



## Empanelment FAQ Care Team Facilitators

### Q: What is empanelment?

Empanelment is when a client is assigned to a care team and/or individual provider. Each care team has a panel of clients.

### Q: Who empanels?

Empaneled care team providers are responsible for empaneling clients to *their care team* and to *themselves* if they are the medical or behavioral health provider. Psychiatrists can also empanel clients to themselves but should not empanel clients to care teams.

There are four empanelment dropdown options in the EHR:

1. Care team
2. Medical provider
3. Behavioral health
4. Psychiatrist

### Q: What's my role?

As a care team facilitator, you are responsible for:

1. Reviewing weekly empanelment reports
  - Review clients who have not been empaneled, or who are empaneled to another team, but who saw one of your care team providers. Bring this list to biweekly team meetings for discussion.
  - Let care team members know about changes through team meetings or via flags.
2. Familiarizing new care team members with empanel procedures
  - Share relevant FAQs and empanelment cheat sheet
  - Show them where to empanel in the EHR (resources available on the portal)

### Q: How can I review empanelment with my Care Team?

1. Open the email from HI labeled "Weekly Empanelment Report"
2. Click the image to be taken to Tableau
3. Select the tab labeled "All Clients Seen Last Week"
4. Select the medical providers on your care team
5. Include only these appointment types:
  - Additional Established Medical
  - Controlled Substance Medical
  - Established Behavioral Health
  - Established Medical
  - Established Medical 15
  - New Behavioral Health
  - New Medical
  - New Pediatrics 30
  - New Pediatrics 60

6. Export to excel, sort by behavioral health provider and delete clients who are assigned to the behavioral health provider on your care team
7. Repeat this process for the behavioral health provider in Tableau, sorting by medical provider in Excel
8. Print and review with your care team

### **Q: When should a client be unassigned?**

“Unassigned” means a client is engaged in care with non-care team providers *only* and they should not be assigned to a care team.

“Null” means the client has **not** engaged with care long enough to determine whether or not they should be added to a care team, and no assignment should be made.

### ***A few special cases...***

- **Saturday medical provider:** Clients seeing the Saturday medical provider at 421 Fallsway should be added to the Purple Team.
- **Pediatrics:** If an adult client is seen in pediatrics by a primary care medical provider, the client should be assigned to the Orange Team (even if that provider isn't on the Orange Team).