



EPT Learning Community

Empanelment office hours

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Icebreaker

In the chat, please share one holiday tradition you look forward to!





- What Empanelment questions are on your mind today?



How does empanelment work in small or solo practices? Is it really needed?

Calculating KPIs in single provider offices



Empanelment

- Easy to assign active patients
- Just need to be sure that all active patients are assigned.



Continuity

- Easy to achieve great continuity!



Access

- Quick to calculate for one provider
- Challenge: cannot shift patients to improve access.

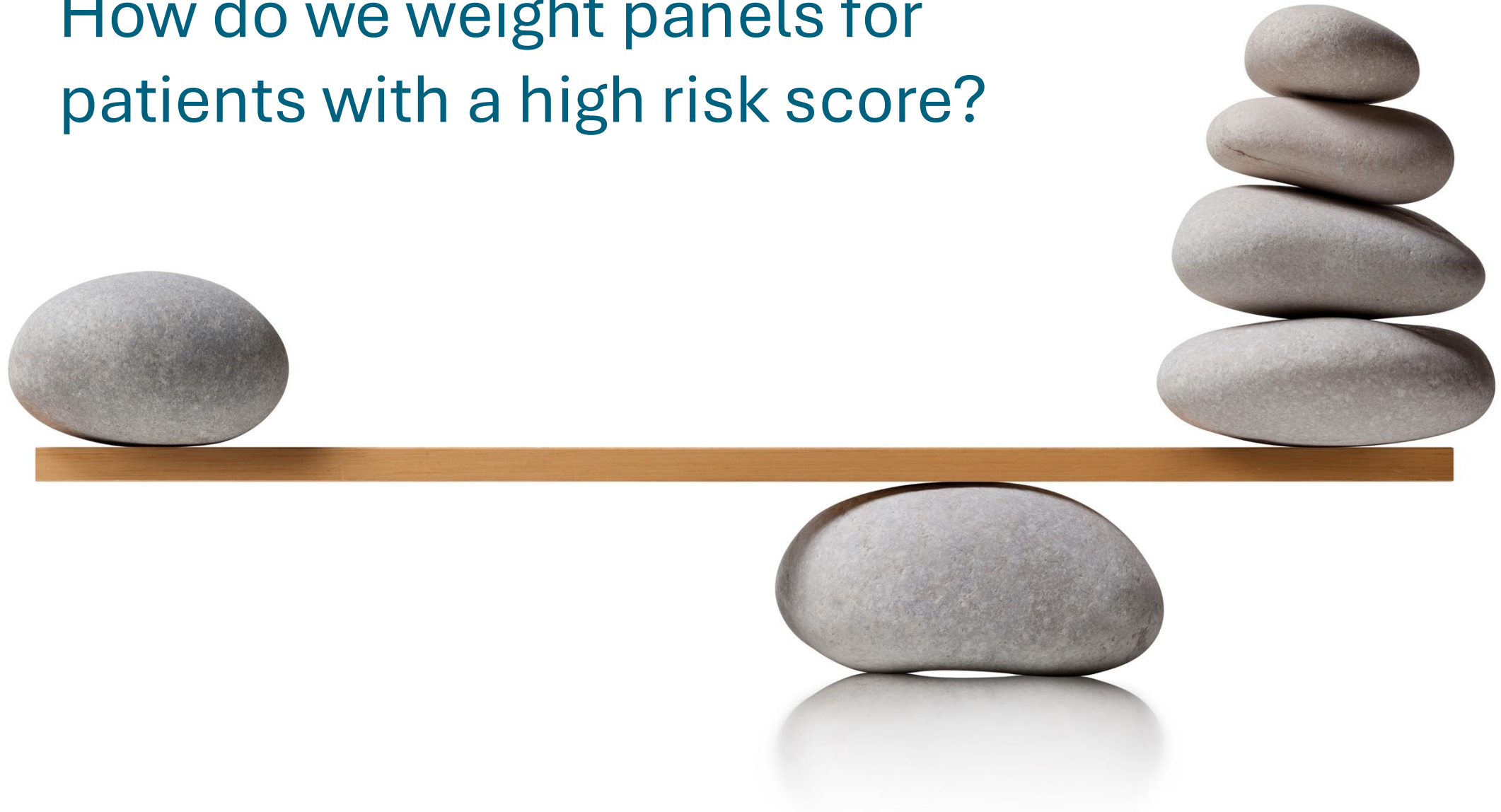


Reporting for May 2025: Is it the same measures? What are the measuring dates?



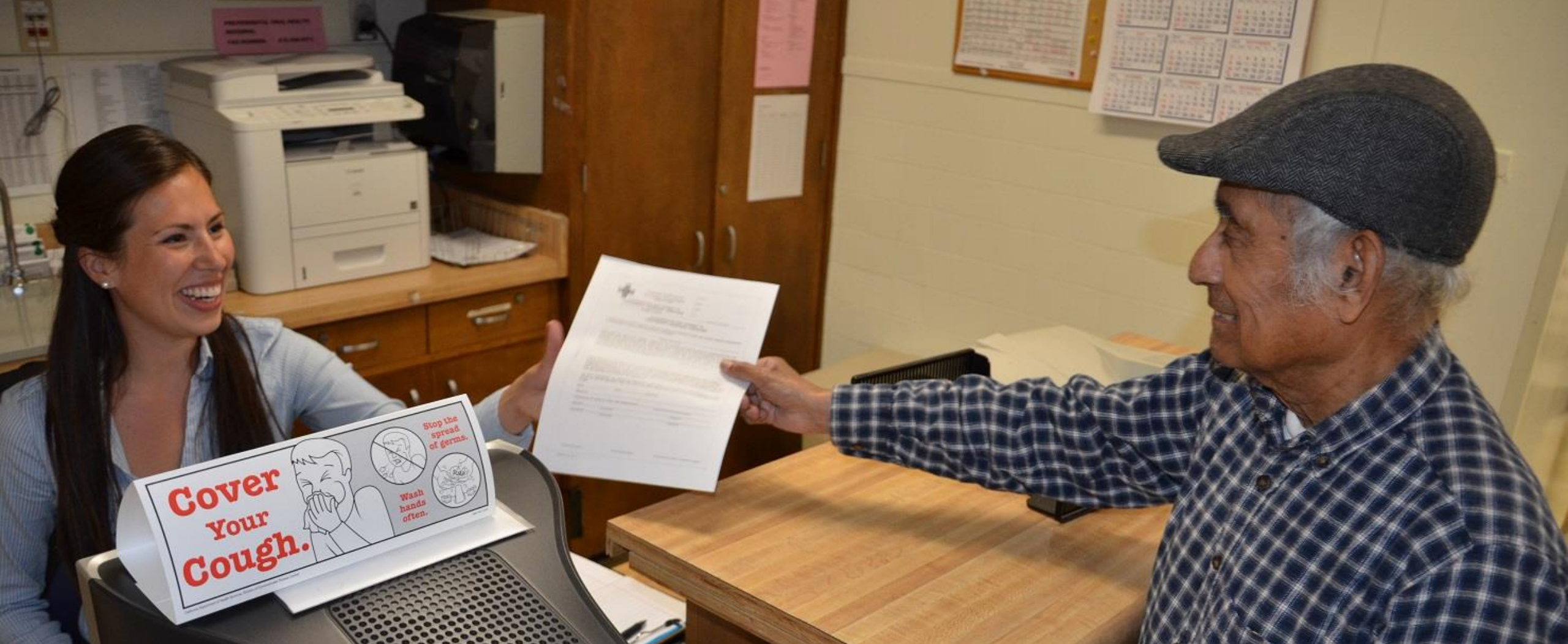
How can I equitably empanel patients when providers practice so differently?

How do we weight panels for patients with a high risk score?





How can we
empanel patients
with 1.5 FTE 2
times/week and
patients want to be
seen?



How do you get front office and medical staff buy-in to empanelment?

A close-up photograph of a silver stethoscope resting on a light blue, textured fabric surface. The stethoscope's chest piece is in the foreground, and its tubing loops across the frame. The background is softly blurred, showing more of the fabric and a white object, possibly a medical instrument.

How do we empanel when
we have locums?



How do you distribute patients from your shadow panel across providers?



What are best practices for transitioning panels when providers leave?

What field in your EHR are you using to empanel to Advanced Practice Practitioners (NPs/PAs)?





How do we decide
who to assign new
patients to?

Resources: Empanelment and KPIs

Empanelment Building Block

Modules

Modules and sections can be completed in any order.

Available Partial Completed

Show sections

1. Foundations of Empanelment Part 1

This module describes why empanelment is foundational to improving population health, patient experience, and access. It also guides you through the first steps of the empanelment process. View this course before you access Foundations of Empanelment Part 2.

Completed ✓ 3 sections

2. Foundations of Empanelment Part 2

This module builds on what you learned in Part 1. In Part 2 you will learn how to design an empanelment policy, calculate ideal panel size, and adjust your panels. You will also learn how to calculate Key Performance Indicators related to empanelment.

0% Resume ▶ 5 sections












3. Resources

Review the Empanelment Implementation Guide and additional resources to support your Empanelment work.

Completed ✓ 11 sections

To download the tool and view an explanation about how to use it, visit Pop Health +

Section Submitted Score Required Status

-  [Empanelment & Access KPI Reporting Tool](#)
-  [Empanelment & Access Video for KPI Reporting Tool](#)
-  [Cheat Sheet 1: Calculating Ideal Panel Size](#)
-  [Cheat Sheet 2: Calculating Ideal Panel Size Per Clinical FTE](#)
-  [Cheat Sheet: Calculating Continuity](#)
-  [Cheat Sheet: Calculating Percentage of Patients Empaneled](#)
-  [Continuous Panel Size Management \(UCSF CEPC\)](#)
-  [Calculating and Weighting Panels \(UCSF CEPC\)](#)
-  [Empanelment Implementation Guide](#)
-  [Ideal Panel Size Calculator](#)
-  [Ideal Panel Size video](#)



Ideal panel size per clinical FTE										
Example										
Primary care provider	Capacity			Demand			Ideal panel size	Current panel size	% empaneled (considering active patients)	# new patients per clinical half day
	Days worked per year	Visits per day	Total visits per year	# Unique active patients	# Visits generated by those patients	Average visits per patient per year				
Overall average	522	70	36540	4599	11289	2.5	5089	4599	90.4%	
Dr. Armstrong	208	24	4992	1730	4883	2.8	1769	1730	97.8%	1
Dr. Baca	184	20	3680	1387	3927	2.8	1300	1387	106.7%	0
Dr. Kular	130	26	3380	1482	2479	1.7	2021	1482	73.3%	3
Total clinical FTE	2.0			Do not write in blue cells (they are formulas)						
Ideal panel size per clinical FTE:	2535			Fill in data in these cells on each of the corresponding dates.						

Opening and closing panels and adjusting new patient appointments

Percent fullness of panel	Number of new patients
<25%	5
25-50%	4
50-75%	3
75-95%	2
95-105%	1
>105%	0



Source: Population Health Management Initiative Empanelment Guide. <https://phinitiative.com/resource/empanelment-guide>

What were your challenges to empanelment?

How did you overcome those challenges?



Where are all the essential elements of a good P&P for empanelment?



Components of an empanelment policy

Purpose of empanelment

Process for empaneling patients

Target panel size

Process for opening and closing panels

Patient rights

Planning for transitions
(e.g., turnover, reduction in clinical time)

Monitoring empanelment



Equity and Practice Transformation (EPT) Payment Program
Empanelment & Access, Milestone 2
Empanelment Policy and Procedure Deliverable Template

Instructions

Please upload your practice's empanelment policy and procedure and provide excerpts that address the following sections.

Section 1. Provide a 2-3 sentence empanelment policy statement.

The "Policy" states what empanelment is and why it is important to your practice. For example: It is the policy of [PRACTICE NAME] to continuously monitor and advance quality, outcomes, and continuity of care for its community residents. [PRACTICE NAME] will implement empanelment to ensure improvement on delivery of care, population health management, and patient and provider satisfaction.

Practice Response

Section 2: Describe your practice's process for empaneling patients. Please include the following:

- Methodology (1-cut, 4-cut, or other) used to establish panels
- How patients assigned by the health plan but unseen by your practice (i.e., shadow patients) are empaneled, if at all
- Target panel size per 1.0 clinical full time equivalent (FTE)
- Process, including roles and responsibilities, for empaneling patients

Practice Response

-
-
-
-

Section 3: Describe your practice's process for defining open and closed panels. Please include the following:

- Criteria used to determine when a panel should be closed
- Criteria used to determine how many new slots are allocated to a provider's schedule
- Process, including roles and responsibilities, for opening and closing panels

Practice Response

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Questions? Email info@pophealthlc.org

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What are strategies to improve TNAA?



Strategies for right-sizing panels



(1)
Opening and closing
panels and adjusting
new appointments



(2)
Actively moving
patients



(3)
Increasing
capacity



(4)
Reducing
demand

Strategies 3-4: Increasing capacity or decreasing demand

Increase capacity through...

- More support from care team
- Using alternative encounters
- Reclaiming “lost” visits (e.g., “no shows”)



Reduce demand (# visits per year) by...

- Increasing interval between visits
- Addressing more in each visit
- Improving continuity

I want to hear from other practices...

- What changes will you make to your Empanelment P&P?
- What were your lessons learned?
- Who manages empanelment at your site?

Thoughts, questions, comments?

