CII/CPAR – Technology for Integration and Continuity

Facilitator (PCN Practice Facilitator or similar)*

Practice Facilitators (PF) are specially trained individuals who work with community care practices to enable meaningful changes designed to improve patients' outcomes and clinic processes. They help physicians and quality improvement teams develop the skills they need to implement and adapt evidence-based practices to the specific circumstance of their practice environment. They are a key resource in the transformation efforts toward the Patient's Medical Home and Health Neighbourhood.

Responsibilities and Tasks

Work in partnership with AMA ACTT Consultant:

- Discuss CII/CPAR training readiness and, if applicable, draft an engagement and implementation plan for the PCN
- Participate AMA ACTT CII/CPAR training
- Finalize implementation plan
- Collaborate ongoing as needed to support engagement and implementation

The facilitator plays the role of a coach or guide for the clinic implementing CII/CPAR.

- Engage and share information with the clinic team
    - Answer decision makers questions and point them to key resources
- Provide recommendations to a team on assignment of CPAR roles (Site Liaison, Access Administrator, Panel Administrator)
- Coach the Site Liaison on form completion (starting with the confirmation of participation form)
- Review Health Information Act requirements with Custodian(s) and Site Liaison(s)
- Direct clinic to readiness and implementation resources such as the team toolkit, clinic journey checklist, process map, EMR resources
    - Assist the clinic to determine if they meet the participation prerequisites including,
        - Reviewing the panel readiness checklist results with the clinic
            - Advise on changes to become panel ready, if applicable
        - Privacy supports including the PIA Update Self-Assessment
        - EMR orientation information, mapping and guides
            - Assist with EMR configuration in readiness for CII/CPAR Go Live

- Remain informed by reviewing eHealth communications sent to clinic Site Liaison
- Communicate regularly with the Site Liaison to identify if there are any issues or concerns
- Facilitate post-implementation process improvement related to:
    - Entry of information into mapped fields and their display in the Community Encounter Digest
    - Panel conflict management
    - Address demographic mismatches
    - Manage eNotifications workflow
- Share lessons learned within the PCN

*It is recognized that roles and responsibilities and titles of resources vary by PCN. The above responsibilities and tasks may be assigned to a facilitator/liaison or other resource for example: panel manager, coordinator, assistant or clinic manager. Sometimes the PF and Site liaison (described below) could be the same person.

CII/CPAR Site Liaison

The Site Liaison (SL) is the primary contact for the PCN and Alberta Health and supports a clinic with the implementation of CII/CPAR. This individual is a “point-person” identified by the clinic that will serve in a coordination role between the clinic, or physician implementing CII/CPAR and the support and implementation groups (PCN, AMA and eHealth Support Services).

Responsibilities and Tasks

- Coordinate the readiness requirements
    - Privacy Impact Assessment (PIA) up to date
    - Alberta Netcare enabled
    - Panel readiness
    - EMR version (for Healthquest and Accuro users only)
- Coordinate completion and submission of forms, letters and agreements
- Coordinate awareness and training
- Assist with CII/CPAR data quality/validation testing
- Support issue management
- Coordinate and participate in evaluation activities

*CPAR Access Administrator***

A Central Patient Attachment Registry Access Administrator (CPAR AA) must be authorized by the Custodian(s) to manage (i.e. create, amend, delete) user access to the CPAR application for the management of patient panels. In addition manage the setup for those provider panels within CPAR. A custodian may also act as a CPAR AA.

CPAR Access Administrators are provisioned with access to AHS’s Identity and Access Management (IAM) application. The AHS IAM application is available the CPAR AA provision access to the CPAR application for Panel

Administrators for the management of the provider(s) panel (s) within the registry. Alternatively, the CPAR AA may complete a form rather than accessing AHS IAM to provision a Panel Administrator.

CPAR Access Administrator accounts are provisioned by the eHealth Support Services Team (eHSS).

Custodians may authorize any staff member to be a CPAR AA. The CPAR AA role can be assigned to the same person as a clinic's Alberta Netcare AA if the provider chooses; or may be assigned to any other appropriate delegate to act on the provider's behalf. Custodians are encouraged to assign more than one CPAR AA for back up.

Responsibilities and Tasks

- Complete CPAR Registration forms for both CPAR Access Administrator and Panel Administrators in the facility. Refer to the CPAR AA Guide for information and instructions.
- Ensure forms have the required authorizing signatures (i.e. provider's signatures for CPAR AA's, CPAR AA signature for Panel Administrators).
- Complete and submit CPAR AA forms when changes to authorization occur (e.g. provider leaves practice or new provider joins) or when a CPAR AA leaves the clinic or does not continue in the role (i.e. submit terminate role).
- Learn the AHS IAM application in order to provision the CPAR entitlement for staff that are authorized for the roles of Panel Administrators. Access to AHS IAM eliminates the need to complete and submit Panel Administrator Registration forms to eHealth Support Services. Provisioning and management of the Panel Administrator accounts can be done directly in the AHS IAM by the CPAR AA.
- Use the AHS IAM application to create, amend or delete Panel Administrator accounts, including removal of panel authorizations.
- Request creation or amendment of provider's panel setup in CPAR in accordance with the provider's instructions by authorizing and submitting Panel Request forms for any changes to panel set up or panel status.
- Submit a panel termination request when the family practice is no longer responsible for managing an existing panel of patients (previously set up in CPAR with assigned panel number), and ensure that panel data submissions to CPAR are stopped for a terminated panel.
- Be the contact for Alberta Health and Alberta Blue Cross regarding CPAR account related activities or questions for the accounts under the CPAR AA's authority.
- Be the contact for Alberta Health or Alberta Health Services for all AHS IAM communications as they relate to the CPAR entitlement
- Perform access certification on an annual basis for each CPAR user (i.e. Panel Administrators), by logging into AHS IAM and extending the sunset date for the panels under their authority for an additional year or a time period that is appropriate. Receive automatic notifications from AHS IAM regarding due dates for annual certification.

** The CPAR Access Administrator and the CPAR Panel Administrator may be the same person.

*CPAR Panel Administrator***

Central Patient Attachment Registry Panel Administrators (CPAR PA) are individuals within a clinic responsible for maintaining panel lists for Primary Providers for uploading to CPAR (i.e. Registry) and for downloading reports from the registry.

Each panel will have an associated Panel Administrator chosen as part of the CPAR registration process. One individual can be a Panel Administrator for multiple panels, (e.g. a clinic with several panels can appoint the same person to be Panel Administrator of all the panels) or each panel can have a different Panel Administrator.

Responsibilities and Tasks

- Ensure that the Provider's panels are up to date and maintained in the EMR. This is likely to include:
    - Ensuring that clinic processes for panel identification and maintenance are in place, widely understood, and consistently applied.
    - Creating saved searches/queries (report criteria or templates) in the EMR that allow consistent generation of panel lists used to manage panels. This will be based on the training provided for each EMR.
    - Working with the clinic team to ensure the panel lists are maintained and accurate at regular intervals by applying the clinic's definition of paneled patients (active and attached) to the lists from the EMR and removing any patients who no longer apply. Many clinics have routine times when they do their panel maintenance.
- Checking that panel lists are ready and accurate for upload to the Registry. Once per month panel lists will be uploaded to the registry. Training will provide direction on how to run lists specific to each EMR.
- Having access to the Primary Provider's Prac ID and the Facility ID for the site.
- Access to a web browser (Internet Explorer, Edge, Chrome, Firefox or Safari) on its latest release.
- Access to a spreadsheet application (e.g. Excel, Open Office) and basic knowledge of how to use the spreadsheet application in order to open and sort the Conflict Reports generated by CPAR.
- Refer to the CPAR Panel Administrator Guide for information and instructions.
- Log into Central Patient Attachment Registry monthly to retrieve Conflict and Demographic Mismatch reports. These two reports will be available shortly after the panel upload period has closed.
- Keeping administrative information current in CPAR through the ability to view, add, edit, or remove administrative information (panel details and clinic contact information) for the panel.
- Be the contact for the CPAR Registry Administrators regarding panel management within the CPAR application.

The Panel Administrator for CPAR may be the same person (or persons) who are already responsible for panel identification and maintenance within the clinic. If not, Panel Administrators will have to work closely with those responsible to ensure accurate panel lists are available.