Presenters

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Today's Agenda

- Milestones & Celebrations!
- New Connect dates added
- Terminate Panel Process
- EMR panel size vs. CPAR panel size
- Ask anything

CII/CPAR MILESTONES

May 2024

1.3M consult reports

566 community specialists

17.3M encounters

2017 CPAR providers

$6.0M Acceleration Grant payments made

687 clinics live

New CPAR Panel Request Form & Processes

- Terminating a Panel
- Placing a Panel In-Transition

Terminating a Panel – Old vs New Process

OLD PROCESS

1. Panel Request Form
   - Terminate panel option
2. Access Admin Form
   - Remove provider/panel authorization option
3. Panel Admin Form
   - Add/Remove panel(s) option

NEW PROCESS

1. Panel Request Form
   - Terminate panel option
   - Access and Panel Admin roles will be automatically terminated

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Type of Panel Request - Complete one form per panel.

○ Create New Panel   ○ Add Facility or Change Facility   ○ Add/Remove Provider or Change Panel Name   ● Terminate Panel   ○ In Transition

By selecting **"Terminate Panel"** you are providing authorization for the removal of any Access Administrators and/or Panel Administrator roles that are currently attached to this panel.

Panel in Transition – Old vs New Process

OLD PROCESS

1. Panel Request Form
   - Add Facility or Change Facility option
   - Write "place panel in transition" in the Comments field

NEW PROCESS

1. Panel Request Form
   - In Transition option

Type of Panel Request - Complete one form per panel.

⚪ Create New Panel   ⚪ Add Facility or Change Facility   ⚪ Add/Remove Provider or Change Panel Name   ⚪ Terminate Panel   ⦿ In Transition

By selecting **"In Transition"** you are acknowledging this panel will still produce CPAR reports and eNotifications (if applicable), but will no longer be able to accept new patients.

CII/CPAR Connect Meeting Series

New dates added July-November

- Continuing every 3rd Tuesday (occasionally 4th Tuesday) of the month
- **Need to register for additional dates in the series:** https://albertadoctors.zoom.us/meeting/register/tZ0lf-CgqT4iGdBMmU4o09ajaiJOv2ZHHklh
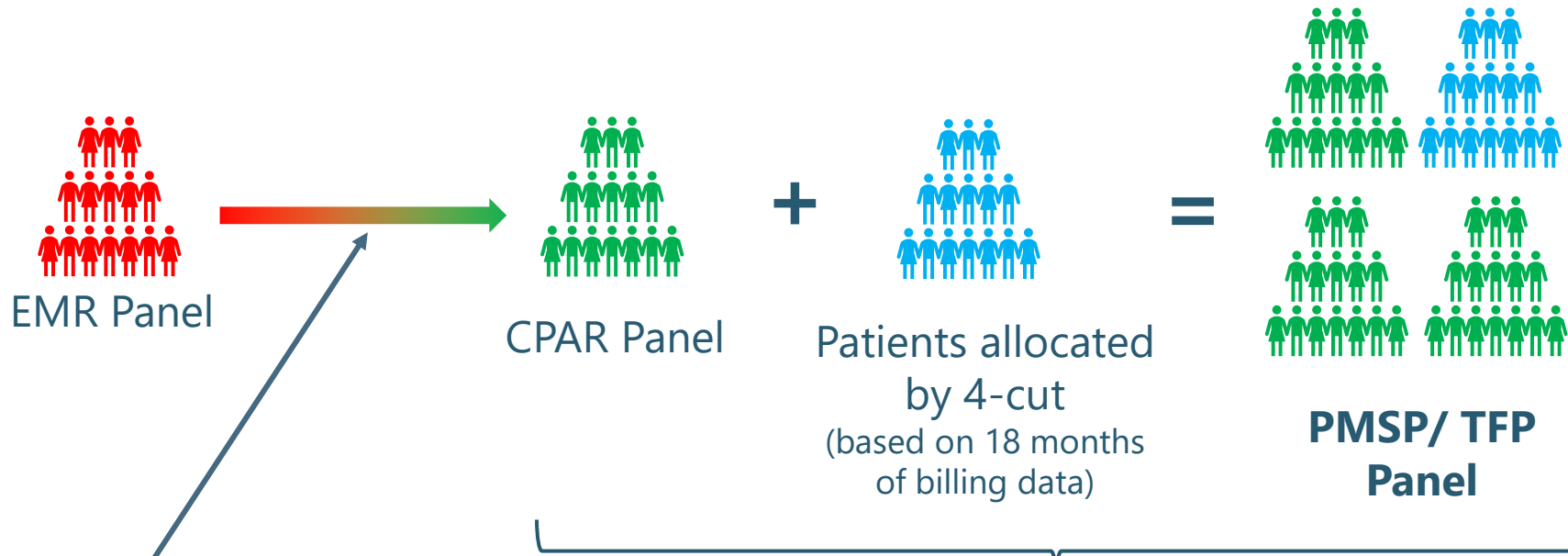
CII/CPAR

CPAR Panel & EMR Panel Reconciliation

Learning Objectives

Develop a **systematic approach** to **identify** and **troubleshoot** differences in panel size between **EMR** and **CPAR**.

Disclaimer: This process is not intended to replicate the exact panel size that AH uses to calculate PMSP or TFP payments.

PMSP & TFP Panel Size Calculation

CPAR + Top Up Allocation Method

EMR Panel

CPAR Panel

+

Patients allocated
by 4-cut
(based on 18 months
of billing data)

=

**PMSP/ TFP
Panel**

This is our focus today. Making sure all the patient you want to include in the CPAR panel are flowing from your EMR to CPAR.

Demographic mismatches, conflicts, and billing data can all impact AH panel size estimates; this will not be covered today.

Preparation

- CII/CPAR Go-Live & Beyond Training
- Who is the panel administrator
  - Email eHealthProviderSupport@gov.ab.ca if you are unsure
- How to login and navigate the CPAR online portal
- EMR requirements for patients on CPAR panels
- How to do EMR searches to identify paneled patients

Troubleshooting Process

- **Step 1:** Run an EMR search to determine the panel size expected by the provider
- **Step 2:** Use the CPAR portal to determine the panel size successfully uploaded to CPAR
- **Step 3:** Compare these two panel sizes
- **Step 4:** Run EMR searches to determine which patients are not being uploaded to CPAR and why

Step 1: Review EMR Panel Size

- Run a search in the EMR to determine the **expected** number of patients that should be uploading to CPAR

- This number **includes** patients that haven't uploaded due to technical reasons

- E.g. search criteria:

    - "Primary Care Provider = Dr. R. Smith"

    - "Patient Status = Active"

    - Any other criteria that the provider says should be used to include or exclude patients from their expected panel

Step 2: Determine CPAR panel size

Access the CPAR portal to review the latest panel submission:
- Be sure to confirm:
  - The provider and panel name are correct
  - Review the contact address and PCN
  - Confirm the panel number in the EMR matches the panel information in CPAR
- Review the panel submission details
  - **Total number of records in file**

Step 3: Compare EMR vs CPAR Panels Size

- If they are very similar, your paneling and EMR processes are likely working well!
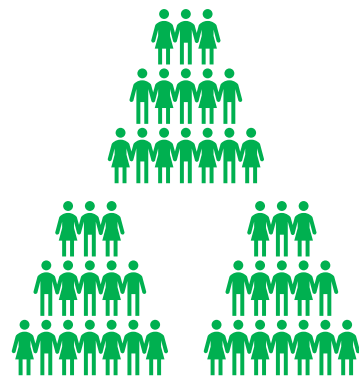- If they are quite different, move onto Step 4 to start troubleshooting

What are we trying to fix?

Example:

EMR Panel	−	CPAR Panel	=	Difference	→	300 Patients not uploading... **why not?**
1400		1100		300		

Step 4: EMR Searches to Find & Fix

Create/import and run searches to find patients that were unexpectedly not sent to CPAR. Common causes include:

1. Verification or Confirmation Date is blank.

2. Last Visit Date is blank.

3. Have a Patient Status that is configured to be excluded from CPAR (e.g. Inactive). Note: this is N/A for AVA and CHR.

4. Not properly linked to participating CPAR provider, via PCP field or by not being adding to a CPAR-configured panel for AVA and CHR).

5. No provincial PHN in the chart.

Fixing These Issues

- Look into any potential "bulk actions" that your EMR offers to correct some issues quickly
- Talk to the EMR vendor if you suspect this is a data migration issue
  - E.g. confirmation dates not transferring to new EMR
  - E.g. new EMR doesn't use Patient Status to include/exclude patients from CPAR) like the old EMR
- Refresh and/or develop new panel processes to address any gaps identified
  - Establish criteria for CPAR panel inclusion/exclusion with primary care providers
  - Develop written policies/processes on how to panel and unpanel patients in your EMR
  - Train/refresh staff on validation, CPAR inclusion criteria, etc.
  - Implement these new processes to begin correcting panel sizes
  - Repeat Steps 1 to 3 in subsequent months, to measure impact

Resources

- CII/CPAR Connect
- Learn@AMA Training – CII/CPAR Go Live & Beyond
- Discussion Boards
- EMR Network Webinar Recordings – creating queries/searches
- CII/CPAR Resource Centre
  - EMR-specific "How Panels Work" articles
  - CPAR Panel Administrator Guide
  - CPAR Panel Administrator Handbook
  - Templates: Notification to change primary care provider