CRISP Patient Panel Checklist Addendum

Please complete this addendum if your organization has chosen to submit panels or receive notifications outside of traditional methods (CRISP Direct or Self-Service Panel Loader), or if you would like to receive CCDAs

Account and POC Information

Account Name: Click to enter text.   **Date:** Click to enter a date.
Point of Contact Name (ENS/Panel Lead): Click to enter text.
Email: Click to enter text.   **Phone Number:** Enter Phone #.

Inbound to CRISP

Please choose one of the following:

☐ SFTP

    ☐ CRISP hosted – CRISP will enter a work ticket to configure this selection

    ☐ Participant hosted – We will reach out to you for the following information: Host Name, Username, Password, and Port #

☐ ADT/SIU
1. What event trigger will be used to add patients? (Ex. A04): Click to enter text.
2. Will there be any additional trigger events (Ex. Discharge=A08): Click to enter text.
3. Do you want to include any specific trigger values (ex. Location)? If so, in which segment(s)? Click to enter text.
4. Will you include any other Attributes (Ex. PCP, Care Manager, Care Program, Insurance)? If so, in which segment(s)? Click to enter text.

☐ Other (Please specify): Click to enter text.

Outbound to Participant

Please choose one of the following:

☐ SFTP

    ☐ CRISP hosted – CRISP will enter a work ticket to configure this selection, and then reach out to your ENS lead to share credentials

    ☐ Participant hosted – We will reach out to your ENS lead for the following information: Host Name, Username, Password, and Port #

☐ TCP/IP

    ☐ Do we have an existing VPN?

        ☐ Yes

            ☐ IP and port for Test: Click to enter text.

            ☐ IP and port for Prod: Click to enter text.

            ☐ Technical Point of Contact (Full Name, Email and Phone): Click to enter text.

        ☐ No

            ☐ Technical Point of Contact (Full Name, Email and Phone): Click to enter text.

☐ CCDA

    ☐ PCP Specific – CCDAs will be send directly to specific PCPs within a practice for their patients. Patient panel will need to have PCPs associated to each patient on panel.

    ☐ Practice Specific – CCDAs will be routed to practice based on how they want to ingest information (ex: Direct Address provided by practice or SFTP).

☐ Other (Please specify): Click to enter text.