Roles and Responsibilities

Facilitator Role

Primary Care Network practice facilitator or similar
Practice Facilitators (PF) help physicians and quality improvement teams develop the skills they need to implement and adapt evidence-based practices to their practice environment.

Facilitator Responsibilities and Tasks

Facilitators work in partnership with AMA ACTT consultants to:

- Discuss CII/CPAR training readiness and, if applicable, draft an engagement and implementation plan for the PCN.
- Participate in CII/CPAR training.
- Collaborate to support engagement and implementation.

Facilitators can help coach and guide clinics when enrolling in and implementing CII/CPAR.

- Engage the clinic team, share information, answer questions, and provide resources.
- Provide recommendations to a team on the assignment of the other CII/CPAR roles.
- Support the Site Liaison on completion of CII/CPAR forms, including Confirmation of Participation.
- Review Health Information Act requirements with Custodians and Site Liaisons .
- Direct clinic to readiness and implementation resources such as Learn@AMA on-demand CII/CPAR courses, CII/CPAR Team Toolkit, clinic journey checklist, and EMR resources.
- Assist the clinic in meeting CII/CPAR participation prerequisites:
    - Review the panel readiness checklist results with the clinic and advise on changes to become panel ready, if needed.
    - Provide privacy supports including the PIA Update Self-Assessment.
    - Share EMR information, mapping, and guides; assist in EMR configuration
- Remain informed by reviewing eHealth communications sent to the clinic Site Liaison.
- Communicate regularly with the Site Liaison to address issues or concerns.
- Facilitate post-implementation process improvement related to panel conflict management, demographic mismatches, eNotifications workflow, and data entry into mapped fields that contribute to the Community Encounter Digest (CED).

*It is recognized that role titles and responsibilities vary by PCN. The above tasks may be assigned to a practice facilitator, liaison, panel manager, coordinator, assistant or clinic manager. Sometimes the Facilitator and Site liaison roles for CII/CPAR could be the same person.

CII/CPAR Site Liaison Role

The Site Liaison supports a clinic with the implementation of CII/CPAR and will coordinate between the clinic and the CII/CPAR support groups (PCN, AMA and eHealth Support Services).

Site Liaison Responsibilities and Tasks

- Coordinate the readiness requirements:
    - Privacy Impact Assessment (PIA) up to date.
    - Alberta Netcare enabled.
    - Panel readiness.
- Coordinate completion and submission of forms, letters, and agreements.
- Coordinate awareness and training.
- Assist with CII/CPAR data quality and validation testing.
- Manage issues and address concerns, as needed.
- Coordinate and participate in evaluation activities.

CPAR Access Administrator Role

Note: CPAR Access Administrator and CPAR Panel Administrator may be the same person, but separate forms are required to establish both roles.

Custodians may authorize any staff member to be a CPAR Access Administrator or it could even be the Custodian themselves. The CPAR Access Administrator will be responsible for the setup of provider panels within CPAR and granting, editing and revoking access to CPAR panels.

CPAR Access Administrator Responsibilities and Tasks

- Complete CPAR registration forms to establish both CPAR Access Administrator and Panel Administrators in the facility or when changes occur to either of these roles
- Learn the AHS IAM application in order to set up CPAR Panel Administrators. Access to AHS IAM eliminates the need to complete and submit Panel Administrator Registration forms to eHealth Support Services.
- Use the AHS IAM application to create, amend or delete Panel Administrator accounts, including the removal of panel authorizations.
- Request creation or amendment of provider's panel setup in CPAR in accordance with the provider's instructions by authorizing and submitting Panel Request forms for any changes to panel setup or panel status.

- Submit a panel termination request when the family practice is no longer responsible for managing an existing panel of patients and ensure that panel data submissions to CPAR are stopped for a terminated panel.
- Be the contact for Alberta Health and Alberta Blue Cross regarding CPAR account related activities or questions for the accounts under the CPAR Access Administrator's authority.
- Be the contact for Alberta Health or Alberta Health Services for all AHS IAM communications as they relate to the CPAR entitlement
- Perform access certification on an annual basis for each CPAR user (i.e. Panel Administrators), by logging into AHS IAM and extending the sunset date for the panels under their authority for an additional year or a time period that is appropriate. Receive automatic notifications from AHS IAM regarding due dates for annual certification.
- Refer to the CPAR Access Administrator Guide for additional details and instructions.

CPAR Panel Administrator Role

CPAR Panel Administrators are individuals within a clinic responsible for maintaining panel lists for Primary Providers that upload to CPAR and for downloading reports from the CPAR portal.

Each panel will have an associated Panel Administrator chosen as part of the CPAR registration process. One individual can be a Panel Administrator for multiple panels, (ie. A clinic with several panels can appoint the same person to be Panel Administrator of all the panels) or each panel can have a different Panel Administrators.

CPAR Panel Administrator Responsibilities and Tasks

- Ensure that the provider's panels are up to date and maintained in the EMR. This is likely to include:
  - Ensuring that clinic processes for panel identification and maintenance are in place, widely understood, and consistently applied.
  - Creating saved searches/queries (report criteria or templates) in the EMR that allow consistent generation of panel lists used to manage panels. This will be based on the training provided for each EMR.
  - Working with the clinic team to ensure the panel lists are maintained and accurate at regular intervals by applying the clinic's definition of paneled patients (active and attached) to the lists from the EMR and removing any patients who no longer apply. Many clinics have routine times when they do their panel maintenance.
- Checking that panel lists are ready and accurate for upload to the CPAR portal, which happens once per month.
- Having access to the Primary Provider's Prac ID and the Facility ID for the site.

- Access to a web browser (Internet Explorer, Edge, Chrome, Firefox or Safari) on its latest release.
- Access to a spreadsheet application (e.g. Excel, Open Office) and basic knowledge of how to use the spreadsheet application in order to open and sort the Conflict Reports generated by CPAR.
- Log into Central Patient Attachment Registry monthly to retrieve Conflict and Demographic Mismatch reports. These two reports will be available shortly after the panel upload period has ended.
- Keeping administrative information current in CPAR through the ability to view, add, edit, or remove (panel details and clinic contact information for the panel.
- Be the contact for the CPAR Registry Administrators regarding panel management within the CPAR application.
- Refer to the CPAR Panel Administrator Guide for further details and instructions.