

# Firm Faculty Coaching Topic PGY3 #7

## Cleaning Up Patient Panel and Bulk Change

1. Follow instructions on Coaching Topic PGY2 #3 and PGY3 #1 on Epic Healthy Planet Quality Data to run the following reports:
  - My Patient Panel with Risk Scores
  - Lost-to-Follow-Up' report
2. Sort patient by risk score by clicking on "General Risk". Select 100-120 sickest patients. Learn to Add/Change PGY2 legatee as PCP.
3. Select 30-50 healthier patients. Learn to Add/Change PGY1 legatee as PCP. (continue to back)

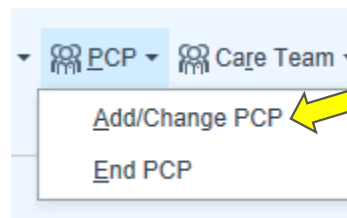
a. Identify your patient panel using 'My Panel with Risk Scores'

b. Click General Risk to sort by risk

c. Highlight patients with Risk score 2 (about 100-120 pt)

d. Hover over PCP, Select Add/Change PCP

e. Add PGY2 legatee's name as 'New PCP' and PCP type as 'General.'



A screenshot of the Epic system interface. The main window shows a patient panel titled 'PC - My Patient Panel with Risk Scores - MD [4708997] as of Mon 4/20/2020 11:28 PM'. The panel is sorted by 'General Risk'. A 'Bulk Add/Change PCP' dialog box is open in the foreground. The dialog box has the following fields: 'New PCP:' (empty), 'PCP type:' (General), 'Start date:' (4/20/2020), 'End date:' (empty), and 'Specialty:' (Internal Medicine). There are yellow arrows pointing to the 'New PCP' and 'PCP type' fields. The dialog box also has an 'Additional Details' section and 'Accept' and 'Cancel' buttons. In the background, the patient panel shows a table with columns for 'General Risk', 'HCC Potential S', 'ASCVD Risk (%)', and 'CHADS2 (%)'. The 'General Risk' column has a red circle with the number '5' next to it. The 'CHADS2 (%)' column has a red circle with a question mark next to it. A yellow arrow points to the 'PCP' dropdown menu in the top right corner of the patient panel.

f. Repeat steps c-e, this time selecting patients with Risk score 1 or below and change to your PGY1 legatee. ( about 40-50 patients)

g. Select all patients. Chose End PCP to remove your name

h. Repeat b-g with "Lost to Follow-up" list

4. Run your patient panel again after bulk-changing patients, highlight all, and select "End for all PCP types"

5. To ensure that this worked, please run your patient panel list 24-48 hours after doing these steps. There should be no patient listed for the following lists:

- My Patient Panel with Risk Scores
- Lost-to-Follow-Up' report

Multiple rows selected