

eForm Completion

- Always download and save a new copy of the eForm to your computer to ensure you are working from the current version.
- Open and fill in the downloaded form. Do not try to fill in the form directly in your browser as the eForm may not display correctly in some browsers.
- The eForm is a PDF smart form that will display new fields based on information entered into previous sections. Please type all required information into the form before printing for authorization.
- Completed form must be faxed to the eHealth Services team at 1-844-630-0877.
 DO NOT EMAIL FORM.

Type of Panel Request Section

- Create new panel Choose this option if you are setting up a new panel in CPAR for the first time (your clinic has just signed up for Community Information Integration (CII)/Central Patient Attachment Registry (CPAR) participation, or a new primary provider has joined a clinic that is already participating).
- Add facility or change facility Choose this option for an existing CPAR panel if the clinic is changing locations, or if the primary provider is now managing this panel across another clinic location.
 - All locations must be using the same Electronic Medical Record (EMR) instance for a single panel to be managed across more than one facility. If each facility is using a separate EMR, then separate panels must be set up for each site.
- Add/Remove provider or change panel name – Choose this option to change the panel name for an existing CPAR panel; or

to add or remove a provider from a shared panel.

• **Terminate panel** – Choose this option if the panel is no longer actively managed at the clinic, and will no longer be submitted to CPAR (e.g., clinic is closing, or primary provider for this panel has left the practice and is not being replaced).

By requesting to terminate a panel, the Access Administrator (AA) and Panel Administrator rights will also be terminated. Once these roles are terminated, authorization to submit panel requests or CPAR user requests will be revoked.

NOTE: By selecting **Terminate Panel** you are providing authorization for the removal of any AA and/or Panel Administrator roles that are currently attached to this panel.

 In Transition - Choose this option if a panel is undergoing a change and will be terminated at some point in the future (e.g. the provider is not expected to return but the clinic wishes to receive conflict reports and CII eNotifications for patients on the departed provider's EMR).

Panels that are **In Transition** behave like regular CPAR panels except that they can no longer accept new patients. This can be an important consideration when the family practice is still providing care for those patients, so they can ensure continuity of care during this transition period.

It is important that at least one CPAR Panel Administrator account be kept active while the panel remains in transition in order to view and download CPAR panel reports during this period.

A panel will remain in transition until a terminate panel request form is submitted.



NOTE: When a new provider takes over the care of an existing panel after the original physician's departure, the existing panel **cannot** be switched over to the new provider. The existing panel must be terminated, and the new provider must submit a request for a new panel in CPAR using the CPAR Panel Request Form.

Panel Details Section

- **Panel Name** is a meaningful name used by the primary provider and CPAR Panel Administrator to uniquely identify their panel when working with CPAR information and reports. It will be shared only with users who are authorized for this panel. Typically, this is the name of the provider.
- **Panel Number** is entered only when changing an existing CPAR panel.
- To change the name for an existing CPAR panel, enter both the Panel Name and Panel Number as currently registered in CPAR. Enter the new panel name in the Change Panel Name To* field.
- Terminate panel Enter the existing CPAR Panel Number and Panel Name. It is very important to enter the date for the termination to take effect in CPAR to prevent the panel from being terminated too early. Reason for termination is optional.
 - Once a panel has been terminated in CPAR, it cannot be re-activated. Panel submissions will not be accepted by CPAR after the Termination Effective Date listed on the form.
- In Transition Enter the existing CPAR
 Panel Number and Panel Name. Enter the date for the transition to take effect in CPAR.
 Reason for transition is optional.

Facility Information Section

Create a new CPAR panel

• **Facility Information** is required for the facility where care is delivered to the

paneled patients, and the patient charts are maintained by the primary provider.

- **Facility Name** is the name of the clinic or family practice where the panel is managed.
- Facility ID is the Alberta Health-issued ID number used for reporting and billing (not the Facility Key/WDFA used for Alberta Netcare Portal [ANP] access).
- If the panel is being managed across multiple facility sites for the same primary provider, click the Add additional facility
 ⁺ button and enter the facility information for each site associated with the panel.
- <u>NOTE</u>: Only create a single panel for multiple facilities if patient charts are being centrally managed on a single EMR instance.
 - If you added another facility by mistake, you can remove an additional facility by clicking the button. <u>NOTE</u>: This button will always remove the last facility listed.

Add facility or change facility for an existing CPAR panel

- An additional facility can be added to an existing CPAR panel only if the panel is actively managed at the existing facility(s) as well as the additional facility. Choose this option only if all sites are using the same shared EMR instance.
 - If the primary provider works at another site with a separate EMR, a separate panel must be set up for each site.
- To add another facility for an existing CPAR panel, click the Add Facility checkbox and enter the Facility Name and Facility ID. The additional facility will be listed for the panel in CPAR, along with any previously listed facilities.
- When an entire CPAR participating practice relocates, click the Change facility (move practice to new location) or remove previous facility checkbox and enter the Facility Name and Facility ID of the new

relocation site. Any previously listed facilities will be removed from the panel setup in CPAR and replaced with the new facility(s) listed on this form.

 Do <u>NOT</u> use this option for a provider moving to a different medical practice. When a provider changes from one medical practice to another, a brandnew panel must be set up at the new practice.

Provider Information Section

Create a new CPAR panel

- Provider Last Name, First Name, and Practitioner ID are required for the primary provider(s) on the panel. Enter the provider's legal name (as registered with the professional College). If the provider practices under a preferred name, enter that in the **Preferred Name** field.
- If this is a shared panel click the Do multiple providers share this panel?
 button and list each additional provider in the sharing arrangement for the patients on this panel.
 - A panel is shared only if all providers listed are equally responsible for the care of all patients on this panel. All providers listed must provide care to the paneled patients at the site(s) listed in the Facility Information Section.
 - If you added another provider by mistake, you can remove an additional provider by clicking the button.
 <u>Note</u>: This button will always remove the last provider listed.
- Primary Care Network should be selected if the primary provider is a member of a PCN. If the primary provider is not part of a PCN, leave this field blank.
- Submission Method should always be EMR automated submission unless you have obtained pre-approval from Alberta

Health for an alternate method of submission.

Add/remove provider for an existing CPAR panel

- Add provider Choose this option only if the panel has already been set up in CPAR as a shared panel (more than one provider equally responsible for patient care), or if the primary provider has now chosen to start sharing care for this panel of patients with another provider at the same clinic/family practice.
- Remove provider Choose this option only if the panel has already been set up in CPAR as a shared panel (more than one provider equally responsible for patient care) but is now being solely managed under a single provider; or if one of the providers on a shared panel is being replaced.
- Enter the provider's name and Practitioner ID for the provider to be added or removed from a shared panel.

HQCA Primary Healthcare Panel Report Section

Sign up to receive access to an online account where HQCA can share your Primary Healthcare Report.

By choosing this option, you agree to share your information with the HQCA.

- Please sign me up for CPAR based HQCA Panel Reports: Check here to receive access to HQCA panel reports based on your CPAR Panel.
- Provider email is a required field. You will receive information via email on how to access your account and download your report from HQCA.
- Do multiple provider's share this panel? If this is a shared panel, click the Do multiple providers share this panel? + button and list each additional provider's email in the sharing arrangement for the patients on this panel.

The Primary Healthcare Panel Report is a free confidential quality improvement resource provided to physicians by the Health Quality Council of Alberta (HQCA). The report provides a summary about your patient panel, including screening rates, chronic conditions, and patient utilization of healthcare services (visit to EDs, other family physicians), etc. To learn more about HQCA and Primary Healthcare Panel Reports visit hgca.ca/panelreports.

Alternate Contact Information Section

This section is optional and is available only on a **Create new Panel** request. The CPAR AAs and CPAR Panel Administrator(s) will always be added as contacts in CPAR by the CPAR Registry Administrator as those forms are submitted and processed. Use this section on a Panel Request Form only to identify any additional contacts that you wish to have on the panel, such as the CII/CPAR Site Liaison or Office Manager. The person listed here may be contacted by Alberta Health if any issues arise with the panel setup, or panel submissions to CPAR if the CPAR Panel Administrator is not available.

Alternate contacts can also be added in CPAR at any time by the CPAR Panel Administrator. Any updates to Alternate Contacts after the CPAR panel has been set up (such as a change in email or phone number, or to replace the person in this role) should be made directly in CPAR by the CPAR panel administrator.

Authorization Section

Create New Panel: This section must be completed and signed by the CPAR AA authorized by the primary provider(s) for the panel.

Add Facility or Change Facility: This section must be completed and signed by the CPAR AA authorized by the primary provider(s) for the panel.

Add/Remove Provider or Change Panel Name: This section must be completed and signed by the CPAR AA authorized by the primary provider(s) for the panel.

In Transition: This section must be completed and signed by the CPAR AA authorized by the primary

provider(s) for the panel or by the Primary Custodian.

Terminate Panel: This section requires two separate authorizing signatures outlined below:

CPAR Access Administrator Authorization Section

The section must be completed and signed by the CPAR AA authorized by the primary provider(s) for this panel.

If the panel is shared by more than one provider, all primary providers listed on the panel must have authorized the same person as their CPAR AA. Forms will not be accepted if the person signing has not been authorized as a CPAR AA by each/all primary provider(s) listed on the CPAR panel.

Provider Authorization Section

This section must be completed and signed by the paneling provider when **terminating** a panel. If the paneling provider is not available to sign (e.g., has already left the clinic), the Primary Custodian for the facility and providers in their organization is required to sign.

Alberta Health eHealth Services – Office Use Only Section

For processing use only. Please do not enter any information in this section.

CPAR Registry Administrator – Office use Only Section

For processing use only. Please do not enter any information in this section.