



# DRVS to Support Panel Management

#### **MTPCA User Group**

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Transformation

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## **Today's Topics**



PANEL MANAGEMENT BASICS



PREPARING DRVS FOR PANEL MANAGEMENT



PANEL MANAGEMENT IN ACTION



WHAT'S NEW IN DRVS



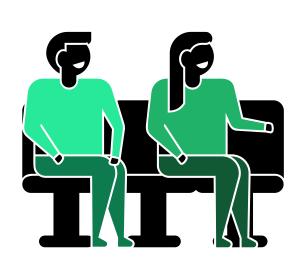




# Panel Management Basics



# **Creating a Common Definition**



#### **Panel**

The group of patients assigned to an individual provider/care team.





#### **Empanelment**

The act of assigning individual patients to individual providers/care teams, with sensitivity to patient & family preference.



#### **Panel Management**

The ongoing management of panels.



#### **Barriers to Empanelment**

Where to Start: Many practices want to work towards empanelment but are unsure where to start or lack the data insights needed for success.

Patient Complexity: Not all patients require the same level of care. Some patients have complex medical and psychosocial needs, requiring more time and resources.

Demand

Panel Size Management: Determining the ideal number of patients a primary care physician can manage is difficult.

Resource Allocation: Initial panel clean up and ongoing maintenance/monitoring.

Trust and Engagement: There can be a lack of trust between physicians and decision-makers, making it difficult to implement changes effectively.

**Administrative Burden:** The process of assigning patients to specific providers and managing these assignments can be **administratively burdensome**, especially **without clear guidelines and support.** 





### **Benefits of Empanelment**

#### Why Does it Matter?



#### **Patient**

Continuity of care /relationships

Builds trust and satisfaction

Health outcomes

Patient choice



#### **Provider/Care Team**

Efficiency (reduces the unfamiliar)

Balance and order

Satisfaction



#### **Practice**

Workload distribution

Predicts demand

Data driven decisions

System costs

ER and hospital visits



# Panel Management | Measures in DRVS

#### **Usual Provider Assigned**

**Percent of patients with a Usual Provider assignment** 

- Do patients have a usual provider assigned?
- Are the providers assigned still active and/or from an appropriate service line?

#### **Panel Size**

The number of patients (or average number) with a UDS Qualifying encounter in the past two years that are assigned to a Usual Provider

- Are the number of patients assigned to a provider appropriate?
- What is the right size for your organization.

#### **Provider Continuity**

Percent of encounters where the patient is seen by their usual provider

• Assess opportunity to improve access or need for additional providers.

#### **4-Cut Provider to PCP Match**

Patients where the recommended 4-Cut Provider matches the assigned EHR Usual Provider.

- Understand how much 'right sizing' is needed.
- Tool to redistribute patients to improve continuity / reflect actual 'usual provider'





Step	Role	Notes
Designate Panel Manager	Practice Leadership	"Panel Manager" is often a hat worn by the Quality Team
Define Appropriate Providers	Medical Leadership	Define who should be included in the 4-Cut calculation
Update DRVS with 4-Cut Providers	Panel Manager	Update the Provider Admin in DRVS
Determine "Active Patient" definition	Panel Manager & Medical Leadership	Patients with a visit in the last 1 year? 1.5 years? 2 years? 3 years?
Review Average Visits per Patient per Year	Panel Manager	Utilize the <i>Interactions/Patient</i> measure
Review Provider Supply	Panel Manager	Utilize the <i>Appointments/Day</i> measure
Calculate "right" panel size	Panel Manager	Divide Provider Supply by Patient Demand



# Acting



Step	Role	DRVS Tool and Considerations
<b>Assign</b> – Assign unassigned primary care patients to a usual provider	Panel Manager	<b>Usual Provider Assigned Measure, apply PC service line:</b> Filter details list to "unassigned" Usual Provider. Consider 4-Cut provider recommendation or other operational needs. Update patient health record.
Clean Up – What providers are assigned to patients but are no longer with the practice?	Panel Manager	<b>Panel Size Measure:</b> Filter details list to usual providers no longer with the practice. Consider 4-Cut provider recommendations or other operational needs. Update patient health record. What about assignments made in error like dental or other specialty providers?
Current State – What are our current panel sizes, are they equitable?	Operations/CMO/Panel Manager	Panel Size Measure: Evaluate your average panel size, and then compare this by individual provider assignment. What actions might you consider?
Access – Are patients able to get in to see their "Usual Provider"	Operations/CMO/Panel Manager	<b>Provider Continuity Measure:</b> Consider 4 Cut Provider Measure if changes are needed.
Adjust – Full or part time providers, close/open panels as appropriate or Risk Adjust	Operations/CMO/Panel Manager	Panel Size Measure, average and individual   Primary Care Service Line: Group by *Risk level or chronic conditions.
Ongoing Review and Maintenance	Panel Manager	Panel Management Dashboard Panel Management Measures, Provider Continuity Measure, 4 cut to PCP match.





# Preparing DRVS for Panel Management



# Preparing ( )

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healthcare		12

# Designate a Panel Manager



#### **Implement processes for:**

- Assigning PCP at or before first visit
- Validating PCP at check in
- Redistributing patients when providers leave the practice
- Requests to move a patient (either by the patient or the provider) to another panel

#### Rigor around use of PCP/Usual provider field

- Review PCP assignments as part of the daily huddle-included on the PVP
- Training for established or new support staff/front desk

# Identify unassigned patients regularly and use standardized process to assign them

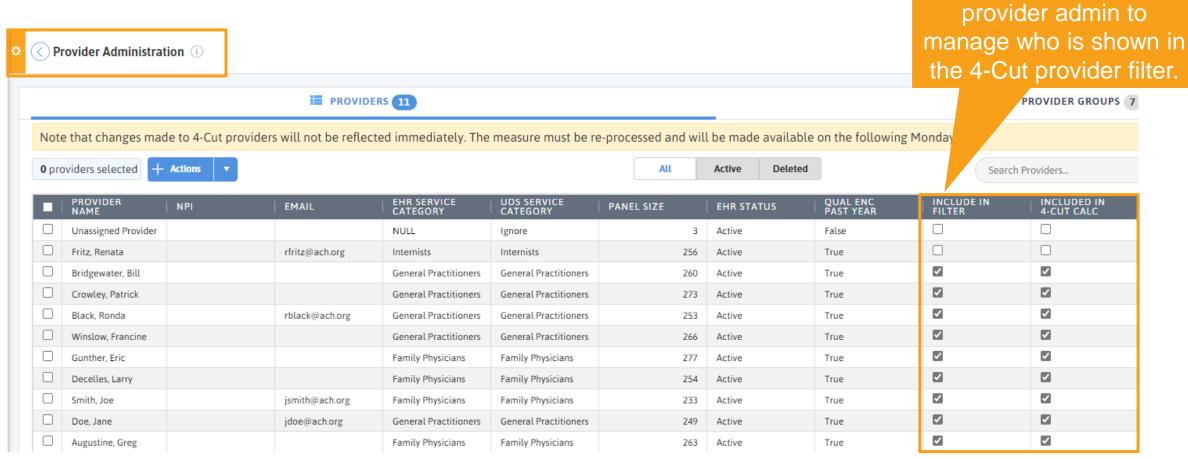
- Consider a PDSA to ensure ongoing follow up or as a standing QI agenda item
- Regular data review for ongoing compliance



Preparing	
	/ <del>(6)</del> (4/

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healthcare		14

# **Define Appropriate Providers**





Use the "Included in 4-

Cut Calc" column in

#### **4-Cut Provider**

Recommended PCP based on the 4-Cut Method

Calculated using only primary care service line appointments

• If there has not been a primary care appointment in the last 2 years, there will not be a recommended provider listed.

Cut	Report Description	Assignment
1 <sup>st</sup> Cut	Patients who have seen only one provider in the past year.	Assigned to that sole provider.
2 <sup>nd</sup> Cut	Patients who have seen multiple providers, but one provider the majority of the time in the past year.	Assigned to majority provider.
3 <sup>rd</sup> Cut	Patients who have seen two or more providers equally in the past year (no majority provider can be determined).	Assigned to the provider who performed the last physical exam (by CPT code)
4 <sup>th</sup> Cut	Patients who have seen multiple providers.	Assigned to last provider seen.



#### Who Should be Included in the 4-Cut?

Define your standards for who can serve as a Primary Care Provider.

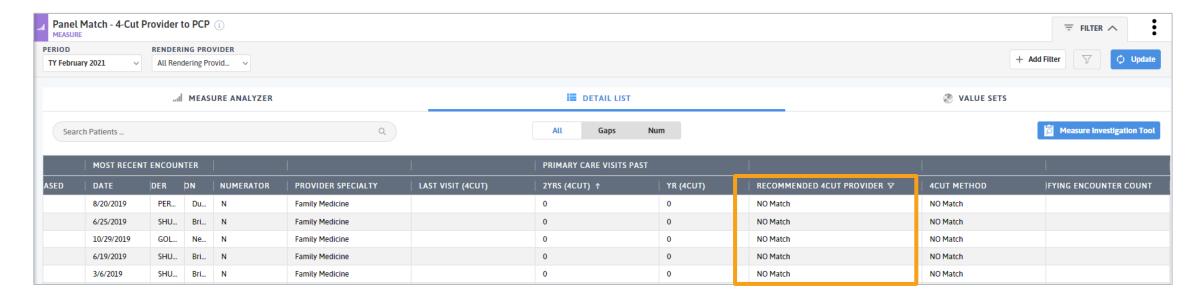
Who to include in the 4-cut calculation?		
Include:	Do Not Include:	
MD	Most Specialists (Dentists, podiatry, BH,	
	etc)	
DO	MAs	
NP	Providers who have left	
PA	Providers who will be leaving	
Decide as an organization: OB/GYN, Urgent Care only providers, etc.		



#### Recommended Provider = No Match

The recommended provider will display as No Match if:

- Patient hasn't had a visit in the last 2 years.
- The recommended provider is not included in the 4-cut calculation and the patient has not seen another provider in the last 2 years.





### Rendering vs. Usual Provider

#### Rendering Provider

The Provider or Location that the patient saw/visited in the Period.

A patient can be seen by multiple providers or at multiple locations in the same period.

#### When to Use:

When you to want to see data/outcomes based on who saw the patient.

#### **Usual Provider**

The Provider or Location assigned to the patient in the EHR.

Usual Provider is generally the PCP, not all centers document a Usual Location.

#### When to Use:

If you want to see a specific PCP's patients' performance.



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healthcare		20

#### **Determine "Active Patients"**

# ACTIVE PATIENT FILTER ALLOWS FOR MORE FLEXIBILITY IN DEFINING THE TIMEFRAME THAT DETERMINES YOUR PRACTICE'S ACTIVE PATIENTS:





The "Active PC Patients" filter can be used to limit patients who have had at least one qualifying encounter in the Primary Care service line in the time periods listed



# Preparing (5)

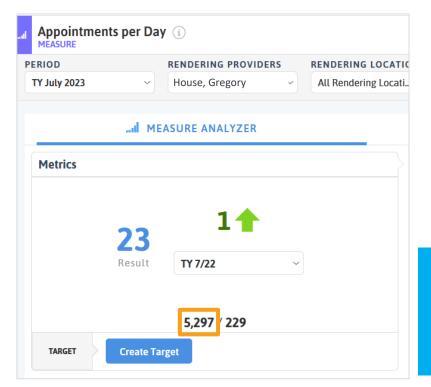
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healthcare		22

# **Calculating Supply & Demand**

Supply = Workdays x visits/day

In DRVS:

Appts per day measure

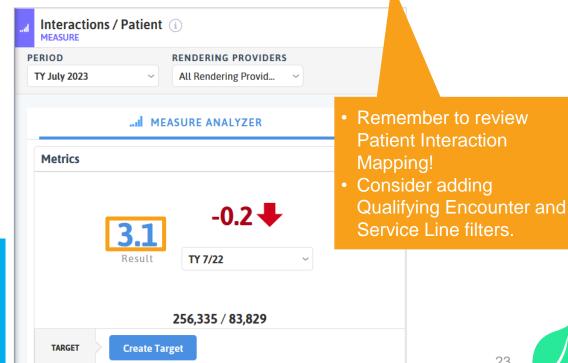




**Demand = Visits/patient/year** 

In DRVS:

Interactions/patient measure





5,297 appts per year / 3.1 visits per year

1,708 slots required per year

Preparing	
	<b>4 ~~  </b>

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# **Calculating Panel Size**

Practice Panel = Unique Pts in 18 mo

Target Panel = Practice Panel / FTE Clinical Providers

6,000 pts / 4 FTE = 1,500 pts/FTE

**Demand** 

Panel Size x Visits/pt/yr

 $1500 \times 3.19 = 4{,}785 \text{ slots/yr}$ 

Supply

Provider Visits/day x Provider days/yr

 $20 \times 230 = 4600 \text{ slots/yr}$ 





# Panel Management in Action

### Review



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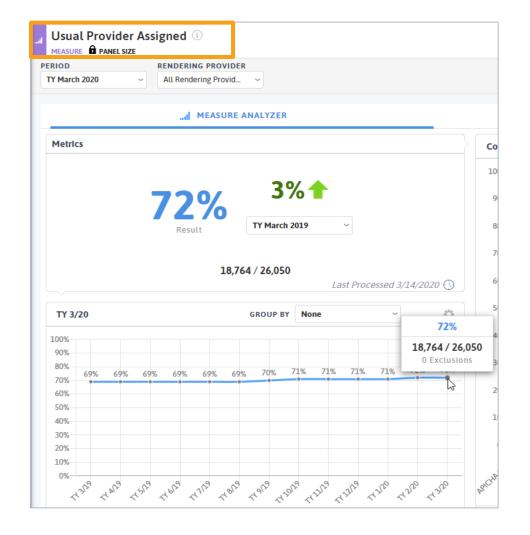


# **Usual Provider Assigned**

# REPRESENTS THE % OF PATIENTS WITH A USUAL PROVIDER ASSIGNED IN THE EHR.

- 26,050 patients with an encounter
- 18,764 or 72% have a Usual Provider assigned





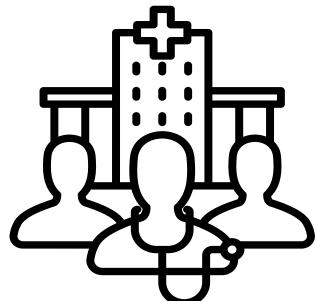


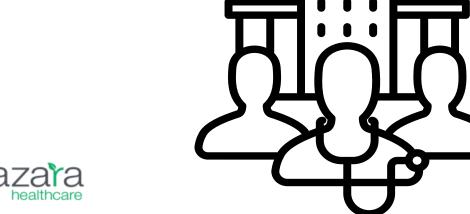


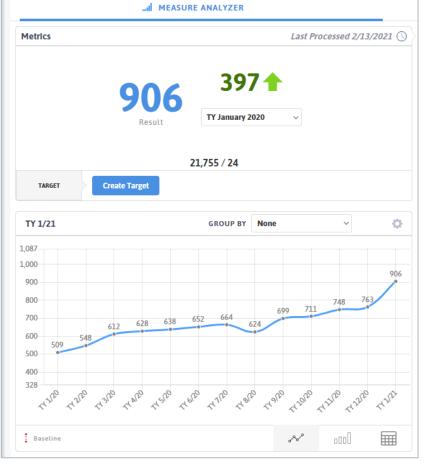
#### Panel Size | Practice Level

#### **AVERAGE PANEL SIZE ACROSS THE** ORGANIZATION.

- 21,755 patients with an encounter
- 24 providers
- 906 patients per provider average







All Rendering Provid... v

Panel Size (1)

TY January 2021

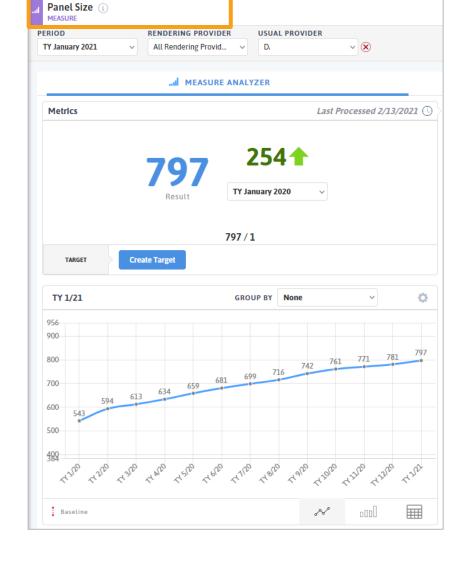


#### Panel Size | Usual Provider Level

# FILTER TO ONE USUAL PROVIDER PANEL SIZE FOR THE FILTERED PROVIDER

797 patients with an encounter for this provider.





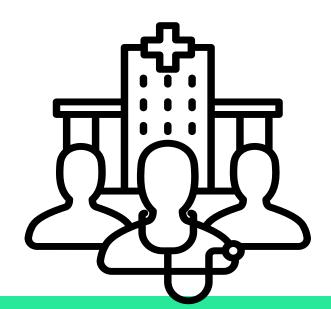


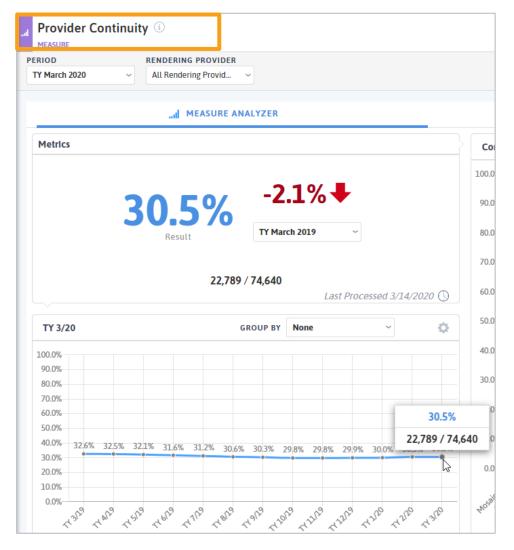


### **Provider Continuity | Practice Level**

# ENCOUNTERS WHERE THE PATIENT SAW THEIR USUAL PROVIDER.

- 74,640 is the number of encounters where Dr. X is the Rendering Provider.
- 22,789 is the number of encounters where Dr. X is also the Usual Provider.







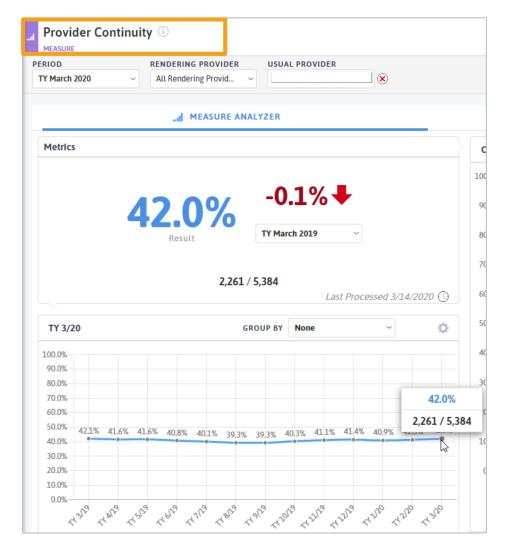
#### **Provider Continuity | Usual Provider Level**

At the Usual Provider level, this represents the % of encounters where the Usual Provider saw his/her own patients.

- 5,384 is the number of encounters where Dr. X is the Usual Provider.
- 2,261 is the number of encounters where Dr. X's patients were also seen by Dr. X.





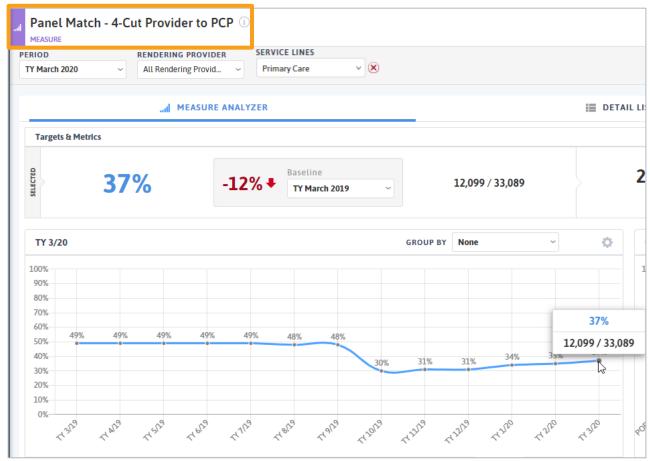




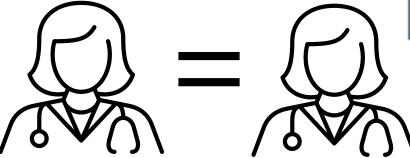
#### 4-Cut Provider to PCP Match

Panel match represents % of patients where the Usual Provider and the recommended PCP are the same.

- 33,089 is the number of patients with a visit in the last 2 years.
- 12,099 is the number of patients where the EHR Usual Provider is the same as the recommended 4-Cut provider.

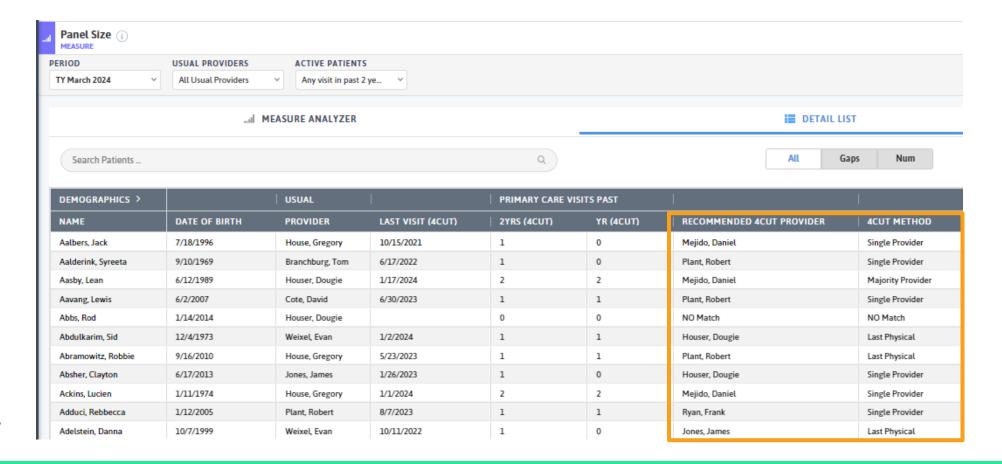






### Panel Size | '4 Cut' Detail

The individual patients that make up a provider's assigned panel can be reviewed to understand and compare who the patient's suggested provider might be based on visit patterns.





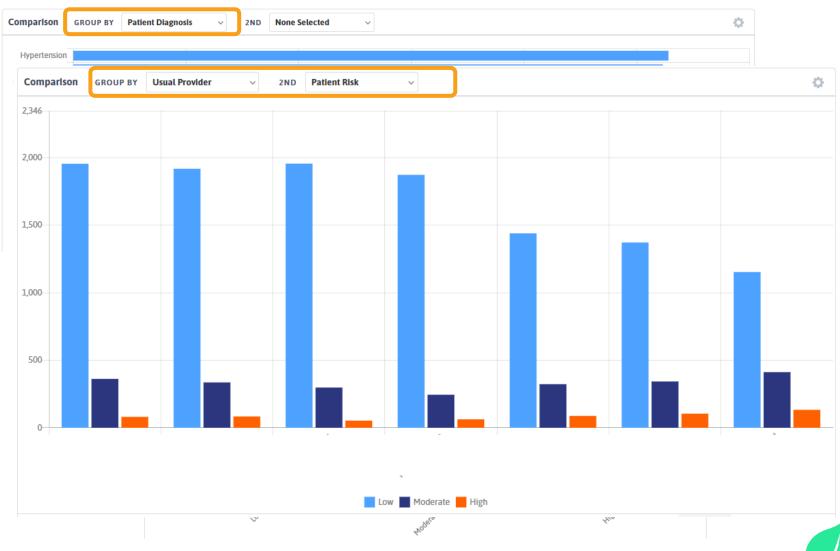


### Panel Size | Provide Context

The panel size can be reviewed in many different contexts.

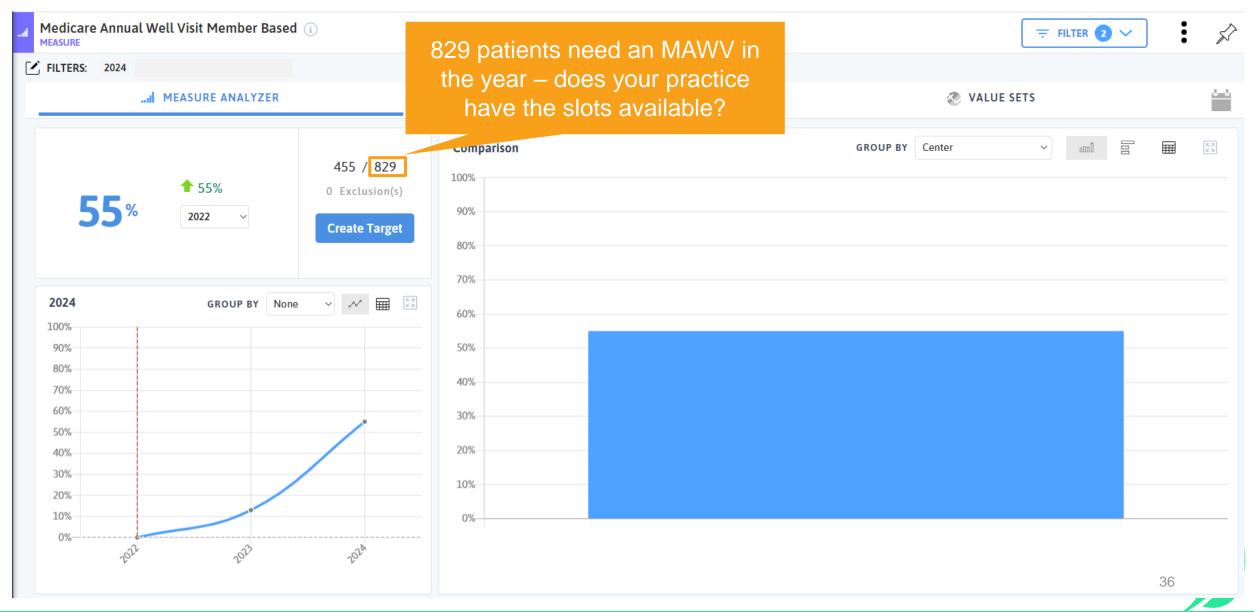
Filter to a single provider to better understand the patients that make up that panel.

Filter to multiple providers to compare the distribution of patient characteristics across multiple panels.





# Panel Management + MAWV



# Panel Management + Annual Physicals



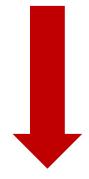
# Gap Closure v. Annual Visit Outreach

## Ad-hoc calls to close gaps:

- Multiple outreach efforts for a single patient
- Potential duplication of efforts across teams

## MAWV + annual physicals

MAWV = payment + MSSP contract fulfillment Annual physicals = opportunity to close care gaps and boost patient engagement



No guarantee of visit or gap closure



Highly efficient forms of patient interaction



# **Opportunities**

If demand is greater than supply:

- Have nurses perform annual wellness visits
- Direct efforts at scheduling annual visits over ad-hoc gap closure
- Review point of care alert closure workflows and adjust alerts on the Patient Visit Planning report to align with priority measures



## **Using Data as Information**

Run supply and demand data regularly to ensure panels continue to be appropriately sized.

Use to inform ongoing empanelment and staffing needs

Regularly review outcomes for panels and act rapidly for improvement

## **Operational outcomes**

- Are patients being assigned to a panel in a timely manner?
- Are they being scheduled with the assigned provider?
- Are registries being used for the patient panel to support care management?
- Are they being seen regularly by that assigned provider?

### **Clinical outcomes**

- Is measure performance impacted?
- Are patients getting in for annual visits?







## Resources

# **Panel Management**

- https://www.safetynetmedicalhome.org/sites/de fault/files/Implementation-Guide-Empanelment.pdf
- https://www.safetynetmedicalhome.org/sites/de fault/files/Empanelment-Pushback.pdf
- https://www.safetynetmedicalhome.org/sites/de fault/files/PCP-Assignment.pdf
- https://www.ahrq.gov/sites/default/files/wysiwyg /ncepcr/tools/PCMH/pcpf-module-31facilitating-panel-management.pdf



## **DRVS**

- Risk Overview
- Provider Admin Quick Tip Clip
- Provider Filters Quick Tip Clip



# **UDS CY24 Tables: Updated**



## **UDS CY24 Table Updates**

Table reports updated to content for 2024 reporting year

### Table Updates For CY 2024 Requirements

- Switch to 2024 COM Versions
  - Table 6b
  - o Table 7b
  - o Table 7c
- Update Table 6a to 2024 manual instructions, notable changes:
  - Line 26e for Childhood development screenings: per manual instruction, patients now limited to age under 18 yo
  - Line 21e for PReP management: switch to single ICD-10 code, Z29.81, to count in charge-based column

### **Additional Content to Support Reporting**

- Table 6b Rendering Location Filter
  - o Filter is now available by default
  - Allows users to limit counts in measures to patients with countable visit at locations in-scope for HRSA grant
- Appendix E, Question #4 on Screening for Family Planning Needs
- Measure released: Annual Family Planning and Contraception Screening
  - Numerator count provides the value necessary for the EHB entry

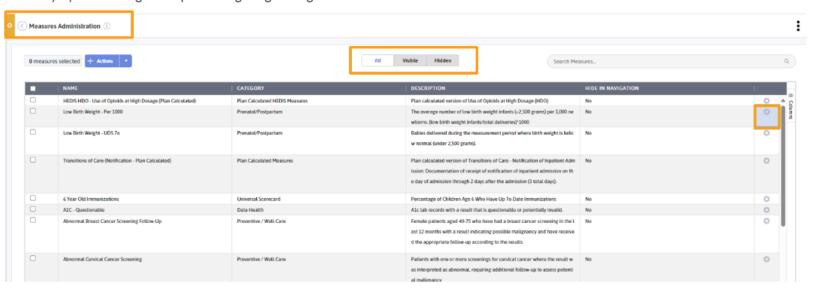




# Measure Administration Page: Now Available!

## **Measure Administration Page**

The measure administration page lists all measures available from the left-hand navigation and search bars. By utilizing this function, you are able to streamline access and view of measures to ensure that other users at your practice can easily find and interpret relevant information. Configuring measure admin may enhance the user experience, provide clear & actionable insights, and increase overall efficiency by minimizing time spent navigating through measures.



All users are able to view measure admin. Those with measure admin permissions can make configurations such as hide/un-hide. Category refers to the measure folder(s) in the left-hand navigation bar. Measures can be included in one or more folders.

- Use Cases
  - "I work as a grant writer and I want to see what measures DRVS has available in my reporting. I can use the Measure Admin Page."
  - "I work as an admin at a practice (or network) and want to configure what my staff sees, and hide measures not relevant to us."





# Measure Administration Page: Now Available! | 2



Measure Administration Functionality (click on gear icon on the far right side of a measure):

- View: Opens measure analyzer in a new tab.
- Hide/Un-hide
  - Ability to hide or un-hide from the left-hand navigation bar and search.
    - Note: hiding/un-hiding will only change visibility for other users with the same scope (i.e., if a network user hides a measure that
      measure will be hidden from other network users but not other practice users).
  - Does not hide the measure from pins (hidden measures still show in pins but not in the left-hand navigation & search bars)
  - Does not hide measures on dashboards/scorecards that exist if measures are added prior to hiding them, but hidden measures will
    not be available to add once hidden.
- Category refers to the measure folders in the left-hand navigation bar. Measures can be included in one or more folders.

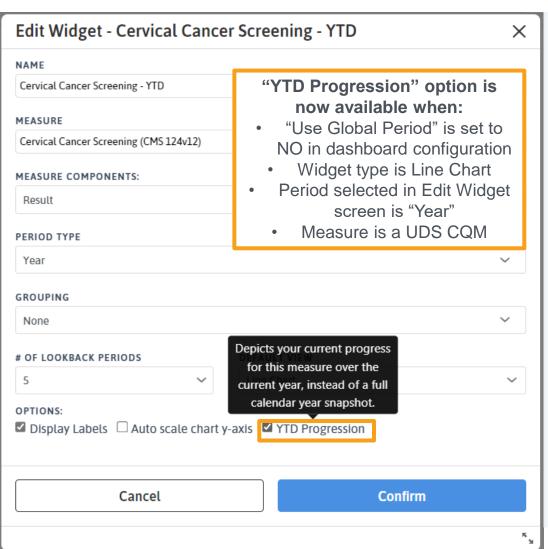


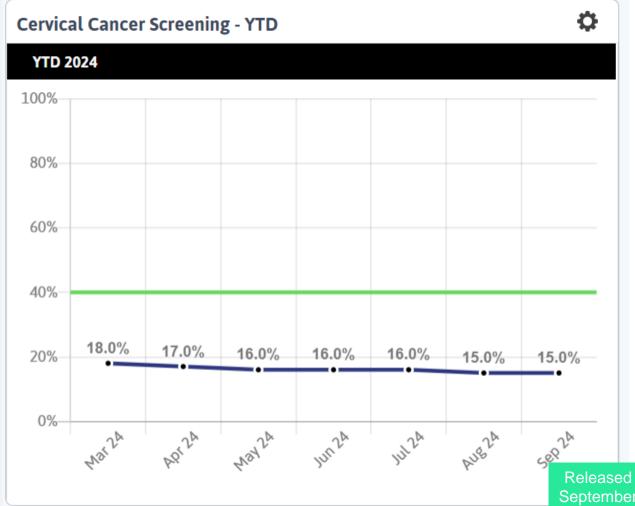


2024

# **Dashboard Update:**

"YTD Progression" Option Now Available on Line Chart Widget!





## **UDS+ Reporting with Azara**



### **COHORT 1 & 2 ARE COMPLETED... WHAT'S NEXT?**

Azara submitted CY23 UDS+ data for 129 health centers in Cohorts 1 and 2

Our focus is now on **providing a seamless UDS+ submission experience** for our users for CY24 reporting

### **HOW IS AZARA SUPPORTING CY24 UDS+ REPORTING?**

- We offer UDS+ submission to our customers free of charge
- We currently meet the HRSA requirements for CY24 reporting
- Next year, authorized users can create and kick-off UDS+ submission in DRVS
- It is our intention to submit the Controlling High Blood Pressure (CMS165 v12) measure (this is the HRSA preferred / recommended measure to submit)

### WHAT CAN YOU DO TO PREPARE FOR NEXT YEAR?

- Join our fall UDS webinar
- Consider our UDS Preparation Sessions
  - Receive in-depth validation of select UDS measures and surface opportunities for workflow improvements

### Calendar Year 24 (CY24) UDS+ Reporting Requirements

The EHB remains the official report of record for CY24 UDS reporting UDS+ Submissions are due by April 30<sup>th</sup>, 2025

#### **Patient Population Requirement**

Submit data for your medical (primary care) patients

#### **Demographics Requirement**

Submit the demographic table data:

- Patients by Zip Code
- Table 3a: Patients by Age and Sex Assigned at Birth
- Table 3b: Demographic Characteristics
- Table 4: Selected Patient Demographics

### **Clinical Quality Measure Requirement**

Submit 1 eCQM from one of the clinical tables:

- Table 6B: Breast Cancer Screening
- Table 6B: Cervical Cancer Screening
- Table 6B: Colorectal Cancer Screening
- Table 7: Controlling High Blood Pressure\*
- Table 7: Diabetes: Hemoglobin A1c (HbA1c) Poor Control (>9.0%)

\*HRSA's recommended measure / Azara supported measure for CY24 submission







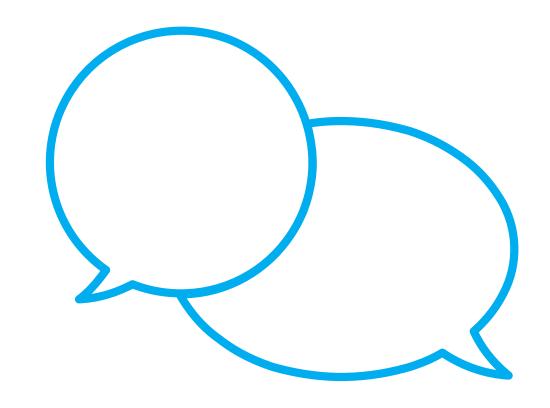
# Call for Abstracts!

We are seeking engaging presentations that showcase your achievements using DRVS, your innovation/expertise in anything related to the world of population health and value-based care, or both!

Submit abstract details by 11.1.24

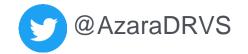


# **Questions?**











# References

- Murray M, Davies M, Bouchon B. Panel size: How many patients can one doctor handle? Family Practice Management. April 2007: 45-51
- Murray M, Davies M, Bouchon B. Panel size: Answers to physicians' frequently asked questions. Family Practice Management. Nov/Dec 2007: 29-32
- Safety Net
   <u>http://www.safetynetmedicalhome.org/sites/default/files/Implementation-Guide-Empanelment.pdf</u>
- http://hiteqcenter.org/Resources/HITEQResources/tabid/122/ArticleID/329/Title Link/Empanelment-Defining-and-Establishing-Patient-Provider-Relationships/ArtMID/718/Default.aspx

