Alberta
Government

Find and maintain panel and attachments

Panel administrators

Alberta Health

Alberta Health Services

ALBERTA MEDICAL ASSOCIATION

CONTENTS

HOW TO

This document describes find and maintain panels and attachments for a panel administrator. It includes tasks to find, view, edit, maintain and create panels.

Find and view panel

1. Click **Panel** from the main menu.

   Once **Panel** is selected

   a. if authorized for a single panel, or if a panel has previously been selected— the *view panel – panel summary* page displays. This page provides panel-specific information including providers, facilities, Programs and Primary Care Networks.

   b. if authorized for multiple panels and no panel has been previously selected— the *view panel – available panels* page displays. This page lists the authorized panels, the name, status and any associated Program for each panel, as well as the option to filter the displayed panels by provider or facility.

      i. Click **View** for the applicable panel.

      ii. The *view panel – panel summary* page displays.
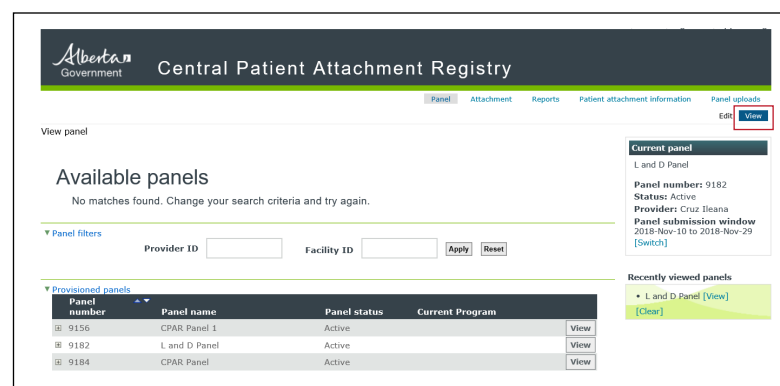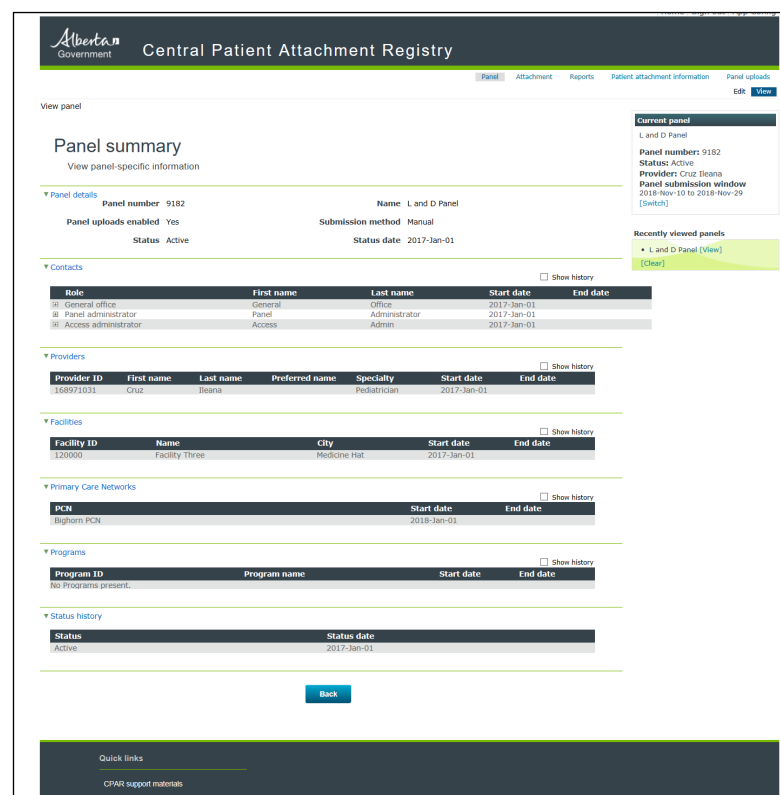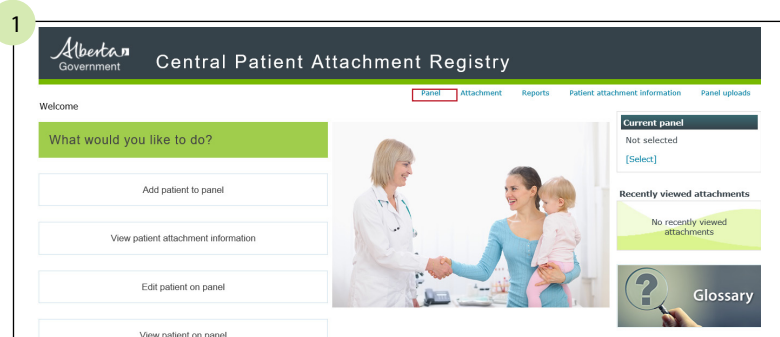
To return to the *view panel – available panels* page from the *panel summary* page

    a. if authorized for multiple panels—click [**Switch**] in the *current panel* sidebar and the *view panel – available panels* page displays; or

    b. click the **Back** button at the bottom of the *view panel – panel summary* page.

Edit panel

1. Click **Panel** from the main menu.

    The following page displays:

      • The *edit panel – panel summary* page if you have access to a single panel or multiple panels but have previously selected a panel.

      • The *edit panel – available panel summary* page displays if you have multiple panel access but have not previously selected a panel to view or edit or click **Edit** for the applicable panel.

This page provides access to update panel-specific information. Only a Registry CPAR Administrator can update the provider and facility information.

EDIT THE PANEL DETAILS BLOCK

1. Click **Edit** in the *panel details* block.

2. Edit any of the following:

   • status active, in transition and terminated; and

   • status date (cannot be future dated).

   NOTE: the * indicates required fields.

3. Click **Save**.

EDIT THE CONTACTS BLOCK

ADD CONTACTS

1. Click **Add** in the *contacts* block.

   The *edit panel – contact details* page displays.

2. Enter the contact detail.

3. Click **Save**.

   NOTE: the * indicates required fields.

EDIT CONTACTS

1. Click **Edit** in the *contacts* block.

   The *edit panel – contact details* page displays.

2. Edit the applicable detail.

   NOTE: the * indicates required fields.

3. Click **Save**.

EDIT PRIMARY CARE NETWORKS BLOCK

ADD PRIMARY CARE NETWORKS

1. Click **Add** in the *Primary Care Networks* block.

   The *edit panel – PCN details* page displays.

2. Enter the applicable detail: PCN, start and end date (optional).

   NOTE: the * indicates required fields.

3. Click **Save**.

EDIT PRIMARY CARE NETWORKS

1. Click **Edit** in the *Primary Care Networks* block.

   The *edit panel – PCN details* page displays.

2. Edit the applicable detail: PCN, start and end date.

   NOTE: the * indicates required fields.

3. Click **Save**.

INVALIDATE PRIMARY CARE NETWORKS

1. Click **Edit** in the *Primary Care Networks* block.

   The *edit panel – PCN details* page displays.

2. Click **Invalidate**.

   NOTE: when invalidate is clicked there is not a warning message; ensure this is the record you wish to invalidate.

Find and view patient on a panel (view attachment)

1. Click **View patient on panel** or **Attachment** and then **View** from the main menu.

   If authorized for more than one panel and no panel has been previously selected—the *view attachment – available panels* page displays. Select the applicable panel and click **Continue** to navigate to the *view attachment search* page.

   If authorized for a single panel or a panel has already been selected—this page does not display and the *view attachment* search page displays.

2. Enter the patient ID or name.

   If needed, click the **Search by additional criteria** link.

   The additional search criteria displays.

   Click **Search**.

3. The search results display.

When searching by
- patient ID—only one result displays.
- anything other than a patient ID— multiple results may display.

Each result has an associated match score. The results are scored based on how closely they match the criteria entered, with a higher score indicating a better match. Each search field contributes to this score. The more information provided in the search criteria, the better the accuracy of the results.

4. Click **View** for the applicable patient.

View the attachment detail.

Click **View another attachment** to return to the *view attachment* search page.

Edit patient on a panel

1. Click **Edit patient on panel** or **Attachment** and then **Edit** from the main menu.

   If authorized for more than one panel and no panel has been previously selected— the *view attachment—available panels* page displays. Select the applicable panel and click **Continue** to navigate to the *edit attachment* search page.

   If authorized for a single panel or a panel has already been selected—this page does not display and the *edit attachment* search page displays.

2. Enter the patient ID or name.

   If needed, click the **Search by additional criteria** link.

   The additional search by additional criteria displays.

3. Click **Search**.

   The search results display.

4. Click **Edit**.

   The *edit attachment—edit an existing attachment* page displays.

5. Update any of the following:
   - preferred name (optional),
   - last confirmation date (required),
   - last visit date (required),
   - death date,
   - end date, and
   - end reason (deceased or ended).

6. Click **Save**.

   The *edit attachment—attachment updated* confirmation page displays.

   Click **Edit another attachment** to return to the *edit attachment* search page.

Add patient to panel

1. Click **Add patient to panel** or **Attachment** and then **Add** from the main menu.

   If authorized for more than one panel and no panel has been previously selected—the *view attachment—available panels* page displays. Select the applicable panel and click **Continue** to navigate to the *add attachment* search page.

   If authorized for a single panel or a panel has already been selected—this page does not display and the *add attachment* search page displays.

2. Enter the patient ID or name.

   If needed, click the **Search by additional criteria** link.

   The additional search criteria displays.

3. Click **Search**.
   The search results display.

   When searching by

   • patient ID—only one result displays.

   • anything other than a patient ID—multiple results may display.

   Each result has an associated match score. The results are scored based on how closely they match the criteria entered, with a higher score indicating a better match. Each search field contributes to this score. The more information provided in the search criteria, the better the accuracy of the results.

4. Select the radio button for the applicable patient and click **Continue**. The *add attachment* page displays.

> **NOTE:** if needed, click **+** to view additional patient details to help determine the applicable patient.

5. Enter the following:

   • preferred name (optional),

   • last confirmation date (required), and

   • last visit date (required).

6. Click **Save**.

The *add attachment—attachment added* confirmation page displays.

Click **Add another attachment** to return to the *add attachment* search page.

Click **Edit** to edit the last patient added. The *edit attachment* page opens.

Find and view patient attachment details

This view allows you to view which panels a patient is attached to, if any.

1. Click **View patient attachment information** or **Patient attachment information** from the main menu.

    The *view patient attachment information* search page displays.

2. Enter the patient ID or name and click **Search**.

    The *view patient attachment information* search results display.

3. Select the radio button for the applicable patient and click **Continue**.

    NOTE: if needed, click **+** to view additional patient details to help determine the applicable patient.

The *view patient attachment information* displays.

Click **Search again** to return to the *view patient attachment information* search page.

Click **Print-friendly view** to print; click the **Print** button.

Click the **X** in the right corner to close the print-friendly page.

View patient attachment information

Patient attachment information
Patient attachment information is up to date as of the latest panel submissions processed by the system.

▼ Patient details

Patient ID	215973100	ID Type	AB-ULI
First name	Jillian	Last name	Doe
Birth date	1981-Aug-24	Gender	Female

▼ Attachment details

Panel name	Provider(s)	Last confirmation date	Last visit date
⊞ CPAR Panel	Sanjuan Elmer	2018-Oct-01	2018-Oct-01

Search again   Print-friendly view

Print

Central Patient Attachment Registry

Patient details

Patient ID	215973100	ID Type	AB-ULI
First name	Jillian	Last name	Doe
Birth date	1981-Aug-24	Gender	Female

Attachment details

Provider(s)	Sanjuan Elmer
Last confirmation date	2018-Oct-01
Last visit date	2018-Oct-01

Panel administrator contact	Phone
Panel Administrator	780-123-4567

Facility	Address	City
No facilities found		

View reports

1. Click **Reports** from the main menu.

   The *view panel reports* page displays.

2. Click **Select** for the applicable report.

3. Click **Open** for the applicable report.

   Depending on your browser, you can choose to download, save or open the report.

   View the report.

Attachment Conflicts

Choose a version of the report to download

Report date	File format	
2018-May-03	Spreadsheet	Open
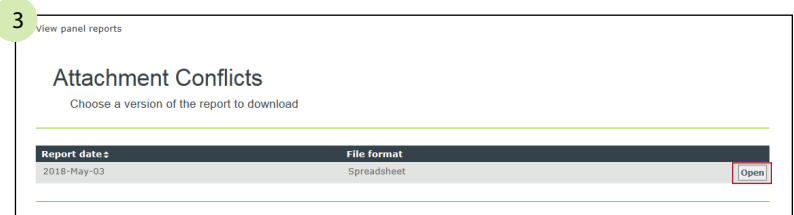
ERU_REP5006B - Attachment Conflicts
Private and confidential. For use only by authorized individuals, as outlined in the applicable terms of use and/or user agreement.
Note: Category 1 indicates when one Primary Provider has a confirmation date that is more recent than other providers, by a period of 30 days or more.
Category 2 when confirmation date is the same or within one month (30 days) between different providers.
Produced date: 2018-May-03
Panel ID: 7371 Name: L and D Panel

Conflict Category	Conflict First Reported	Patient ID	Last Name	First name	Date of Birth	Gender	Last Confirmation Date	Date of Last Visit	Conflicting Provider	Conflicting Provider Facility	Last Confirmation Date for Conflicting Provider	Date of Last Visit for Conflicting Provider
2	5/3/2018	14493-3100 Alberta ULI	Doe	Janet	1989-Oct-14	Female	1/1/2017	1/1/2017	Saito, Morgan	Facility Three, Medicine Hat	1/1/2017	1/1/2017
2	5/3/2018	14493-3100 Alberta ULI	Doe	Janet	1989-Oct-14	Female	1/1/2017	1/1/2017	Nancy, Mathur		1/1/2017	1/1/2017

Upload panel

1. Click **Panel uploads** from the main menu.

   The following page displays:
   • The *view panel uploads* page displays the results summary for all panel submissions.
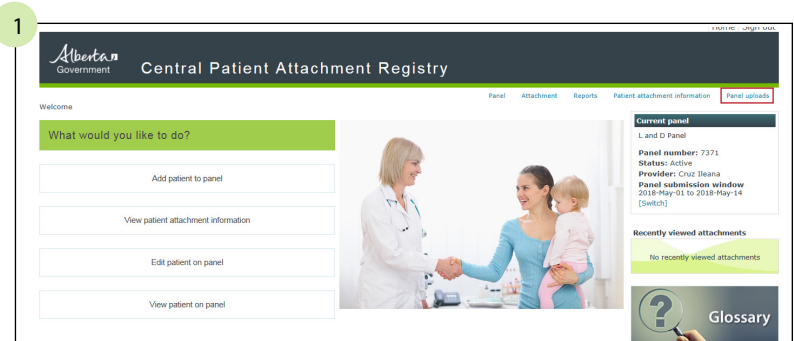
2. Click **Upload** from the main menu.
   • The *upload panel* page displays.
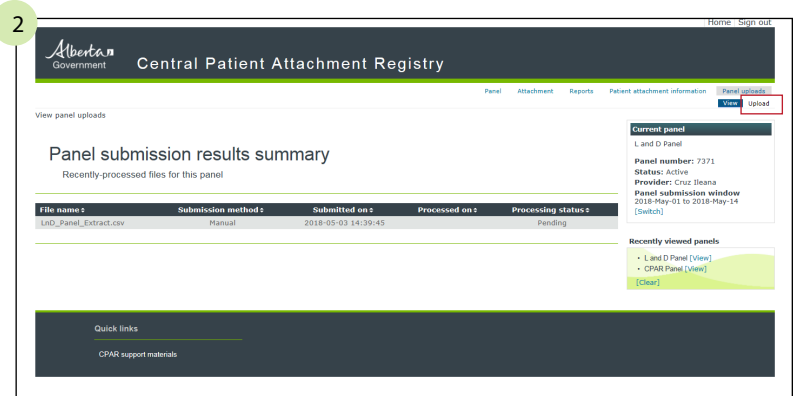
3. Click **Browse**.
   • The *Choose File to Upload* dialogue box opens.
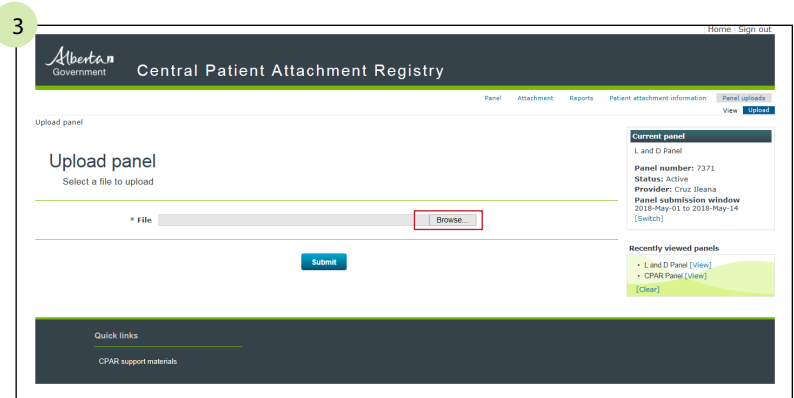
4. Select the panel file that you want to upload.

   • Click **Open**.
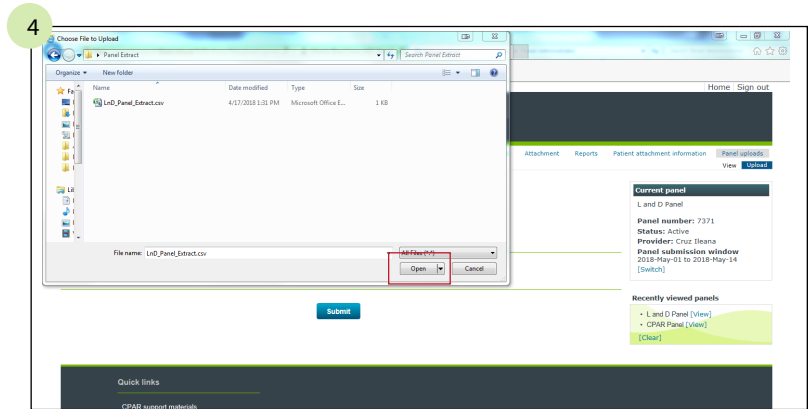
5. Click **Submit**.

   • The *file upload confirmation page* appears.
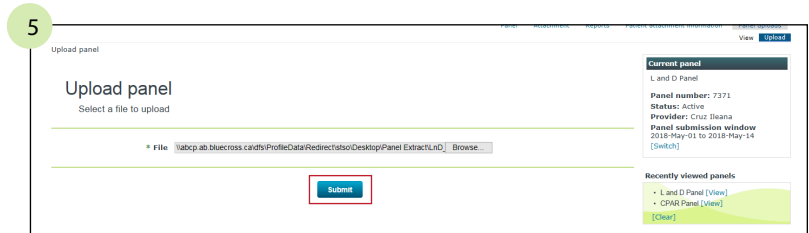
6. Click **Proceed to upload panel** to confirm the upload.

NOTE: Panel Upload is only available during Panel submission window for manual upload.

View panel submission results summary

1. Click **Panel uploads** from the main menu.

   The following page displays:
   - The *view panel uploads* page displays the panel submission results summary of all the submissions that were submitted to this panel.

2. Click **View**.
   - The *Panel submission results details* displays the panel submission summary for viewing.
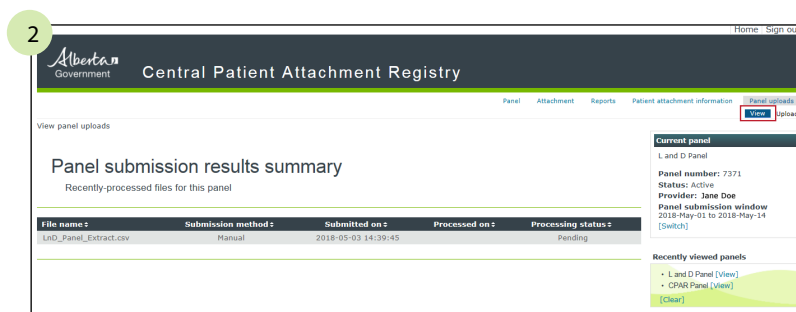
3. The *Panel submission results summary* screen displays one of the following statuses:
   - Pending: the Panel is still being processed. Check back later for an updated status.
   - Ignored: a Panel was submitted multiple times and the earliest files will be ignored.
   - Complete: the Panel was successfully processed and conflict reports will be available once the submission window closes.
   - Complete with errors: the Panel was processed with record level errors. See submission result details page for more information.
   - Failed: the manual or automated submission was not successful. You will be contacted shortly by the eHealth Services Support team or the CPAR Registry Administrators.
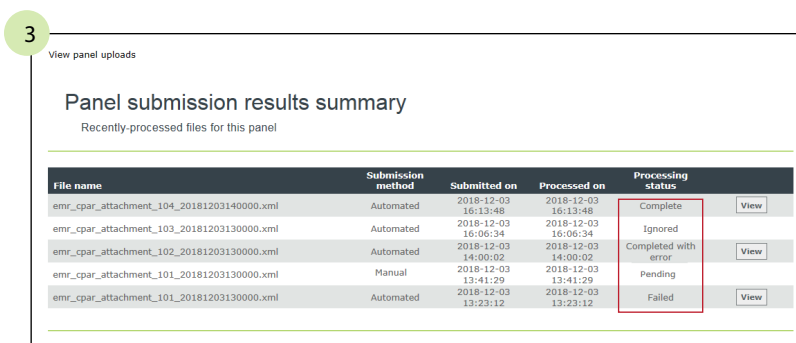
4. If your Panel is processed without any file-level errors, you will also see the total number of

- records in file,
- records processed,
- records not processed,
- total number of warnings,
- attachments added,
- attachments updated, and
- attachments ended.

TROUBLE-SHOOTING TIPS

GENERIC FIELD LEVEL MESSAGES

These messages may be received throughout the application, update according to the hint below.

Required

2017-13-13
(YYYY-MM-DD)
Invalid format

1165T2208
Value must be numeric.

1234569   Ext
(XXX-XXX-XXXX)
Invalid phone number.

emailaddress.com
Invalid email address. Email address format must be a@b.cc.

123456
Invalid postal code. Postal code format must be A9A9A9.

GENERIC ERROR AND WARNING MESSAGES

DATE-RELATED ENTRY MESSAGES

> • Effective date cannot be future dated.

➡ **TIP**   Enter a day in the past or today's date.

> • End date must be later than start date.

➡ **TIP**   Check the start date and ensure the end date entered is later.

> • Area Code is not valid for Country Code.

➡ **TIP**   Verify the area code has been entered correctly.

> • Maximum number of results displayed. Other matching patients may exist, but are NOT shown. Consider adding search criteria if your patient does not appear in this list.

➡ **TIP**   The maximum number of search results is 20. Try to search again and add additional search criteria.

ADD OR EDIT PANEL

> • Panel Administrator contact is mandatory. No gaps are allowed.

TIP There must be at least one contact with the role of panel administrator for the entire effective period of the panel.

> • Duplicate panel contact found.

TIP A contact with the same name and role already exists.

> • Contact start date must be on or after the initial panel start date 2017-Jun-26.

TIP The contact has a start date prior to the start date of the panel.
Correct the contact start date.

> • Panel PCN start date must be on or after the initial panel start date 2017-Jun-26.

TIP The start date entered for the PCN is before the panel start date.
Correct the PCN start date.

> • The same PCN has been entered twice on this panel.

TIP The PCN has already been added to the panel.

> • New panel status date must be later than current panel status date.

TIP The panel status date entered is earlier or equal to the previous panel status date.
Correct the panel status date.

ADD OR EDIT ATTACHMENTS

> • The Panel status must be active in order for an attachment to be added.

➤ **TIP** A new attachments cannot be added to a panel with a status of "in transition".

> • A conflicting attachment with another provider's panel has been found for this patient. Refer to the Conflict details for more information.

➤ **TIP** This patient already has one or more active attachments to one or more other panels.

> • The patient has already been attached to this panel.

➤ **TIP** This patient has a current active attachment to this panel.

> • The last existing panel attachment termination date 2017-09-10 cannot be earlier than new panel attachment last visit date 2017-09-19

➤ **TIP** A previously ended attachment to this panel already exists for this patient.
Edit the existing attachment rather than trying to create a new one.

> • New panel attachment last visit date 2017-08-15 cannot be earlier than the last existing panel attachment termination date 2017-08-31

➤ **TIP** A previously ended attachment to this panel already exists for this patient.
Edit the existing attachment rather than trying to create a new one.

> • **End reason must be blank if end date is not populated.**

➡️ **TIP**   The end reason has been populated but the end date is blank.
Either remove the end reason or populate the end date.

> • **Add attachment is not allowed for patient John Doe 12345-6789. The selected patient is deceased.**

➡️ **TIP**   A new attachment cannot be created for this patient as the patient is deceased.

> • **Last confirmation date cannot be later than death date**

➡️ **TIP**   The patient's last confirmation date is later than the death date.
Correct the last confirmation date.

> • **Last visit date cannot be later than death date**

➡️ **TIP**   The patient's last visit date is later than the death date. Correct the last visit date.

PANEL UPLOADS

You may receive these message after your panel is processed by CPAR. To resolve these errors, please correct the data in your electronic medical record (EMR) software before you upload the panel again.

Failed to process patient: Patient date of birth is not a valid date.

Failed to process patient: Duplicate attachments found in Panel file. Patient attachment has not been created.

Failed to process patient: Record was submitted with incorrect number of columns.

Failed to process patient: Confirmation date is not a valid date.

Patient Preferred name is not valid or missing.

Patient last name is not valid or missing.

Patient given name is not valid or missing.

Failed to process patient: Last visit date is not a valid date.

Patient is not found in the Client Registry.

Confirmation date of 2018-01-01 must be equal to or greater than patient date of birth.

Last visit date of 2018-01-01 must be equal to or greater than patient date of birth.

Confirmation date of 2007-01-01 must be equal to or greater than patient date of birth.

Last visit date cannot be future dated.

Confirmation date cannot be future dated.

Federal or provincial code is incorrect.