EMPANELMENT RESOURCE 1: PANEL MANAGER JOB DESCRIPTION[1]

Job Title: Panel Manager

Department: Operations

Reports to: Chief Operating Officer

Effective Date:

Job Summary: The Panel Manager works closely with the Chief Operating Officer (COO) and Chief Medical Officer (CMO) to manage panel assignment, develop and track reports on key empanelment metrics, and conduct staff training.

Duties and Responsibilities:

- Ensures each patient is assigned a primary care provider (PCP).
- Resolves unassigned patients by reviewing appointment history to determine appropriate assignment based on PCP availability.
- Monitors influx of new patients into panels and analyzes PCP capacity (panel fullness) to absorb new patients. Reviews issues with medical director and reassigns as appropriate.
- Reporting:
  - » Develops monthly panel report and reviews PCP assignments. The monthly panel report consists of all patients seen in specified month, assigned PCP, treating provider (continuity), retention and PCP change.
  - » Determines continuity percentages for each provider against community health center (CHC) goals.
  - » Ensures continuity target goals are being met. If not, develops a performance improvement plan in collaboration with CMO.
  - » Generates operational reports such as panel fullness, urgent/same-day appointment availability, third next available.

- Manages PCP change requests in collaboration with CMO, which could include:
  - » Patient-initiated PCP change requests. Facilitates discussion between and obtains approval from current assigned PCP and future PCP, and makes the change in the practice management system.
  - » Provider-initiated PCP change requests. Facilitates discussion between current PCP and potential future PCPs, and obtains agreement of acceptance by the new PCP. Makes the change in the practice management system.
- Tracks patient status changes including death and transfers to other care, and makes the change in the practice management system.
- Assesses panel fullness against "right size" and discusses any needed adjustments with CMO.
- Assesses impact of requests for changes in part-time status.
- Under the direction of the CMO, tracks impact and supports medical and operational leaders in making decisions on cross coverage, temporary coverage, and movement of whole or partial panels.
- Tracks PCP status changes (transfer, termination, sabbatical, medical leave, etc.) and:
  - » Evaluates impact on assigned panel of patients.
  - » Reassigns panel to other clinic providers according to panel fullness.
  - » Notifies affected patients of new PCP assignment.
- Conducts trainings including:
  - » Empanelment 101 training for all staff (importance of empanelment, access and continuity).
  - » Call center and front office/back office training on scheduling with assigned PCP.
  - » PCP change request training for call center, and front office/back-office staff.
- Conducts oversight (and governance participation) of PCP data and clinical full-time employee (FTE) data.
- With operations and medical leaders, creates PCP teams and care teams.
- Manages and updates PCP care teams (e.g., adjusts teams if there are staff turnover issues).
- Manages weighting parameter.

Required Skills and Abilities:
- Three to five years of experience in healthcare.
- Knowledge of Federally Qualified Health Centers.
- Previous experience with electronic health records.
- Previous experience working with CHCs.
- Strong data and analytical skills.
- Proficient with Microsoft Office suite or related software.

Education and Experience:
- High school diploma or equivalent.
- At least two years related experience.

ENDNOTES

1   Developed in 2022 through the PHMI empanelment design team process.