

Panel Management Meeting Quality Checklist

Purpose: Collect and record process metrics on panel management meetings

Before the Meeting

- Schedule was blocked for all required attendees to attend
- Panel Manager ran panel reports ahead of meeting:
 - Diabetes Panel Report
 - Due for AWV List with patients flagged high priority for discussion
 - Other:

During the Meeting

- All required invitees attended
- Meeting started on time
- Room was configured so that all attendees can view a shared screen with prepared panel reports pulled up at start of meeting
- Review of PCP Diabetes Panel Occurred: Yes/No
- How was PCP Diabetes Panel sorted/organized? ***
- Number of patient cases reviewed:
- Meeting discussion resulted in actionable follow-up items: (how to rate?)
- Review of “due for AWV” list occurred
- Number of actionable follow-up items generated from Due for AWV list review:
- Panel Manager documented in Epic during the meeting: Yes/No
- If yes, Panel Manager documented using .PANELMANAGEMENTMEETING SmartPhrase in Epic: Yes/No
- Rate efficiency of time management during this meeting: (how to rate?)