



Primary Healthcare Centre Management Course: Patient Empanelment, Access and Clinic Operations



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Introduction:

Primary healthcare centre management, covering patient empanelment, access and clinic operations, is a 5-day course for health centre directors, nursing heads and primary care network managers that ends with an Operational Improvement Plan for a case health centre. Many centres run with unassigned patients, early-morning booking queues, walk-in surges, idle afternoon clinic rooms and referrals sent without criteria, so access suffers while staff feel overloaded. Nominees already run or supervise a health centre, and work through case studies on centre activity, rota and complaint data. CoreConcept Training Center delivers this primary healthcare centre management course.

Course Objectives:

- Assess a primary healthcare centre against the core primary care functions and set a baseline of activity, service package and opening model
- Organise patient empanelment, calculate panel sizes and assign care team roles under a family medicine model
- Redesign appointment scheduling, walk-in flow and same-day capacity using advanced access methods and the third next available appointment measure
- Apply gatekeeping criteria and referral templates that track patients sent to specialists and the feedback that returns
- Supervise chronic disease and preventive clinics, pharmacy, laboratory and imaging support and infection prevention rounds at management level
- Build a centre budget, quality indicator set and performance dashboard and assemble an Operational Improvement Plan for a case centre

Target Audience:

- Health centre directors accountable for the daily operations, staffing and results of a primary care facility
 - Nursing heads responsible for clinic sessions, nursing rosters and infection prevention in health centres
 - Primary care network and cluster managers who oversee several centres and compare their performance
 - Family medicine practice managers responsible for appointments, reception and patient registration
 - Quality and patient experience leads who monitor indicators and complaints across primary care services
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Course Outline:

Day 1: Primary Care Role and Health Centre Current-State Assessment

- WHO Primary Care Functions Applied to Health Centre Services
- First-Contact, Continuity and Coordination Roles in the Care Pathway
- Health Centre Service Package and Opening Hours Models
- Catchment Profile and Centre Activity Baseline Review
- Health Centre Current-State Assessment Checklist and Gap Log

Day 2: Family Medicine Model, Empanelment and Care Team Design

- Family Medicine Model and Named Physician Continuity Rules
- Patient Empanelment Steps and Panel Size Calculation
- Panel Management Routines for Unassigned and Inactive Patients
- Team-Based Care Roles for Physicians, Nurses and Health Educators
- Patient-Centered Medical Home Principles for Centre Redesign

Day 3: Appointment Access, Reception Flow and Referral Management

- Advanced Access Scheduling and Same-Day Appointment Capacity
- Third Next Available Appointment and Demand Versus Capacity Tracking
- Walk-In Triage, Reception Flow and Waiting Time Mapping
- Gatekeeping Criteria, Referral Templates and Referral Tracking Log
- Patient Experience Survey and Complaint Theme Review

Day 4: Clinic Sessions, Support Services, Safety and Centre Budgets

- Chronic Disease and Preventive Clinic Session Templates and Recall
- Pharmacy, Laboratory and Imaging Support Turnaround Controls
- Infection Prevention and Control Rounds and Sterilisation Supervision
- Staffing Skill Mix, Rosters and Clinician Productivity Measures
- Centre Budget, Quality Indicators and Performance Dashboard Design

Day 5: Case Study and the Operational Improvement Plan for a Health Centre

- Case Health Centre Activity, Panel and Rota Data Review
 - Case Access Bottleneck and Referral Leakage Diagnosis
 - Case Skill Mix and Clinic Session Redesign Options
 - Centre KPI Set With Targets and Monthly Review Routine
 - Operational Improvement Plan Completion and Peer Challenge
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Skills You Will Gain:

- Health Centre Baseline Assessment
- Panel Size Planning
- Advanced Access Scheduling
- Referral Pathway Management
- Clinic Session Template Design
- Support Service Turnaround Control
- Centre Budget Monitoring
- Primary Care KPI Dashboard Design

Why Attend This Course:

- Deliver an Operational Improvement Plan for a case health centre to the cluster primary care director or the centre management committee
- Decide panel sizes, session templates and same-day slot numbers from demand data rather than habit
- Avoid early-morning queues, unmanaged referrals and idle clinic rooms that waste staff time and frustrate patients
- Share empanelment rules, referral templates and the dashboard layout with reception, nursing and physician teams

Conclusion:

Back at work, the participant presents the Operational Improvement Plan to the cluster primary care director and the centre management committee. They use it to approve panel assignments, the session template, same-day appointment capacity, referral criteria and the centre KPI set with targets. Nursing heads use it to adjust rosters and clinic sessions, and reception teams use it to change booking rules. After the first three months, the centre should compare waiting times, third next available appointment, referral volumes, patient experience scores and budget variance against the baseline and refine the plan.

Frequently Asked Questions FAQ:

What should participants know before a primary healthcare centre management course?

Participants should already run, supervise or support a health centre or a group of centres. Bringing anonymised appointment, attendance, staffing or referral data from their own centre helps them apply the access, empanelment and dashboard exercises to real conditions.

How does primary healthcare centre management differ from a hospital management or population health course?

It concentrates on running one health centre or a small group: empanelment, appointments, clinic sessions, referrals, support services and budgets. Hospital courses cover beds, theatres and inpatient flow, while population health courses focus on risk stratification and registries across a whole population.

Why does patient empanelment matter in primary healthcare centre management?

Empanelment links every registered patient to a named physician and care team, so continuity improves and demand becomes predictable. Panel sizes then guide staffing, session numbers and appointment capacity, and help managers spot unassigned or overloaded panels early.

What do participants take back from a primary healthcare centre management course?

Participants take back an Operational Improvement Plan for a case health centre, with an access diagnosis, panel and skill-mix options, a revised session template, referral rules and a KPI set with targets they can adapt to their own centre.
