



## **Panel Readiness Checklist**

For participation in Community Information Integration (CII) and the Central Patient Attachment Registry (CPAR).

### **Responsible Person**

- Clinic has a person responsible and accountable for panel processes who can confirm that panel identification and maintenance processes are established and acted on

### **Panel Identification**

- Clinic has a clear internal definition for:
  - Attached patients
  - Patient statuses in the EMR
- Clinic has a process in place to actively ask patients about their attachment:
  - Patients are asked consistently to confirm that their Doctor or Nurse Practitioner is their one and only provider for comprehensive, longitudinal primary care<sup>1</sup>
  - Attachment information is recorded in the clinic EMR including date of confirmation/validation
  - Confirmation/validation rates are calculated regularly as a process check
- Clinic EMR is used to produce lists of each provider's paneled patients

### **Panel Maintenance**

- Processes are in place to keep panels maintained:
  - Panel lists are reviewed by clinic team members on a regular basis
- Once confirmed, patient records are maintained in the EMR:
  - Patient demographic information is updated
  - Patient attachments are updated
  - Patient statuses are updated

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<sup>1</sup> Confirmation message is adapted for shared panel situations.



## ***CII-CPAR Intent to Participate - The clinic will:***

- Participate in orientation to CII-CPAR and understands how it works for panel
- Check their Primary Provider panel lists to understand what will be automatically uploaded to the registry  
OR  
Prepare the panel lists, as per CPAR requirements, to upload to the registry
- Identify individual(s)/job role(s) that will act as CPAR Panel Administrator
  - Each Panel Administrator must have their own e-mail address for clinic business purposes
- Use the toolkit and develop preliminary plans for handling attachment conflicts from reports
- Use the toolkit and developed preliminary plans for handling mismatch notifications
- Complete the package of registration documents
- Review and update on their privacy policies and training including storage of and access to patient panel lists.

## ***Reference Documents:***

### Supportive Tools for Every Panel (STEP) Documents:

STEP Checklist: <http://www.topalbertadoctors.org/file/step-checklist.pdf>

STEP Toolkit: <http://www.topalbertadoctors.org/file/step-toolkit.pdf>

STEP Workbook: <http://www.topalbertadoctors.org/file/step-workbook.pdf>

### Guide to Panel Identification

<http://www.topalbertadoctors.org/file/guide-to-panel-identification.pdf>

### TOP EMR Supports

<http://www.topalbertadoctors.org/tools--resources/emrsupports/#vendor>

### Alberta Medical Association Privacy Information:

What You Need to Know About Privacy Agreements:

<https://www.albertadoctors.org/leaders-partners/emrs/privacy/what-you-need-to-know-about-privacy-agreements>

Privacy and Security Management:

(Includes training tools)

[https://www.albertadoctors.org/leaders-partners/emrs/emr\\_resources/implementing-an-emr-guide/privacy-security-management](https://www.albertadoctors.org/leaders-partners/emrs/emr_resources/implementing-an-emr-guide/privacy-security-management)