

Submission Id: 2954

Title

Defining and Measuring Primary Care Panels: A Systematic Review

Priority 1 (Research Category)

Practice management and organization

Presenters

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Abstract

CONTEXT: Empanelment, assigning individual patients to primary care providers (PCP), is a building block of primary care (PC). Panel size plays increasing role in determining workload, capacity, and pay. Marked differences exist in reported panels, from <500 to >5000. Variation in rules used to define panels may contribute to these differences, but data on current practices are lacking OBJECTIVE: Identify a) methods used to define and measure panels by researchers and health care systems (HCS) and b) research on strengths/weaknesses of specific approaches. STUDY DESIGN: Systematic Review DATASET: Search of 4 databases from inception to 4/28/21 and Google grey literature search with review of article list & structured data extraction in duplicate ARTICLES: 93 articles which included description of rules to define panel OUTCOME MEASURES: Frequency with which HSC or researchers used specific practices for defining panels RESULTS: Panel Assignment: 25 assigned patients if seen at least once, 3 required 2 visits and 3 HMOs assigned upon enrollment in health plan. Duration without visit to inactivate: varied from 12 months (5 HCS), 18 months (9), 24 months (5) and 36 months (8). 2 HMOs inactivated patients when they left health plan. Frequency of updating panels: 1 HCS updated 2x/month, 8 monthly, 2 quarterly and 2 annually. Advanced Practice Providers (APP): some HSC included patients seen by APPs in physician panels, others assigned them independent panels. 2 surveys of PC NPs found 45% & 64% had independent panels. Adjusting panel size for part time practice: in 33 studies where panel size was a variable in multivariate analysis 18(55%) of articles did not adjust panel size for part time practice. Research on strengths and weaknesses of specific approaches: no published research was located. CONCLUSIONS: Great variation exists in rules used to define and measure panels. This may be contributing to the enormous variation in reported panel sizes. Caution is needed comparing reports across articles and organizations. Research on best method to define and measure panels is needed and could contribute to an evidence-based, standard approach.