



PRIME REGISTRY™

Improving America's Health

PRIME Registry Patient Empanelment

Quick Start Guide

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American Board
of Family Medicine

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1. INTRODUCTION

This guide explains the process of patient empanelment. It provides a step by step procedure to access the Care Team and the Patient Management dashboard.

****Only Admin users have access to Patient Empanelment. ****

(NOTE: Practice Admin may also be a clinician)

2.2. PATIENT EMPANELMENT

In Patient Empanelment, primary care providers are assigned to individual patients. Only practice admins have access to Patient Empanelment.

Patient Empanelment allows the admin to:

- Manage care teams.
- Manage patients.
- Run and View the Empanelment Status Report for the practice.

The Patient Empanelment dashboard includes the following three tabs:

1. [Practice Settings](#)
2. [Care Team Management](#)
3. [Patient Management](#)

The screenshot displays the Prime Registry interface for Patient Empanelment. At the top, the logo 'PRIME REGISTRY' is followed by the tagline 'Improving America's Health'. Below this, a breadcrumb trail reads 'CPC+ > Patient Empanelment'. The main content area features three tabs: 'Practice Settings' (which is active), 'Care Team Management', and 'Patient Management'. The 'Practice Settings' tab contains two questions with dropdown menus: 'Do you primarily empanel patients by practitioner (i.e., MD,DO,PA or NP) or by care team (i.e., practitioner-led teams)? *' with 'Practitioner' selected, and 'Set the Look back period for your Practice: *' with '4 year' selected. At the bottom right of the form are three buttons: 'Save', 'Run Report', and 'Cancel'.

2.2.1 PRACTICE SETTINGS

Practice settings allows the admin to set the method of empanelment used by the practice and view the empanelment status report for the practice. See **Figure 1: Practice Settings**.

There are two ways to empanel patients – by practitioner, and by care team.

CPC+ > Patient Empanelment

Practice Settings Care Team Management Patient Management

Do you primarily empanel patients by practitioner (i.e., MD,DO,PA or NP) or by care team (i.e., practitioner-led teams)? *

Practitioner

Set the Look back period for your Practice: *

5 year

Save Run Report Cancel

Figure 1: Practice Setting

After you have begun to empanel patients (section 2.2.3), you can run the Empanelment Status Report to see an overview of the numbers of patients empanelled.

EMPALEMENT STATUS REPORT

Use the following steps to view the empanelment status report:

1. Select the practitioner or care team from the **Empanel Patients by Practitioner or by Care Team** drop-down menu.
2. Select the lookback period for the practice from the **Set the Lookback period for your Practice** drop-down menu.
3. Click **Run Report**.

Lookback period can be selected only in years.

The empanelment status report is displayed on the page.

Empanelment Status Report				
EMPALEMENT STATUS	Q1	Q2	Q3	Q4
Number of panels at your Practice	0	22	23	-
Total number of patients empaneled with a practitioner or care team at your practice	0	51	52	-
Total number of active patients	21952	21952	21952	-
% of patients empaneled	0.00	0.23	0.24	-

Figure 2: Empanelment Status Report

The report displays empanelment status for each quarter. The report displays the following:

1. Number of panels at your practice.
2. Total number of patients empanelled with a practitioner or care team at your practice.
3. Total number of active patients.
4. % of patients empanelled.

2.2.2 CARE TEAM MANAGEMENT

Care teams are groups of healthcare providers who take collective responsibility for patients. The Care Team Management tab contains a list of care teams with the following details about:

- Name of the care team.
- Name of the clinician associated with the care team.
- Number of patients in the care team.

CARE TEAM	CLINICIAN NAME	NO. OF PATIENTS	EDIT

Records 0 << < 1 > >>

✓ Add Care Team

Figure 3: Care Team Management

Adding a Care Team:

The **Add Care Team** feature is used to add care team details.

Use the following steps to add a new care team:

1. Click **Add Care Team**.
The Add Care Team page opens.
2. Enter a name for the care team.
3. Select the name of the clinician associated with the care team, from the **Clinician** drop-down list.
4. Click **Save** to save the details entered.
Or
Click **Cancel** to cancel the details.

Add Care Team

Care Team: *

Clinician: * --Select--

✓ Save x Cancel

Figure 4: Add Care Team

Both fields are mandatory.

On saving, a record is added to the Care Team Management table.

CPC+ > Patient Empanelment

Practice Settings Care Team Management Patient Management

CARE TEAM ▲	CLINICIAN NAME ▼	NO. OF PATIENTS ▼	EDIT
Team 1	DemoClinician_one	0	

Records 1 of 1 << < 1 > >>

✓Add Care Team

Figure 5: Care Team Record

Edit:

Click the Edit icon to edit an existing care team record.



You are taken to the **Update Care Team** page.

Make the necessary edits and update the care team details.

You can change the care team name or the assigned clinician while updating the record.

Search:

The Search feature enables searching for a particular care team, clinician or the number of patients associated with a care team.



The name of the care team should be unique.

One patient cannot be assigned to multiple care teams.

A single care team can have multiple patients.

2.2.3 PATIENT MANAGEMENT

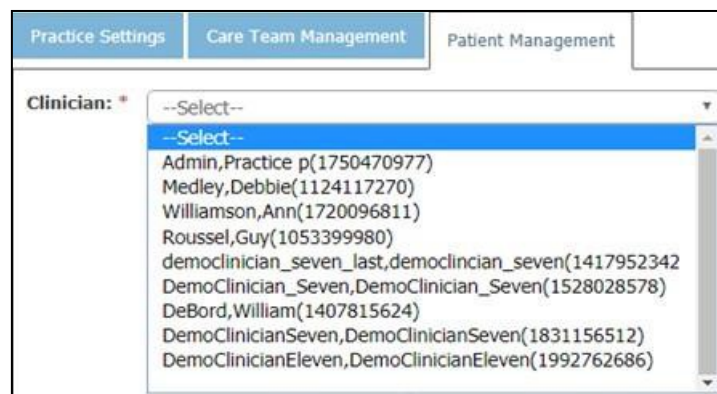
Patient Management tab displays the list of patients associated with a particular clinician. Using this functionality an administrator can:

1. View patients linked to a clinician.
2. Assign care team to patients.
3. Unassign care team from patients.

2.2.3.1 VIEWING PATIENTS LINKED TO A CLINICIAN

1. Select the name of a clinician from the **Clinician** drop-down list.

The list of patients assigned to the selected clinician is displayed in a tabular format.

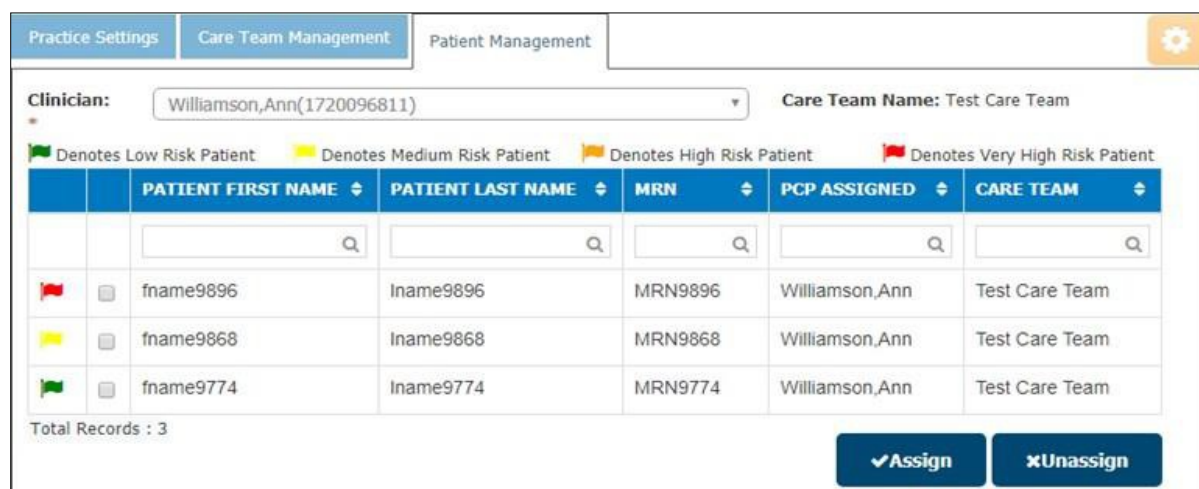


Practice Settings | Care Team Management | Patient Management

Clinician: * --Select--

- Select--
- Admin, Practice p(1750470977)
- Medley, Debbie(1124117270)
- Williamson, Ann(1720096811)
- Roussel, Guy(1053399980)
- democlinician_seven_last, democlinician_seven(1417952342)
- DemoClinician_Seven, DemoClinician_Seven(1528028578)
- DeBord, William(1407815624)
- DemoClinicianSeven, DemoClinicianSeven(1831156512)
- DemoClinicianEleven, DemoClinicianEleven(1992762686)

Figure 6: Patient Management - Clinician



Practice Settings | Care Team Management | Patient Management

Clinician: Williamson, Ann(1720096811) Care Team Name: Test Care Team

Denotes Low Risk Patient Denotes Medium Risk Patient Denotes High Risk Patient Denotes Very High Risk Patient

	PATIENT FIRST NAME	PATIENT LAST NAME	MRN	PCP ASSIGNED	CARE TEAM
	fname9896	lname9896	MRN9896	Williamson, Ann	Test Care Team
	fname9868	lname9868	MRN9868	Williamson, Ann	Test Care Team
	fname9774	lname9774	MRN9774	Williamson, Ann	Test Care Team

Total Records : 3

Assign Unassign

Figure 7: Patient Management - Patients

Flags of different colors are displayed before the patient name. The flags represent the health risk score assigned to each patient. (This score is assigned in the Risk Stratification module)

Flag Color	Representation
	Denotes Low Risk Patient
	Denotes Medium Risk patient
	Denotes High Risk Patient
	Denotes very High Risk Patient

Search:

Search icon in each column enables searching based on a specific parameter. You can also conduct a partial search.



2.2.3.2 ASSIGNING PATIENTS TO A CARE TEAM

Use the following steps to assign a patient to a care team:

1. Select the checkbox next to the patient name.

	PATIENT FIRST NAME	PATIENT LAST NAME	MRN	PCP ASSIGNED	CARE TEAM	STATUS
☒	fname32895	lname32895	MRN32895			Unassigned

1 **2**

Figure 8: Assigning Patients to a Care Team

2. Click **Assign**.
The **Add Clinician** page is displayed.
3. Select the name of the clinician from the **Clinician** drop-down list.

Add Clinician

Clinician: *

4

Figure 9: Add Clinician

4. Click **Save**.
The care team and PCP Assigned values are updated in the patient list table and a success message is displayed.

An administrator can change an assigned clinician. Use the above procedure to assign a different clinician to the patient. A confirmation message for the change is displayed on the screen.

Confirmation

One or more patients are already mapped to another Clinician. It will Reset the Mapping.Are you sure want to Proceed?

5

Figure 10: Confirmation Window

5. Click **Yes**.
Record is updated in the patient list table.

2.2.3.3 UNASSIGNING PATIENTS FROM A CARE TEAM

Use the following steps to unassign a patient from a care team:

1. Select the name of a clinician from the **Clinician** drop down list.

Patients assigned to the selected clinician are displayed in a tabular format.

Clinician: * Williamson,Ann(1720096811) Care Team Name: Test Care Team

Denotes Low Risk Patient Denotes Medium Risk Patient Denotes High Risk Patient Denotes Very High Risk Patient

		PATIENT FIRST NAME	PATIENT LAST NAME	MRN	PCP ASSIGNED	CARE TEAM
	☒	fname9774	lname9774	MRN9774	Williamson,Ann	Test Care Team

Figure 11: Unassign Care Team from Patient

2. Select the checkbox before the patient first name.
3. Click **Unassign**.
The selected patient is unassigned from the clinician.