

# Health PEI

## Panel Identification and Maintenance in Primary Care Standard Operating Procedure (SOP)

### What is Panel Identification and Panel Maintenance?

- Panel identification is the process of cleaning a panel list to include only those patients who consider a physician or nurse practitioner to be their primary care provider, and that provider agrees.
- Panel maintenance is the ongoing process of keeping the panel clean once it has been identified. Each patient encounter is an opportunity to confirm patient information, including the name of their provider, their contact information and to check health card expiry dates. Panel lists are dynamic, e.g. patients may leave the province, may transition to a Long Term Care facility provider, etc.

### Who is the Primary Practitioner?

- The most responsible provider (MRP) is the individual Physician or Nurse Practitioner providing longitudinal, coordinated and continuous care to a patient.
- Each patient has only one MRP and is designated as the “**Primary Practitioner**” in the provincial EMR.
- Other providers including Specialists, Nurse Practitioners, Psychologists, and Allied Health Professionals involved in the circle of care may add themselves in the Patient Chart Dashboard in the “**Care Team**” widget.



**Primary Practitioner =  
Most Responsible Provider**

### Where is the Primary Location?

- The location where the primary practitioner practices longitudinal, coordinated and continuous care.
- The primary location should not be used for other services **not** part of longitudinal, coordinated and continuous care such as walk-in clinics, methadone clinic, etc.

### What is the Patient Status?

- The Provincial EMR provides an area to update the status of patients in the Demographics sub-section of the Patient Data section. The patient Status selections include:
  - Active:** Includes Canadian citizens/permanent residents of Canada who reside in PEI with PEI 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.
    - 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.
  - Unknown:** Applicable for Temporary Patients including:
    - 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 student or working visa and new residents awaiting their PEI Health Card.
- Please refer to the Panel Identification and Maintenance SOP and Process Maps (Swim Lanes) for further information on the circumstances to use each of the statuses (<https://src.healthpei.ca/physicians>).

### What constitutes a Primary Practitioner panel?

- The number of unique individuals under the care of a specific MRP (Primary Practitioner in EMR) within their primary location. Includes active and blank status. Excludes inactive, deceased and unknown (temporary patients).

**The Panel Overview Dashboard is where you can find a list of patients affiliated to you the Primary Practitioner, their status, Medicare eligibility, and patient count.**

### Panel Identification and Maintenance Training

- A one and half hour Panel Identification and Maintenance Training for MOA's is available. Please contact the Primary Care Network Admin Supervisor

**Panel Identification and Maintenance Training is Available**