

SOP Name:	Primary Practitioner, Primary Location and Patient Status fields in the Provincial EMR
Effective Date:	October 17 th , 2025
Next Review Date:	October, 2028
Revision Dates:	
Related SOPs, Directives, Policies, & Forms:	Panel Identification and Maintenance SOP (Link is under development)
Owner:	Provincial EMR Program Standards Committee

Purpose:
 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 sits with the Primary Care Division to support panel identification.

General Introduction:
 The Primary Practitioner field in the patient chart dashboard provides an area to update Primary Practitioner name. The Primary Practitioner is a primary care physician or nurse practitioner providing longitudinal primary care. If a primary care provider is not on the Provincial EMR, the primary care provider can be added to the family physician field and the Primary Location = No Location or Blank.

 The Primary Location is the clinic where the primary practitioner practices longitudinal, coordinated care. UPEI Health and Wellness Centre, Holland College, PCAC's and Primary care network services **are not** considered Primary Locations.

 The Provincial EMR provides an area to update the status of patients in the Demographics sub-section of the Patient Data section.

Scope:
 Primary Care clinics and staff are responsible for updating patient Primary Practitioner and Primary Location fields in the Dashboard of the patient's chart, and Patient Status in Patient Data section.

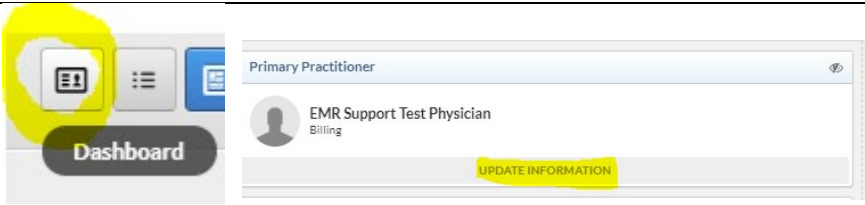
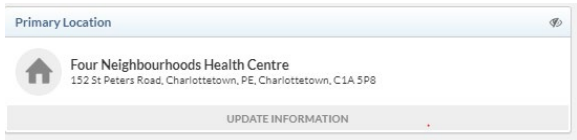
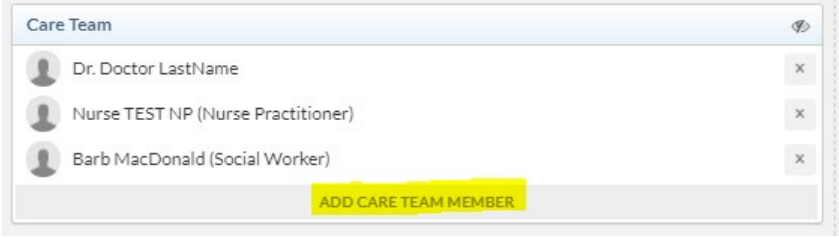

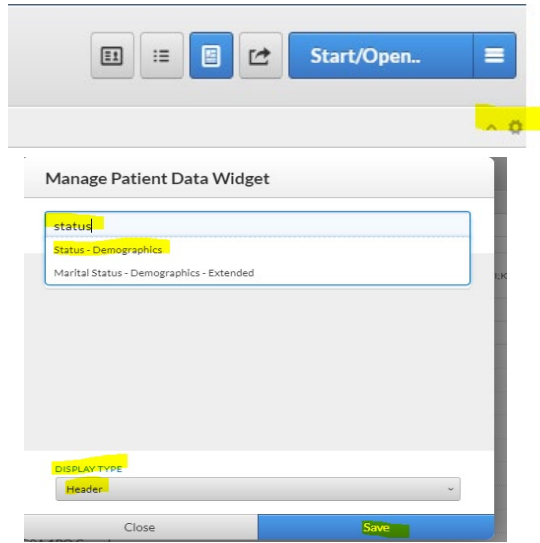
 Each patient has only 1 Primary Practitioner providing longitudinal care as documented by Primary Care Offices and Division.

 Specialist or practitioner/clinicians in other program areas may add themselves in the Patient Chart Dashboard in the "Care Team" Widget. This is open to all users to update.

Terms & Definitions:	
Primary Practitioner	A Family Physician Specialist or Nurse Practitioner, who is a Provincial EMR user, 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.
Family Doctor	The Family Doctor field in the Provincial EMR is often the same as Primary Practitioner. To be used to enter in any primary care provider who is not a Provincial EMR user (Family Physician Specialist or Nurse Practitioner providing longitudinal primary care).
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	It is the clinic where the primary practitioner practices longitudinal, coordinated care. UPEI Health and Wellness Centre, Holland College, PCACs and Primary Care Network Services are not considered Primary Locations.
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.

Approvals:
EMR Standards Committee

Appendix A:

Procedure Steps:		
#	Description	
1	Primary Practitioner widget in patient chart dashboard.	 <p>A screenshot of the 'Primary Practitioner' widget. It features a 'Dashboard' button on the left and a profile card on the right for 'EMR Support Test Physician' with a yellow 'UPDATE INFORMATION' button at the bottom.</p>
2	Primary Location widget in patient chart dashboard.	 <p>A screenshot of the 'Primary Location' widget showing 'Four Neighbourhoods Health Centre' with its address and a yellow 'UPDATE INFORMATION' button.</p>
3	Care Team widget in patient chart dashboard. Open to all users to update.	 <p>A screenshot of the 'Care Team' widget listing 'Dr. Doctor LastName', 'Nurse TEST NP (Nurse Practitioner)', and 'Barb MacDonald (Social Worker)', each with a delete 'x' button and a yellow 'ADD CARE TEAM MEMBER' button at the bottom.</p>
4	Patient Status under demographics folder in the patient data section of patient chart.	 <p>A screenshot of the 'Patient Data' section with a yellow arrow pointing to the 'Status' item under the 'Demographics' folder. A yellow 'No Entry' label is also present.</p>
6	Patient header at the top of the chart to add Patient Status for easy view.	 <p>A screenshot of the 'Manage Patient Data Widget' dialog box. It shows a search field with 'status' entered, a list of results including 'Status - Demographics', and a 'DISPLAY TYPE' dropdown set to 'Header'. Buttons for 'Close' and 'Save' are at the bottom.</p>