BEFORE THE MEETING

- Coordinate with Clinic Manager to ensure meeting is scheduled and a room is booked
  - May vary clinic-to-clinic who is responsible for calendar and room reservations, etc.
  - If you are asked to support with scheduling activities and don’t have time to do this AND panel management clinical activities, ask if another staff can support with scheduling
  - Recommended attendees: PCP, Panel Manager
    - Optional/suggested: RD, MA, RN, SW

- Agenda-Setting
  - Do not create a Word document Agenda for the panel management meeting
    - This may be different than how you’ve prepared for meetings in the past
    - Clinic Chiefs will explain to providers that we are using a new meeting format; you can re-explain this if needed
  - Agenda Format
    - Use Pop Health “Due for AWV” Excel to review this patient list
    - Use Epic “PCP Diabetes Panel Report” to review this patient list

- AWV List
  - Pull a specific provider’s patient list of Due for AWV from Population Health master list
  - Can filter the master Excel spreadsheet to show only one PCP’s list, or create your own Excel sheet for each provider
  - Not required to do a chart review to check if each patient recently had AWV – it is ok to spend time reviewing this with PCP during the meeting
  - Optional (only if you have time for any chart review):
    - Check if any patients can be removed from AWV list due to recent appt
    - Check if any of these patients already have an upcoming AWV appt scheduled or appt that could be converted/extended to an AWV

- Diabetes Panel Report
  - Optional: ask PCP in advance how they’d like to prioritize their Diabetes Panel Report for the upcoming meeting (i.e. by A1C >9, overdue for screening, etc.)
  - Run Epic PCP Diabetes Panel Report in Epic on behalf of a specific provider
    - Run Report
    - Save as “PCP NAME Diabetes Panel Report”
    - Favorite the report so it is in your Reporting Workbench
Panel Management Meeting Workflow for Panel Managers

- If provider has a preferred way to review report, you can sort columns according to this in advance
  - Example: Report sorted by A1 high to low

<table>
<thead>
<tr>
<th>Age</th>
<th>Sex</th>
<th>Next PCP Visit</th>
<th>Last A1C Date</th>
<th>Last A1C</th>
<th>Last BP Date</th>
<th>Last BP</th>
<th>Diabetes Retin Exam?</th>
<th>Last Microalbumin</th>
<th>Diast Last Microalb</th>
</tr>
</thead>
<tbody>
<tr>
<td>67 year old Female</td>
<td>06/03/2020</td>
<td>02/10/2020</td>
<td>13.3</td>
<td>05/04/2020</td>
<td>111/64</td>
<td>Met</td>
<td>Met</td>
<td>3.05</td>
<td></td>
</tr>
<tr>
<td>72 year old Female</td>
<td>12/02/2019</td>
<td>12/03/2019</td>
<td>12.8</td>
<td>02/15/2022</td>
<td>133/84</td>
<td>Met</td>
<td>04/06/2019</td>
<td>40.70</td>
<td></td>
</tr>
<tr>
<td>50 year old Female</td>
<td>09/16/2019</td>
<td>03/16/2020</td>
<td>12.6</td>
<td>02/15/2020</td>
<td>120/79</td>
<td>Met</td>
<td>02/07/2019</td>
<td>3.40</td>
<td></td>
</tr>
<tr>
<td>48 year old Female</td>
<td>12/09/2019</td>
<td>12/12/2019</td>
<td>11.7</td>
<td>12/12/2019</td>
<td>137/87</td>
<td>Met</td>
<td>12/09/2019</td>
<td>1.75</td>
<td></td>
</tr>
<tr>
<td>64 year old Female</td>
<td>05/12/2020</td>
<td>02/12/2020</td>
<td>11.5</td>
<td>02/12/2020</td>
<td>145/69</td>
<td>Met</td>
<td>03/12/2020</td>
<td>11.50</td>
<td></td>
</tr>
<tr>
<td>51 year old Female</td>
<td>11/20/2019</td>
<td>11/14/2020</td>
<td>11.4</td>
<td>02/12/2020</td>
<td>139/69</td>
<td>Met</td>
<td>03/29/2019</td>
<td>3.91</td>
<td></td>
</tr>
<tr>
<td>80 year old Female</td>
<td>02/05/2020</td>
<td>02/05/2020</td>
<td>129/62</td>
<td>03/10/2020</td>
<td>3.05</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Panel Management Meeting Workflow for Panel Managers

DURING THE MEETING

- 1) Review provider’s Due for AWV list
  - Review patient charts in Epic during meeting on shared screen (if possible) to:
    - Check if patient recently had a visit and/or if there is an upcoming visit scheduled
    - Check for other Health Maintenance items due soon
    - Get provider’s input on if/when to schedule patient for AWV and any other needed gap closure
  - Documentation
    - If there is no individual clinical discussion/review and the only identified action is “Schedule for AWV” - you don’t need to open .PANELMANAGEMENTMTG TE
      - Could instead open a TE with brief note for MA/PSR to schedule AWV and route it to them for follow-up
    - If there is individual clinical discussion about the patient’s needs and a plan:
      - Option 1) Open TE for each patient discussed during meeting with brief notes in .PANELMANAGEMENTMTG
      - Option 2) Make note in a column on the Excel of what was decided; document in Epic post-meeting using .PANELMANAGEMENTMTG

- 2) Pull up PCP’s Diabetes Panel Report in Epic, on shared screen
  - If you haven’t done already - ask PCP for their preferred way to view the list (by which column they would like to see it sorted)
    - This is a clinical decision that the PCP should take ownership of
  - Once list is sorted this way, go through patients one at a time
    - Open patient’s chart

Updated 5.11.20
Panel Management Meeting Workflow for Panel Managers

- Open TE for the patient with .PANELMANAGEMENTMTG

- Identify what patient is due for (whatever is listed in PCP Diabetes Report and can look at other Health Maintenance while chart is open)
- Get PCP and other team members’ feedback on how to proceed with closing care gaps
- Make brief note in TE (while in meeting) of what is discussed and decided
  - If you find it too difficult to make notes in the TE during the meeting, you might take handwritten notes and document in Epic later.
    - However, this will take more of your time post-meeting and may lead to a backlog of notes.

- You can finish and route the TE after the meeting
Panel Management Meeting Workflow for Panel Managers

- May add Personal Sticky Note – “Reviewed in PM Meeting 5/10/20”
  - If you add “My Personal Sticky Note” as a column on each PCP’s Diabetes Panel Report, you can see this in the future and know which patients were recently reviewed

**STICKY NOTE DURING MEETING**

**HOW TO ADD STICKY NOTE TO PCP PANEL REPORT**

**HOW YOUR STICKY NOTE WILL LOOK WITHIN THE REPORT**

<table>
<thead>
<tr>
<th>MRN</th>
<th>My Sticky Note</th>
<th>Age</th>
<th>Sex</th>
<th>Next PCP Visit</th>
<th>Last A1C Date</th>
<th>Last A1C</th>
</tr>
</thead>
<tbody>
<tr>
<td>U2422066</td>
<td>Reviewed in Panel Management meeting 5.10.20</td>
<td>67</td>
<td>year old Female</td>
<td>08/03/2020</td>
<td>02/10/2020</td>
<td>13.3</td>
</tr>
</tbody>
</table>

Updated 5.11.20
Panel Management Meeting Workflow for Panel Managers

○ If you discover errors in the chart, make a note within the TE and/or add a Personal Sticky Note (to address after meeting):
  ▪ If patient should be removed from PCP’s Panel
  ▪ If Primary Location is incorrect
  ▪ If it is discovered that patient had labs done outside of UW and this needs to be updated (post-meeting, by MA or you)
○ Move on to next patient on the list; repeat process

○ At end of meeting – ask PCP how they’d like the list sorted for the next month’s meeting
  ▪ Could be the same way as today’s meeting, until list is completely reviewed with action items taken (i.e. until all patients with A1C over 9 have been discussed), or could look at it a different way the next month
○ May also ask PCP a general question – “would you like all patients who are due for Retinal Exam to be scheduled?” and then make a batch decision on this.
  ▪ PCP’s MA could support with this outreach after the meeting, in addition to determining which other gaps patient is due for at the time of next visit scheduled

AFTER THE MEETING

• Documentation
  ○ Complete notes from meeting in each open TE
  ○ Route TE to the person responsible for patient follow up
• Chart Updates
  ○ Update outside lab values (or make request of MA/other staff to do this)
• Panel Clean-Up
  ○ Update GenPCP and/or Primary Location field for patients determined to need updates

<table>
<thead>
<tr>
<th>Patient Care Team</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search for PCP  +Add</td>
</tr>
<tr>
<td>Search for Team Member +Add</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Team Member</th>
<th>Relationship</th>
<th>Specialty</th>
<th>Start</th>
<th>End</th>
<th>Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>PCPs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ztrain, Epiccare Physician</td>
<td>PCP - General</td>
<td></td>
<td>01/03/2017</td>
<td>X End</td>
<td>1/3/17</td>
</tr>
</tbody>
</table>

Fax: 206-206-1111