

## Panels in CPAR

A patient panel is a set of patients that have established relationships with a primary provider. There is an implicit agreement that the identified physician or nurse practitioner and team will provide comprehensive, longitudinal primary care.

With that in mind, a Central Patient Attachment Registry (CPAR) panel of patients 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 (beginning in June 2021 a patient’s CPAR attachments will display in their 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 CPAR in PS Suite

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

- Full Name
- Patient’s MD/NP
- Health Card Prov HN (PHN#)
- Date of Birth (Birthdate)
- Patient Status (must be Active)
- Confirmation Date (“Data Last Verified”)
- Gender (Sex)

The screenshot shows a patient demographic form for Patient # 206. The form is titled "Patients" and includes a menu bar with "Edit", "Find", "View", "Bill", "Print One", "Email", "Flags", and "Netcare". The patient's name is Debbie Diabetes. The form is divided into several sections:
 

- Personal Information:** Surname: Diabetes, Patient #: 206, First name: Debbie, Middle name: (empty), Preferred name: (empty), Maiden name: (empty), Birthdate: Jun 7, 1975, Age: 44, Sex: F, Title: Ms., Suffix: (empty).
- Address:** Mailing Address (Address line 1, 2, City, Province & Country: ON CAN, Postal code) and Residence Address (same).
- Insurance:** Health Card Prov, HN: AB 45678-9008, HC Expiry date: n/a, Insurance number: n/a, Appointment alert: (checkbox), Family Addressee: (checkbox).
- Language:** Language (EN or FR): EN, Spoken language: English.
- Medical Information:** Home phone, Business phone, Mobile, Ext: n/a, Patient's MD/NP: Marcus Welby, Referring MD/NP: Adams, Fred, Family MD/NP: (empty), Next of kin: (empty), Comments: (empty), Preferred Pharmacy: (empty).
- Status and Verification:** Patient status: Active, Patient status date: Aug 7, 2015, Data Last Verified: Sep 20, 2019, Exclude from CPAR Panel: (checkbox).
- Providers:** Primary Provider and Other Provider dropdown menus.

 At the bottom, there are buttons for "Edit", "Cancel", "Save & Add", "Save", and "Close".

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

- There are 3 fields in the patient’s demographics that appear logical for indicating the primary provider:
  - Patient’s MD/NP
  - Family MD/NP (do not use for panel)
  - Primary Provider (do not use for panel)

It is intended by PS Suite that pediatrician practices use the first option of **Patient’s MD/NP** to indicate the most responsible provider.

- the “Data Last Verified” field must have a date
- To exclude a patient from your panel make sure the “Exclude from CPAR Panel” checkbox has been checked, otherwise, leave it un-checked

Patient status date: Aug 7, 2015  
Data Last Verified: Sep 20, 2019  
 Exclude from CPAR Panel

Some useful resources on setting demographic information in your EMR

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

and

[Using Practice Solutions Suite to Support 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 (once registered, TELUS uploads automatically on the 10<sup>th</sup> of the month)

### **Viewing a List of Patients in a Provider’s Panel**

TELUS Health can provide a **custom query** that will generate a report of all patients in each provider's panel, which **allows you to review your panel and ensure it is accurate.**

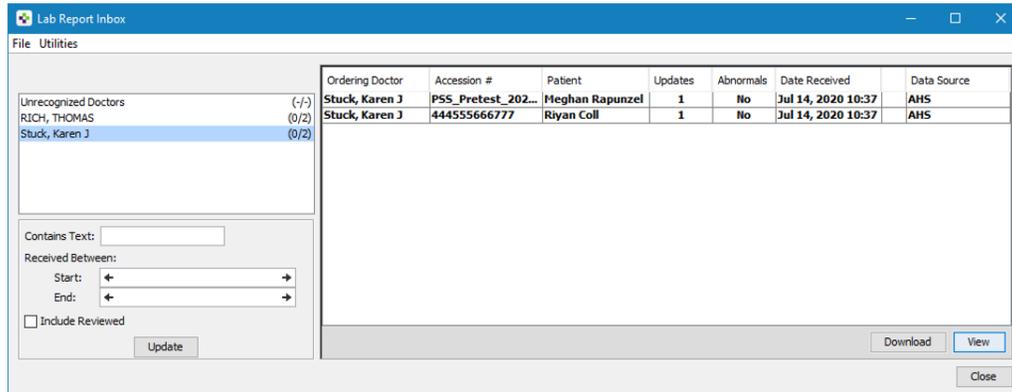
Contact the Support team (1-844-367-4968 or PSSuiteEMR.support@telus.com) to have the query installed in your system.

### **eNotifications in your PS Suite 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:

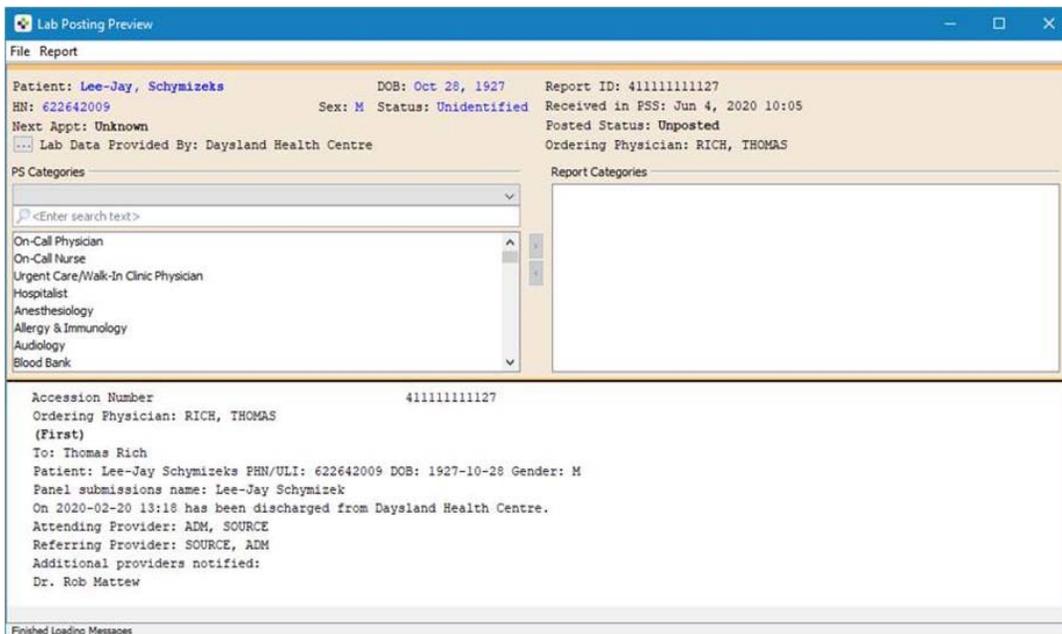
- Emergency room discharges or left without being seen
- Inpatient admissions and discharges
- Day surgery discharges

eNotifications are received by the clinic twice daily and appear in the Lab Report Inbox:



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

- Pt demographics
- Facility location
- Date/time
- Type of event
- 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.

eNotifications are posted to the patient’s chart from the Lab Report Inbox:

The screenshot shows a patient chart for Lee-Jay Schymizek. At the top, the patient's name is displayed with a dropdown arrow. To the right, there are fields for Birthdate (Oct 28, 1927), Sex (M), Health # (AB 62264-2009), Last Billed (Never), and MD (Marcus Welby). Below this is a grid of empty lab report boxes. At the bottom, an eNotification is displayed with the following details:

- Mar 18, 2020** Daysland Health Centre Inpatient Discharge eNotification MW (04/06/20 12:32)
- Accession Number: 41111111127
- Ordering Physician: RICH, THOMAS (First)
- To: Thomas Rich
- Patient: Lee-Jay Schymizek PHN/ULI: 622642009 DOB: 1927-10-28 Gender: M
- Panel submissions name: Lee-Jay Schymizek
- On 2020-02-20 13:18 has been discharged from Daysland Health Centre.
- Attending Provider: ADM, SOURCE
- Referring Provider: SOURCE, ADM
- Additional providers notified: Dr. Rob Matzew

### 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 by changing the Patient Status to Deceased so the patient will not load to CPAR in the next monthly upload.

### 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.