

Central Patient Attachment Registry

Panel Administrator guide

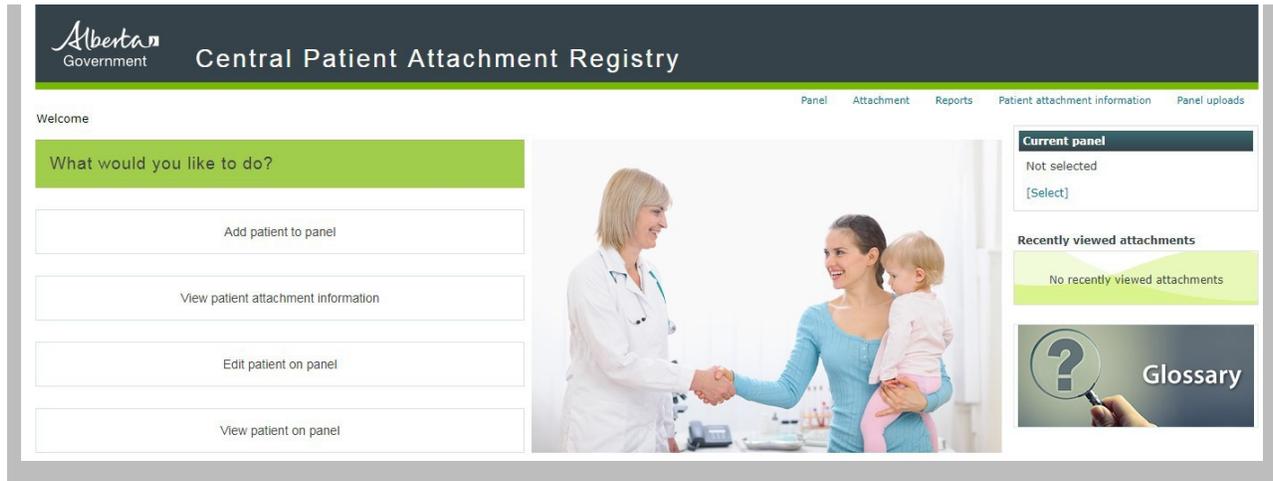
REVISED JANUARY 2022

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INTRODUCTION

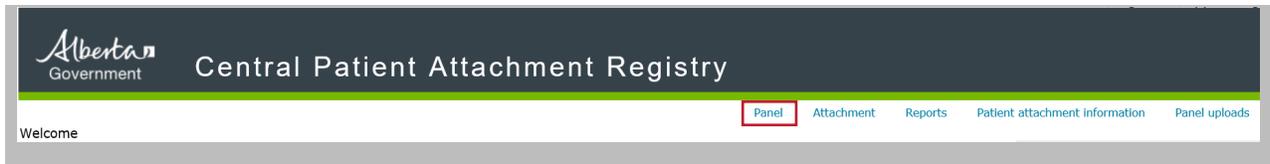
This guide describes how a Panel Administrator finds and maintains panels and attachments in the Central Patient Attachment Registry. It includes sections on the reports that are generated as well as errors/messages that may be encountered with panel files and patient records.



NOTE: Refer to Roster Administrators Guide for further information regarding Programs and rosters.

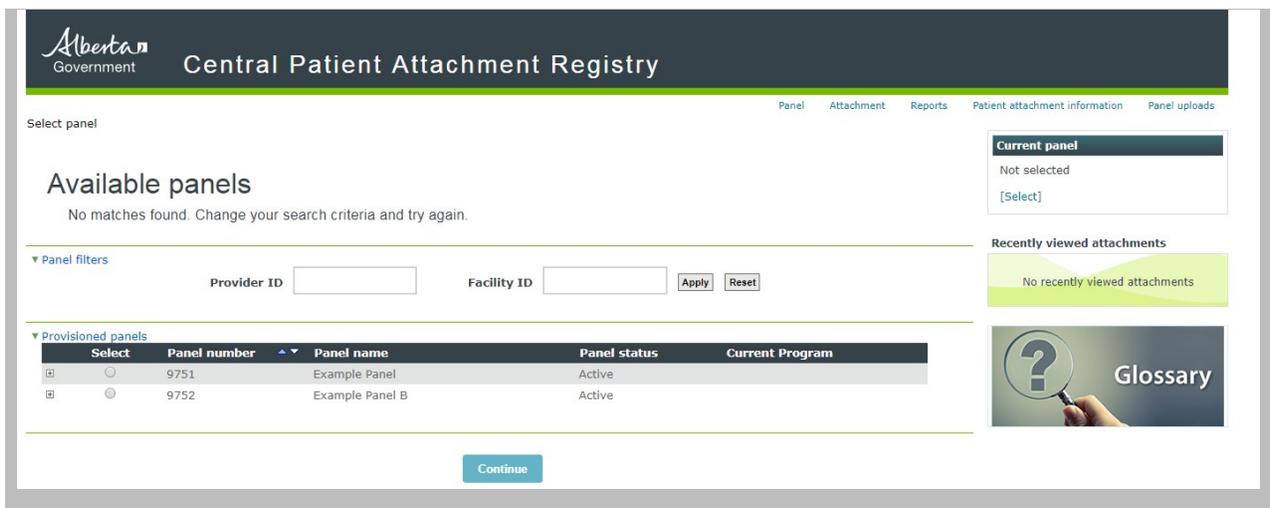
FIND AND VIEW PANEL

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



If authorized for multiple panels and no panel has been previously selected, the *Select panel > Panel search criteria* page displays. Select the applicable panel and click **Continue** to navigate to the *View panel > Panel summary* page.

2. Select the applicable panel using the radio buttons and click **Continue**.



NOTE: The panel status can only be set by a CPAR Registry Administrator and values can be active, terminated, or in transition.

Active: An active panel is one that is being actively managed by the primary provider(s) at the clinic, and has been set up for CPAR submissions.

Terminated: A terminated status is assigned to the panel when the primary provider leaves the practice (or stops practicing altogether), and there are no plans for another provider to take over care of that panel within the clinic.

In Transition: An in-transition status is assigned to the panel when the primary provider is not actively practicing at the clinic, but the clinic is still assuming responsibility for comprehensive care of those patients - either through a locum until a permanent replacement is found; and/or by moving the patients into the panels for other providers at the practice.

3. 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.


Central Patient Attachment Registry

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

[Exit](#) [View](#)

View panel

Panel summary

View panel-specific information including providers, facilities, Program(s), Primary Care Network(s)

Panel details

Panel number 10904	Name L&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
General office	General	office	2017-Jan-01	
Panel administrator	Panel	Admin	2017-Jan-01	
Access administrator	Access	Admin	2017-Jan-01	

Providers Show history

Provider ID	First name	Last name	Preferred name	Specialty	Start date	End date
100002001	Winston	Al		General practitioner	2017-Jan-01	

Facilities Show history

Facility ID	Name	City	Start date	End date
120	Facility CPAR Two	Calgary	2017-Jan-01	

Primary Care Networks Show history

PCN	Start date	End date
Edmonton Oliver PCN	2017-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

Current panel

L&D Panel

Panel number: 10904

Status: Active

Provider: Winston Al

Panel submission window
2019-Apr-01 to 2019-Apr-21

Recently viewed panels

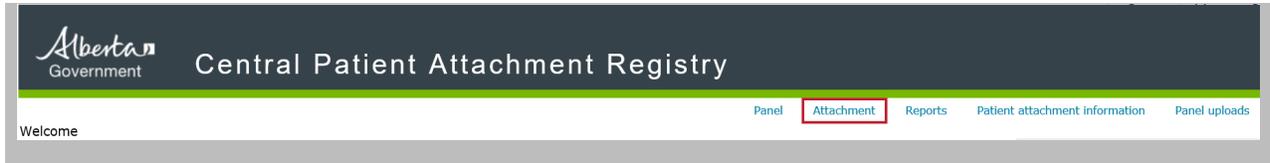
- L&D Panel [\[View\]](#)

[\[Clear\]](#)

[Back](#)

FIND AND VIEW PATIENT ON A PANEL

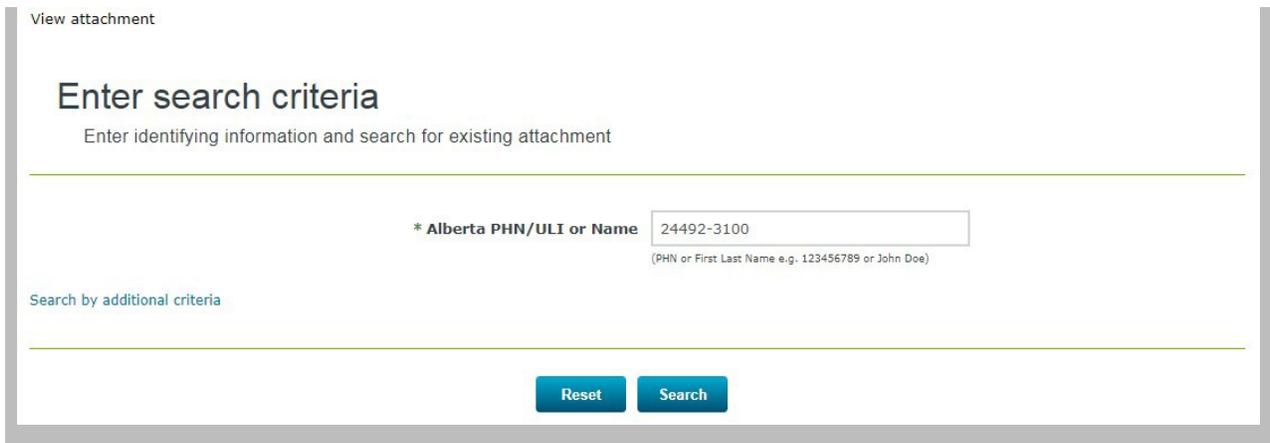
1. Click **Attachment** from the main menu.



If authorized for more than one panel and no panel has been previously selected, the *View attachment > Panel search criteria* 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, the *View attachment* search page displays instead.

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



3. If needed, click the **Search by additional criteria** link to search additional fields.



4. Ensure to select the **Include ended** check box when searching for ended attachments or no record will display.

Enter search criteria

Enter identifying information and search for existing attachment

Patient ID	<input type="text"/>	ID Type	<input type="text" value="▼"/>
First name	<input type="text"/>	Last name	<input type="text"/>
Birth date	<input type="text"/> <small>(YYYY-MM-DD or YYYY-MM or YYYY)</small>		
Gender	<input type="text" value="▼"/>		
Include ended <input type="checkbox"/>			

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

[Return to basic criteria](#)

5. The search results display. Click [View](#) for the applicable patient to view the attachment detail or click [Search again](#) to enter new search criteria. When searching by:
- patient ID—only one result displays.
 - anything other than a patient ID— multiple results may display.

Attachment search results

Review matching patients on your panel

Patient ID	ID Type	First name	Last name	Preferred name	Birth date	Gender	End date
244923100	Alberta Health unique lifetime identifier	Janine	Doe		2000-Aug-31	Female	View

[Search again](#)

6. Click [View another attachment](#) to return to the *View attachment* search page.

View an existing attachment

Patient ID (Alberta ULI) 24492-3100
Name Janine Doe
Birth date 2000-Aug-31 **Gender** Female
Last confirmation date 2018-Jan-01 **Last visit date** 2018-Jan-01

[View another attachment](#)

VIEW PANEL SUBMISSION RESULTS SUMMARY

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



If authorized for more than one panel and no panel has been previously selected, the *View panel uploads > Panel search criteria* page displays. Select the applicable panel and click **Continue** to navigate to the *Panel submission results summary* page.

If authorized for a single panel or a panel has already been selected, this page does not display and the *Panel submission results summary* page displays.

The *View panel uploads* page displays the panel submission results summary of all the submissions that were submitted to this panel. Spreadsheet software such as Excel must be used to open and view the csv reports.

2. Click **Select**.

View panel reports

Panel reports

Select a panel report type

▼ Pre-generated reports

Report type	Details	
Attachment Conflicts (csv)	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
Attachment Conflicts (pdf)	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

NOTE: To view the panel submission results summary on other panels you are authorized for, click the Switch link in the side bar. Refer to the Troubleshooting Errors and Messages section of the guide for error details and troubleshooting steps.

3. The *Panel submission results details* page displays the panel submission summary for viewing.

The screenshot displays the 'Panel submission results details' page in the Central Patient Attachment Registry. The page header includes the Alberta Government logo and navigation links. The main content area is titled 'Panel submission results details' with a sub-section for 'Processing details'. A 'Processed file' section shows the file name 'emr_cpar_attachment_101_20190311120000.xml', processed on '2019-03-11 13:00:46', and a 'Processing status' of 'Complete'. A 'Processing summary' table provides a breakdown of records and attachments. A 'Current panel' sidebar on the right shows details for 'CPAR PANEL TEST ONE', including group number, panel number, status, provider, and submission window. A 'Recently viewed panels' section at the bottom right lists the current panel with a 'View' link and a 'Clear' button. A 'Back' button is located at the bottom center of the page.

Processing summary	
Total number of records in file	1
Total number of records processed	1
Total number of records not processed	0
Total number of warnings	0
Total number of attachments added	1
Total number of attachments updated	0
Total number of attachments ended	1

The *Panel submission results summary* page 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 earlier 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 entire panel submission failed and did not successfully upload to CPAR. Please contact eHealth Support Services for assistance with this error. Contact information can be found in the Additional Support & Resources section at the end of this guide.

VIEW PANEL REPORTS

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



If authorized for more than one panel and no panel has been previously selected, the *View panel reports > Panel search criteria* page displays. Select the applicable panel and click **Continue** to navigate to the *View panel reports > Panel reports* page.

If authorized for a single panel or a panel has already been selected, this page does not display and the *View panel reports > Panel reports* page displays.

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

- Demographic Mismatch Report
- Conflict Report

View panel reports

Panel reports

Select a panel report type

▼ Pre-generated reports

Report type	Details	
Attachment Conflicts (csv)	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
Attachment Conflicts (pdf)	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.

NOTE: Spreadsheet software such as Excel must be used to open and view the csv reports.

MAINTAIN PANEL SET-UP

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



If authorized for multiple panels and no panel has been previously selected, the *View panel > Panel search criteria* page displays. Select the applicable panel and click **Continue** to navigate to the *View panel > Panel summary* page.

If authorized for a single panel, or if a panel has previously been selected, the *View panel > Panel summary* page displays.

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

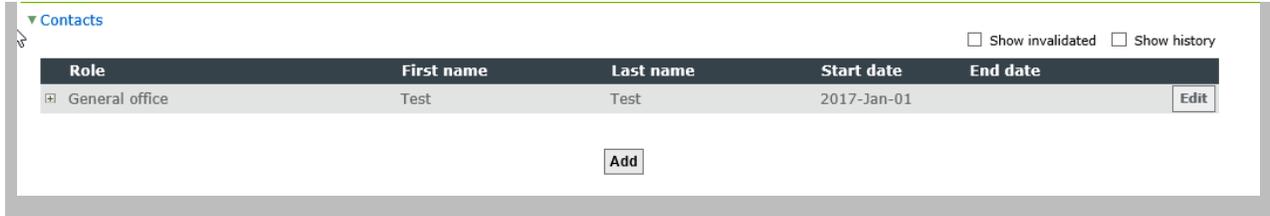


NOTE: This page provides access to update panel-specific information. Not all panel details can be updated by a Panel Administrator. The CPAR Access Administrator and Panel Administrator are added as contacts for the panel by CPAR Registry Administrators. The Panel Administrator can update the panel with additional contacts if required. For updates that can only be made by CPAR Registry Administrators, complete and submit a Panel Request form requesting the appropriate amendment. Access the form at <https://www.albertanetcare.ca/learningcentre/CPARForms.htm>

Contacts

Add contact:

1. Click **Add** in the *Contacts* block. The *Edit panel—Contact details* page displays.



2. Enter the contact detail.

The screenshot shows the 'Edit panel—Contact details' form. The title is 'Contact details' with the subtitle 'Enter new panel contact details'. The form is divided into three sections: 'Contact information', 'Phone/Email', and 'Contact address'. Each section has several input fields and a dropdown menu. At the bottom, there are three buttons: 'Cancel', 'Reset', and 'Save'.

Contact information

- * Role: [Dropdown menu]
- * First name: [Text input]
- * Last name: [Text input]
- * Start date: [Text input] (YYYY-MM-DD)

Phone/Email

- * Primary phone: [Text input] (XXX-XXX-XXXX) Ext: [Text input]
- Alternate phone: [Text input] (XXX-XXX-XXXX) Ext: [Text input]
- Email: [Text input]
- * Preferred contact method: [Dropdown menu]

Contact address

- Address line 1: [Text input]
- Address line 2: [Text input]
- City: [Text input]
- Province: [Dropdown menu]
- Postal code: [Text input]

Buttons: Cancel, Reset, Save

3. Click **Save**.

Edit contact:

1. Click **Edit** in the *Contacts* block. The *Edit panel—Contact details* page displays.

Role	First name	Last name	Start date	End date
General office	Test	Test	2017-Jan-01	Edit

[Add](#)

Show invalidated Show history

2. Edit the applicable detail.

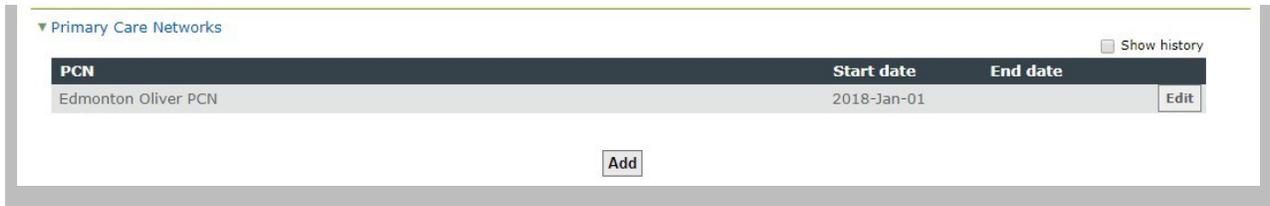
3. Click **Save**.

NOTE: The * indicates required fields. Only general office contact information can be added or edited by a Panel Administrator. The CPAR Registry Administrator will add or edit contacts for the CPAR Access Administrator(s) and Panel Administrator(s), from the account request forms.

Primary care networks

Add primary care network:

1. Click **Add** in the *Primary Care Networks* block. The *Edit panel—PCN details* page displays.



▼ Primary Care Networks Show history

PCN	Start date	End date
Edmonton Oliver PCN	2018-Jan-01	

Add

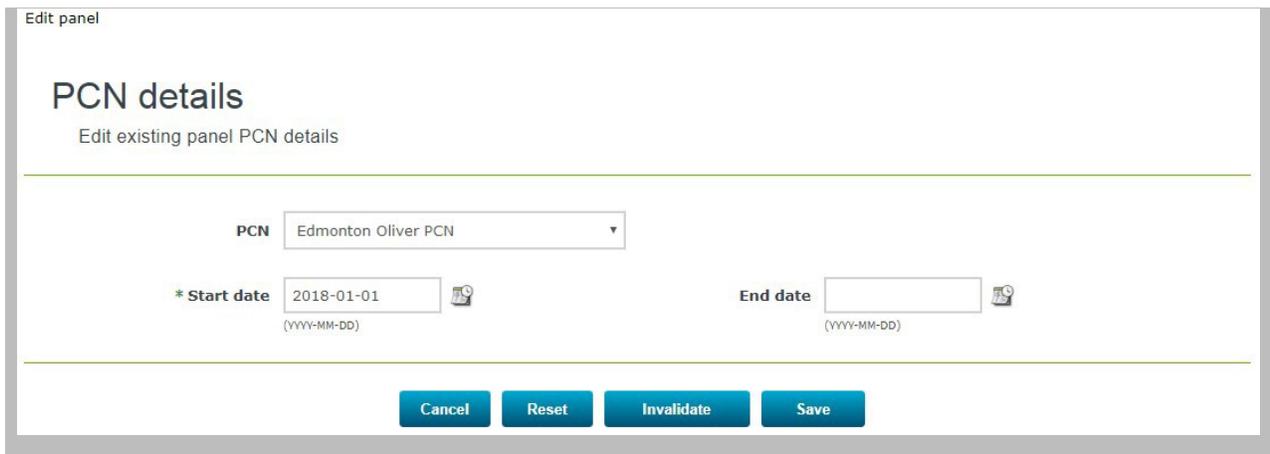
2. Enter the applicable detail: PCN, start date, and end date (optional).
3. Click **Save**.

Edit primary care network:

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.
3. Click **Save**.

Invalidate primary care network:

1. Click **Edit** in the *Primary Care Networks* block. The *Edit panel—PCN details* page displays.
2. Click **Invalidate**.



Edit panel

PCN details

Edit existing panel PCN details

PCN

* Start date (YYYY-MM-DD)

End date (YYYY-MM-DD)

Cancel **Reset** **Invalidate** **Save**

NOTE: The * indicates a required field. Select **Invalidate** to remove a PCN previously entered in error. The invalidated entry will not show on any screens or reports for this panel.

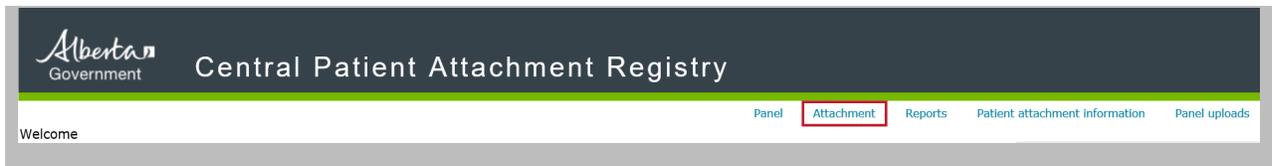
MAINTAIN PANEL ATTACHMENTS MANUALLY

This section is not applicable for panels that are submitted using the automated method or csv submission method. For either of those methods, patient attachments are maintained within the provider’s EMR and updated in CPAR through the panel submissions.

Add patient to panel

NOTE: Not applicable for automated submission method or manual (csv) submission method.

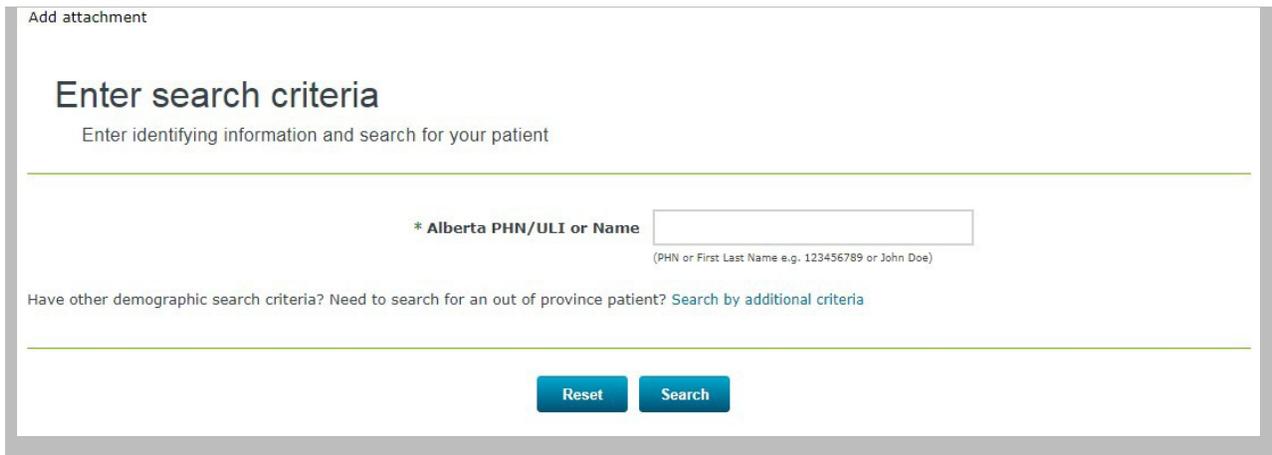
1. Click **Attachment** from the main menu.



If authorized for more than one panel and no panel has been previously selected, the *Add attachment > Panel search criteria* 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. Click **Add** from the main menu.
3. Enter the patient ID or name and click **Search**. If needed, click the **Search by additional criteria** link. The additional search criteria displays.



- The search results display. When searching by
 - patient ID—only one result displays.
 - anything other than a patient ID—multiple results may display.
- Select the radio button for the applicable patient and click **Continue**.

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"/>	84496-3100	Lisa		Johnson	1955-Aug-21	Female	

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

NOTE: If required, click + to view additional patient details to see more patient information.

- The *Add attachment—Create a new attachment* page displays:

Add attachment

Create a new attachment

Patient ID (Alberta ULI) 84496-3100

Name Lisa Johnson **Preferred name**

Birth date 1955-Aug-21 **Gender** Female

*** Last confirmation date** 
(YYYY-MM-DD)

*** Last visit date** 
(YYYY-MM-DD)

- Enter the following:
 - preferred name (optional),
 - last confirmation date (required), and
 - last visit date (required).

8. 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.

Add attachment

Attachment added

The patient is added successfully to panel Example Panel

Patient ID (Alberta ULI) 84496-3100	
Name Lisa Johnson	
Birth date 1955-Aug-21	Gender Female
Last confirmation date 2018-Dec-01	Last visit date 2018-Dec-01

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

Edit patient on a panel

NOTE: Not applicable for automated submission method.

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

Alberta Government Central Patient Attachment Registry

Panel **Attachment** Reports Patient attachment information Panel uploads

Welcome

If authorized for more than one panel and no panel has been previously selected, the *Edit attachment > Panel search criteria* 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. Click **Edit** from the main menu.

3. Enter the patient ID or name and click **Search**. If needed, click the **Search by additional criteria** link.

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](#)

4. The search results display.

5. Click **Edit**. The *Edit attachment–Edit an existing attachment* page displays.

Edit attachment

Edit an existing attachment

Patient ID (Alberta ULI) 24492-3100

Name Janine Doe **Preferred name**

Birth date 2000-Aug-31 **Gender** Female

* **Last confirmation date** 
(YYYY-MM-DD)

* **Last visit date** 
(YYYY-MM-DD)

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

End date 
(YYYY-MM-DD)

End reason

6. Update any of the following and click **Save**:

- preferred name (optional),
- last confirmation date (required),
- last visit date (required),
- death date,
- end date, and
- end reason (deceased or ended).

7. The *Edit attachment–Attachment updated* confirmation page displays. Click [Edit another attachment](#) to return to the *Edit attachment* search page.

Edit attachment

Attachment updated

The attachment is updated successfully

Patient ID	(Alberta ULI) 24492-3100		
Name	Janine Doe		
Birth date	2000-Aug-31	Gender	Female
Last confirmation date	2018-Jan-05	Last visit date	2018-Jan-05

[Edit another attachment](#)

TROUBLE-SHOOTING MESSAGES/ERRORS

Automated panel uploads

You may receive these messages 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.

Cannot add a patient with a date of death defined.

TIP Patient has a date of death in the Provincial Client Registry. A deceased patient cannot be uploaded for a new attachment or new panel. A deceased patient who was previously submitted will be shown on the Demographics Mismatch report. Mark the patient as deceased in your EMR to remove from the panel. The date of death shown in CPAR may be copied to the patient's chart as needed.

Field Given Name contains an invalid string Robert "BOB"

TIP Patient name contains characters that are not allowed in CPAR. CPAR allows only alphabet, space, period, hyphen and apostrophe.

Cannot revise attachment end date using death date yyyy-mm-dd

TIP Patient has a date of death in the Provincial Client Registry. A deceased patient cannot be uploaded for a new attachment or new panel. A deceased patient who was previously submitted will be shown on the Demographics Mismatch report. Mark the patient as deceased in your EMR to remove from the panel. The date of death shown in CPAR may be copied to the patient's chart as needed.

Cannot add Field LAST_VISIT_DATE contains an invalid string NULL.

TIP Patients with no visit date are not eligible to be included on a panel. Change the patient's status to exclude from panel submissions; and re-add to the panel once the patient has confirmed attachment through an office visit.

Client information was not found for ULI.

TIP Verify that the patient ID, name, and date of birth in the EMR match the patient's Alberta Health Care insurance card.

Client information was not found for client identifier.

TIP Verify patient information is correct.

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

TIP Verify patient's date of birth in your electronic medical record (EMR). Blank dates are not supported.

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

TIP Verify patient record does not exist twice in your electronic medical record (EMR). If duplicate record exists, modify record as required. e.g merge record, update status etc.

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

TIP Verify patient's confirmation date in your electronic medical record (EMR). Blank dates are not supported.

Patient last name is not valid or missing.

TIP Patient name contains characters that are not allowed in CPAR. CPAR allows only alphabet, space, period, hyphen and apostrophe.

Patient given name is not valid or missing.

TIP Patient name contains characters that are not allowed in CPAR. CPAR allows only alphabet, space, period, hyphen and apostrophe.

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

TIP Verify patient's last visit date in your electronic medical record (EMR). Blank dates are not supported.

Patient is not found in the Client Registry.

TIP Verify the patient PHN/ULI is correct in your electronic medical record (EMR).

Confirmation date of yyyy-mm-dd must be equal to or greater than patient date of birth.

TIP Verify that both the confirmation date and date of birth is correct in your electronic medical record (EMR).

Last visit date of yyyy-mm-dd must be equal to or greater than patient date of birth.

TIP Verify that both the last visit date and date of birth is correct in your electronic medical record (EMR).

Confirmation date of yyyy-mm-dd must be equal to or greater than patient date of birth.

TIP Verify the confirmation date in the electronic medical record (EMR) is greater than the patient date of birth.

Last visit date cannot be future dated.

TIP Verify the last visit date in the electronic medical record (EMR) is a past date.

Confirmation date cannot be future dated.

TIP Verify the confirmation date in the electronic medical record (EMR) is a past date.

Federal or provincial code is incorrect.

TIP You may be using a custom code that is not supported. Please contact your EMR vendor for information on the codes that are supported for your EMR product.

Processing has been delayed and your panel will be reprocessed shortly.

TIP Check back within 1-2 days for panel processing results. Do no upload panels again.

Panel ID (number) is incorrect and/or has been assigned to the wrong provider.

TIP Check that the CPAR panel number has been entered correctly in the EMR and that it is associated to the correct provider.

Submissions are not allowed for this panel. You will be contacted shortly by our eHealth Services Support team.

TIP If submission occurred outside the scheduled submission period, wait until next month and resubmit. If the panel was submitted during the submission period contact eHealth Support Services for assistance. You can view the panel submission period dates on the CPAR panel summary page.

Generic error and warning 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.

- 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

- 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.

Maintain panel attachments manually

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

TIP A new attachment cannot be added to a panel with a status of “in transition”.

- The patient has already been attached to this panel.

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

- 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.

- 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.

ADDITIONAL SUPPORT & RESOURCES

eHealth Support Services

Contact if you require assistance with any information in the Panel Administrator guide or the use of CPAR:

- Toll free: 1-855-643-8649
- Hours of Operation: 7am - 7pm (Mon- Fri)
- E-mail: ehealthsupport@cgi.com
- CPAR Registration forms submission: Fax 1-844-630-0877

CII/CPAR Tools and Resources

<https://actt.albertadoctors.org/CII-CPAR/Pages/Tools-and-Resources.aspx>

EMR Resources Page

<https://actt.albertadoctors.org/EMR/Pages/default.aspx#vendor>

Alberta Netcare Learning Centre for CPAR Panel Administrator registration form, Panel Administrator Guide, training videos

<https://www.albertanetcare.ca/learningcentre/CPAR-PA.htm>

Alberta Netcare Learning Centre for Community Information Integration (CII) & Central Patient Attachment Registry (CPAR)

<https://www.albertanetcare.ca/learningcentre/CII-CPAR.htm>

