

# IDENTIFYING YOUR PATIENT PANEL (ROSTER) IN MED ACCESS

## Blended Capitation, Identifying a Patient Panel (Roster) and the \*MyQ Dashboard

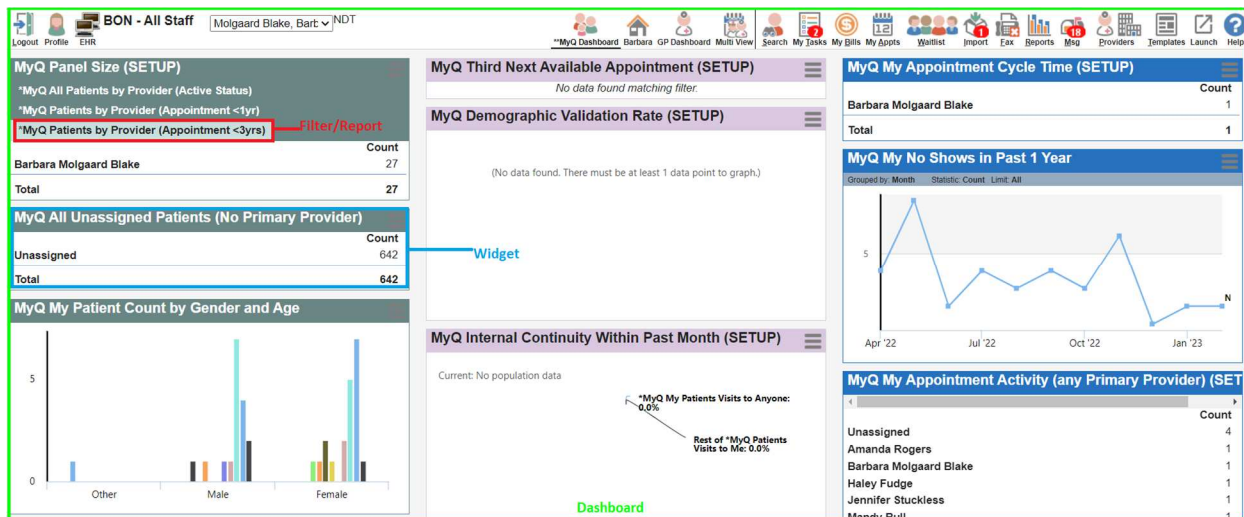
**Disclaimer: the information provided by eDOCSNL in this user guide is intended to support Providers in identifying their patient panel (roster). Providers are responsible for validating any data produced from reports referenced. Any decisions made by Providers pertaining to the Blended Capitation Model as a result of this user guide and resulting reports is solely the responsibility of the Provider and eDOCSNL cannot be held liable for these decisions.**

The \*MyQ Dashboard is available in all EMR instances in Newfoundland and Labrador and contains widgets which can be used to help determine your patient panel (roster) for the purposes for preparation for/consideration of the Blended Capitation Model.

Two specific widgets: **MyQ Panel Size (Setup)** and **MyQ All Unassigned Patients (No Primary Provider)** can be used to support the Blended Capitation model.

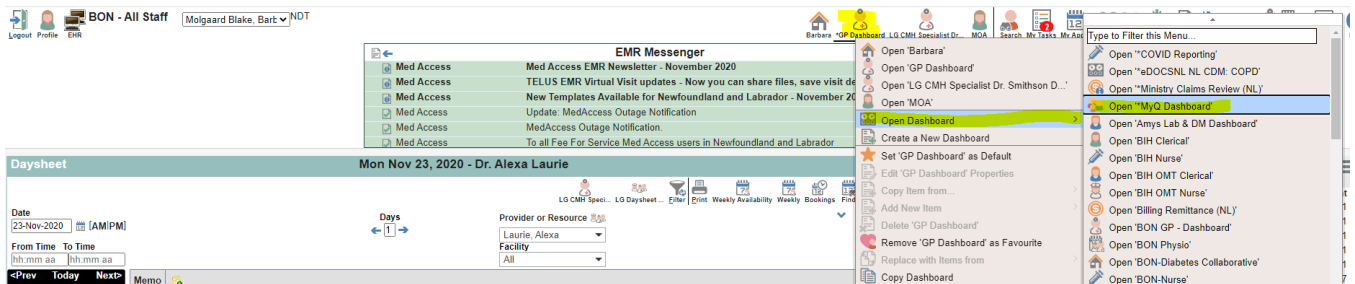
Following the steps outlined in this document, it is recommended to:

- run the “\*MyQ Patients by Provider (Appointment <3yrs)” Report/Filter,
- do a review of **Unassigned Patients**, and if changes are made,
- run the “\*MyQ Patients by Provider (Appointment <3yrs)” Report/Filter again, and
- then do a breakdown of the updated and validated roster by **Gender and Age**.

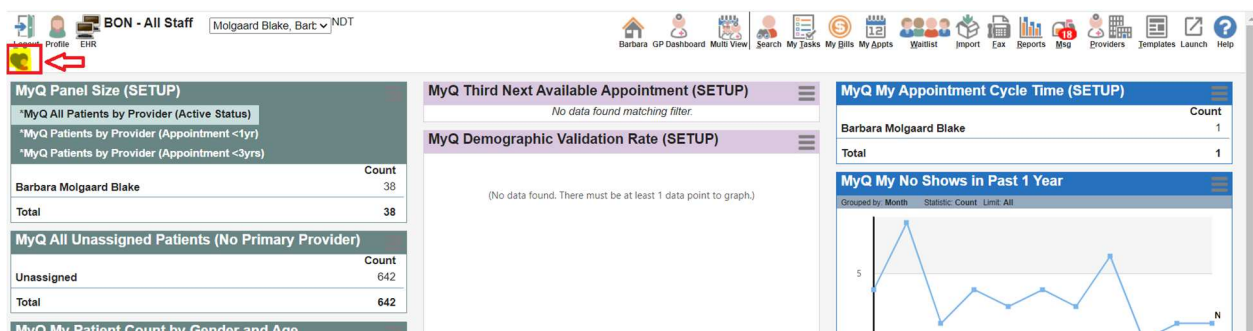


## Finding and Favouriting the \*MyQ Dashboard

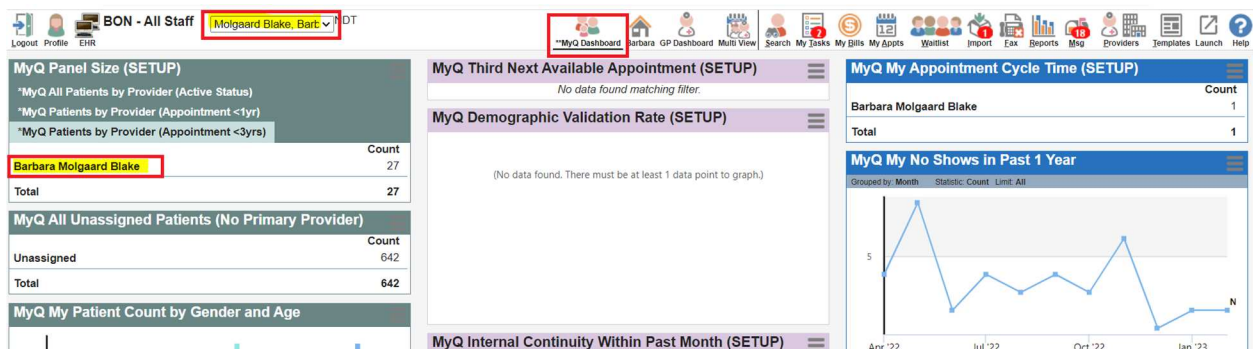
- To find the \*MyQ Dashboard in the EMR, hover and right-click on any existing dashboard icon.
- Bring the mouse down and hover on “Open Dashboard” until a further menu opens and hover and look for “Open \*MyQ Dashboard” (other options may be visible, depending on the EMR).
- You can also type in “MyQ” in the search filter filed to quickly locate it if it doesn’t appear right away on the pull-down list. Select (i.e., left click on) “Open \*MyQ Dashboard”:



The \*MyQ Dashboard can now be favourited (for that user for themselves) by left clicking on the grey heart below:



Note that the \*MyQ Dashboard is set to automatically display data for the patients who have the selected “working for” provider (pull down list of providers at top-left of dashboard) listed in their Primary Provider field in the Demographics tab in their chart in that EMR. For Family Physicians, this should default to themselves when logged into the EMR:



## 1. MyQ Panel Size (SETUP):

The three Report filters in this widget display a count of patients who have a default **Status of Active** and a **Primary Provider** in their charts matching the “Working For” Provider. The Report filters which include Appointment criteria will include this and, in addition, patients who have had an Appointment with a Status of “Done” and with any Provider within that EMR instance.

It is recommended that the third filter, “**\*MyQ Patients by Provider (Appointment <3yrs)**” is used as the starting point to help determine a Primary Provider’s Roster for the purposes of the Blended Capitation Model as evidence indicates it aligns most closely with MCP billing data:

MyQ Panel Size (SETUP)	
*MyQ All Patients by Provider (Active Status)	
*MyQ Patients by Provider (Appointment <1yr)	
*MyQ Patients by Provider (Appointment <3yrs)	
	Count
Barbara Molgaard Blake	27
Total	27

The other Report Filters can be used in the same manner as required and at the Primary Provider’s discretion.

**Important Note:** if you use and need to include different **Patient Statuses** and/or **Appointment Statuses**, please contact the Newfoundland and Labrador Medical Association (NLMA) at [nlma@nlma.nl.ca](mailto:nlma@nlma.nl.ca) for assistance, if required.

### 1.1 \*MyQ All Patients by Provider (Appointment <3yrs)

Highlight (i.e., left-click on) the Report (Filter) tab and then left-click on the displayed Provider’s name:

MyQ Panel Size (SETUP)	
*MyQ All Patients by Provider (Active Status)	
*MyQ Patients by Provider (Appointment <1yr)	
*MyQ Patients by Provider (Appointment <3yrs)	
	Count
Barbara Molgaard Blake	27
Total	27

Click here first

Then click here

This opens the Practice Management Reporting screen. The list of patient names who are displayed, who:

- have a status of Active, and
- have the selected Primary Provider listed in their Demographics tab, and
- have had an Appointment with a Status of “Done” with any Provider in that EMR in the past three years.

If more than 25 names are listed, move from page to page with green arrows as highlighted below and/or pull down the Limit selection and increased to 200 (maximum display per page):

The screenshot shows the 'Practice Mgmt Reporting' interface. On the left, there are tabs for Demographics, Profile, Visits, Task, Observation, Medications, Allergy, Goals, Billing, and Appointment. The main area displays a list of patients with columns for Patient Name, Ins #, Birthdate, Gender, and Primary Provider. A red box highlights the 'Pg 1' and 'Limit 25' fields in the top right corner, with a red arrow pointing to the 'Pg 1' field.

Patient names/charts can be reviewed individually from here by left clicking on their name from the list, and if required, changes can be made to the Primary Provider field in the patient's Demographics tab.

Further details about these patient's appointments and/or billing history can be accessed by downloading the above report (and other variations of it) to Excel. Refer to [Appendix A](#) for more details.

Additional instructions are included in the [Appendix B](#) on how to identify patients who have a Status of Active, the selected Primary Provider, but who have **NOT** had an appointment with any Provider in the EMR in the past 3 years.

## 1.2 Primary Provider's Patients by Gender And 5-Year Age Increments

From within the Practice Management Reporting screen in [1.1](#) above showing the reviewed and validated patient list generated from, “\*MyQ Patients by Provider (Appointment <3yrs)”, pull down the “Select Report” field on the right-hand side and select “Age Histogram – 5 year Groups”. Then click on the Printer icon to the right:

The screenshot shows the 'Practice Mgmt Reporting' interface with the 'Reports' dropdown menu open. The 'Age Histogram - 5 year Groups' option is selected and highlighted with a red box. A red arrow points to the printer icon in the top right corner of the dropdown menu.



## 2. MyQ All Unassigned Patients (No Primary Provider) Widget:

This widget displays a total patient count in the EMR of patients with an **Active Status** but who do **not** have a Primary Provider listed in the Demographics tab in their chart. It is also important to review the patient list produced by this Report/Filter in order to determine if any patients should have the/a Primary Provider added to their Demographics tab in their chart.

Click on “Unassigned” to access the Practice Management Reports and follow the same steps as outlined above to access and/or download a patient list:

MyQ All Unassigned Patients (No Primary Provider)	
Unassigned	Count 642
Total	642

Make changes as required to the Status and/or Primary Provider as listed in the patient’s chart.





## Appendix A – How to Download a Practice Management Report to Excel

### PRIVACY TIP:

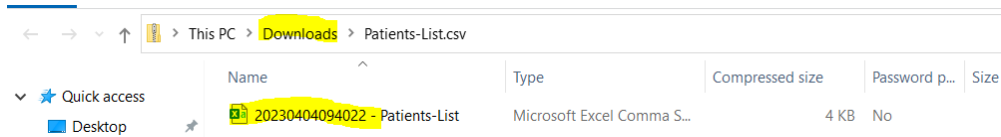
After downloading to a report that contains identifiable personal health information, it is best practice and strongly recommended to delete the report from your computer when it is no longer needed. Also don't forget to empty out the Recycle Bin after deleting!

Many Practice Management Reports can be downloaded to Excel by first selecting the report from the applicable widget can be created by pulling down "Select Report", scroll down and select Patient List and then click on Printer icon to the right:

The screenshot shows the 'Practice Mgmt Reporting' interface. On the left, there are various criteria filters like Demographics, Profile, Visits, Task, Observation, Medications, Allergy, Goals, Billing, and Appointment. On the right, the 'Reports' dropdown menu is open, displaying a list of report types. The 'Patients List' report is highlighted in yellow. A printer icon is visible at the bottom right of the report list.

A zip file will download to the Downloads folder on your computer. Click on the zip file at bottom left-hand corner of the screen:





The Excel file then needs to be manipulated to fully display the patient data.

There are two additional reports that can be downloaded to Excel, and which can provide additional detail on the **Appointment and/or Appointment Billing** activity for the identified patients:

The screenshot displays the 'Practice Mgmt Reporting' interface. On the left, the 'Criteria' section includes filters for Demographics (Status: Active, Primary Provider: Molgaard Blake, Bar), Profile, Visits, Task, Observation, Medications, Allergy, and Goals. The 'Appointment' section is expanded, showing filters for Type (All), Time Type (Registered), Status (Done), Date (Back 1 year, Ahead None), and Count (Greater than or 1). On the right, the 'Reports' section shows a list of reports, with 'Appointment Billing List' and 'Appointments List' highlighted in red boxes. The 'Patients List' report is also highlighted in a red box.

***Don't forget to delete the downloaded file and empty the Recycle Bin when no longer required!***

## Appendix B - How to obtain a list of “\*MyQ Patients who have NOT had an Appointment <3yrs”

The criteria in the “\*MyQ Patients by Provider (Appointment <3yrs)” Report/Filter above in [1.1](#) can easily be edited to display a list of patients who have a **Status of Active**, the **selected Primary Provider**, and who have **NOT** had an appointment in the past 3 years:

- run the “\*MyQ Patients by Provider (Appointment <3yrs)” Report as in Section B above, and
- check in the box to the left of “not” in the Appointment criteria, and
- click on the binoculars in the Search section:

Practice Mgmt Reporting

Criteria Unmask

Template: \*MyQ Patients by Pr

Demographics

Status  Active

Primary Provider Molgaard Blake, Bar

Profile

Visits

Task

Observation

Medications

Allergy

Goals

Appointment  not

Type  All

Time Type  Registered

Status  Done

Date Back 3 years Ahead None

Count Greater than or 1

Reports

Type: ...Select Report...

Searching

Type: Select search type...  Search

Search

Patient Name

Acevedo , John

ARNOLD , JENEE\_TPCHI

BALLARD , LYDA\_TPCHI

Barrera , Neal\_tpchi

BULLOCK , NELSON\_TPCHI

Dalton , Cory\_tpchi

DEWEY , ROGER

Farmer , Elba\_tpchi

FORD , ZELLA\_TPCHI

Gay , Major

Gregory , Lani\_tpchi

Hardy , Lonny\_tpchi

Hayley , Test

Hendricks , Alphonso\_tpchi

HOLDER , HEIDE\_TPCHI

Kidd , Damien

LINDSEY , MANDY

Moon , Eun\_tpchi

Nichladmbarry , Hugo

Nichladmbsborn , Jada

The resulting list of patients can be viewed and/or edited from the screen similar to above and/or can be downloaded to Excel (refer to [Appendix A](#) on how to download to Excel):

Practice Mgmt Reporting

Criteria Unmask

Template: \*MyQ Patients by Pr

Demographics

Status  Active

Primary Provider Molgaard Blake, Bar

Profile

Visits

Task

Observation

Medications

Allergy

Goals

Appointment  not

Type  All

Time Type  Registered

Status  Done

Date 18-Feb-2020 to 17-Feb-2023

Count Greater than or 1

Reports

Type: Patients List

Field Filter: Select Template...

Searching

Type: Select search type...  Search

Search

Patient Name

Aguilar , Michel\_tpchi

Barker , Merri\_tpchi

BOWMAN , ANTOINE\_TPCHI

CHEN , EDMUND\_TPCHI

COX , EUGENE\_TPCHI

CUMMINGS , REBA\_TPCHI

FOWLER , IRWIN\_TPCHI

Frazier , Dana\_tpchi

MASSEY , KIZZY\_TPCHI

Massey , Philip\_tpchi

Nichlilabpage , Leana

Export options: Excel | PDF | RTF