



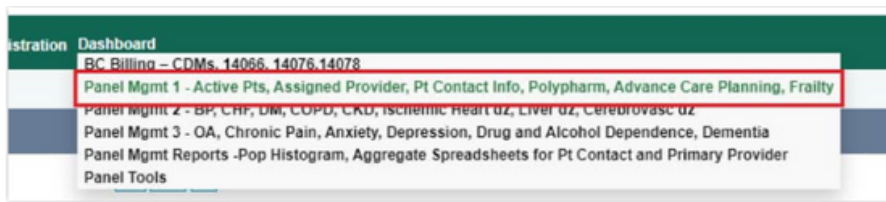
HOW TO MANAGE YOUR PATIENT PANEL IN OSCAR PRO

Quick Reference Guide

DISPLAY A LIST OF ACTIVE PATIENTS ASSIGNED TO YOU

To analyze your patient panel, retrieve the names of patients assigned to you.

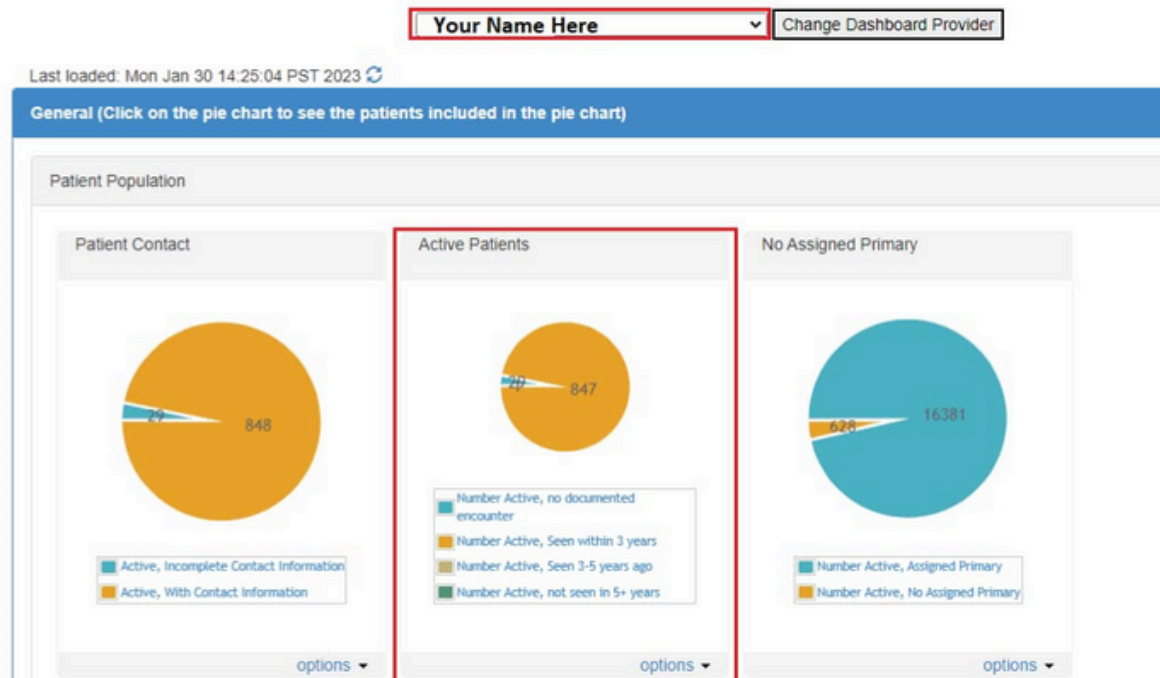
1. Select the **Dashboard** tab on your main screen.
2. Choose **Panel Mgmt 1** from the drop-down list.



3. Click on the **Active Patients** pie chart to list active patients under your name as the assigned provider.

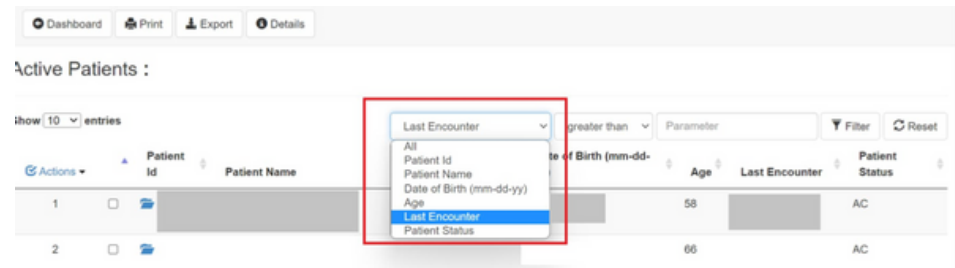
IMPORTANT NOTE

Oscar Pro uses dashboards to manage the patient panel. Check your main toolbar: If you see **Dashboard** to the right of the **Administrative** button, this functionality has been installed. If you do not see it, contact us at help@oscarprodesk.ca to activate it.



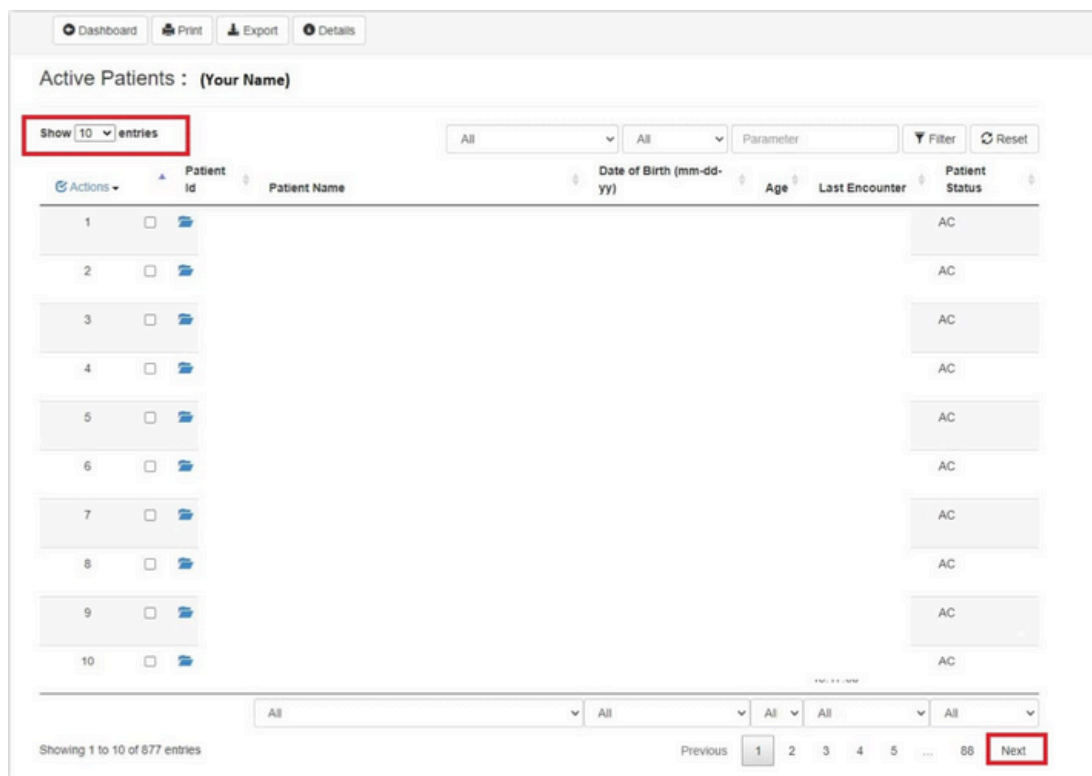


4. A list of all your **Active Patients** is displayed as one long list. You can filter this list using the drop-down menus at the top of the table to narrow this list.

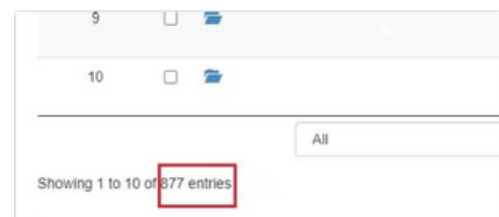


You can customize the number of entries to show per screen.

5. Click **Next** to advance through pages of results.



6. The total number of patients currently active and assigned to you is displayed at the bottom of the screen. Record this number for your measurement baseline.



7. Review the panel list displayed. Consider what errors apply to your practice and what needs to be changed in your EMR. Identify areas for improvement and corrections needed in your EMR and discuss the process with your team.



REMOVE PATIENTS FROM YOUR PANEL

You can remove a patient's name that should not be on your list of patients by changing patient status from Active to Inactive, Deceased, Moved, etc. as appropriate:

1. Click on patient **File Number** to open their chart.
2. Click **Edit** to update their Master Record.

The screenshot shows the 'Master Record' page for a patient. On the left is a navigation menu with links like Appointment, Billing, Clinical Modules, etc. The main area has a 'Next Appointment:' header and a 'PATIENT SEARCH' section. Below that, the patient's file number '(3782)' is displayed, with the word 'Edit' circled in red. Other options like 'Export this Demographic' and 'Add Relation' are also visible.

3. Change the **Patient Status** as appropriate.

This screenshot shows the 'Patient Information' form. The 'Patient Status' dropdown menu is highlighted with a red box and currently shows 'AC - Active'. Other fields include DOB, Health Ins. #, Health Card Type, Country Of Origin, SIN, Physician/MRP, and various dates.

4. Then scroll to the bottom and click **Update Record**.

The screenshot shows the 'Health Care Team' section at the bottom of the patient record. It includes fields for adding providers and a list of patient notes. The 'Update Record' button is highlighted with a red box. Other buttons like 'Export this Demographic', 'Save & Update Family Members', and 'PDF Envelope' are also visible.

Your current patient panel will be updated.

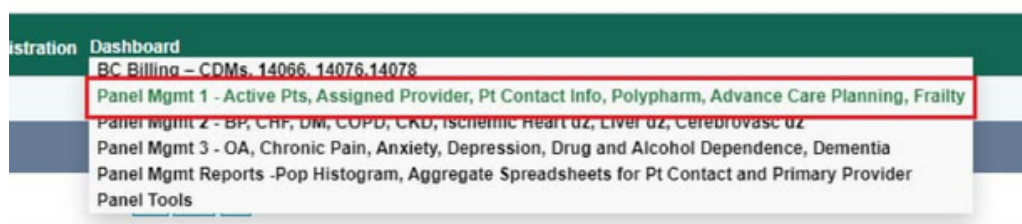


IDENTIFY PATIENTS WITHOUT A PRIMARY PROVIDER

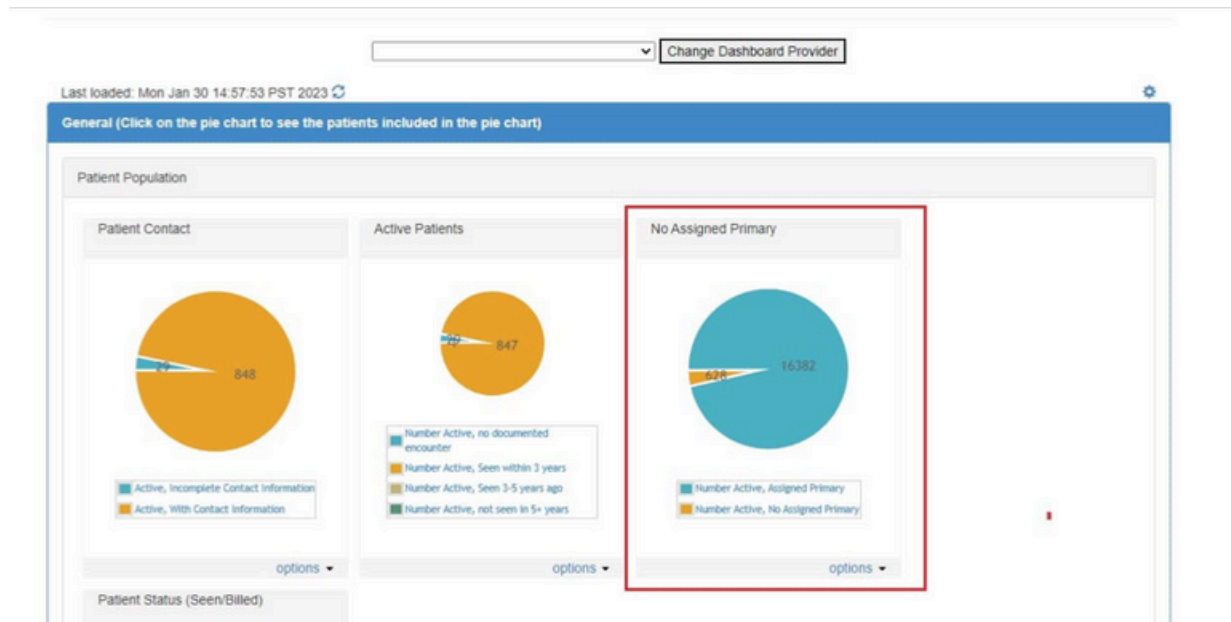
Run a report for unassigned patients and add yourself as most responsible provider (MRP).

Discuss with your practice team if there are any patients requiring investigation prior to adding or removing the assigned provider.

1. Click on **Dashboard** on your toolbar and select **Panel Mgmt 1** from the drop-down list.



2. Click on the **No Assigned Primary** pie chart to open the list.



Review the list and manually update patient's primary provider as appropriate.

3. Click on their **Demographic Number** to open their Master Record.

4. Click **Edit**.



Master Record

Next Appointment:

PATIENT SEARCH

ABOUT

Name Search Inactive All

(378) **Edit**

Export this Demographic

DEMOGRAPHIC

Last Name:
First Name:
Preferred Name:
Title:
Sex: **M**
Age:
SIN:
Language: **English**

OTHER CONTACTS: [ADD RELATION](#)

CLINIC STATUS (ENROLLMENT HISTORY)

5. Choose your name from the drop-down list under **Physician/MRP**.

6. Click **Update Record** to save the change.

Physician/MRP :

Patient Status: **AC - Active** Add New

Midwife:

Referral Doctor: Search Name

Family Doctor: Search Name

Enrollment Physician: Same as MRP

Enrollment Status: Add New

Insurance No:

Patient Type: Not Specified

External ID:

Archived Paper Chart: yyyy-mm-dd

Date Joined: 2021-12-03

Nurse:

Patient Status Date: 2021-12-03

Resident:

Referral Doctor #:

Family Doctor #:

Date Enrolled: yyyy-mm-dd

Chart Number:

PHU: Select Below

Demographic Group: None

End Date: yyyy-mm-dd

Waiting List: --Select Waiting List--

Waiting List Note:

Date of request: yyyy-mm-dd

Provider: internal Add

Rx Interaction Warning Level: Not Specified Show Description

Notes

Alert:

Alert:

Notes:

Update Record Save & Update Family Members



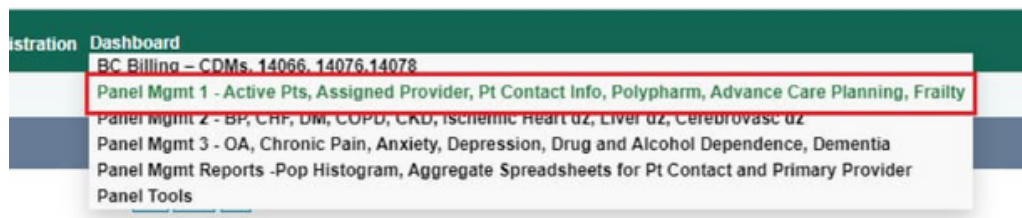
DEACTIVATE PATIENTS NOT SEEN BY X YEARS

Identify patients with 'Active' status but have not been seen for last few years.

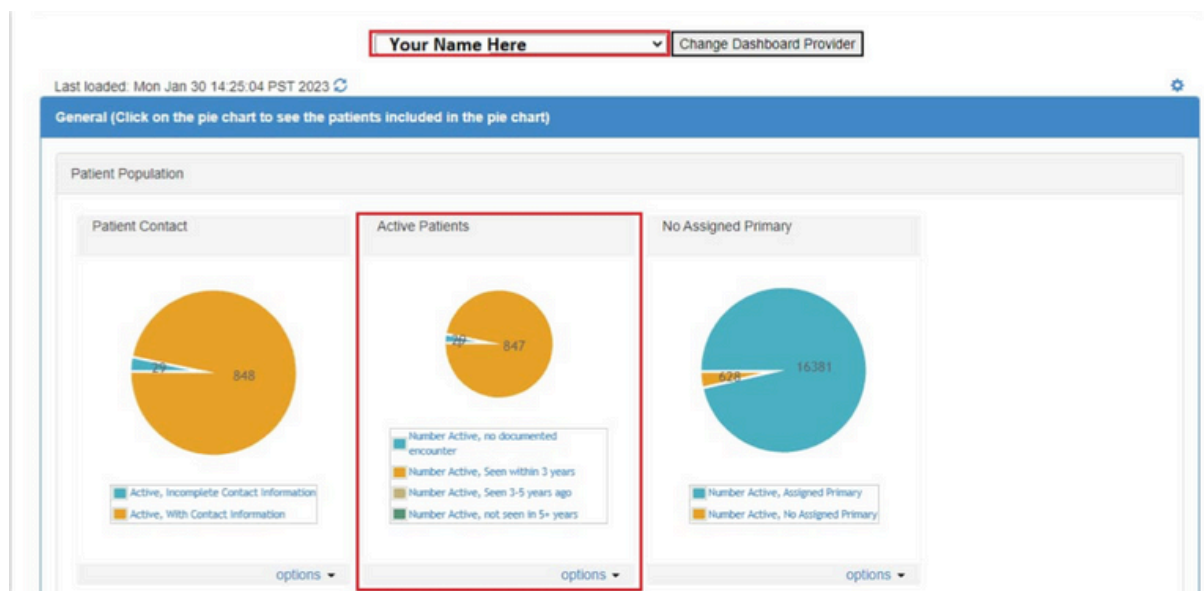
Decide what date range for active patients suits your practice.

Discuss with your team how they can help with necessary updates if needed.

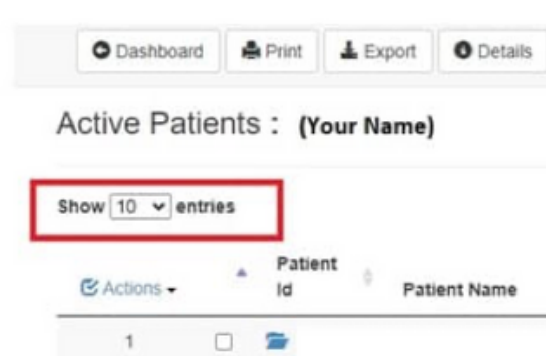
1. Click on **Dashboard** and select **Panel Mgmt 1** from the drop-down list.



2. Click on the **Active Patients** pie chart to display the list of patients.



3. Change the number of entries per screen to show – a larger number is easier to scroll through.





4. Click the column heading **Last Encounter** to sort the list by most recent visit.

All	All	Parameter 2	Filter	Reset
Date of Birth (mm-dd-yy)	Age	Last Encounter	Patient Status	
	55	2019-04-11 19:58:53	AC	
	71	2019-04-23 07:08:10	AC	
	54	2019-04-18 07:40:01	AC	
	53	2019-04-24 09:36:56	AC	

5. Scroll down to identify patients with last encounter outside of the date range that you have specified for active patients.

IMPORTANT NOTE

This search is looking for an encounter note. If there is no date under the last encounter, either the patient has not been seen in the office or it might be a new patient who has not yet had their first appointment.

6. To narrow the list, you can also use additional filters.

For example search for patients older than 20 years to remove them from the view.

- Select criteria from drop-down menus at the top of the page, for our example select **Age**
- select **greater than**
- type **20**
- Click **Filter** to execute the search. Patients

Age	greater than	20	Filter	Reset
Date of Birth (mm-dd-yy)	Age	Last Encounter	Patient Status	

7. Click patient id number to open master record and review patient's e-chart.

- Check off the patient you want to deactivate.
- Click **Actions to display options**.
- Select **Set Status Inactive**.

Inactive patients will not be listed in the next search.

Active Patients : Physician Name				
Show 10 entries	All	All	Parameter	
Actions	Patient Id	Patient Name	Date of Birth (mm-dd-yy)	Age
Select All in View	12241	Patient Name	11-17-1952	68
Select None	26966	Patient Name	01-15-1986	35
Assign Tickler	35440	Patient Name	11-20-1950	70
Set Status Inactive	35599	Patient Name	04-17-1944	77

IMPORTANT NOTE

This action cannot be undone. We recommend that you print or save a list of these patients prior to inactivating.

To update more than one patient at a time, use **batch** action.

Check off all the patients you want to deactivate.



MANAGE PATIENT STATUS OPTIONS AND CORRECT ENTRIES

To maintain your panel effectively, you may consider adding patient statuses other than Active, Inactive, and Deceased to identify patient populations, e.g., for walk-in, maternity, or cosmetic treatment. Discuss with your team criteria for different statuses that will remove patients from your active patients' panel.

To create a new status, locate the patient for whom this new status applies.

1. Open **Master Record** for this patient.
2. Click **Edit**.

3. Locate the **Patient Status** field and click **Add New**.

4. Type the name for the new status, then click **OK**.



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PRO**

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The new status will now be available in the Patient Status drop-down list in all charts:

Physician/MRP :

Patient Status: **Maternity**

Midwife:

Referral Doctor: [Search Name](#)

Family Doctor: [Search Name](#)

Enrollment Physician: **Maternity**

Enrollment Status:

Insurance No:

IMPORTANT NOTE

New statuses can't be edited later. You can only inactivate the status you no longer need. Apply a different status to all patients with the status you want to change. Then, the unwanted and not used status will no longer appear on the drop-down list.

After completing this section, you can report current and accurate number of active patients assigned to you.

Plan the process with your team and assign responsibilities to ensure the accuracy of entries from this point forward.

**Have questions on how to
manage your patient panel?**

Contact us at
help@oscarprodesk.ca.

