



# Panel Management Stories from Primary Care Networks

## How do other PCN clinics manage their panels?



**Sylvan Medical Clinic – ASaP Improvement Team**

Back (from left): Marena Seifert, Dr. MC van Schalkwyk, Monica Pregoda, Esther McNeely. Front: Debbie Greenbank, Paddy Lynch

When Sylvan Medical Centre from Wolf Creek PCN decided to participate in Alberta Screening and Prevention (ASaP), they were hoping to improve their panel management and increase offers of screening to their patients. Here’s what they did - **Step 1:** Debbie Greenbank, an LPN supported by Wolf Creek PCN, attended ASaP improvement facilitation training, where she learned the skills necessary to guide the clinic in developing new processes. **Step 2:** As Debbie explained, “My first job was to set up the improvement team. I invited Dr. MC because I

### IN THIS ISSUE

A number of clinics who are participating in ASaP (Alberta Screening and Prevention) have been implementing panel identification and management processes in their clinics to improve the care they offer their patients. These are their stories!

### Step 1

I knew he would get the work done. I also strategically invited Monica (Receptionist) because she’s a leader and I knew everyone would listen to her - so things would get implemented.” **Step 3:** Once the team was formed, they met to design their new process for opportunistic screening – a method for catching patients when they’re in for any reason. “At first, we focused on ‘completes’; we looked at adult patients with an appointment for a complete physical in the next 2 weeks to see if they were due for any preventive screening. If they were, we phoned the patient and faxed the blood work and diagnostic requisitions to the lab of their choice. When the patient came in, most of the results were already in the chart.” Once this process was established, they began to include adult patients booked for any appointment. As for next steps, now that the team has the process for opportunistic screening working well, they are starting to add ‘outreach’ screening offers by combing the panel for patients who are overdue and inviting them to be screened. •



## How do I use my panel for more effective service delivery?



### The Alexander Community Health Centre - Calgary, AB

Josephine Leung, RN & Chris Wood NP, Director of Health Programs

#### OPTIMIZING USE OF YOUR EMR

Through her improvement facilitation training with ASaP, Josephine has also been working to optimize use of the EMR. The first step is to ensure that everyone is entering data in the correct places and using consistent naming conventions when scanning documents. This will help them to be able to accurately identify patients who are due for screening. Those who come in frequently will be offered appropriate preventive care at any appointment.

Due to their patients' unique living situations, reaching out to invite patients in for screening maneuvers can be challenging. The Alex is exploring different strategies - sending e-mails, texts and Facebook messages to reach their homeless clients. •

Panel support is available to PCNs. Turn to page 4 to learn more...

## Isn't panel a lot of work?

*"It makes less work for us overall... It seemed like a fair amount of work in the beginning, but now we realize that it's making less work for us overall. As well, we've discovered patients who haven't had, for example, a fasting glucose test since 2008. It's easy to see how they could have been missed previously - there's so little time and so many issues to cover in an appointment."*

**Source:** Debbie Greenbank, LPN, Wolf Creek PCN

To complete the panel clean-up (from 66,000 to 10,000 patients), Lana estimates she spent a total of 6 hours (including meetings with the improvement team).... *"Although changing the patients' statuses took a bit of time, it wasn't difficult to do."*

**(Read** - "You have your panel! Now, how do you maintain it?" - on page 3 for details of Lana's clean-up process)

**Source:** Lana deBoon, Clinic Manager, Peace River Associate Medical Clinic

*"We learned that the true patient panels are actually quite manageable, and we're encouraging the reception team to increase continuity of care by booking patients with their own providers."*

**Source:** Josephine Leung, RN, Alexandra Community Health Centre ("The Alex")

## You have your panel! Now, how do you maintain it?



### Peace River Associate Medical Clinic - ASaP Improvement Team

Left to right: Lana deBoon RN, Clinic Manager, Angie Weston, Assistant Clinic Manager & Janyce Tookey, Clinical Assistant

### TWO COMMON CHALLENGES

Now that Peace River Associate Medical Clinic's practice panels were more accurate, they wanted to plan how they would maintain or "manage" them going forward. To start, they reviewed the [ASaP Panel Process Assessment Tool](#) with the staff. Several challenges became apparent: **Patients who move** - when those with more complex issues relocate out of the area, the clinic typically receives a chart request which effectively notifies them of the move. However, healthy patients often don't request their charts. In doing chart reviews, Clinical Assistant Janyce Tookey noted that physicians had often recorded that the patient was relocating

in their notes, but there wasn't a process in place that involved sharing that information so that the patient status could be changed. **Patient deaths** - when patients pass away, unless it occurs at the hospital, there is often no notification. On a hunch, they checked the website of the local funeral home, and found that the site posted the funerals that had occurred over the past two years. Using this information, they were able to change the statuses of 173 patient records. Now, they have a process to check the website once per week. It doesn't catch every instance, but it's much better.

### KEEP PANEL TOP OF MIND

Moving forward, the clinic plans to "keep panel top of mind" and be more diligent about keeping patients' statuses up to date and accurate. According to Janyce, "We need to make it part of everyone's daily routine. Then we'll know we can trust the results of the practice searches we run to look for patients due for screening."

Lana adds, "It's also helpful for the physicians to know exactly whose care they're responsible for - especially now that we know it's not 66,000!" •

Do you have a panel story to share? Contact us!

(contact information - page 4)

## What's in it for me?

*"I feel that we're moving toward more responsible care. The background work and improved knowledge of the basic use of the EMR is giving the physicians the information they need to more effectively maximize screening opportunities."*

**Source:** Alexandra Community Health Centre ("The Alex")

...overall, the Sylvan Medical Centre is off to a great start. As Dr. MC van Schalkwyk put it, "ASaP has given us tools to improve screening and enhance preventative care - and it's just the beginning."

**Source:** Sylvan Lake Medical Clinic

## Panel support is available to PCNs...

There is support to help you achieve panel management successes like these PCN clinics! TOP is coordinating and providing three types of **hands-on panel related supports** to help PCNs:

**1. Panel Workshops** - Working closely with PCN leadership, a physician champion will support the delivery of key messages for panel to PCN members.

**2. Panel Management Training** – These one day sessions will provide clinic or PCN staff with panel management basics. This practical training will enable participants to support screening and clinical care processes, optimize EMR functionality and communicate effectively with patients.

**3. Improvement Facilitator Training** – This training opportunity will provide PCN or clinic staff with the knowledge and skills to utilize quality improvement and facilitation techniques to support clinics' medical home transformations – the initial steps of panel identification will be a key component.

## For more information about panel...

The panel workshops, training opportunities (listed above) and other ongoing activities including the ASaP (Alberta Screening and Prevention) Initiative are some of the supports available to you.

Please contact **Mark Watt** - TOP Program Delivery Lead ([top@topalbertadoctors.org](mailto:top@topalbertadoctors.org)) to discuss these opportunities or to suggest other panel identification supports TOP may provide.

## Notes:

## Contact us

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