

## **The empanelment process**

Empanelment is the assignment of panels of clients to providers and integrated care teams. Clients see the provider of their choice, and when they need additional services from Health Care for the Homeless, they are referred to other providers on their provider's care team, to reinforce and improve continuity of care.

Clients will only be empaneled to a care team after they have engaged with medical or behavioral health services. Clients who have engaged with another Health Care for the Homeless service (e.g., case management) will not be placed on a care team until they are referred to either medical or behavioral health.

### **Definitions of key terms**

- **Service.** *Each discipline that offers care to a Health Care for the Homeless client: medical, behavioral health, psychiatry, etc.*
- **New client.** *A first-time client who has never engaged with any Health Care for the Homeless service, or a re-engaged client who has not received services in more than three years since he or she has engaged in a service*
- **Internal referral/new service.** *A client currently engaged with one service who is seeking to engage with an additional service (e.g., an existing medical client newly engaging in psychiatry services).*
- **Re-engaged client.** *A lapsed client who has not had appointments at Health Care for the Homeless in more than three years, but who is returning to make an appointment. Re-engaged clients will be scheduled and empaneled as new clients unless they request to see their previous providers and those providers are available.*

### **New clients (medical or behavioral health)**

New clients will be empaneled to providers or care teams following their first scheduled medical or behavioral health appointment. During discharge from that appointment, the unit clerk will:

- schedule a follow-up appointment with the same provider AND
- assign the client to that provider and the provider's care team in the EHR

In the case of clients who leave after an appointment without checking out, empanelment happens during follow-up appointments. When a client calls to schedule a follow-up appointment, the scheduler schedules the client with the same provider as his or her first appointment. Then, at discharge from that second, follow-up appointment, the unit clerk assigns the client to that provider's care team in EHR. If the client does not return for a follow-up appointment, or returns as a walk-in without scheduling an appointment, the client will not be empaneled.

### **Existing clients**

Some of our existing clients have not yet been assigned to care teams. To empanel them, we will use two processes:

- during appointment scheduling (by phone)
- during appointment checkout

### **During appointment scheduling**

If a client calls to schedule a first-time appointment for a new service, the scheduler checks whether the client is assigned to a care team in the EHR (i.e., whether the client has been empaneled based a different service).

- If the client is empaneled, the scheduler schedules the client with a provider on the same care team
- If the client is not empaneled, the scheduler checks whether client is a current client of a Health Care for the Homeless provider in another discipline.
  - If so, the scheduler schedules the client with a provider on the same care team
  - If not, the scheduler schedules the client with the first available provider

***During appointment checkout***

When a client checks out from a behavioral health or medical appointment, the unit clerk will ensure the client is empaneled in the EHR by:

- Checking the EHR banner to see if the client's care team is displayed
- If a client does not have a care team listed, the unit clerk looks to see if the client's name is on the weekly client query generated by the Informatics team\*
- The unit clerk assigns the client to the care team listed on the Informatics list AND gives the client an appointment (blue) card with his or her care team and provider assignments

***\*The Informatics list***

Each week, Informatics will run a query on clients who have a behavioral health or medical appointment scheduled for the upcoming week (Monday through Saturday) AND who do not have a care team assignment in the EHR. Informatics then determines the care team assignment for each client.

If a client's providers are on the same care team—Informatics assigns the client to that care team AND places the client and the client's care team assignment on a list for unit clerks.

If a client sees providers on different care teams—Informatics assigns the client to the care team of the behavioral health provider AND places the client and the client's care team assignment on a separate list for review by care teams, to determine whether the empanelment is appropriate.

Informatics distributes lists of new empanelment information, sorted by site, to unit clerks at all sites on a weekly basis.

The unit clerk then formally assigns the client to the care team in the EHR.