



This checklist covers all requirements to participate in the Community Information Integration (CII) and Central Patient Attachment Registry (CPAR) initiative.

## 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

**Clinic has a clear internal definition for:**

- Attached patients
- Patient statuses in the Electronic Medical Record (EMR)

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

- Patients are asked consistently to confirm that their physician or nurse practitioner is their only provider for comprehensive, longitudinal primary care.
- 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.

## CII/CPAR Intent to Participate

**The clinic will:**

- Participate in orientation to CII/CPAR and understands how it works for panel.
- Do **one** of the following:
  - 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 [Panel Conflicts & Demographic Mismatches Guide](#) 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.
- Act on eNotifications, as appropriate, when they are enabled.

**TIP**

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