</p> <p>Appointment</p> <p><input checked="" type="checkbox"/> Doesn't Match <input checked="" type="checkbox"/> Patient Records Only <input type="checkbox"/> Optional</p> <p><input type="button" value="Update Rule"/> <input type="button" value="Remove"/></p> <p>Date: In the Next 1 Years <input type="button" value="New"/></p> <p><input type="button" value="Run Comparison"/> <input type="button" value="Run Report"/></p>
	 <p>Check for Alert Matches</p> <p>Erika Test Reports</p> <p>Apply Against</p> <p><input type="radio"/> All Patients</p> <p><input checked="" type="radio"/> Selected Providers' Patients</p> <p>Fields to Display</p> <ul style="list-style-type: none"> <input type="checkbox"/> Patient Status <input checked="" type="checkbox"/> Patient Status <p>Match Types to View</p> <p><input checked="" type="checkbox"/> Unassigned <input type="checkbox"/> Assigned <input type="checkbox"/> Completed</p> <p><input type="button" value="Run"/> <input type="button" value="Cancel"/></p>

ACTION	HOW TO
	
<p>Update missing demographics</p>	<p>Start by assessing the accuracy of your EMR demographic records. Address, phone numbers, and email are most likely need updating. This action can be time-consuming and include administrative tasks. Plan for administrative support to complete corrections.</p> <p>Run the EMR report to be exported to Excel where you can identify missing information and keep track of updates.</p> <ul style="list-style-type: none"> • Click on Accuro icon  on the Home screen. • Click on Reports → Query Builder

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	<div data-bbox="383 421 1452 1220"> <p>Erika Test</p> <p>Current Rules</p> <ul style="list-style-type: none"> Status Starts With 'Active' Email Address Exists Carecard Exists Phone Number Exists Postal Code Exists <p>New Rule</p> <p>Rule Category: Demographics</p> <ul style="list-style-type: none"> Address Arrival Notes Bill Notes Book Notes Carecard City Deceased Default Insurer Email Address Employer Family Phys. File Number Flags Global Message Medeo Patient ID Next of Kin <p>Manage Rule</p> <p>Carecard</p> <p><input checked="" type="checkbox"/> Doesn't Match <input type="checkbox"/> Patient Records Only <input type="checkbox"/> Optional</p> <p>Update Rule Remove Rule</p> <p>Instances: 1</p> <p>Not Constrained</p> <p>+ New</p> <p>e.patterson</p> <p>Run Comparison Run Report Close</p> </div>																																																																																																				
	<table border="1" data-bbox="383 1265 1452 1556"> <thead> <tr> <th>Last Name</th> <th>First Name</th> <th>PHN</th> <th>Birthdate</th> <th>Sex</th> <th>Home Phone</th> <th>Status</th> <th>Patient Status</th> <th>Office Provider Last Name</th> <th>Office Provider First Name</th> </tr> </thead> <tbody> <tr> <td>Test</td> <td>A Female-60 Plus</td> <td>234567890</td> <td>01/01/1955</td> <td>F</td> <td>(250) 555-2345</td> <td>Unassigned</td> <td>Active 2016</td> <td>Jones</td> <td>Jenny</td> </tr> <tr> <td>Test</td> <td>Abby-Female 50 Plus</td> <td>123456789</td> <td>02/02/1965</td> <td>F</td> <td>(000) 000-0000</td> <td>Unassigned</td> <td>Active 2016</td> <td>Jones</td> <td>Jenny</td> </tr> <tr> <td>Test</td> <td>Adam Male -35plus</td> <td>123456789</td> <td>06/01/1980</td> <td>M</td> <td>(000) 000-0000</td> <td>Unassigned</td> <td>Active</td> <td>Jones</td> <td>Jenny</td> </tr> <tr> <td>Test</td> <td>Al Male-60 Plus</td> <td>434343434</td> <td>10/10/1954</td> <td>M</td> <td>(000) 000-0000</td> <td>Unassigned</td> <td>Active</td> <td>Jones</td> <td>Jenny</td> </tr> <tr> <td>Test</td> <td>Bobbie Female-35plus</td> <td>123456789</td> <td>05/05/1980</td> <td>F</td> <td>(780) 555-6666</td> <td>Unassigned</td> <td>Active</td> <td>Jones</td> <td>Jenny</td> </tr> <tr> <td>Test</td> <td>Jane Female-50plus</td> <td>135792468</td> <td>07/01/1960</td> <td>F</td> <td>(780) 555-4343</td> <td>Unassigned</td> <td>Active</td> <td>Jones</td> <td>Jenny</td> </tr> <tr> <td>Test</td> <td>Leanne</td> <td>123456789</td> <td>12/12/1990</td> <td>M</td> <td>(000) 000-0000</td> <td>Unassigned</td> <td>Active 2016</td> <td>Jones</td> <td>Jenny</td> </tr> <tr> <td>Test</td> <td>Ned Male-75 Plus</td> <td>111111112</td> <td>02/04/1939</td> <td>M</td> <td>(000) 000-0000</td> <td>Unassigned</td> <td>Active</td> <td>Jones</td> <td>Jenny</td> </tr> <tr> <td>Test</td> <td>Tomato</td> <td>123456789</td> <td>09/15/2014</td> <td>M</td> <td>(000) 000-0000</td> <td>Unassigned</td> <td>Active</td> <td>Jones</td> <td>Jenny</td> </tr> </tbody> </table> <p>9 Matches - Select Action - Completed Rerun Print All Export Close</p>	Last Name	First Name	PHN	Birthdate	Sex	Home Phone	Status	Patient Status	Office Provider Last Name	Office Provider First Name	Test	A Female-60 Plus	234567890	01/01/1955	F	(250) 555-2345	Unassigned	Active 2016	Jones	Jenny	Test	Abby-Female 50 Plus	123456789	02/02/1965	F	(000) 000-0000	Unassigned	Active 2016	Jones	Jenny	Test	Adam Male -35plus	123456789	06/01/1980	M	(000) 000-0000	Unassigned	Active	Jones	Jenny	Test	Al Male-60 Plus	434343434	10/10/1954	M	(000) 000-0000	Unassigned	Active	Jones	Jenny	Test	Bobbie Female-35plus	123456789	05/05/1980	F	(780) 555-6666	Unassigned	Active	Jones	Jenny	Test	Jane Female-50plus	135792468	07/01/1960	F	(780) 555-4343	Unassigned	Active	Jones	Jenny	Test	Leanne	123456789	12/12/1990	M	(000) 000-0000	Unassigned	Active 2016	Jones	Jenny	Test	Ned Male-75 Plus	111111112	02/04/1939	M	(000) 000-0000	Unassigned	Active	Jones	Jenny	Test	Tomato	123456789	09/15/2014	M	(000) 000-0000	Unassigned	Active	Jones	Jenny
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	<p>From your report you can toggle between the report and the patient's chart to update PHN, phone number etc.</p> <p>Select Action allows you to Bulk change patient status.</p>																																																																																																				

ACTION	HOW TO
	
<p>Manage patient status options</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 your team criteria for different statuses that will remove patients from your active patients' panel.</p> <p><input type="checkbox"/> EMR Administrative privileges are necessary to customize settings for patient status. Ensure your team has the appropriate level of access.</p> <ul style="list-style-type: none"> • Select a test patient. • Press F8 to open the Patient Status History window. • Click on the Pencil icon  to Manage Patient Status window. • Click the green plus icon , which will add a row to the end of the status lists.
	

ACTION	HOW TO
	 <ul style="list-style-type: none"> • Double clicking on the Status column allows naming the status. • Clicking on the Color column allows selection of a color unique to that status.
<p>Outcome</p>	<p>After completing the Empanelment phase, 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>