EPT Learning Community
Empanelment office hours

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Icebreaker

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

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- What Empanelment questions are on your mind today?

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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
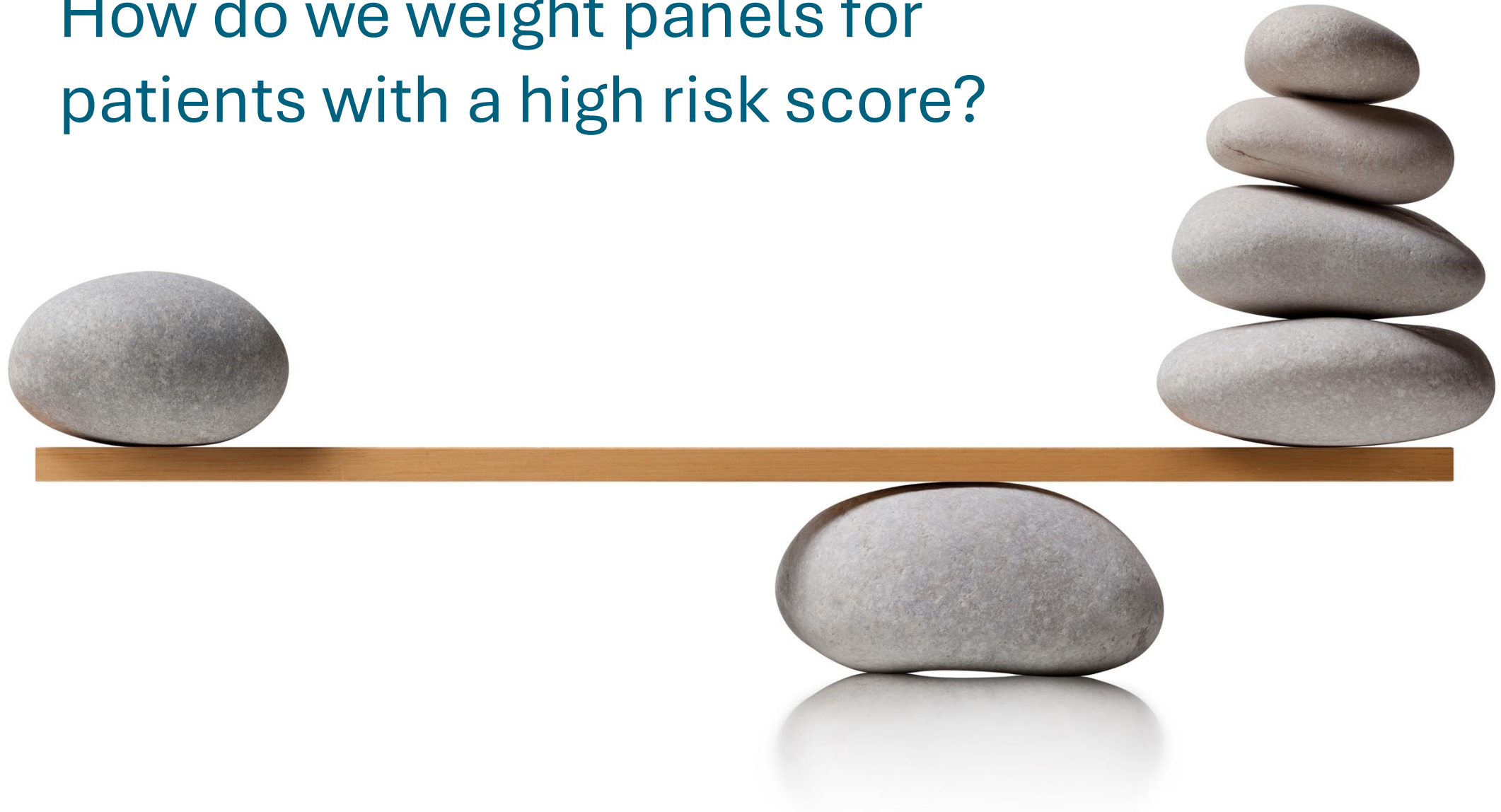- Challenge: cannot shift patients to improve access.

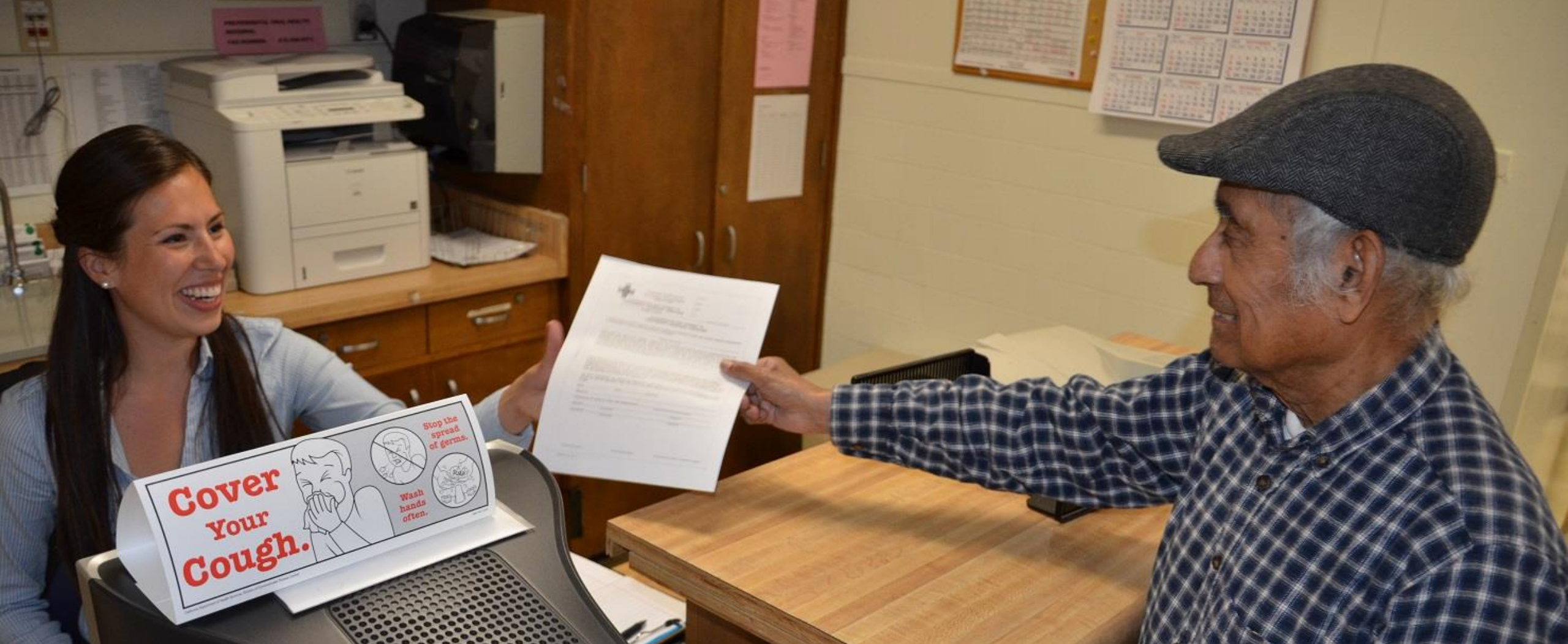Reporting for May 2025: Is it the same measures? What are the measuring dates?

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?

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

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?

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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.

⌄ Show sections

> Available   ∼ Partial   ✓ Compl

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 to support your Empanelment work.

Completed ✓

11 sections ⌃

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

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

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 vists 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. |

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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://phminitiative.com/resource/empanelment-guide

What were your challenges
to empanelment?

How did you overcome
those challenges?

Whare 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

What are strategies to improve TNAA?

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Strategies for right-sizing panels

(1)
Opening and closing panels and adjusting new appointments

(2)
Actively moving patients

(3)
Increasing capacity

(4)
Reducing demand

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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

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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?

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Thoughts, questions, comments?