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
The UCSF Center for Excellence in Primary Care would like to acknowledge Jen Wong and Amireh Ghorob, MPH for their contribution to this work.
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:**

<table>
<thead>
<tr>
<th><strong>Logging in to i2i</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Panel Manager can access the Citrix login page.</td>
<td></td>
</tr>
<tr>
<td>□ Panel Manager can login to Citrix.</td>
<td></td>
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<tr>
<td>□ Panel Manager can login to i2i.</td>
<td></td>
</tr>
<tr>
<td>□ Panel Manager knows to contact the Help Desk if having trouble logging in to Citrix or i2i.</td>
<td></td>
</tr>
</tbody>
</table>

Comments:

<table>
<thead>
<tr>
<th><strong>General i2i Knowledge</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Panel Manager knows what a chronic disease registry is.</td>
<td></td>
</tr>
<tr>
<td>□ Panel Manager knows the difference between an electronic medical record and a registry.</td>
<td></td>
</tr>
<tr>
<td>□ Panel Manager knows that data flows unidirectionally from LCR to i2i and that some data must be manually entered into i2i.</td>
<td></td>
</tr>
<tr>
<td>□ Panel Manager knows the definition of “active” patient.</td>
<td></td>
</tr>
<tr>
<td>□ Panel Manager knows who their clinic’s super users are.</td>
<td></td>
</tr>
</tbody>
</table>

Comments:

<table>
<thead>
<tr>
<th><strong>Panel Management Concepts</strong></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>□ Panel Manager knows that panel management is a way to perform population based care.</td>
<td></td>
</tr>
<tr>
<td>□ Panel Manager knows what a panel is.</td>
<td></td>
</tr>
<tr>
<td>□ Panel Manager knows what a care gap is.</td>
<td></td>
</tr>
<tr>
<td>□ Panel Manager can easily identify care gaps.</td>
<td></td>
</tr>
</tbody>
</table>

Comments:
### Maintaining the Patient Panel (aka “cleaning” the registry)

- Panel Manager can add/remove patients from a Primary Care Provider’s (PCP’s) panel in LCR.
- Panel Manager add patient to a chronic disease registry.
- Panel Manager can remove patient from a chronic conditions registry.

**Comments:**

### Individual Patient Profile-Data Entry

- Panel Manager can look up an individual patient in i2i and LCR
- Panel Manager can correctly enter information for an individual patient in i2i and LCR.
- Panel Manager can print a letter for an individual patient in i2i.
- Panel Manager can print a patient visit summary sheet for an individual patient in i2i.
- Panel Manager can flag patient as “Do No Contact” in i2i.

**Comments:**

### Patient Searches

- Panel Manager can run a pre-made search.
- Panel Manager can filter search results by location.
- Panel Manager can export and save search results to the i2iTracks Workfolder.
- After saving search results, Panel Manager can open saved excel file.
- 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:

### Panel Management In-reach

- **Panel Manager knows the clinic’s standing orders.**
- **Panel Manager correctly identifies care gaps on the patient visit summary sheet or on LCR before patient appointment.**
- **Panel Manager greets patient warmly and introduces themselves as part of the care team.**
- **Panel Manager asks “is this a good time to talk?”**
- **Panel Manager says to patient “I notice that you are due for a...(HbA1c, FOBT, mammogram, etc)”**
- **Panel Manager uses ask-tell-ask to educate patient about care gap and to close the care gap.**
- **Panel Manager closes the loop with the patient about care gap.**
- **Panel Manager asks patient “Do you want to make an appointment to review test results with your clinician?” (if appropriate)**

### Comments:

### Panel Management Out-reach

- **Panel Manager knows the clinic’s standing orders and panel management outreach guidelines.**
- **Panel Manager has registry report of patients with care gaps set-up for outreach available.**
- **Panel Manager can identify patients on the list who should not be contacted.**
- **Panel Manager mails letters to patient according to guidelines**
- **Panel Manager can print letters and labels for multiple patients in i2i**
- **Panel Manager calls patients according to guidelines**
- **Panel Manager asks to speak to patient**
- **Panel Manager greets the patient warmly and introduces themself as part of the care team**
- **Panel Manager asks “is this a good time to talk?”**
- **Panel Manager says to patient “the reason I am calling today is because (you are due for HbA1c, FOBT, mammogram, etc)”**
- **Panel Manager uses ask-tell-ask to educate patient about care gap and to close the care gap.**
- **Panel Manager closes the loop with the patient about care gap.**
- **Panel Manager asks patient “Do you want to make an appointment to review test results with your clinician?” (if appropriate)**

### Comments:
### Ask-Tell-Ask

- Panel manager listens without interrupting.
- Comments, tone and facial expressions are friendly and not judgmental
- Panel Manager exhibits reflective listening—uses patient’s words as cues for next sentence
- Panel Manager provides information ONLY when patient asks or patient doesn’t know
- Panel Manager provides accurate information.
- 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

- Coach makes sure client understands what was said by closing the loop in a respectful manner.

**Comments:**