

HIM Professionals and Panel Management

Panel management is one of the components of Alberta's Primary Health Care Strategy. This has been implemented to varying levels in many clinics, as well as at the PCN level. Health Information Management (HIM) professionals are well suited to assist with implementing and/or enhancing your panel management processes.

Why is Panel Management Important?

- Allows providers to focus on the individual instead of their disease
- Connects a patient to their provider or team (medical home)
- Coordinates care for the patient
- Assists with the monitoring of ASaP (Alberta Screening and Prevention Program) screening maneuvers

What is Panel Management?

If you have already started the process of panel management within your clinic or PCN, you will be familiar with the steps needed to reach the point where you can use the information for decision making and evaluation of care provision. If you are early in the process, you must begin by identifying which patients are part of each providers panel (roster, practice); this will require contacting patients who have visited your clinic to:

- Determine active patients
- Confirm demographic information
- Ensure the patient is attached to a provider so you can determine their medical home

Once you have determined the panel for each provider, ongoing panel management involves:

- Using the ASaP screening guidelines to determine which patients are missing the suggested maneuvers
- Considering the addition of other screening measures the medical team think will assist with providing proactive healthcare
- Creating dashboard reports/tools to evaluate rates of compliance with screening measures and identify areas for quality improvement
- Implementing regular meetings to review your progress with panel management and how you are using the data

What Resources are Available?

There are many resources to assist you with panel management, whether you are just starting the process, or whether you have an established program in place that you want to expand to maximize the use of the patient care data that can be generated. Towards Optimized Practice (TOP) is a primary source of checklists, resources, and guidelines. There can also be

information found through PCN groups, Alberta Health, and the Alberta Medical Association (AMA). SAIT HIM practicum students can be a significant resource to assist you in this process.

Practicum Opportunity

Often clinics and PCNs find that one of the biggest challenges in starting panel management is the initial time commitment. SAIT Health Information Management students complete an 8-week unpaid practicum at the end of their second year (each May/June) before graduating. We have had several successful practicum projects where a clinic or PCN has hosted students to perform the initial panel identification process, evaluate compliance with ASaP screening guidelines, and identify patients who are missing maneuvers. They have created reminders in the practice EMR so that at the patient's next visit, the provider is notified of any missing required screening. In most cases they also have time to start building reports in your EMR that will generate data to assist you with ongoing panel management, and have created a panel management update presentation for the providers. We have found these projects to be beneficial for both parties, as the HIM student receives experience that adds to their learning and exposes them to employment opportunities in primary health, and the clinic or PCN is able to benefit from the mentoring experience and enhanced panel management processes.

Anyone can act as the preceptor (trainer) for the student. It can be the clinic manager, an analyst who works in evaluation/analytics/quality improvement, or a current panel manager. All you need to be an effective preceptor is a desire to be a coach and mentor, and a willingness to support a student. You do not need to have all of the answers! We work with our students on critical thinking and the proper use of resources; our students know that as part of the practicum process they will often be required to contact outside resources, including the EMR vendor, to ensure they can create best practice solutions for panel management.

If you are interested in discussing practicum placement opportunities, please contact either Stephanie Clack (stephanie.clack@sait.ca) or Lisa Proudfoot (lisa.proudfoot@sait.ca) and we would be happy to provide you with more details.