



## The 10 Building Blocks of Primary Care Panel Manager Observation Checklist

### Background and Description

The Panel Manager Observation Checklist is designed to assess the knowledge and skills needed by panel managers to perform in their role. It consists of a checklist of the basic tasks or knowledge needed by a panel manager, including using a chronic disease registry, cleaning the registry, pulling individual patient profiles, conducting inreach and outreach, and using patient-centered communication skills (ask-tell-ask).

### Instructions

The checklist is used during an observation of a panel manager. It can be used soon after the panel manager is trained to assess knowledge and skills learned, or after the panel manager has been practicing for several months for skills reinforcement. Check off each item as you observe. Write N/A if it does not apply to the particular observation session. After each observation, make time to discuss the visit and identify strengths and areas for improvement. We have also found it useful to ask panel managers to observe each other and provide feedback, and they often come away with ideas for improvement.

### UCSF Center for Excellence in Primary Care

The Center for Excellence in Primary Care (CEPC) identifies, develops, tests, and disseminates promising innovations in primary care to improve the patient experience, enhance population health and health equity, reduce the cost of care, and restore joy and satisfaction in the practice of primary care.

### Acknowledgments

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## Panel Manager Observation Checklist

Panel Manager: \_\_\_\_\_

Date: \_\_\_\_\_

*Directions: The following are tasks or knowledge that every Panel Manager should have a basic understanding of. Check off each item as you observe. Write N/A if it does not apply to the particular observation session.*

### Conceptual and Technical Knowledge:

<b>Logging in to i2i</b>	
<input type="checkbox"/>	Panel Manager can access the Citrix login page.
<input type="checkbox"/>	Panel Manager can login to Citrix.
<input type="checkbox"/>	Panel Manager can login to i2i.
<input type="checkbox"/>	Panel Manager knows to contact the Help Desk if having troubling logging in to Citrix or i2i.
Comments:	
<b>General i2i Knowledge</b>	
<input type="checkbox"/>	Panel Manager knows what a chronic disease registry is.
<input type="checkbox"/>	Panel Manager knows the difference between an electronic medical record and a registry.
<input type="checkbox"/>	Panel Manager knows that data flows unidirectionally from LCR to i2i and that some data must be manually entered into i2i.
<input type="checkbox"/>	Panel Manager knows the definition of “active” patient.
<input type="checkbox"/>	Panel Manager knows who their clinic’s super users are.
Comments:	
<b>Panel Management Concepts</b>	
<input type="checkbox"/>	Panel Manager knows that panel management is a way to perform population based care.
<input type="checkbox"/>	Panel Manager knows what a panel is.
<input type="checkbox"/>	Panel Manager knows what a care gap is.
<input type="checkbox"/>	Panel Manager can easily identify care gaps.
Comments:	

**Maintaining the Patient Panel (aka “cleaning” the registry)**

- |                          |  |
|--------------------------|--|
| <input type="checkbox"/> | Panel Manager can add/remove patients from a Primary Care Provider’s (PCP’s) panel in LCR. |
| <input type="checkbox"/> | Panel Manager add patient to a chronic disease registry.                                   |
| <input type="checkbox"/> | Panel Manager can remove patient from a chronic conditions registry.                       |

Comments:

**Individual Patient Profile-Data Entry**

- |                          |   |
|--------------------------|---|
| <input type="checkbox"/> | Panel Manager can look up an individual patient in i2i and LCR                          |
| <input type="checkbox"/> | Panel Manager can correctly enter information for an individual patient in i2i and LCR. |
| <input type="checkbox"/> | Panel Manager can print a letter for an individual patient in i2i.                      |
| <input type="checkbox"/> | Panel Manager can print a patient visit summary sheet for an individual patient in i2i. |
| <input type="checkbox"/> | Panel Manager can flag patient as “Do No Contact” in i2i.                               |

Comments:

**Patient Searches**

- |                          |  |
|--------------------------|--|
| <input type="checkbox"/> | Panel Manager can run a pre-made search.   |
| <input type="checkbox"/> | Panel Manager can filter search results by location.   |
| <input type="checkbox"/> | Panel Manager can export and save search results to the i2iTracks Workfolder.                                  |
| <input type="checkbox"/> | After saving search results, Panel Manager can open saved excel file.  |
| <input type="checkbox"/> | Panel Manager can print labels, patient visit summaries or letters for multiple patients on the search result. |

Comments:

## Closing Care Gaps and Communicating with Patients:

<b>Panel Management In-reach</b>	
<input type="checkbox"/>	Panel Manager knows the clinic’s standing orders.
<input type="checkbox"/>	Panel Manager correctly identifies care gaps on the patient visit summary sheet or on LCR before patient appointment.
<input type="checkbox"/>	Panel Manager greets patient warmly and introduces themselves as part of the care team.
<input type="checkbox"/>	Panel Manager asks “is this a good time to talk?”
<input type="checkbox"/>	Panel Manager says to patient “I notice that you are due for a...(HbA1c, FOBT, mammogram, etc)”
<input type="checkbox"/>	Panel Manager uses ask-tell-ask to educate patient about care gap and to close the care gap.
<input type="checkbox"/>	Panel Manager closes the loop with the patient about care gap.
<input type="checkbox"/>	Panel Manager asks patient “Do you want to make an appointment to review test results with your clinician?” (if appropriate)
Comments:	
<b>Panel Management Out-reach</b>	
<input type="checkbox"/>	Panel Manager knows the clinic’s standing orders and panel management outreach guidelines.
<input type="checkbox"/>	Panel Manager has registry report of patients with care gaps set-up for outreach available.
<input type="checkbox"/>	Panel Manager can identify patients on the list who should not be contacted.
<input type="checkbox"/>	Panel Manager mails letters to patient according to guidelines
<input type="checkbox"/>	Panel Manager can print letters and labels for multiple patients in i2i
<input type="checkbox"/>	Panel Manager calls patients according to guidelines
<input type="checkbox"/>	Panel Manager asks to speak to patient
<input type="checkbox"/>	Panel Manager greets the patient warmly and introduces themself as part of the care team
<input type="checkbox"/>	Panel Manager asks “is this a good time to talk?”
<input type="checkbox"/>	Panel Manager says to patient “the reason I am calling today is because (you are due for HbA1c, FOBT, mammogram, etc)”
<input type="checkbox"/>	Panel Manager uses ask-tell-ask to educate patient about care gap and to close the care gap.
<input type="checkbox"/>	Panel Manager closes the loop with the patient about care gap.
<input type="checkbox"/>	Panel Manager asks patient “Do you want to make an appointment to review test results with your clinician?” (if appropriate)
Comments:	

**Ask-Tell-Ask**

- |                          |   |
|--------------------------|---|
| <input type="checkbox"/> | Panel manager listens without interrupting.   |
| <input type="checkbox"/> | Comments, tone and facial expressions are friendly and not judgmental   |
| <input type="checkbox"/> | Panel Manager exhibits reflective listening-uses patient's words as cues for next sentence                                    |
| <input type="checkbox"/> | Panel Manager provides information ONLY when patient asks or patient doesn't know   |
| <input type="checkbox"/> | Panel Manager provides accurate information.  |
| <input type="checkbox"/> | If Panel Manager doesn't know the answer to a patient's question, say "I don't know but I will find out and get back to you." |

Comments:

**Closing the loop**

- |                          |   |
|--------------------------|---|
| <input type="checkbox"/> | Coach makes sure client understands what was said by closing the loop in a respectful manner. |
|--------------------------|---|

Comments: