

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 care¹
 - 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

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](#).

<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="background-color: #008080; color: white; border-radius: 50%; padding: 10px; text-align: center;"> PANEL PROCESSES </div> <div style="font-size: 0.8em;"> Purpose: To assist primary care clinics in optimizing processes for panel management. Aim Statement: By X date provider X can produce a confirmed list of their patient panel. Outcome Measure: # of patients on confirmed panel list to plan proactive care. Balancing Measure: Team satisfaction with panel process. </div> <div style="text-align: right;"> </div> </div>			
High Impact Changes	Potentially Better Practices	Process Measures	Tools
Identify patients on the panel	At every interaction, ask who the patient identifies as their primary provider and confirm demographics	# of patients with unassigned primary provider	Guide to Panel Identification
	Mark the ER (i.e., date stamp) as patient's status (demographic information and primary provider) has been confirmed/updated	# of patients confirmed	STEP Checklist STEP Toolkit STEP Workbook
Maintain panel processes	Review HQCA Primary Healthcare Panel Report with team members. Suggested section: - Panel Characteristics	HQCA Primary Healthcare Panel Report distribution of patient continuity (%) to physician	HQCA Primary Healthcare Panel Report
	Establish a process for confirming attachment to practice for patients not seen within the past 3 years	# of patients on panel not seen within the past 3 years	Panel Maintenance Tool
	Assign an EMR status to each patient to isolate active panel		EMR Guide
	Submit panels to CII-CPAR and resolve conflicts	# of patients on CPAR conflict report	CII-CPAR Team Toolkit

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