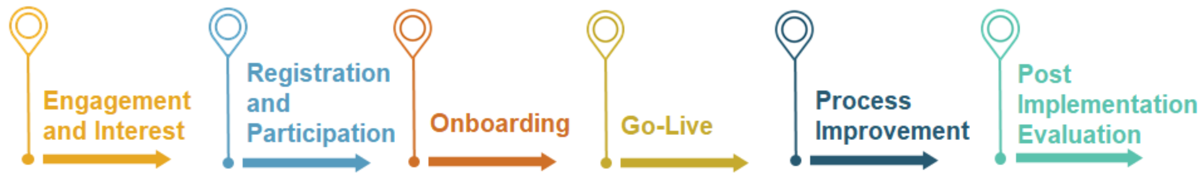
Specialist Clinic CII Journey Checklist



1. Engagement and Interest

- ☐ Initial Interest – Clinic receives information about CII through a newsletter, presentation, personal discussion, self-identifies, is approached by their EMR vendor or another stakeholder. Inform AMA ACTT[1] that you are interested at cii-specialty@albertadoctors.org
- ☐ Information Gathering – Clinic team goes over more detailed information to allow them to make a participation decision.
  - ☐ CII Site Liaison Roles and Responsibilities document is read
  - ☐ CII overview PowerPoint slides are viewed to orient to the initiative
  - ☐ View the EMR Orientation Presentation for your clinic EMR to get an overview of CII in the context of your EMR. This includes:
    - ☐ How consult reports are submitted
    - ☐ The option for physicians and allied healthcare providers to submit encounters to the Community Encounter Digest
- ☐ Clinic Team Addresses Prerequisites
  - ☐ Privacy Impact Assessment is up to date (or in process) and reflects current environment
  - ☐ Completion of the Privacy Impact Assessment Update Self-Assessment is recommended
  - ☐ Alberta Netcare Readiness – clinic is live on Alberta Netcare
  - ☐ EMR is Microquest, QHR or TELUS (clinic will switch to latest version if using local install of Healthquest or Accuro)
- ☐ Clinic identifies a Site Liaison and an alternate
- ☐ Site Liaison and other appropriate team members review **The Clinic Journey** section in the **CII Team Toolkit**
- ☐ Site Liaison identifies providers (physicians and allied health providers) who will participate and what each individual will submit (consults and/or encounters)

Tip: Participation Option

Both physicians and allied health providers may choose to participate and submit encounters to the Community Encounter Digest and/or consult reports. Submitting encounters signals to other providers in the circle of care when a visit occurred, with which provider and for what reason.

[1] The Alberta Medical Association (AMA), Accelerating Change Transformation Team (ACTT) is a partner with AH in increasing awareness and engagement of CII/CPAR with physicians and their teams.

2. Registration and Participation

> Do not print and fill out the forms by hand. Download the CoP and complete on the computer.

☐ Site Liaison accesses [Confirmation of Participation Form (CoP) form] and will:

- ☐ Complete Confirmation of Participation form; instructions are found on page 2 of the CoP document;
- ☐ Site Liaison downloads support tools referenced in the CoP and will;
  - ☐ Confirm on the CoP that custodians are aware and comfortable with sharing CII data elements with AH and Alberta Netcare (when encounters are chosen)
  - ☐ Confirm on the CoP that custodians and team have been/will be trained on all CII support tools listed and attached to CoP form.
  - ☐ Check CoP form for errors and completeness before submission to Alberta Health eHealth Support Services Team (eHealth).

☐ Site Liaison submits completed CoP form to eHealth team via email to eHealth Support Services at eHealthciiimplementations@cgi.com

☐ Site Liaison receives acknowledgement of receipt from eHealth:

Thank you for submitting the Confirmation of Participation form.
We will review the information provided and confirm that the clinic meets participation prerequisites. In the meantime, you will receive a communication from the eHealth Privacy Team to validate your EMR Privacy Impact Assessment (PIA) and confirm readiness. To prepare for this conversation, it would be beneficial to complete a short PIA Update self-assessment. If you have already completed a self-assessment, thank you.
Click here to launch the PIA self-assessment.
We will be in touch with next steps once the review has been completed. Looking forward to working with you.

☐ Site Liaison receives communication from the eHealth Privacy Team and validates the EMR PIA and confirms readiness. Depending on the age and content of PIA, suggestions will be made to the clinic regarding next steps. For most sites, the actions required are simple and may be done in tandem with CII/CPAR implementation activities. If a new PIA is needed, site must wait until PIA submission to continue with CII/CPAR implementation. Information on this process is found here: https://actt.albertadoctors.org/file/CII-CPAR_EMR_PIA_Information_for_Clinics.pdf
Once clinic prerequisites are met, the Site Liaison receives confirmation that they may proceed with implementation.

☐ Site Liaison will receive a participation email from eHealth that includes a Participation Package Checklist with links to all participation forms. Site Liaison will;

- ☐ Co-ordinate signature of PIA Endorsement Letter(s)
- ☐ Email a signed copy of the PIA Endorsement letter to the OIPC at pia@oipc.ab.ca and copy the eHealth team at ehealthciiimplementations@cgi.com and any additional participating providers on the same email

☐ Site Liaison identifies providers and clinic members who will need EMR training (awareness of CED mapping and confidentiality features).

3. Onboarding

☐ Go-Live date is confirmed by eHealth Support Services with the Site Liaison.

☐ Your EMR guide is downloaded and reviewed.

☐ A team member at the clinic uses the EMR guide to complete the set-up steps at the clinic before Go-Live

4. Go-Live

- ☐ Site Liaison verifies that the Health Collection Notice posters are posted in the clinic
- ☐ Physician or delegate verifies Community Encounter Digest (CED) report information and/or Consult Report information in Alberta Netcare.
  - ☐ eHealth will work with the Site Liaison to securely collect 3 PHNs to verify that the consult report is displaying in Netcare as expected. The validation testing process takes 1 to 2 weeks.
  - ☐ Once validation is complete in the testing environment the site will be provided with the date that consult reports will flow to Netcare – live environment.
  - ☐ If Consult Report or CED information does not appear or appears incorrectly, direct inquiries to the eHealth Support Services at ciioperations@cgi.com

5. Process Improvement

- ☐ Do a quality check a few weeks after go-live to view a few submitted consult reports in Netcare. Are they as expected? Periodic review of consult reports in Netcare is a suggested best practice.
- ☐ If participating in CED: Provider, or delegate, reviews CEDs initially and periodically in Netcare to confirm that the data looks correct. If you look at the CED of a patient that has had repeat clinic visits since go-live, you can verify more information in one look.

6. Post Implementation Evaluation

- ☐ Site Liaison and/or others are contacted to optionally provide feedback on the implementation. This will be done via an online survey 2 – 4 weeks post go-live, sent directly to site contacts.

TIP: Save the link to the CII Specialist Tools and Resources page in your web browser favourites:

https://actt.albertadoctors.org/PMH/panel-continuity/CII-CPAR/Pages/CII-Tools-and-Resources.aspx

Refer to your EMR guide, EMR orientation presentation, privacy information and PIA update information on this webpage.