



Find and maintain panel and attachments

Panel administrators



CONTENTS

HOW TO 3

Find and view panel.....	3
Edit panel.....	4
<i>EDIT THE PANEL DETAILS BLOCK</i>	5
<i>EDIT THE CONTACTS BLOCK</i>	5
ADD CONTACTS.....	5
EDIT CONTACTS.....	6
<i>EDIT PRIMARY CARE NETWORKS BLOCK</i>	7
ADD PRIMARY CARE NETWORKS.....	7
EDIT PRIMARY CARE NETWORKS.....	7
INVALIDATE PRIMARY CARE NETWORKS.....	7
Find and view patient on a panel (view attachment).....	8
Edit patient on a panel.....	10
Add patient to panel.....	12
Find and view patient attachment details.....	14
View reports.....	15
Upload panel.....	16
View panel submission results summary.....	18

TROUBLE-SHOOTING TIPS 20

<i>GENERIC FIELD LEVEL MESSAGES</i>	20
<i>GENERIC ERROR AND WARNING MESSAGES</i>	20
DATE-RELATED ENTRY MESSAGES.....	20
ADD OR EDIT PANEL.....	21
ADD OR EDIT ATTACHMENTS.....	22
PANEL UPLOADS.....	24

HOW TO

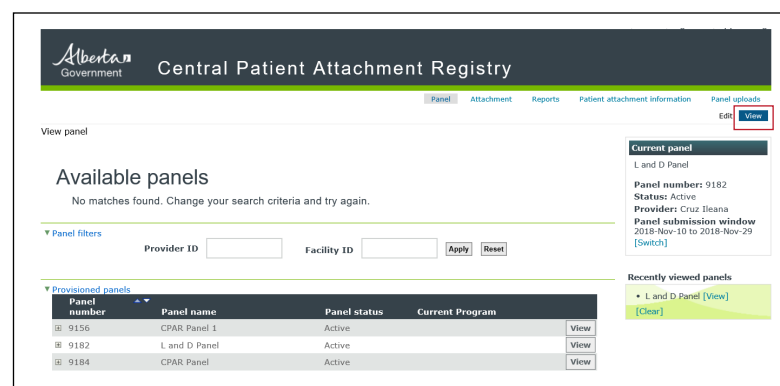
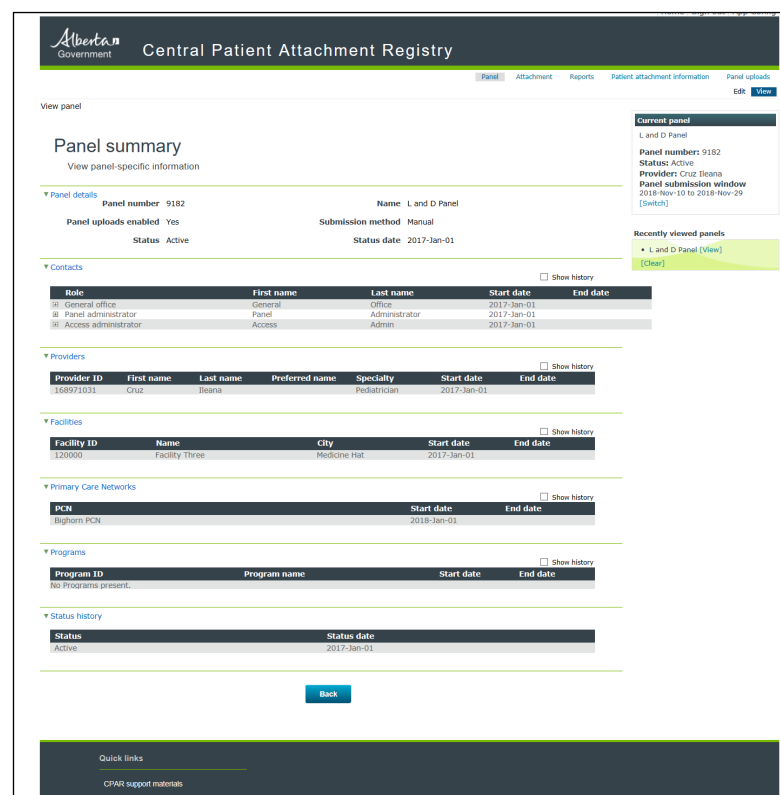
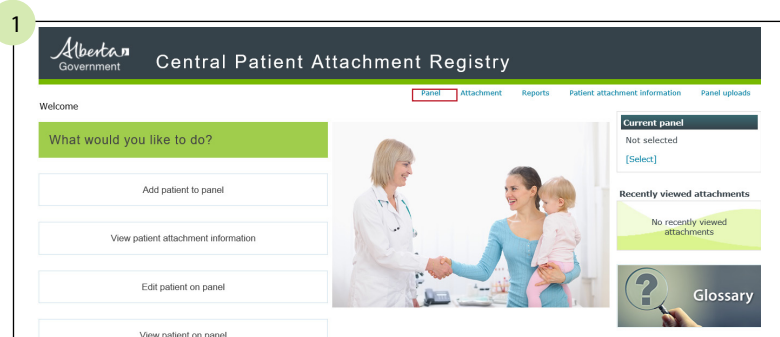
This document describes find and maintain panels and attachments for a panel administrator. It includes tasks to find, view, edit, maintain and create panels.

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

- if authorized for multiple panels—click **[Switch]** in the *current panel* sidebar and the *view panel – available panels* page displays; or
- click the **Back** button at the bottom of the *view panel – panel summary* page.

Panel summary
View panel-specific information

Panel details
Panel number: 9182
Name: L and D Panel
Panel uploads enabled: Yes
Submission method: Manual
Status: Active
Status date: 2017-Jan-01

Contacts
Show history

Role	First name	Last name	Start date	End date
i General office	General	Office	2017-Jan-01	
ii Panel administrator	Panel	Administrator	2017-Jan-01	
iii Access administrator	Access	Admin	2017-Jan-01	

Primary Care Networks
Show history

PCN	Start date	End date
Bighorn PCN	2018-Jan-01	

Programs
Show history

Program ID	Program name	Start date	End date
No Programs present.			

Status history

Status	Status date
Active	2017-Jan-01

Back

Current panel
L and D Panel
Panel number: 9182
Status: Active
Provider: Cruz Ileana
Panel submission window: 2018-Nov-10 to 2018-Nov-29
[Switch]

Recently viewed panels
L and D Panel **[View]**
[Clear]

Edit panel

- 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.

1

Alberta Government **Central Patient Attachment Registry**

Welcome

Panel Attachment Reports Patient attachment information Panel uploads

What would you like to do?

Add patient to panel

View patient attachment information

Edit patient on panel

Current panel
L and D Panel
Panel number: 9182
Status: Active
Provider: Cruz Ileana
Panel submission window: 2018-Nov-10 to 2018-Nov-29
[Switch]

Recently viewed attachments
No recently viewed attachments

Alberta Government **Central Patient Attachment Registry**

Edit panel

Panel summary
Update panel-specific information

Panel details
Panel number: 9182
Name: L and D Panel
Panel uploads enabled: Yes
Submission method: Manual
Status: Active
Status date: 2017-Jan-01
Edit

Contacts
Show history

Role	First name	Last name	Start date	End date
i General office	General	Office	2017-Jan-01	
ii Panel administrator	Panel	Administrator	2017-Jan-01	
iii Access administrator	Access	Admin	2017-Jan-01	

Providers
Show history

Provider ID	First name	Last name	Preferred name	Specialty	Start date	End date
168971031	Cruz	Ileana		Physician	2017-Jan-01	

Facilities
Show history

Facility ID	Name	City	Start date	End date
L20000	Facility Three	Medicine Hat	2017-Jan-01	

Primary Care Networks
Show history

PCN	Start date	End date
Bighorn PCN	2018-Jan-01	

Programs
Show history

Program ID	Program name	Start date	End date
No Programs present.			

Status history

Status	Status date
Active	2017-Jan-01

Back

Current panel
L and D Panel
Panel number: 9182
Status: Active
Provider: Cruz Ileana
Panel submission window: 2018-Nov-10 to 2018-Nov-29
[Switch]

Recently viewed panels
L and D Panel **[View]**
[Clear]

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**.

1

▼ Panel details

Panel number	9182	Name	L and D Panel
Panel uploads enabled	Yes	Submission method	Manual
Status	Active	Status date	2017-Jan-01

Edit

Edit panel

Panel details

Enter required panel updates and click save

▼ Panel details

Panel number	9182	* Name	<input type="text" value="L and D Panel"/>
Panel uploads enabled	Yes	Submission method	Manual
* Status	<input type="text" value="Active"/>	* Status date	<input type="text" value="2017-01-01"/>

(YYYY-MM-DD)

Cancel **Reset** **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.

1

▼ Contacts ☐ Show history

Role	First name	Last name	Start date	End date
<input type="checkbox"/> General office	General	Office	2017-Jan-01	Edit
<input type="checkbox"/> Panel administrator	Panel	Administrator	2017-Jan-01	
<input type="checkbox"/> Access administrator	Access	Admin	2017-Jan-01	

Add

Edit panel

Contact details

Enter new panel contact details

▼ Contact information

* Role

* First name * Last name

* Start date

(YYYY-MM-DD)

▼ Phone/Email

* Primary phone (XXX-XXX-XXXX) Ext Alternate phone (XXX-XXX-XXXX) Ext

Email * Preferred contact method

▼ Contact address

Address line 1

Address line 2

City

Province

Postal code

Cancel **Reset** **Save**

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**.

1

▼ Contacts

Show history

Role	First name	Last name	Start date	End date	
General office	General	Office	2017-Jan-01		Edit
Panel administrator	Panel	Administrator	2017-Jan-01		
Access administrator	Access	Admin	2017-Jan-01		

Add

Panel

Attachment

Reports

Patient attachment information

Panel uploads

Edit

View

Edit panel

Contact details

Edit existing panel contact details

▼ Contact information

* Role

General office

▼

* First name

General

* Last name

Office

* Start date

2017-01-01

YYYY-MM-DD

End date

YYYY-MM-DD

▼ Phone/Email

* Primary phone

780-123-4567

(000-000-XXXX)

Ext

Alternate phone

(000-000-XXXX)

Ext

Email

* Preferred contact method

Phone

▼

Contact address

Notice an error in the current contact? You can invalidate it. Invalidate contact

Cancel

Reset

Save

Current panel

L and D Panel

Panel number: 9182

Status: Active

Provider: Cruz Ileana

Panel submission window

2018-Nov-10 to 2018-Nov-29

[Switch]

Recently viewed panels

L and D Panel [View]

[Clear]

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**.

1

▼ Primary Care Networks ☐ Show history

PCN	Start date	End date	
Bighorn PCN	2018-Jan-01		Edit

Add

Edit panel

PCN details

Edit existing panel PCN details


PCN Bighorn PCN

* Start date 2018-01-01 (YYYY-MM-DD) End date (YYYY-MM-DD)

Cancel Reset Invalidate 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**.

1

▼ Primary Care Networks ☐ Show history

PCN	Start date	End date	
Bighorn PCN	2018-Jan-01		Edit

Add

Edit panel

PCN details

Edit existing panel PCN details


PCN Bighorn PCN

* Start date 2018-01-01 (YYYY-MM-DD) End date (YYYY-MM-DD)

Cancel Reset Invalidate 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.

1

▼ Primary Care Networks ☐ Show history

PCN	Start date	End date	
Bighorn PCN	2018-Jan-01		Edit

Add

Edit panel

PCN details

Edit existing panel PCN details

PCN Bighorn PCN

* Start date 2018-01-01 (YYYY-MM-DD) End date (YYYY-MM-DD)

Cancel Reset Invalidate Save

2

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.

1

Available panels

No matches found. Change your search criteria and try again.

▼ Panel filters

Provider ID Facility ID

▼ Provisioned panels

Select	Panel number	Panel name	Panel status	Current Program
<input type="radio"/>	9156	CPAR Panel 1	Active	
<input type="radio"/>	9182	L and D Panel	Active	
<input checked="" type="radio"/>	9184	CPAR Panel	Active	

2. Enter the patient ID or name.

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

The additional search criteria displays.

Click **Search**.

2

View attachment

Enter search criteria

Enter identifying information and search for existing attachment

* Alberta PHN/ULI or Name
(PHN or First Last Name e.g. 123456789 or John Doe)

View attachment

Enter search criteria

Enter identifying information and search for existing attachment

Patient ID ID Type

First name Last name

Birth date
(YYYY-MM-DD or YYYY-MM or YYYY)

Gender

Include ended ☐

[Return to basic criteria](#)

Tip:
When searching for a patient attachment, either an ID or a name is required.

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.

3

View attachment

Attachment search results

Review matching patients on your panel

Patient ID	ID Type	First name	Last name	Preferred name	Birth date	Gender	End date
115983100	Alberta Health unique lifetime identifier	Jessica	Doe		1972-Dec-11	Female	

[View](#)

[Search again](#)

4

View attachment

Attachment search results

Review matching patients on your panel

Patient ID	ID Type	First name	Last name	Preferred name	Birth date	Gender	End date
115983100	Alberta Health unique lifetime identifier	Jessica	Doe		1972-Dec-11	Female	

[View](#)

[Search again](#)

View attachment

View an existing attachment

Patient ID (Alberta ULI) 11598-3100

Name Jessica Doe

Birth date 1972-Dec-11 **Gender** Female

Last confirmation date 2018-Nov-01 **Last visit date** 2018-Nov-01

[View another attachment](#)

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.

1

The screenshot shows the 'Central Patient Attachment Registry' dashboard. On the left, under 'What would you like to do?', the 'Edit patient on panel' button is highlighted with a red box. On the right, the 'Current panel' section shows details for 'L and D Panel' with panel number 9182, status 'Active', provider 'Cruz, Ileana', and a submission window from 2018-Nov-10 to 2018-Nov-29. Below this, the 'Recently viewed attachments' section shows 'No recently viewed attachments'. At the bottom right is a 'Glossary' link with a question mark icon.

Edit attachment

Enter search criteria

Enter identifying information and search for existing attachment

* Alberta PHN/ULI or Name

(PHN or First Last Name e.g. 123456789 or John Doe)

[Search by additional criteria](#)

2. Enter the patient ID or name.

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

The additional search by additional criteria displays.

2

Edit attachment

Enter search criteria

Enter identifying information and search for existing attachment

* Alberta PHN/ULI or Name

(PHN or First Last Name e.g. 123456789 or John Doe)

[Search by additional criteria](#)

3. Click **Search**.

The search results display.

3

Enter search criteria

Enter identifying information and search for existing attachment

Patient ID ID Type

First name Last name

Birth date

(YYYY-MM-DD or YYYY-MM or YYYY)

Gender

Include ended ☐

[Return to basic criteria](#)

Tip:

When searching for a patient attachment, either an ID or a name is required.

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.

4

Attachment search results

Review matching patients on your panel

Patient ID	ID Type	First name	Last name	Preferred name	Birth date	Gender	End date
115983100	Alberta Health unique lifetime identifier	Jessica	Doe		1972-Dec-11	Female	<div>Edit</div>

Search again

5

Edit attachment

Edit an existing attachment

Patient ID (Alberta ULI) 11598-3100

Name Jessica Doe

Preferred name

Birth date 1972-Dec-11

Gender Female

* Last confirmation date 2018-11-01 (YYYY-MM-DD)

* Last visit date 2018-11-01 (YYYY-MM-DD)

Death date (YYYY-MM-DD or YYYY-MM or YYYY)

End date (YYYY-MM-DD)

End reason

Cancel

Reset

Save

6

Edit attachment

Edit an existing attachment

Patient ID (Alberta ULI) 11598-3100

Name Jessica Doe

Preferred name

Birth date 1972-Dec-11

Gender Female

* Last confirmation date 2018-11-01 (YYYY-MM-DD)

* Last visit date 2018-11-15 (YYYY-MM-DD)

Death date (YYYY-MM-DD or YYYY-MM or YYYY)

End date (YYYY-MM-DD)

End reason

Cancel

Reset

Save

Edit attachment

Attachment updated

The attachment is updated successfully

Patient ID (Alberta ULI) 11598-3100

Name Jessica Doe

Birth date 1972-Dec-11

Gender Female

Last confirmation date 2018-Nov-01

Last visit date 2018-Nov-15

Edit another attachment

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.

1

The screenshot shows the 'Central Patient Attachment Registry' dashboard. At the top, there's a navigation bar with 'Panel', 'Attachment', 'Reports', 'Patient attachment information', and 'Panel uploads'. Below this, a 'Welcome' message is followed by a green box asking 'What would you like to do?'. Four buttons are listed: 'Add patient to panel' (highlighted with a red box), 'View patient attachment information', 'Edit patient on panel', and 'View patient on panel'. On the right, there's a 'Current panel' section showing 'L and D Panel', 'Panel number: 9182', 'Status: Active', 'Provider: Cruz, Ileana', and 'Panel submission window: 2018-Nov-10 to 2018-Nov-29'. Below that is a 'Recently viewed attachments' section showing 'No recently viewed attachments'. At the bottom right is a 'Glossary' link with a question mark icon.

Add attachment

Enter search criteria

Enter identifying information and search for your patient

* Alberta PHN/ULI or Name

(PHN or First Last Name e.g. 123456789 or John Doe)

Have other demographic search criteria? Need to search for an out of province patient? [Search by additional criteria](#)

2. Enter the patient ID or name.

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

The additional search criteria displays.

2

Add attachment

Enter search criteria

Enter identifying information and search for your patient

* Alberta PHN/ULI or Name

(PHN or First Last Name e.g. 123456789 or John Doe)

Have other demographic search criteria? Need to search for an out of province patient? [Search by additional criteria](#)

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.

3

Enter search criteria

Enter identifying information and search for your patient

Patient ID ID Type

First name Middle name Last name

Birth date
(YYYY-MM-DD or YYYY-MM or YYYY)

Gender

City

Tip:
When using additional criteria, either a patient ID and type, or a name is required.

[Return to basic criteria](#)

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.

4 Add attachment

Patient search results

Select patient and continue

Select	PHN/ULI	First name	Middle name	Last name	Birth date	Gender	Death date
<input checked="" type="radio"/>	21597-3100	Jillian		Doe	1981-Aug-24	Female	

Can't find your patient on the patient search? The patient may be found on a CPAR Panel instead. [Search panels](#)

[Search again](#) [Continue](#)



5 Add attachment

Create a new attachment

Patient ID (Alberta ULI) 21597-3100

Name Jillian Doe Preferred name

Birth date 1981-Aug-24 Gender Female

* Last confirmation date  * Last visit date 

(YYYY-MM-DD) (YYYY-MM-DD)



6 Add attachment

Create a new attachment

Patient ID (Alberta ULI) 21597-3100

Name Jillian Doe Preferred name

Birth date 1981-Aug-24 Gender Female

* Last confirmation date  * Last visit date 

(YYYY-MM-DD) (YYYY-MM-DD)

[Cancel](#) [Reset](#) [Save](#)

Add attachment

Attachment added

The patient is added successfully to panel L and D Panel

Patient ID (Alberta ULI) 21597-3100

Name Jillian Doe Gender Female

Birth date 1981-Aug-24

Last confirmation date 2017-Jan-01 Last visit date 2017-Jan-01

[Add another attachment](#) [Edit](#)

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.

1

Alberta Government

Central Patient Attachment Registry

Panel Attachment Reports Patient attachment information Panel uploads

Welcome

What would you like to do?

Add patient to panel

View patient attachment information

Edit patient on panel

Current panel

Land D Panel

Panel number: 9182

Status: Active

Provider: Cruz Ileana

Panel submission window: 2018-Nov-10 to 2018-Nov-29

[Switch]

Recently viewed attachments

No recently viewed attachments

2

View patient attachment information

Enter search criteria

Enter identifying information and search for your patient

* Alberta PHN/ULI or Name 21597-3100

(PHN or First Last Name e.g. 123456789 or John Doe)

Have other demographic search criteria? Need to search for an out of province patient? [Search by additional criteria](#)

Reset Search

3

View patient attachment information

Patient search results

Select patient and continue

Select	PHN/ULI	First name	Middle name	Last name	Birth date	Gender	Death date
<input checked="" type="radio"/>	21597-3100	Jillian		Doe	1981-Aug-24	Female	

Can't find your patient on the patient search? The patient may be found on a CPAR Panel instead. [Search panels](#)

Search again Continue

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](#)

Central Patient Attachment Registry

[Print](#)

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.

1

Alberta Government Central Patient Attachment Registry

Welcome

What would you like to do?

[Add patient to panel](#)

[View patient attachment information](#)

[Edit patient on panel](#)

[View patient on panel](#)

[Panel](#) [Attachment](#) [Reports](#) [Patient attachment information](#) [Panel uploads](#)

Current panel

L and D Panel

Panel number: 9182

Status: Active

Provider: Cruz Ileana

Panel submission window: 2018-Nov-10 to 2018-Nov-29 [\[Switch\]](#)

Recently viewed attachments

No recently viewed attachments

[?](#) Glossary

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

2

View panel reports

Panel reports

Select a panel report type

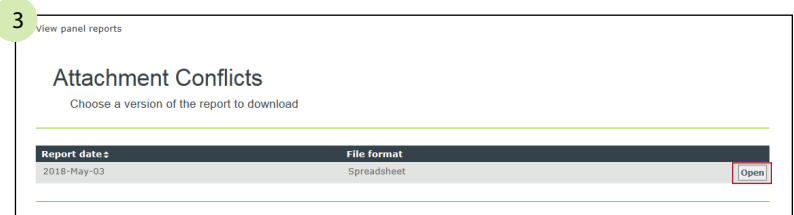
▼ Pre-generated reports

Report type	Details	
Attachment Conflicts	The purpose of this report is to provide a list of all patients on a primary provider's panel who have attachments to other primary providers in the registry. Attachment information is dependent on participation in the registry.	Select
Demographic Mismatch Report (csv)	User will only be able to download csv version of the report	Select
Demographic Mismatch Report (pdf)	User will only be able to download pdf version of the report	Select

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

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

View the report.



ERU_REP6006B - 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

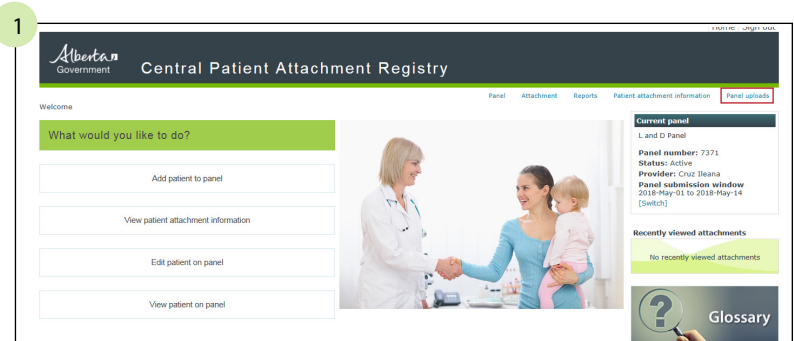
Conflict Category	Conflict First Reported	Patient ID	Last Name	First name	Date of Birth	Gender	Last Confirmation Date	Date of Last Visit	Conflicting Provider	Conflicting Provider Facility	Last Confirmation Date for Conflicting Provider	Date of Last Visit for Conflicting Provider
2	5/3/2018	14493-3100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

Upload panel

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

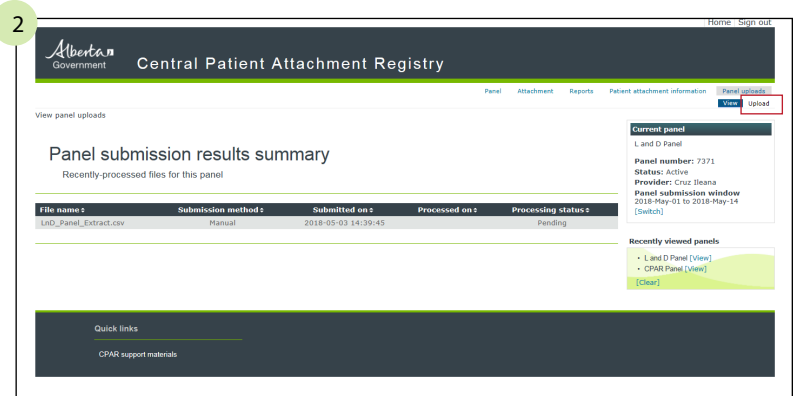
The following page displays:

- The *view panel uploads* page displays the results summary for all panel submissions.



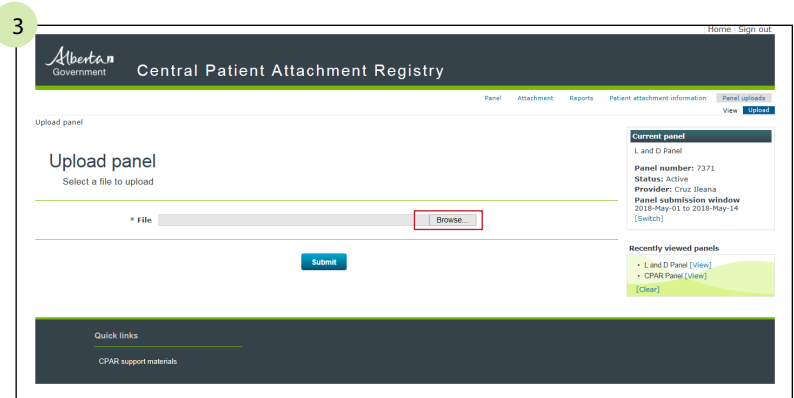
2. Click **Upload** from the main menu.

- The *upload panel* page displays.



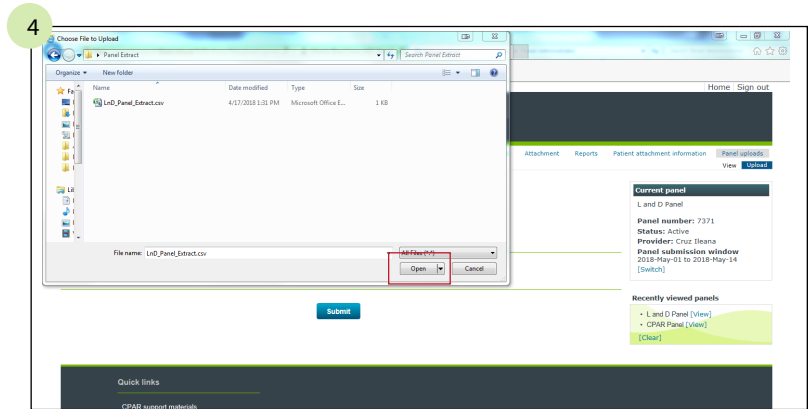
3. Click **Browse**.

- The *Choose File to Upload* dialogue box opens.



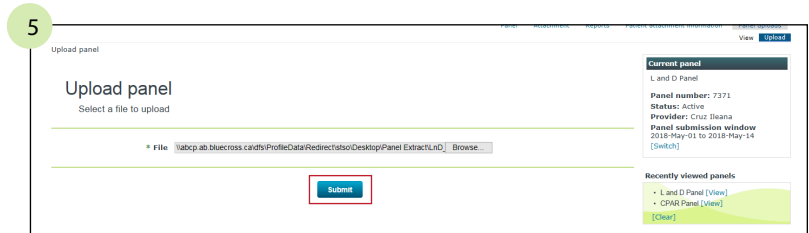
4. Select the panel file that you want to upload.

- 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.

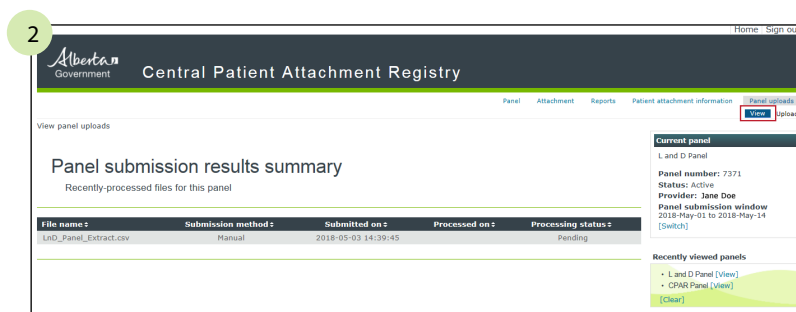
The following page displays:

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



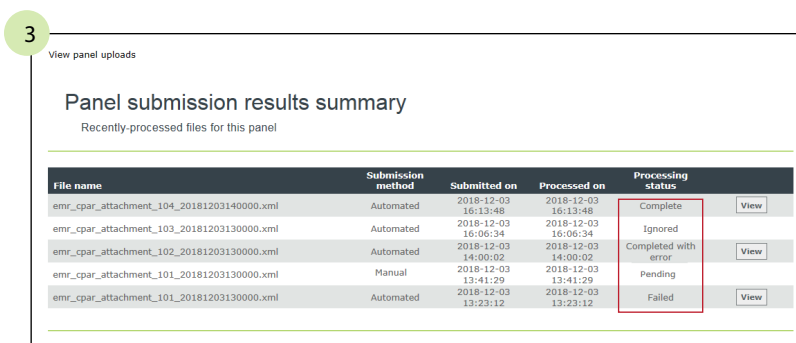
2. Click **View**.

- 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.

4

The screenshot displays the 'Central Patient Attachment Registry' interface. The main heading is 'Panel submission results details' with a sub-heading 'Processing details'. A 'Processed file' section shows the file name 'enr_cpar_attachment_143_20180227111151.xml' and the processing date '2018-02-27 09:44:48'. The 'Processing status' is 'Completed with error'. A 'Processing summary' table is shown with a red box highlighting the 'Total number of records in file' (6), 'Total number of records processed' (5), 'Total number of records not processed' (1), 'Total number of warnings' (0), 'Total number of attachments added' (2), 'Total number of attachments updated' (3), and 'Total number of attachments ended' (5). A 'Details' table at the bottom shows a single row with patient ID 193363100, ID type ABH-ULI, name Haggis, Dcpartn, severity ERROR, and error message 'Field STATUS_CODE contains an invalid string NULL'. A 'Back' button is at the bottom. On the right, a 'Current panel' sidebar shows panel number 7371, status Active, provider Jane Doe, and submission window 2018-May-03 to 2018-May-14. A 'Recently viewed attachments' section shows 'No recently viewed attachments'.

Alberta Government Central Patient Attachment Registry

Program Roster Panel Attachment Reports Patient attachment information Panel uploads View Configure

View panel uploads

Panel submission results details

Processing details

Processed file

File name enr_cpar_attachment_143_20180227111151.xml

Processed on 2018-02-27 09:44:48

Processing status Completed with error

Processing summary

Total number of records in file	6
Total number of records processed	5
Total number of records not processed	1
Total number of warnings	0
Total number of attachments added	2
Total number of attachments updated	3
Total number of attachments ended	5

Details

Patient ID	ID Type	Name	Severity	Error message
193363100	ABH-ULI	Haggis, Dcpartn	ERROR	Field STATUS_CODE contains an invalid string NULL

Back

Current panel

L and D Panel

Panel number: 7371

Status: Active

Provider: Jane Doe

Panel submission window
2018-May-03 to 2018-May-14
[Switch]

Recently viewed attachments

No recently viewed attachments

TROUBLE-SHOOTING TIPS

GENERIC FIELD LEVEL MESSAGES

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

The screenshot shows a form with the following fields and error messages:

- Field 1: Empty. Error: Required.
- Field 2: 2017-13-13. Error: Invalid format (YYYY-MM-DD).
- Field 3: 1165T2208. Error: Value must be numeric.
- Field 4: 1234569. Error: Invalid phone number. (XXX-XXX-XXXX). There is an 'Ext' label next to the field.
- Field 5: emailaddress.com. Error: Invalid email address. Email address format must be a@b.cc.
- Field 6: 123456. Error: 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.

Panel Attachment Reports

Add attachment

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

Attachment added

The patient is added successfully to panel Dr C Clinic B

Patient ID (British Columbia personal health number) 1942063796

Name Cornelius Green

Birth date 1952-Jun-22 Gender Male

Last confirmation date 2017-Sep-10 Last visit date 2017-Sep-10

▼ Conflict details

Provider name ↕	Facility name ↕	Last confirmation date ↕	Last visit date ↕
Andrew Dixon	45678/Smart Ronald Dr.	2017-Sep-10	2017-Sep-10
	110000/Facility Three	2017-Sep-02	2017-Sep-02

Add another attachment Edit

Current panel: Dr C Clinic B
Number: 12345678
Status: Active
Provider: Dr C Clinic B

Recently visited:
• Cornelius Green
[Clear]

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.