Panel Readiness Checklist

Responsible Person

☐ The clinic has a person responsible and accountable for panel processes who can confirm that panel identification and maintenance processes are established and acted on.

Panel Identification

The clinic has a clear internal definition for:

☐ Attached patients.
☐ Patent statuses in the EMR.

The clinic has a process in place to actively ask patients about their attachment:

☐ Patients are asked consistently to confirm that their Doctor or Nurse Practitioner is their one and only provider for comprehensive, longitudinal primary care.[1]
☐ Attachment information is recorded in the clinic EMR including the date of confirmation. **Note: for inclusion in CII/CPAR panels patients MUST have a date of last visit and a confirmation date**
☐ Confirmation rates are calculated regularly as a process check.

☐ The clinic EMR is used to produce lists of each provider's paneled patients.

Panel Maintenance

Processes are in place to keep panels maintained:

☐ Panel lists are reviewed by clinic team members on a regular basis.

Once confirmed, patient records are maintained in the EMR:

☐ Patient demographic information is updated.
☐ Patient attachments are updated.
☐ Patient statuses are updated.

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[1] Confirmation message is adapted for shared panel situations.

CII/CPAR Intent to Participate

The clinic will:

☐ Participate in orientation to CII-CPAR and understands how it works for panel.

Choose one:

☐ Check their Primary Provider panel lists to understand what will be automatically uploaded to the registry.

☐ Prepare the panel lists as per CPAR requirements to upload to the registry.

☐ Identify individual(s) or job roles that will act as CPAR Panel Administrator.

    ☐ Each Panel Administrator has their own email address for clinic business purposes.

Use the CII/CPAR Team Toolkit to:

    ☐ Develop preliminary plans for handling attachment conflict reports.

    ☐ Develop preliminary plans for handling mismatch notifications.

☐ Complete the package of registration documents.

☐ Review and update on their privacy policies and training including storage of and access to patient panel lists. Note: Privacy training is available through Learn@AMA.

☐ Act on eNotifications, as appropriate, when they are enabled.

Supports

If your clinic cannot check off every box and needs guidance for panel processes, refer to the ACTT Panel Processes Change Package summary.