



12, 18 and 36 Month Panel

We often get asked questions about how to best “count” a provider’s panel of patients. If we “count” only the patients who have come into the clinic within the last 12 months, we will fail to capture significant numbers of patients who believe they are linked to the clinic but have just not come in the last year. At the same time, if we count only 12 months we will also over count some patients. So looking at 12 months will result in some over and some under count, although probably much more under count. If we “count” patients back as far as 36 months, we over count the panel (some of the patients counted may no longer be patients of the provider, for a variety of reasons). If we look back at the last 18 months, we over count some and under count a few, but the result is more accurate than a 12 month or 36 month count.

The most important number to look at is the **visit rate**. If we take physician’s panel (as defined by looking back 18 months) and say “How many visits did these patients have in the last 18 months?” and then divide the number of visits in those 18 months by the number of patients, we get number of visits per 18 months. We would then have to look at physician supply (capacity) for the last 18 months. A common error here is assuming that the same visit rate for 18 months can be proportionally applied to a year. However, this is also not accurate, since the return visit rate over 12 months is not necessarily equal to two-thirds of what it would be for 18 months.

On the other hand, if we take the 18 month panel (unique patients seen in the last 18 months) and look at how many visits they had in the last 12 months, we get a 12 month (annual) visit rate. Using **18 month panel** and **12 month visit rate**: raises the panel size, gives a rate lower than the 12 month patient rate and higher than the 18 month patient rate. Keep in mind some of the patients in the 18 month panel will have zero visits within the last 12 months. So they count in the panel calculation, but would be recorded as having no visits in the last 12 months.

The best way to discover the “active” panel of patients for a physician is to look back 18 months, and use the “four cut” method of counting the number of unique patients in a physician’s panel. Then look back 12 months to determine the annual return visit rate for each of the patients in the panel.

In summary, the best way to do this would be to discover the unique unduplicated patients over the last 18 months and use their 12 month visit rate in the panel equation.