

# Panels in CPAR for Pediatricians

## Healthquest

We recognize that pediatricians around the province have different models of practice. Some may have a significant caseload of patients with a little or no panel, others may have a substantial number of patients who qualify as a panel.

With that in mind, for the purposes of participating in CII/CPAR a panel of patients for a pediatrician can be thought of as:

- that group of patients for whom you:
  - provide comprehensive longitudinal care and consider that you “quarterback” their care, and:
  - wish to:
    - declare yourself to the rest of the health care system as their primary provider, or as a partner in their primary care team in Alberta Netcare (it will display in the patient’s Netcare record)
    - receive [eNotifications](#) of events at AHS facilities such as ER discharges, inpatient admissions and discharges, and day surgery discharges

### Some useful resources for additional information on panels:

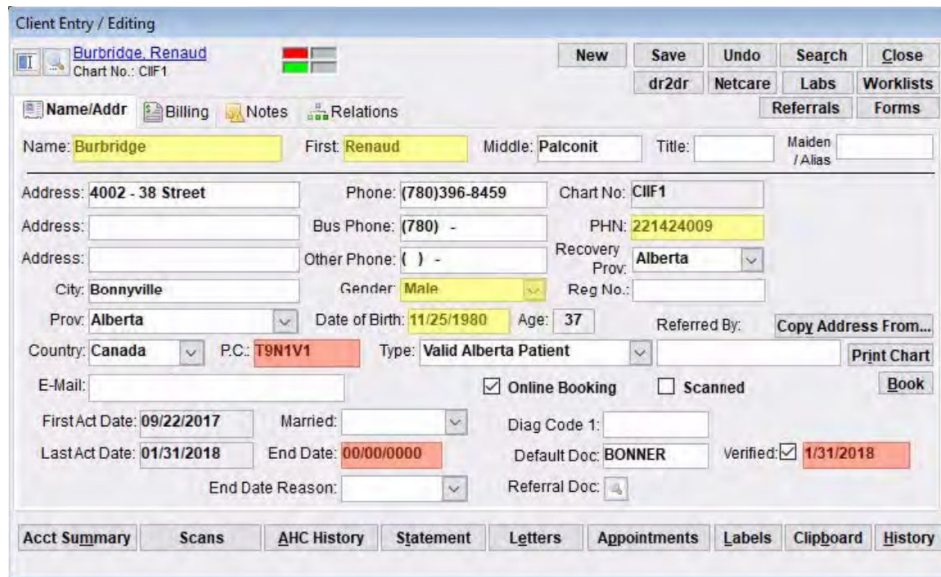
[Guide to Panel Identification](#)  
and  
[ACTT Panel and Continuity Resources](#)

## How to panel for CII/CPAR in Healthquest

In the demographic area of the patient chart the basic information that is needed for patient panel identification for CII/CPAR is:

Full Name	Default Doc	Alberta Health Care # (PHN)
Date of Birth	Gender	Confirmation Date (checked “Verified” with a date)





Client Entry / Editing

Burbridge, Renaud  
Chart No.: CIIF1

Name: Burbridge First: Renaud Middle: Palconit Title: Maiden / Alias

Address: 4002 - 38 Street Phone: (780)396-8459 Chart No: CIIF1  
 Address: Bus Phone: (780) - PHN: 221424009  
 Address: Other Phone: ( ) - Recovery Prov: Alberta  
 City: Bonnyville Gender: Male Reg No.:  
 Prov: Alberta Date of Birth: 11/25/1980 Age: 37 Referred By: Copy Address From...  
 Country: Canada P.C: T9N1V1 Type: Valid Alberta Patient Print Chart  
 E-Mail:  Online Booking  Scanned Book  
 First Act Date: 09/22/2017 Married:  Diag Code 1:  
 Last Act Date: 01/31/2018 End Date: 00/00/0000 Default Doc: BONNER Verified:  1/31/2018  
 End Date Reason: Referral Doc:

Acct Summary Scans AHC History Statement Letters Appointments Labels Clipboard History

**Note:** key items to consider are:

- The “Verified” field: the checkbox must be checked and there must be a date in the date field
- The end date and the end date reason fields must be blank

**Some useful resources on setting demographic information in your EMR:**

[The Healthquest EMR CII and CPAR Online Guide](#)

and

[The Healthquest EMR Guide for Patient’s Medical Home](#)

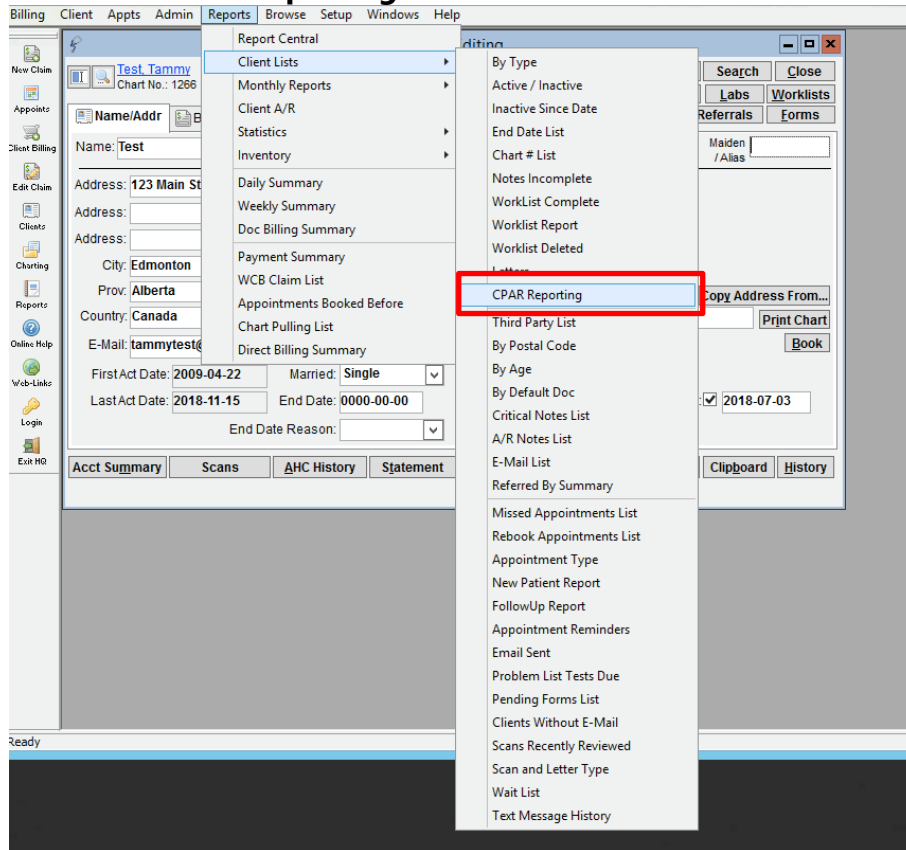
## Five Key Changes in Behaviors at the Practice

1. Regularly confirm that both you and the patient consider that you are “quarterbacking” their care.
2. Record the confirmation in the EMR in the “Patient Data Verified” field with a date.
3. Maintain & review the panel list at regular intervals.
4. Utilize the panel list to plan care delivery.
5. Submit the panel list to CPAR (Microquest moved to an automated upload of panels in May 2021. The manual upload button has remained and is an option for clinics to use).

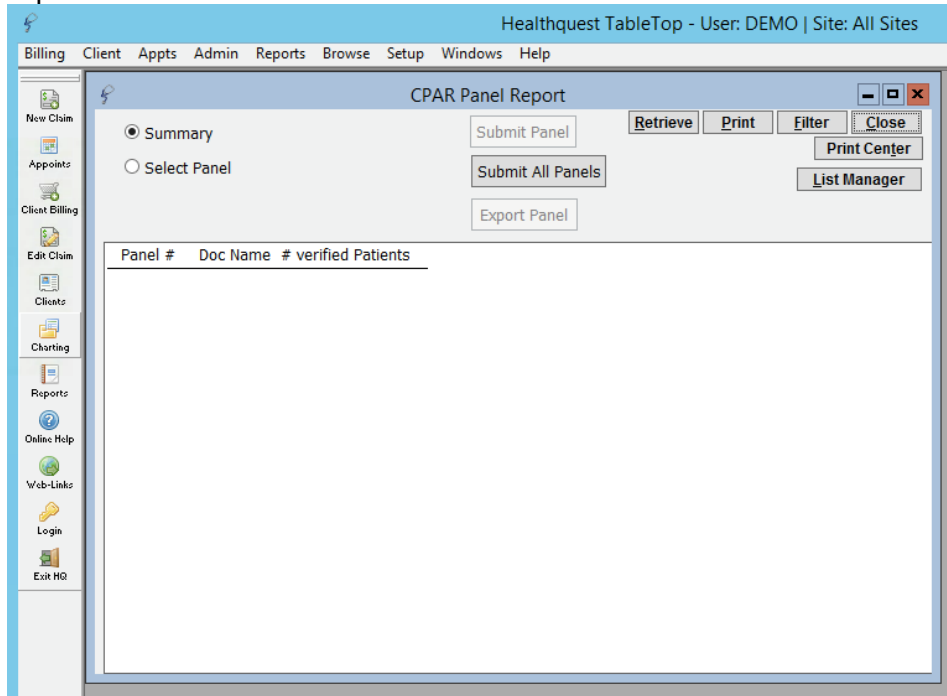


## Report of Panel List and Upload

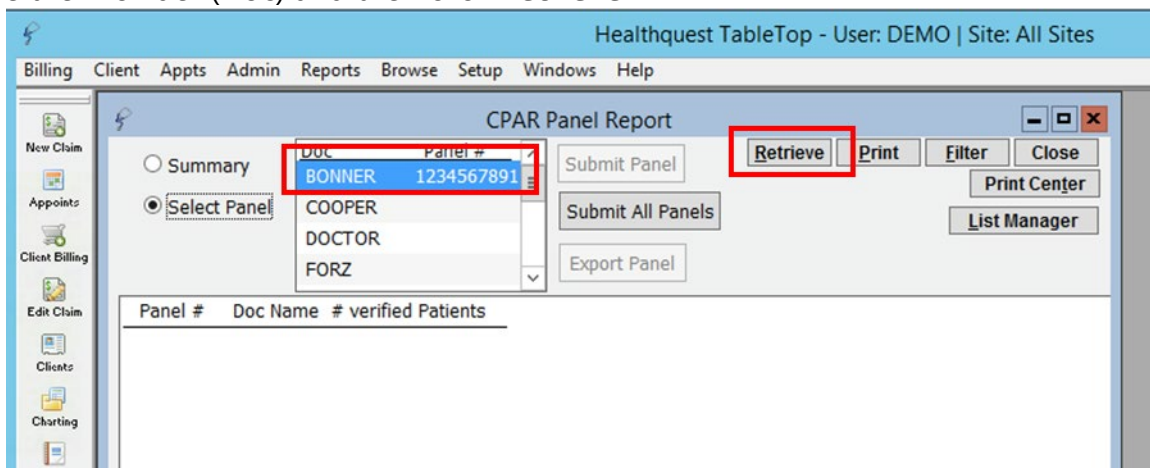
To view a list of patients that will be uploaded to CPAR there is a set report available in **Reports > Client Lists > CPAR Reporting**



On the CPAR report click **Select Panel**

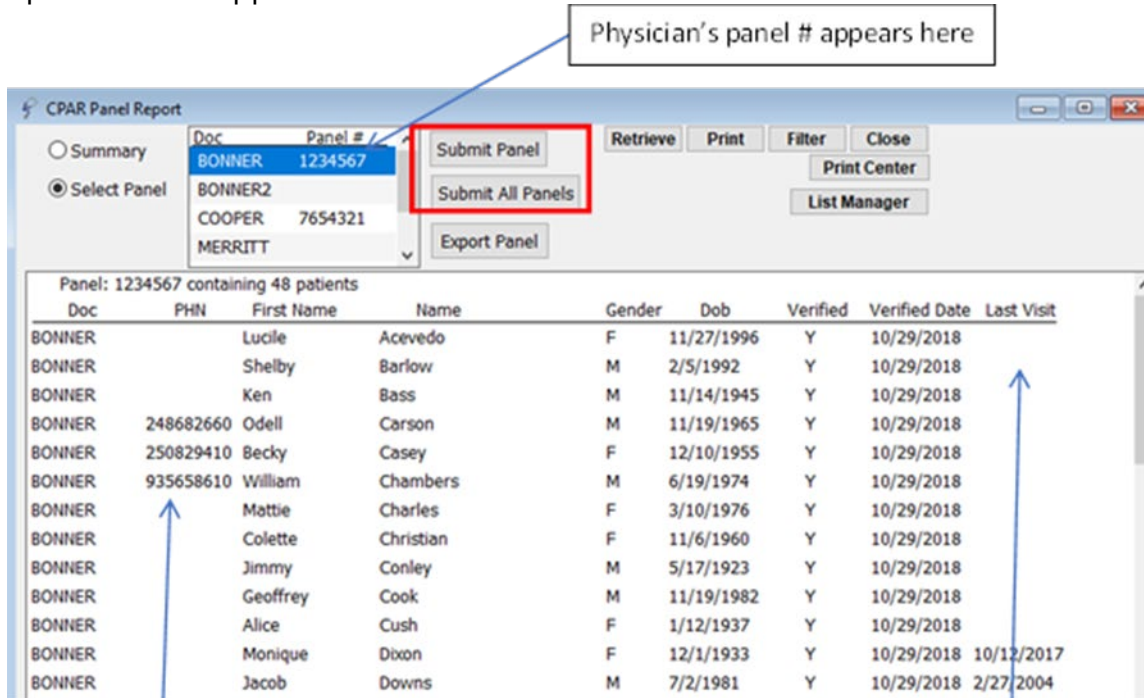


Choose the Provider (Doc) and then click **Retrieve**



The panel list will appear

Physician's panel # appears here



Doc	PHN	First Name	Name	Gender	Dob	Verified	Verified Date	Last Visit
BONNER		Lucile	Acevedo	F	11/27/1996	Y	10/29/2018	
BONNER		Shelby	Barlow	M	2/5/1992	Y	10/29/2018	
BONNER		Ken	Bass	M	11/14/1945	Y	10/29/2018	
BONNER	248682660	Odell	Carson	M	11/19/1965	Y	10/29/2018	
BONNER	250829410	Becky	Casey	F	12/10/1955	Y	10/29/2018	
BONNER	935658610	William	Chambers	M	6/19/1974	Y	10/29/2018	
BONNER		Mattie	Charles	F	3/10/1976	Y	10/29/2018	
BONNER		Colette	Christian	F	11/6/1960	Y	10/29/2018	
BONNER		Jimmy	Conley	M	5/17/1923	Y	10/29/2018	
BONNER		Geoffrey	Cook	M	11/19/1982	Y	10/29/2018	
BONNER		Alice	Cush	F	1/12/1937	Y	10/29/2018	
BONNER		Monique	Dixon	F	12/1/1933	Y	10/29/2018	10/12/2017
BONNER		Jacob	Downs	M	7/2/1981	Y	10/29/2018	2/27/2004

**Note:** This is a list from a test database. For actual submission, each patient will have a **PHN**. Each patient must have a **last visit date** to be accepted by CPAR.

## Reviewing the Panel List

It is an important step to review the panel list and look for:

- Accuracy of paneled patients
- Factors that would cause that patient record to be rejected by CPAR:
  - Patients with special characters in their names
  - Patients without a last visit date
  - Patients with a blank PHN

Make corrections before submission.

The report gives you a count of how many patients are on the list. You can print the list, filter, export or send to the List Manager.

During the CPAR submission period for CPAR, click **Submit Panel** (panels are automatically uploaded on the 8<sup>th</sup> of each month by Microquest).



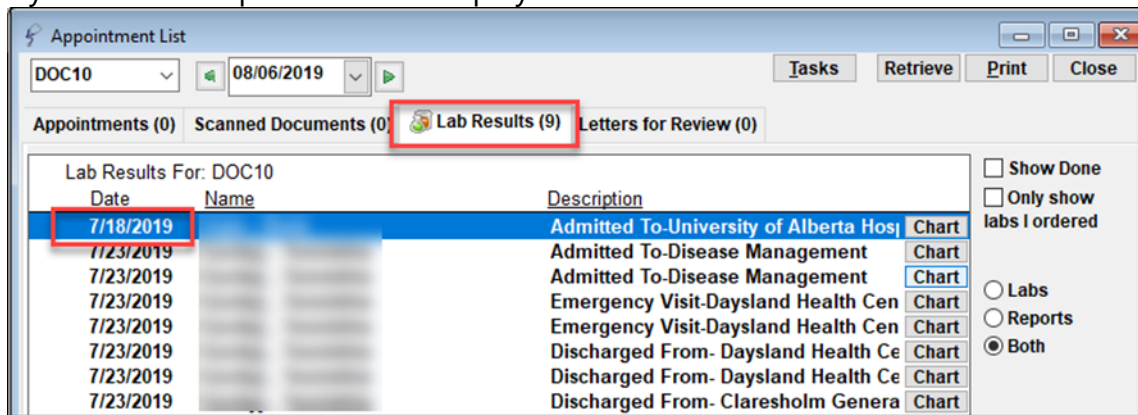
If there are many provider panels in the clinic and each list has been reviewed and is ready to send, a Panel Administrator may click **Submit All Panels**. All panels will be sent to CPAR.

## eNotifications in your Healthquest EMR

Uploading your paneled patients to CPAR enables routing of eNotification alerts to your EMR inbox when one of your paneled patients has an event at an AHS facility. eNotifications are sent for:

- Emergency room discharges and left without being seen
- Inpatient admissions and discharges
- Day surgery discharges

eNotifications appear in the Lab Results tab of a provider’s Appointment List. They are delivered twice daily at 6am and 2pm. The date displayed is the date the event occurred:



Team members with access to the lab results can see the eNotifications and responding can be teamwork. The eNotification includes basic information:

- Pt demographics
- Facility location
- Date/time
- Attending provider
- Admission reason (if available)
- Additional providers notified (if multiple providers have identified the patient on their CPAR panel).

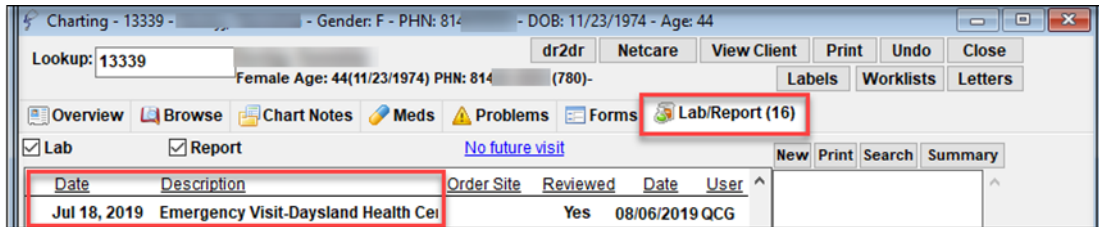
**It is important to check Alberta Netcare for additional information about the encounter before following up with the patient.**

The notice remains in the lab/report tab of the patient chart and is coded with:

- Date: Date the event occurred
- Document Type: Notification



- Admission or Discharge
- Inpatient, Outpatient or Emergency
- Facility (e.g., Daysland Health Centre)



## About deceased patients

The notice will include a deceased notification next to the patient's name if the information is available in the data feed from the AHS facility's Admission, Discharge Transfer (ADT) system. If the data includes both the patient name and the date of death, both will be displayed: Patient Name (Deceased: YYYY-MM-DD). If the ADT data does not include a date of death, then only the deceased notification will be shown: Patient Name (Deceased). ANP can be checked in the meantime to see if a death has been recorded by the AHS facility. Once the death has been registered with Vital Statistics, the date of death will be shown on the CPAR demographic mismatch report after the next panel submission.

At the clinic mark the patient as deceased on their client card so the patient will not load to CPAR in the next monthly upload. You can do this by applying any "End Date Reason" to the client card. Another way the patient will not upload to CPAR is if you change the Default Doc to a blank field.

## More Panel Resources:

Additional resources are available for clinic team members maintaining the panel on the [Panel Resources](#) page.

The [Panel Readiness Checklist](#) is a valuable tool to determine if your clinic is panel ready before participating.

