

Sample Primary Care Provider Assignment Policy

Unassigned new patients are scheduled in new patient appointment slots by scheduling staff. Front desk staff do not enter new patient's treating provider in primary care provider (PCP) data field at check-in, but instead use the electronic health record (EHR) notes fields to enlist the support of the care team in determining PCP assignment. If the patient requests a different provider, or if a provider requests that the patient be managed by a different PCP, the current PCP is responsible for identifying a receiving PCP. A care team member refers the requesting party to the panel manager for assistance. A panel management log is used to document transfers to new PCPs initiated by patients or by providers.

Existing patient is unassigned

- Scheduling staff asks the patient if he/she has an assigned PCP.
- If the patient knows the PCP:
 - Scheduling staff enter the provider in the EHR notes for the care team to confirm.
 - Upon reviewing the EHR notes and confirming the PCP, the care team member enters the provider name in the PCP data field.
- If the patient does not know the PCP:
 - Staff makes a note in the EHR requesting the care team to review the patient's record and assign a PCP. The care team then reviews the EHR notes.
 - Next, a team member reviews the patient's visit history with the patient, determines appropriate PCP assignment, and enters the provider name in the PCP data field.

Patient requests a PCP assignment change within the same clinic

- Staff informs the patient that the panel manager will assist in making PCP assignment change.
- Panel manager uses the PCP change request form and documents request, then discusses the change request with current PCP and reviews patient's medical record for history with appointments and providers (e.g., number of PCP changes, no-shows, number of clinic transfers).
- Panel manager asks current PCP for a recommendation for a new receiving PCP and facilitates a dialog between current PCP and receiving PCP. If all parties agree, the panel manager confirms acceptance and documents the entire process, including the change request, approval, and acceptance on the panel management log.
- Appropriate documentation is made in the patient's EHR notes by the panel manager, and the new PCP is documented in the PCP assignment data field.

Patient requests a transfer to a PCP at a different clinic

- Staff inform patient that the panel manager will assist in making PCP assignment change.
- Panel manager uses the PCP change request form and documents request, then consults with current PCP and reviews patient's medical record for history with appointments and providers
- Panel manager then contacts the panel manager at the receiving clinic (if applicable) and/or potential PCP at receiving clinic to review patient's request and determine appropriate PCP assignment.
- Appropriate documentation in the patient's EHR notes is made by the panel manager, and the new PCP is documented in the PCP assignment data field.
- Panel manager enters appropriate notes onto the panel management log.

PCP requests that patient be reassigned to another provider (within same clinic or at different clinic)

- Requesting PCP contacts panel manager to request change, recommends a new PCP for assignment to patient, and confirms that the new PCP will assume care.
- Current PCP provides accepting PCP with summary patient information. The situation is documented on PCP change request form.
- Panel manager receives request and discusses rationale for change with requesting PCP. If a new PCP is not nominated, the panel manager evaluates providers that are able to accept new patients and informs the current PCP.
- Panel manager facilitates discussion between PCP requesting the change and potential new PCP and obtains approvals for transfer of care.

Panel manager informs patient of the new PCP, enters appropriate documentation in the EHR note section and also on the panel management log, and enters in the new PCP in the PCP assignment data field.

Remember, if the patient requests a different provider, or if a provider requests that the patient be managed by a different PCP, the current PCP is responsible for identifying a receiving PCP.

PCP Change Request Form

Request Initiated by Patient Provider Date

Our goal at [XYZ Clinic] is to match patients to providers in a continuous healing relationship. Continuity of care helps patients and the care teams develop a close, trusting relationship and results in better quality of care and higher patient satisfaction with the care provided. We recognize that occasionally changes need to be made to most effectively match our patients with providers that can best meet their needs. Change requests will be reviewed by the providers involved and the panel manager, and action will be taken in approximately two weeks.

Patient Name: Date of Birth:

Home Clinic:

Currently Assigned Primary Care Provider:

Reason for change request:

Suggested New Primary Care Provider:

Suggested new clinic location:

For internal use only:

- | | |
|--|----------------------------|
| <input type="checkbox"/> Panel manager review of patient history completed | Date: <input type="text"/> |
| <input type="checkbox"/> Previous PCP consulted | Date: <input type="text"/> |
| <input type="checkbox"/> New PCP consulted | Date: <input type="text"/> |
| <input type="checkbox"/> Patient and PCPs notified | Date: <input type="text"/> |
| <input type="checkbox"/> New assignment completed in EMR | Date: <input type="text"/> |
| <input type="checkbox"/> Correspondence and forms scanned and shredded | Date: <input type="text"/> |

Brief summary of action taken:

Panel manager signature:

Date:

Safety Net Medical Home Initiative

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The objective of the Safety Net Medical Home Initiative was to develop and demonstrate a replicable and sustainable implementation model to transform primary care safety net practices into patient-centered medical homes with benchmark performance in quality, efficiency, and patient experience. The Initiative was administered by Qualis Health and conducted in partnership with the MacColl Center for Health Care Innovation at the Group Health Research Institute. Five regions were selected for participation (Colorado, Idaho, Massachusetts, Oregon and Pittsburgh), representing 65 safety net practices across the U.S. For more information about the Safety Net Medical Home Initiative, refer to: www.safetynetmedicalhome.org.



MacColl Center for Health Care Innovation