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1. INTRODUCTION

This guide explains the process of patient empanelment. It provides a step by step procedure to access the Care Team and the Patient Management dashboard.

**Only Admin users have access to Patient Empanelment.**

(NOTE: Practice Admin may also be a clinician)

2.2. PATIENT EMPANELMENT

In Patient Empanelment, primary care providers are assigned to individual patients. Only practice admins have access to Patient Empanelment.

Patient Empanelment allows the admin to:

- Manage care teams.
- Manage patients.
- Run and View the Empanelment Status Report for the practice.

The Patient Empanelment dashboard includes the following three tabs:

1. Practice Settings
2. Care Team Management
3. Patient Management

2.2.1 PRACTICE SETTINGS

Practice settings allows the admin to set the method of empanelment used by the practice and view the empanelment status report for the practice. See Figure 1: Practice Settings.

There are two ways to empanel patients – by practitioner, and by care team.
After you have begun to empanel patients (section 2.2.3), you can run the Empanelment Status Report to see an overview of the numbers of patients empanelled.

**EMPANELMENT STATUS REPORT**

Use the following steps to view the empanelment status report:

1. Select the practitioner or care team from the **Empanel Patients by Practitioner or by Care Team** drop-down menu.
2. Select the lookback period for the practice from the **Set the Lookback period for your Practice** drop-down menu.
3. Click **Run Report**.

The empanelment status report is displayed on the page.

The report displays empanelment status for each quarter. The report displays the following:

1. Number of panels at your practice.
2. Total number of patients empanelled with a practitioner or care team at your practice.
3. Total number of active patients.
4. % of patients empanelled.
2.2.2 CARE TEAM MANAGEMENT

Care teams are groups of healthcare providers who take collective responsibility for patients. The Care Team Management tab contains a list of care teams with the following details about:

- Name of the care team.
- Name of the clinician associated with the care team.
- Number of patients in the care team.

Adding a Care Team:

The Add Care Team feature is used to add care team details.

Use the following steps to add a new care team:

1. Click Add Care Team.  
The Add Care Team page opens.

2. Enter a name for the care team.

3. Select the name of the clinician associated with the care team, from the Clinician drop-down list.

4. Click Save to save the details entered.  
   Or
   Click Cancel to cancel the details.

On saving, a record is added to the Care Team Management table.
Edit:

Click the Edit icon to edit an existing care team record.

You are taken to the Update Care Team page.

Make the necessary edits and update the care team details.

Search:

The Search feature enables searching for a particular care team, clinician or the number of patients associated with a care team.

You can change the care team name or the assigned clinician while updating the record.

The name of the care team should be unique.

One patient cannot be assigned to multiple care teams.

A single care team can have multiple patients.

2.2.3 PATIENT MANAGEMENT

Patient Management tab displays the list of patients associated with a particular clinician. Using this functionality an administrator can:

1. View patients linked to a clinician.
2. Assign care team to patients.
3. Unassign care team from patients.
2.2.3.1 VIEWING PATIENTS LINKED TO A CLINICIAN

1. Select the name of a clinician from the Clinician drop-down list.

   The list of patients assigned to the selected clinician is displayed in a tabular format.

   ![Figure 6: Patient Management - Clinician](image)

Flags of different colors are displayed before the patient name. The flags represent the health risk score assigned to each patient. (This score is assigned in the Risk Stratification module)

<table>
<thead>
<tr>
<th>Flag Color</th>
<th>Representation</th>
</tr>
</thead>
<tbody>
<tr>
<td>🟢</td>
<td>Denotes Low Risk Patient</td>
</tr>
<tr>
<td>🟤</td>
<td>Denotes Medium Risk patient</td>
</tr>
<tr>
<td>🟡</td>
<td>Denotes High Risk Patient</td>
</tr>
<tr>
<td>🟥</td>
<td>Denotes very High Risk Patient</td>
</tr>
</tbody>
</table>

![Figure 7: Patient Management - Patients](image)
Search:

Search icon in each column enables searching based on a specific parameter. You can also conduct a partial search.

2.2.3.2 ASSIGNING PATIENTS TO A CARE TEAM

Use the following steps to assign a patient to a care team:

1. Select the checkbox next to the patient name.

2. Click Assign.
   The Add Clinician page is displayed.

3. Select the name of the clinician from the Clinician drop-down list.

4. Click Save.
   The care team and PCP Assigned values are updated in the patient list table and a success message is displayed.

   An administrator can change an assigned clinician. Use the above procedure to assign a different clinician to the patient. A confirmation message for the change is displayed on the screen.

5. Click Yes.
   Record is updated in the patient list table.
2.2.3.3 UNASSIGNING PATIENTS FROM A CARE TEAM

Use the following steps to unassign a patient from a care team:

1. Select the name of a clinician from the Clinician drop down list.

   Patients assigned to the selected clinician are displayed in a tabular format.

![Figure 11: Unassign Care Team from Patient](image)

2. Select the checkbox before the patient first name.

3. Click Unassign.

   The selected patient is unassigned from the clinician.