# 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)

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**Instructions**

- 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.’
- 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