Standard Operating Procedure | Health PEI

SOP Name:	Panel Identification and Maintenance in Primary Care
Effective Date:	2025-11-28
Next Review Date:	2026-10-30
Revision Dates:	May 17, 2024; November 10, 2025
Related SOPs, Directives, Policies, & Forms:	Primary Practitioner, Primary Location and Patient Status fields in the Provincial EMR; Panel Identification Process Maps (Swim Lanes)
Owner:	Primary Care Division

Purpose:
The Panel Identification and Maintenance Standard Operating Procedure (SOP) outlines the standard documentation steps to identify affiliated versus unaffiliated patients in relation to Primary Care panel of care.

General Introduction:
The Provincial EMR provides an area to update the Primary Practitioner, Primary Location and Patient status fields in the Provincial EMR. The same principles are used for non-Provincial EMR primary care providers using an excel spreadsheet.

Patient Status

The patient status field can be updated in the Demographics sub-section of the Patient Data section. Status selections include None, Active, Inactive, Deceased and Unknown.

The circumstances to use each of the statuses are as follows:

None: Displays as "No Entry"

Active: includes Canadian citizens/ permanent residents of Canada who reside permanently in PEI with Health Cards. Includes students and seasonal workers who are temporarily living out-of-province.

Inactive: Includes formerly active patients that are no longer being followed by a primary care provider on the Island. Would include:
- Patient is no longer living in the province (This would not include students or seasonal workers who are temporarily out-of-province)

Deceased: Patient is deceased, and the date of death is known. Status can be updated by staff and will be updated via Client Registry integration. Client Registry date of death is informed by Vital Statistic so there can be lag time.

Unknown: Used to identify temporary patients who are accessing care who do not meet eligibility for "active" status such as those who have out of province health cards, those with a working visa and new residents awaiting their PEI Health Card.

Affiliated or unaffiliated patients are identified by the "Status" field along with "Primary Practitioner" and "Primary Location" fields. Status and Primary Practitioner fields can be displayed in the patient data headers and used in Analytics Dashboards for panel maintenance monitoring. The following defines the affiliated versus unaffiliated and Temporary patient determination in the Provincial EMR:

Affiliated patient:
Status = Active
Primary Practitioner = Family Physician Specialist or Nurse Practitioner
Primary Location = Where Primary Practitioner provides longitudinal care

Unaffiliated patient:
Status = Active
Primary Practitioner = Unaffiliated Provider
Primary Location = No Location or Blank

Temporary patients are identified by the "Status" field, "Primary Practitioner" and "Primary Location" fields:

Temporary patient:
Status = Unknown
Primary Practitioner = Family Physician or Nurse Practitioner
Primary Location = Where Primary Practitioner provides longitudinal care

Note: If a primary practitioner is not on the Provincial EMR, the primary practitioner can be added to the family physician field and the Primary Location = No Location or Blank

Scope:
The scope of this standard operating procedure applies to all areas within Health PEI using the Provincial EMR, however updates to Primary Practitioner, Primary Location and Patient Status fields predominantly sit with the Primary Care Division. It is the sole responsibility of primary practitioners or their designate to update patient "Status" in Patient Data section, and "Primary Practitioner" and "Primary Location" in the Patient Chart. Appendix C outlines Panel Maintenance processes in primary care to assist with maintaining an accurate panel patient list. Each patient has only one (1) Primary Practitioner providing longitudinal care as documented by Primary Care Offices and Division. Other practitioners involved in the circle of care are identified as part of the Care Team. Specialist or practitioner/clinicians in other program areas may add themselves in the Patient Chart Dashboard in the "Care Team" Widget.

Terms & Definitions:	
Active	A Patient Status option. **Active** includes Canadian citizens/ permanent residents of Canada who reside permanently in

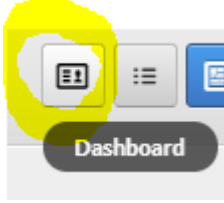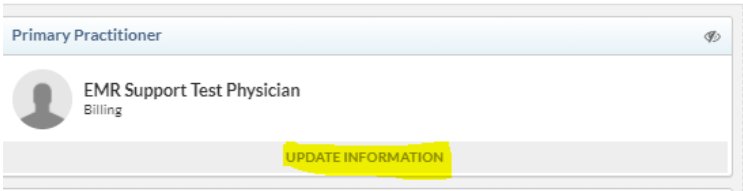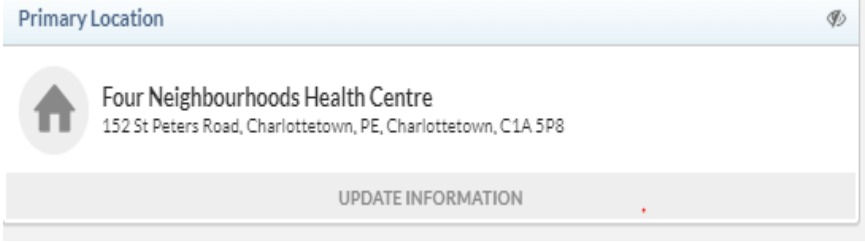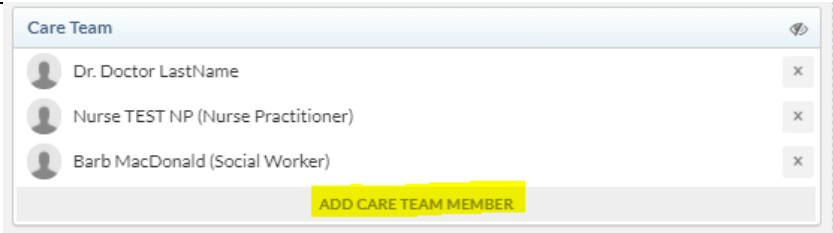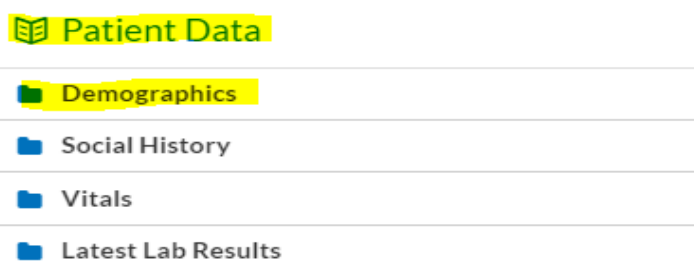|	
	PEI with Health Cards. Includes students and seasonal workers who are temporarily living out-of-province.
Affiliated Patient	A patient considered part of a primary practitioner panel in Primary Care for longitudinal primary care. The Status = Active. Primary Practitioner = Family Physician Specialist or Nurse Practitioner. Primary Location = where Primary Practitioner provides longitudinal care or if primary practitioner is not on the EMR Primary Location = No Location or Blank
Care Team	Health care professionals' part of the patient's care team not identified as the Primary Practitioner or Family Doctor. Including but not limited to Specialists, Nurse Practitioners, Psychologists and Allied Health Professionals.
Deceased	Patient is deceased. Status can be updated by staff and will be updated via Client Registry integration. Client Registry date of death is informed by Vital Statistic so there can be lag time.
Family Doctor	The Family Doctor field in the Prov EMR is often the same as Primary Practitioner. To be used to enter in any primary care provider (family physician specialist or nurse practitioner) not onboarded to the Provincial EMR.
Inactive	Includes formerly active patients that are no longer being followed by a primary practitioner on the Island. Would include: • Patient is no longer living in the province (This would not include students or seasonal workers who are temporarily out-of-province)
No Location	This exists in the system as an alternative to leaving the field blank. Also use this option for patients whose primary practitioner is not on the EMR.
Patient Panel	A patient panel is a set of patients that have established relationships with a primary practitioner. There is an implicit agreement that the identified family physician specialist or nurse practitioner and team will provide comprehensive, longitudinal primary care.
Primary Location	It is the clinic where the primary practitioner practices longitudinal, coordinated care. UPEI Health and Wellness Center, Holland College, PCACs and Primary Care Network Services **are not** considered Primary Locations.
Primary Practitioner	A family physician specialist or nurse practitioner providing longitudinal primary care. It is a field in the Provincial EMR on the patient chart dashboard to record the primary care provider identified as the Primary Practitioner.
Patient Status	An identifier within the Provincial EMR to identify the activity level within the Health PEI system. A determining factor for panel identification. Patient Status is recorded as Status in the Demographics section of the Patient Data in the patient chart on the Provincial EMR.
Temporary Patient	An out-of-province patient seeking episodic temporary care who does not meet eligibility for "active" status. The Status = Unknown. Primary Practitioner = Family Physician Specialist or Nurse Practitioner. Primary Location = where Primary

	Practitioner provides longitudinal care or if primary practitioner is not on the EMR Primary Location = No Location or Blank
Unaffiliated Patient	A patient with no Primary Practitioner attachment.
Unaffiliated Provider	The option to add to the Primary Practitioner field in the Provincial EMR to identify a patient with no Primary Practitioner attachment. Primary Location = No Location or Blank
Unknown	Applicable for Temporary Patients including: • An out-of-province patient seeking episodic temporary care who does not meet eligibility for "active" status • Patients with a working visa A new resident of the Island that is waiting for a PEI Health Card number. Once a PEI Health Care number is received, update Patient Status.
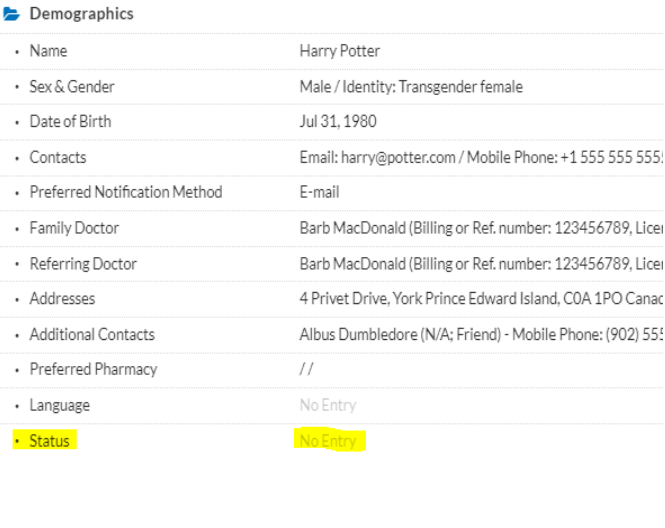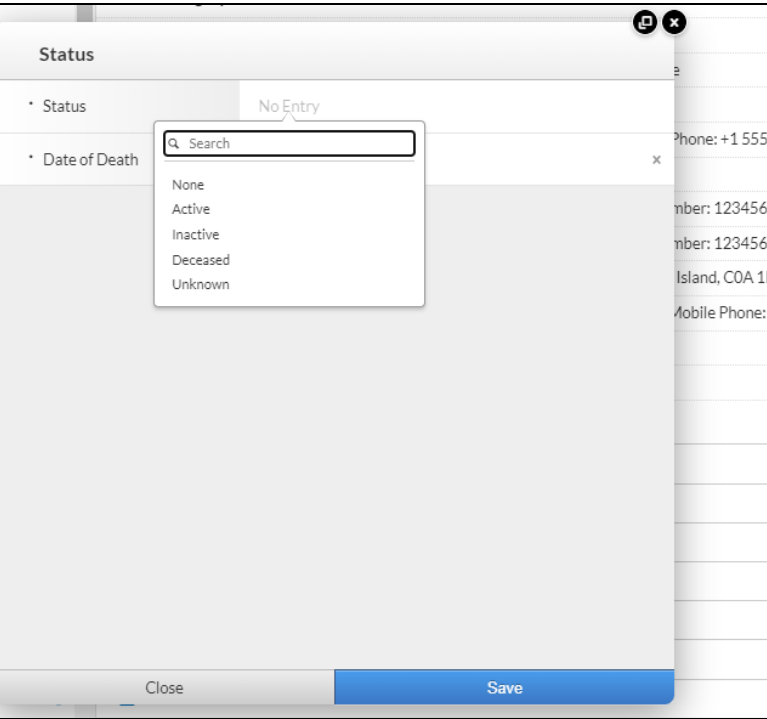
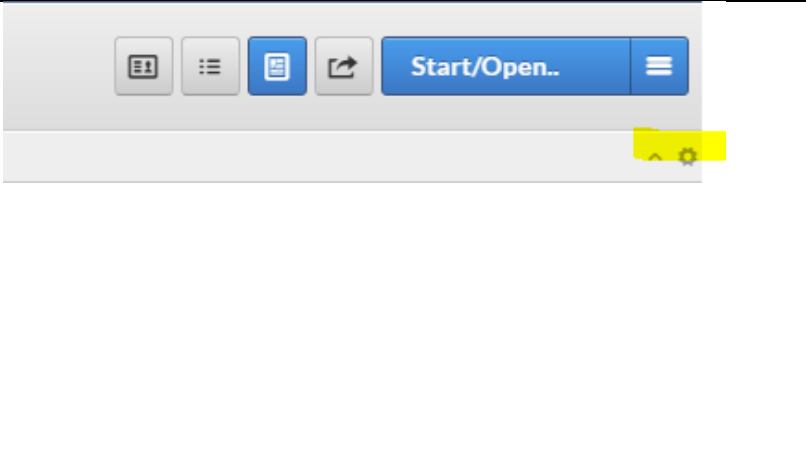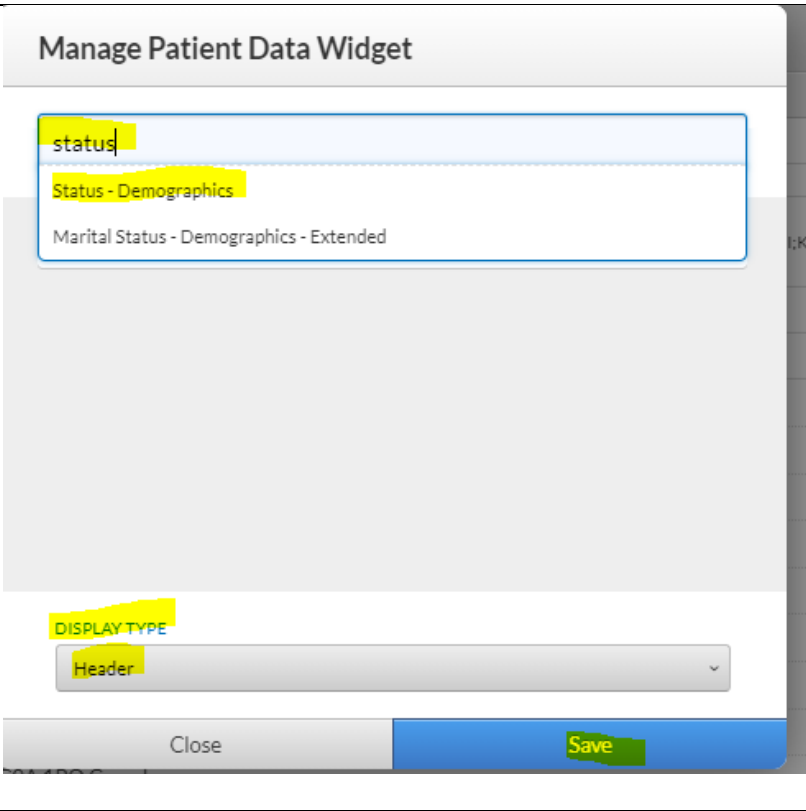| **EMR Process Steps in Primary Care: (Visual steps in Appendix A)**		
#	**Description**	**Responsible**
1	Navigate to the Primary Practitioner Widget in Patient Chart Dashboard and Click on "update information": - Affiliated Patients: Update Primary Practitioner to appropriate family physician specialist or nurse practitioner - Unaffiliated Patients: Update Primary Practitioner to "Unaffiliated Provider"	MOA/Clinic Coordinator
2	Navigate to the Primary Location Widget in Patient Chart Dashboard - Verify if location is the same as Primary Practitioner for Affiliated, Temporary and Deceased Patients - If not, click on "update information" and select appropriate Primary Location	MOA/Clinic Coordinator
3	Navigate to the Care Team Widget in Patient Chart Dashboard and add other health care providers involved in care team of the patient (optional)	Any EMR User
4	Navigate to Patient Data Section of Patient Chart	MOA/Clinic Coordinator
5	Click on Patient Status and a new window appears	MOA/Clinic Coordinator
6	Select appropriate Patient Status from dropdown according to definitions	MOA/Clinic Coordinator
7	Click Save	MOA/Clinic Coordinator
8	Navigate to Patient Header to add Status for easy view (you may have this step set up through your implementation)	MOA/Clinic Coordinator

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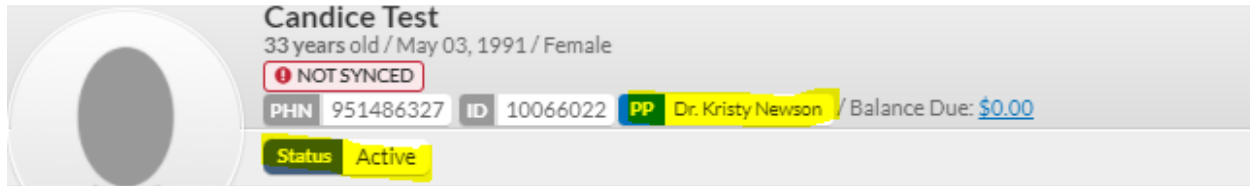| 9	Navigate to the far right and click on the settings wheel just under the Start/Open blue button and a new window will appear named "Manage Patient Data Widget"	MOA/Clinic Coordinator
10	In "Search Field" type "Status" and select "Status – Demographics" from drop down. Also select "Display Type" as "Header" and click "Save"	MOA/Clinic Coordinator
11	View Status in Header (see Appendix B for views of Patient Status)	

Approvals:
Director Primary Health Care Operations and Director TO Workstream (Access and Affiliation)

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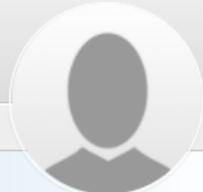
Appendix A:

EMR Process Steps in Primary Care: (Visual steps)		
#	**Description**	
1	Navigate to the Primary Practitioner Widget in Patient Chart Dashboard and Click on "update information": - Affiliated Patients: Update Primary Practitioner to appropriate family physician specialist or nurse practitioner - Unaffiliated Patients: Update Primary Practitioner to "Unaffiliated Provider"	Dashboard Primary Practitioner EMR Support Test Physician Billing UPDATE INFORMATION
2	Navigate to the Primary Location Widget in Patient Chart Dashboard - Verify if location is the same as Primary Practitioner for Affiliated, Temporary and Deceased Patients - If not, Click on "update information" and select appropriate Primary Location	Primary Location Four Neighbourhoods Health Centre 152 St Peters Road, Charlottetown, PE, Charlottetown, C1A 5P8 UPDATE INFORMATION
3	Navigate to the Care Team Widget in Patient Chart Dashboard: - Add other providers that are part of the care team (optional)	Care Team Dr. Doctor LastName × Nurse TEST NP (Nurse Practitioner) × Barb MacDonald (Social Worker) × ADD CARE TEAM MEMBER
4	Navigate to Patient Data Section of Patient Chart and click Demographics	Patient Data Demographics Social History Vitals Latest Lab Results

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5	Click on Patient Status and a new window appears	
6	Select appropriate Patient Status from dropdown according to definitions	
7	Click Save.	
8	Navigate to Patient Header at the top of the chart to add Status for easy view (you may have already set this up during your implementation)	(extends further than picture displayed)

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9	Navigate to the far right and click on the settings wheel just under the Start/Open blue button and a new window will appear named "Manage Patient Data Widget"	
10	In "Search Field" type "Status" and select "Status-Demographics" from drop down. Also select "Display Type" as "Header" and click "Save"	

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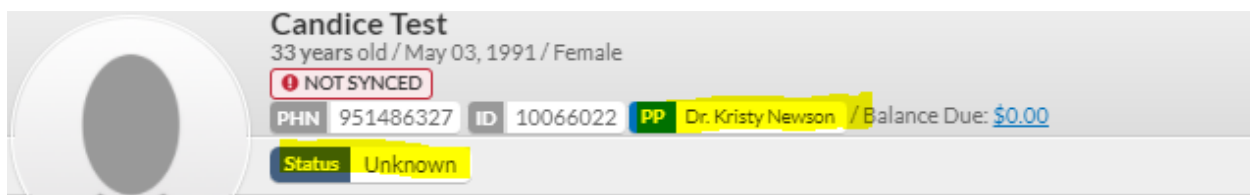| 11 | View Status in Header (see Appendix B for views of Patient Status) | Affiliated View:

Karen Lea Test (She/Her)
56 years old / Apr 01, 1968 / Female
⊘ NOT SYNCED
PE 00765678 ID 9850341 PP Dr. Kristy Newson / Balance Due: $0.00
Status Active

Unaffiliated view:

Kristy Montague Test
13 years old / 2010/Jun/15 / Male
⊘ NOT SYNCED
OTHER TEST00002 PP Unaffiliated Provider / Balance Due: $0.00
Status Active

CELL PHONE |

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Appendix B: Display of various Patient Status in Patient Chart Header

Affiliated patient:
Status = Active
Primary Practitioner = Family Physician Specialist or Nurse Practitioner

Unaffiliated patient:
Status = Active
Primary Practitioner = Unaffiliated Provider

Temporary patient:
Status = Unknown
Primary Practitioner = Family Physician Specialist or Nurse Practitioner

Inactive:
Status = Inactive

Deceased:
Status = Deceased

Appendix B: Panel Maintenance Processes in Primary Care

Save and Validate Button (Provincial EMR Primary Practitioners)

Each patient visit to the clinic is an opportunity to confirm patient information is accurate. Client identification is an Accreditation Required Organizational Practice (ROP) that can avoid harmful incidents such as privacy breaches, allergic reactions, medication errors, lab specimen errors, and wrong-person procedures. At least two person-specific identifiers are used to confirm the right client receives the right care at the right time. Best practice is to make this a routine part of the check-in process. By clicking the "Save and Validate" button you are confirming the VALID process (outlined below) was completed on the date specified.

V   Verify identity – Personal Health Number (PHN), DOB, Name and Health Card Status

A   Address – What is your address?

L   Last phone number on file – What is your phone number?

I   Identify Primary Practitioner and Primary Location fields are correct on Provincial EMR

D   Date Stamp – Click "Save and Validate" to confirm patient information is accurate.

The "Save and Validate" button is available in the Update Patient Information section of the Provincial EMR. Can be accessed from the schedule.

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Regular review of Panel Patient List

Each site can run reports that will produce lists of patients by primary practitioner(s). To generate a primary practitioner panel patient list, follow the steps below:

1. From the Left Navigation panel, click on the Analytics icon
2. Click "Panel Overview"
3. Choose Primary Location and if applicable Primary Practitioner

4. For purpose of panel maintenance: remove Patient Status and Medicare Eligibility filters. Note: The default filters are for the purpose of panel counts

5. On the dashboard locate the patient list section, click on the 3 dots and click "Download Data"
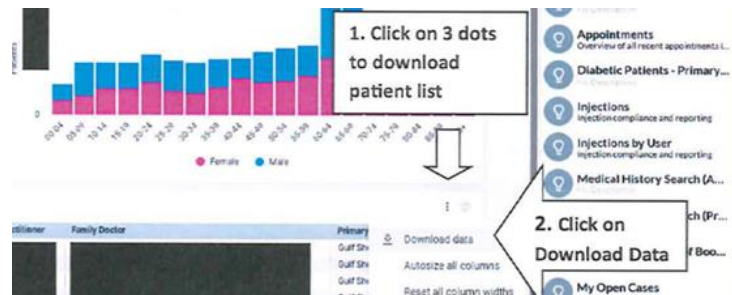
6. Choose Format Excel Spreadsheet, click "All Results" and click "Download"
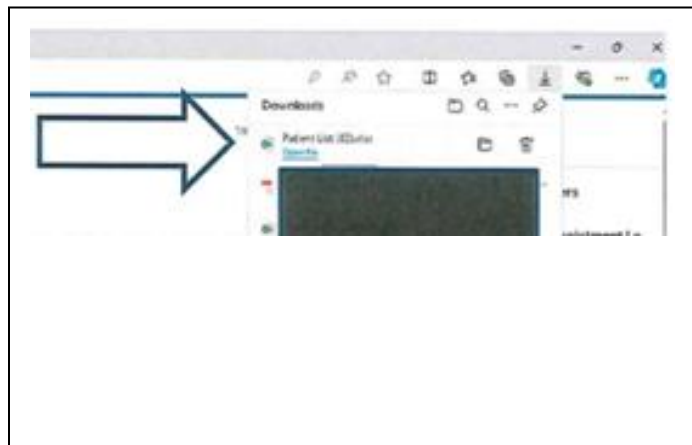
It is recommended the primary practitioner review their patient panel list every six to 12 months at a minimum. Ensure Primary Practitioner, Primary Location and Status fields are accurate.

Flag patients using Medicare Eligibility column who are deceased, moved away or do not meet the eligibility criteria for Active status as per below.

- 10 – Eligible for coverage (Working Visa): Status change to "Unknown"
- 24 – Working Visa: Status change to "Inactive"
- 40 – Terminated By H.C.S.A: Status change to "Inactive"
- 50 – Left Province: Status change to "Inactive"
- 60 – Deceased: Status change to "Deceased"
- No Status: Status change to "Unknown"; or if Newborn to same status as the mother

Note: 70 – Expiry Date of Card – may still be a PEI Resident with an expired PEI Health Card meeting eligibility criteria for Active Status.

Paper based clinics can create and maintain panel patient lists using an excel spreadsheet.

Monthly Panel Maintenance Reports

There are five monthly reports generated at the first of each month as follows:

Report 1: Public LTC Residents on Provincial EMR by Primary Location

This report merges Public Long-Term Care (LTC) extract with the Provincial EMR patient list by primary location. The purpose of the report is to identify active patients affiliated to a primary practitioner that have transitioned to a public LTC facility.

Report 2: Discrepancy of Primary Care Provider between Provincial EMR and Clinical Information Systems (CIS) by Primary Location

This report merges CIS Encounter Family Physician data tables with the Provincial EMR patient list by primary location. The purpose of the report is to identify patients affiliated to a primary practitioner that have a different primary care provider listed in CIS.

Report 3: Newly Deceased List by Primary Location

This report merges deceased list from Vital Statistics with the Provincial EMR patient list by primary location. The purpose of the report is to identify patients affiliated to a primary practitioner who are deceased.

Report 4: Affiliated patients on the Provincial EMR on the Provincial Patient Registry

This report merges the Provincial Patient Registry (eCRM) with the Provincial EMR patient list by primary location. The purpose of the report is to identify patients affiliated to a primary practitioner that are on the eCRM awaiting affiliation.

Report 5: Patients on the Provincial EMR with the wrong Primary Location

This report identifies patients affiliated to a Primary Practitioner on the Provincial EMR where the Primary Location does not match the correct location for that primary practitioner.

Biannual Panel Maintenance Reports

An updated excel spreadsheet of patient lists for non-provincial EMR will be generated and merged with the Provincial EMR patient list by primary location. The purpose is to identify patients affiliated with more than one primary practitioner as well as to identify patients affiliated to a primary practitioner that are on the eCRM awaiting affiliation.