

# OntarioMD PSS Clinic Toolkit: Patient Panel

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## PSS Clinic Toolkit - Patient Panel



## EMR and Data Entry Requirements

### EMR knowledge prerequisites:

- Familiarity with recall tools within the EMR

### Each report in the toolkit has specific data requirements in addition to the following:

- Patient charts must be assigned to a provider
- Accurate 'Active' status of patient charts ('Active' status includes rostered and non-rostered patients)

## Indicators

Below you will find explanations of the indicators. Each entry includes the indicator's purpose and any charting and documentation requirements.

To access support or to provide feedback on your experience, contact us at 1-866-744-8668 or [support@ontariomd.com](mailto:support@ontariomd.com).

## Panel Management: Patient Status

### i4C Indicator PRM-PAT-001: Patient Status v 2.0

#### Category: Practice Management/Patient Status

**Purpose:** This indicator provides an overview of the patient population based on patient demographic status recorded in the EMR.

**Base Population:** All patients with a patient demographic status recorded in the EMR.

**Suggested use:** Reviewing and updating patient demographic and roster status for patients, so that patients with an 'Active' demographic status recorded in the EMR reflect the current patient population.

#### Metric Criteria:

Active: All patients identified with a status of 'Active'

Inactive: All patients identified with a status of 'Inactive'

Deceased: All patients identified with a status of 'Deceased'

Other: All remaining patients' statuses.

- NOT Active, NOT Inactive. NOT Deceased, NOT identified as 'Deleted'

Active and Rostered, seen this year: Status of 'Active and Rostered' where the most recent visit is less than 12 months ago.

Active and Rostered, seen within 1-2 yrs: Status of 'Active and Rostered' where the most recent visit is between 12-24 months ago.

Active and Rostered, not seen in 2+ yrs: Status of 'Active and Rostered' where the most recent visit is more than 24 months ago.

Active and Not Rostered, seen this year: Status of 'Active and Not Rostered' where the most recent visit is less than 12 months ago.

Active and Not Rostered, seen within 1-3 yrs: Status of 'Active and Not Rostered' where the most recent visit is between 12-36 months ago.

Active and Not Rostered, not seen in 3+ yrs: Status of 'Active and Not Rostered' where the most recent visit is more than 36 months ago.

**TIP:** *Ensure that patients that are current patients in the practice have an 'Active' status set in demographics.*