

Clinical Standards for Empanelment

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Purpose

To link each primary care client with a Primary Care Provider (PCP).

Goal

To increase client and provider satisfaction, improve continuity of care, and improve delivery of care.

Procedural Steps

1. PCP Assignment Roles/Responsibilities

AIC Staff:

- Confirms PCP assignment when making appointments. Reports discrepancies via appointment notes. Does not change PCP assignments.

Front Desk Staff:

- Confirms PCP assignment at check-in.
- Assigns new unassigned patients to provider scheduled with for first appointment.
- Resolves discrepancies between client’s stated PCP and EPIC assignment and reassigns PCP if indicated.

Care Team:

- Confirms PCP assignment with new patients.
- Resolves discrepancies with provider assignment for established patients.
- Changes PCP assignment upon request by provider or management team.

Panel Manager (or designee):

- Reviews PCP assignments for team providers monthly.
- Addresses discrepancies in PCP assignment and unassigned patients seen by team provider.
- Tracks visits with PCP versus other providers.

Management Team

- Follows up on patient requests to change providers.
- When provider transfers or terminates, evaluates patient needs in collaboration with team and reassigns to other clinic providers according to panel capacity and notifies affected patients.

2. Unassigned Patients

NEW PATIENTS

AIC: Schedules patient in available NPU/CRN appointment.

Front Desk: Assigns PCP who client is seeing for new patient appointment at check-in.

Care Team: Confirms assignment with patient. If patient requests different provider, facilitates change of assignment.

UNASSIGNED PATIENTS PREVIOUSLY SEEN

AIC: Asks client who their PCP is, and documents in appointment notes for team to confirm.

Front Desk Staff: Reviews appointment notes and EHR. Assigns to PCP previously seen unless patient requests different assignment.

Care Team: Reviews PCP assignment and confirms with client and provider, and changes assignment as indicated.

3. PCP Assignment Change

CLIENT WHO WANTS TO CHANGE PCP ASSIGNMENT WITHIN SAME CLINIC

AIC: Informs client cannot make PCP assignment change. Offers to refer to operations supervisor. Does not appoint to different PCP unless directed by clinic management staff.

Operations Supervisor: Consults with current PCP. If transfer is approved, confirms acceptance by new PCP (should include PCP-PCP communication).

CLIENT REQUESTS TRANSFER TO PCP AT DIFFERENT CLINIC

AIC: Informs client cannot make PCP assignment change. Offers to refer client to operations supervisor. Does not appoint to different PCP unless directed by clinic management staff.

Operations Supervisor: Consults with current PCP. Reviews client's history (# of PCP changes, no-shows, number of clinic transfers).

PCP REQUESTS CLIENT REASSIGNMENT WITHIN SAME CLINIC

Provider: Contacts Operations Supervisor to request change. Provides accepting PCP with information re: patient and confirms new PCP will assume care.

Operations Supervisor: Receives request and discusses rationale for change. Evaluates current providers who are able to accept new patient and informs current PCP. Informs patient of new PCP and ensures PCP reassignment in EPIC.

PCP REQUESTS TRANSFER TO A DIFFERENT CLINIC

Provider: Contacts Operations Supervisor to request change. Provides accepting PCP with information re: patient and confirms new PCP will assume care.

Operations Supervisor: Receives request and discusses rationale for change. Informs clinic where proposed client will transfer. Confirms approval for transfer and new PCP assignment. Informs patient of new PCP. Receiving clinic changes PCP assignment.

4. Client notification of provider transfer or termination

In the event of a provider transfer or termination, each clinic site will take responsibility for notifying clients.

Clinic Manager or designee:

- Notify Application Support Services of the provider change within two weeks of receiving notice.
- Notify Application Support Services of the termination/transfer date so the EPIC provider profiles can be updated and needed client extracts, letters and labels can be provided.

EPIC Staff:

- Provide the clinic a list of clients assigned to the provider, client letters and optional mailing labels, if needed.

PCP/Clinic Manager or Designee:

- The manager will assure that the computer is updated with the revised PCP information. Standard personalized letters will be sent from the provider to notify clients of the transfer or termination. Clients should be told that the clinic will notify them when their PCP has been replaced. Until reassignment occurs, clients will be seen by the appropriate provider as determined by the clinic manager in coordination with the other providers at the site.

Clinic Manager or Designee:

- Notify EPIC when a new PCP is hired or when caseload needs to be reassigned to new provider. Clinics will be responsible for reassigning the client to a new PCP within the clinic site.