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[1]

    ☐ Attachment information is recorded in the clinic EMR including date of confirmation/validation – **Note: for inclusion in CII/CPAR panels patients MUST have a date of last visit and a confirmation/validation date**

    ☐ 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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[1] 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 should 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.

- ☐ Act on eNotifications, as appropriate, when they are enabled

Supports:

If a clinic cannot check off every box and needs guidance for panel processes, refer to the ACTT Panel Process Change Package.