

# Advice to PCNs – Building Capacity for Panel

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**Goal: By April 1, 2015 each PCN will have 80% of their physicians with panel identification processes in use.**

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## Context

### Primary Care Strategy

- PCN Evolution and the development of medical homes across the province is an integral part of *Alberta's Primary Health Care Strategy*.
- The vision for primary care in Alberta is based on the medical home model where every Albertan has a personal family physician who works with a team of health care professionals to provide a broad scope of primary care services for patients.
- Physician clinics are the hub of the medical home with the responsibility to coordinate primary care services for the entire population of patients.
- Medical home requires transformation of primary care clinics and the “work” of transformation happens at the clinic level and those doing the work must be involved and supported in this transformation.
- Individual physician attachment with the patients is foundational to the provision of quality care and the development of a sustainable primary care system in Alberta.

### PCN Evolution

- PCN Evolution is the next step in PCN growth and development.
- PCN Evolution and the progressive development of primary care clinics to achieve all of the successful elements of a medical home will entail a tremendous amount of change.
- The PCN role will be to provide the resources and skillful support to help make the transition possible.

## Implementing Panel – Implications for PCN Business Planning

To achieve the panel objective, PCNs business plans need to support capacity development in member clinics. Experience shows there are multiple ways to provide this support. Therefore, without being prescriptive as to a solution, each PCN should consider how its business plan supports the skills and resources its members need to achieve the objectives.

For example, “facilitator” may be a position managed by the PCN to multiple clinics or it may be one part of a role managed at a clinic level. Another example is that some clinics may employ a panel manager to identify and contact patients needing to be screened, while other clinics may make identification of at-risk patients part of the role of a chronic disease management nurse.

## Actions to Consider:

### Does your PCN Business Plan deliver the following supports to its members?

#### Capacity for change

- ✓ **Leadership/championship** – One or more physicians to step up to explain, promote and model the changes.
- ✓ **Time** – Physician(s) and team members have dedicated time to work on changes.
- ✓ **Practice facilitation** – Individual with skills and content to coach the team through the changes.
- ✓ **Tools and resources** – Tools and resources to assist clinics be successful in the changes.

#### Required roles

- ✓ **Panel identification/maintenance** – One or more individuals (typically part of the reception role) to confirm attachment as patients present and perform other tasks to maintain the panel list.
- ✓ **Panel utilization** – One or more individuals to mine panel data for clinical opportunity and enable the appropriate care (e.g., screening). This is required because panel without clinical context is not easily sustainable. Ensuring a practical use for the information is the best way to ensure buy-in by both physicians and staff.
- ✓ **Measurement, data collection and reporting** – Collecting and aggregating data for improvement and reporting at the clinic level. Note that this is NOT a requirement for evaluation expertise at each clinic. Rather, this is the responsibility to operationalize clinic level measurement in support of PCN evaluation and PCN Evolution reporting /accountability requirements.

#### Required skills

- ✓ **EMR reporting technical skills** – Skills required to use the EMR data reporting functions or a data extraction and reporting tool. Note these skills are different from the skills used with the clinical, billing or scheduling/reception functions in EMRs.
- ✓ **Panel management** – Skills required by the interdisciplinary team to approach delivery of care in the context of comprehensive management of a panel of patients

## Where can PCNs go for support?

Support for PCNs is available through the Alberta Medical Association's (AMA's) Primary Care Networks Program Management Office (PCN PMO), as well as partner organizations including AHS, Alberta AIM, and the Alberta College of Family Physicians. Some specifics include:

- **Panel Guide** – A “how-to” **resource** for clinics and facilitators to use in implementing panels. <http://www.topalbertadoctors.org/file/guide-to-panel-identification.pdf>.
- **Coordinated Approach to Continuity, Attachment and Panel in Primary Care** – A backgrounder for **leaders/champions** to assist in understanding and promoting change in this area. [www.topalbertadoctors.org/file/coordinated-approach-to-continuity-attachment-and-panel.pdf](http://www.topalbertadoctors.org/file/coordinated-approach-to-continuity-attachment-and-panel.pdf).
- **Panel Workshops** – Physician-to-physician workshops to help build **leaders/champions** for panel. Workshops with CME credits are now available for PCN's to access and book. The workshops are targeting member physicians to discuss medical home, panel identification and management. A narrative approach will be used for learning employing physician stories related to medical home, panelling and patient care. The supporting evidence will also be relayed to show the correlation between panel identification, patient care and medical home objectives. CME credits are available. Contact the AMA's Toward Optimized Practice (TOP) at [top@topalbertadoctors.org](mailto:top@topalbertadoctors.org) to book.
- **ASaP Initiative** – A program with a combination of **facilitation, panel and EMR skills development** for practical implementation of panel identification and application to screening. Contact TOP for more details.
- **Improvement Facilitator training** – Training on **facilitation** skills is also available through TOP or AIM and continues independent of a specific program. Contact TOP or AIM for more details.
- **Panel Manager Training Pilot** – A pilot program for training on **panel utilization and management skills** for clinic staff. Contact TOP for more information.
- **Online EMR tools and resources** – Panel ID and Management **EMR-specific tools and resources** can be found at [www.topalbertadoctors.org/asap/resourcestools/emrkt/](http://www.topalbertadoctors.org/asap/resourcestools/emrkt/).

## For more information contact:

- PCN PMO by email at [pcnevolution@albertadoctors.org](mailto:pcnevolution@albertadoctors.org) or by phone 1.866.714.5724.