

Panel Maintenance Tool

This tool is designed to assist clinics in assessing or developing their current processes for maintaining their panel lists. Capture all relevant processes and improve on them by building clarity and team agreement for each process.

New Patients Added to Panel	How is this Confirmed?	How is this Documented?	Who is Responsible?
New patient phones and requests a physician.	Patient calls reception, requests a physician, and is accepted by a physician with an open panel.	Patient is assigned a primary physician in EMR field or paper chart/manual database.	Front of office admin staff.
Patient requests/receives a "Meet and Greet" appointment, but is not yet assigned.			
Unassigned patient does not belong to any panel, but has been accepted into the practice.			
Non-panel child or relative attends appointment or separate visit is generated.			
Newborn patient.			
Patients Removed from Panel	How is this Confirmed?	How is this Documented?	Who is Responsible?
Patient deceased.			
Patient moved away, has stated ended relationship with clinic.			
Patient moved away for extended period, but intends to return to community (e.g., university/college, mission).			
Lapsed patient: has not attended clinic in 36 months (or other specified time period).			
Orphaned patient: physician leaves the clinic, resulting in unassigned panel.			
Patient belongs to a physician panel, but is seen by other physician more frequently.			
Diagnostic Imaging visit: non-clinic patients.			
Emergency Department/"O/P" visits: Non-panel patients.			
Patients Seen, Not Added to Panel	How is this Confirmed?	How is this Documented?	Who is Responsible?
Walk-in patient: has a primary physician in another clinic in region.			
Transient patient: has a primary physician in a clinic outside of region.			
Specialty care (seen for specialized services, not accepted to panel).			
Other			

This tool is adapted from Chinook Primary Care Network Clinic Panel Management Process Assessment. We gratefully acknowledge their contribution.