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.

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 CII/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 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).

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.

- **Panel Number** is entered only when changing an existing panel that has already been set up in CPAR.

- To change the name for an existing panel in CPAR, 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**. Enter the date for the termination to take effect in CPAR. **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 this form.

  - **NOTE**: The CPAR Panel Administrator(s) will still be able to access the panel information in CPAR for a terminated panel until a separate request is received to remove access for that panel. Access to a terminated panel is removed by submitting a CPAR Panel Administrator Request form using the **Add/remove panel** option; or by removing the panel from the CPAR Panel Administrator's account if your clinic is using the AHS IAM online services.

    - Authorization to administer the terminated panel should be removed from the CPAR Access

Administrator(s) *only* after all CPAR Panel Administrator accounts have been updated to remove the panel. Submit a CPAR Panel Administrator Request form using the **Remove provider/panel** option.

Facility Information Section

Create a new CPAR panel

- **Facility Information** is required for the site 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 AH-issued ID number used for reporting and billing (not the Facility Key/WDFA used for Alberta Netcare 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. **NOTE**: Only create a single panel for multiple sites if patient charts are being centrally managed on a single EMR instance.

  o If you added another facility by mistake, you can remove an additional facility by clicking the - button. **NOTE**: 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 site(s) as well as the additional site. Choose this option only if all sites are using the same shared EMR instance.

  o 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.
- To change the facility site location for an existing CPAR panel, 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 site(s) listed on this form.

  o Do *not* use this option for a provider moving to a different medical practice. When a provider changes from one medical practice to another, a brand new 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.

  o 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**.
  o If you added another provider by mistake, you can remove an additional provider by clicking the - button. **Note**: 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 never 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 name and Practitioner ID for the provider to be added or removed from a shared panel.

Alternate Contact Information Section

This section is optional and is available only on a **Create new Panel** request. The CPAR Access Administrator(s) 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

Authorization is required for all panel requests.

- A CPAR Access Administrator that has been appointed by the primary provider(s) for this panel must sign to authorise the panel request.

- 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 Access Administrator. Forms will not be accepted if the person signing has not been authorized as a CPAR Access Administrator by each/all primary provider(s) listed on the CPAR panel.

- When a new provider joins the clinic, be sure to also submit the **CPAR Access Administrator Request** form (either setting up a brand new Access Administrator for the new provider, or adding the new provider to an existing Access Administrator's authorizations), along with the **Panel Request** form to create the new panel in CPAR.

AH eHealth Services – Office Use Only Section

This section is completed by eHealth Services once quality assurance checks are performed for completeness and accuracy.

CPAR Registry Administrator – Office use Only Section

This section is used by the CPAR Registry Administrator when completing the panel setup within CPAR. If the request is to create a new panel in CPAR, the CPAR Panel Number will be assigned once the CPAR Registry Administrator has processed this request. The Panel Number will be sent by email to the CPAR Access Administrator(s).