

CRISP eReferral Tool

Starter Guide



Please email support@crisphealth.org for any issues, suggestions or defects.

Referral Submission Process



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CRISP eReferral Tool - Referral Submission Process

1 ULP Login & Patient Search

(1) Log into to the Unified Landing Page at ulp.crisphealth.org (1a) then search the desired patient (First Name, Last Name, and Date of Birth are required). (1b) Once the patient list loads, any potential matches that meet your criteria will appear. The results will show the likelihood of a patient match by ranking levels indicated by likely, very likely, and potential. Select the most appropriate patient by clicking the box in the “Include” column on the right-hand side of the screen then access the “Referrals Web Form” by clicking the “Referrals” tab at the top of the screen or (1c) hovering over the selected patient to prompt the applications drop down option.



Sign In **1**

Email Address

Password

Sign In

[Forgot Password](#)

Home - Unified Landing Page x +
ulp.crisphealth.org/web/guest/welcome

CRISP Unified Landing Page

HOME PATIENT SNAPSHOT ENS PROMPT HEALTH RECORDS PDMP IMAGING-WORKLIST **REFERRALS** HEALTH RECORDS REFERRAL PORTAL CBO REFERRAL WORKLIST

User Guide HELP (SIGN OUT)

1a New Search
Patient Search
Last Name(Required) First Name(Required) Date Of Birth(Required) PATIENT SEARCH
Integrations patone 01 01 2001
Gender: Male Female
SSN
XXXX-XX-XXXX

Patient Search Results

FIRST	LAST	DATE OF BIRTH	CRISP ID	GENDER	ADDRESS	MATCH SCORE	INCLUDE
Patone	Integrations	01/01/2001	214684535		1234 Integrations St. Baltimore, MD 21201	Very Likely	<input checked="" type="checkbox"/>

- PDMP
- Snapshot (MD)
- Health Records
- Imaging Worklist
- Referrals**
- COVID Order Form

1c

CRISP eReferral Tool - Referral Submission Process

2 Referrals Tab: Web Form

Once in the “Referrals” tab, the Web Form will prepopulate with patient demographic information. Patient Vitals, Alternate Phone Number, and Email sections must be completed manually.



HOME

PATIENT SNAPSHOT

ENS PROMPT

HEALTH RECORDS

PDMP

IMAGING-WORKLIST

REFERRALS

COVID-19 LAB TOOLS

NO PATIENT:

CRISP Program Referral

2

Patient Information

* First Name	Middle Name	* Last Name	
Patone		Integrations	
* Date of Birth (Format MM/DD/YYYY)			
01/01/2001			
* Home Address 1	* Phone Number	* Type	
1234 Integrations St.	667-2131111	Home	
Home Address 2	Alternate Phone Number	Type	
* City	* State	* Zip	Email
Baltimore	MD	21201	

Patient Vitals

BMI	HbA1c	Blood Pressure
Cholesterol	Fasting Glucose	

Referring Physician

* Name

CRISP eReferral Tool - Referral Submission Process

3 Organization and Program Selections

(3) Select a CBO from the "Organization" dropdown

(3a) Select a "Program".

(3b) The selected Program's description will pop up to the right of the CBO and Program selection.

Cholesterol Fasting Glucose

Referring Physician

* I am referring this patient myself I am referring this patient on behalf of a physician

3 Referral Program

* Organization

Meals on Wheels

3b Meals on Wheels of Central Maryland provides home delivered meals, isolation reduction, and supportive services to seniors, individuals with disabilities, and other homebound adults throughout central Maryland.

3a Programs

- Home Delivered Meals - Meals on Wheels of Anne Arundel County (Northern 2/3rds)
- Home Delivered Meals - Meals on Wheels of Baltimore City
- Home Delivered Meals - Meals on Wheels of Baltimore County
- Home Delivered Meals - Meals on Wheels of Carroll County

* Please enter all relevant information that you would like relayed to the accepting provider below:

Example: Luke Skywalker is a 44 y.o. male who presented to ABC Family Practice and qualifies for enrollment into a DPP. Per most recent encounter on 4/1/19, BMI is 32, HbA1c level is 6.2. No previous diagnosis of DM1 or DM2. Counseled patient on lifestyle changes including healthy eating habits and fitness regimens.

Characters remaining: 200

Please keep a copy of this referral for your records.

Submit Clear Patient Consent ?

CRISP eReferral Tool - Referral Submission Process

4 Submitting the Web Form

The comment box is a required field provided for sharing pertinent patient notes with the CBO. Once the Web Form is complete, check the 'Patient Consent' box then click "Submit" to send the referral.

The screenshot displays the 'Referral Program' section of the web form. The 'Organization' dropdown menu is open, showing 'Meals on Wheels' as the selected option. A tooltip is visible over the dropdown, stating: 'Meals on Wheels of Central Maryland provides home delivered meals, isolation reduction, and supportive services to seniors, individuals with disabilities, and other homebound adults throughout central Maryland.' The 'Programs' dropdown menu is also open, listing several options: 'Home Delivered Meals - Meals on Wheels of Anne Arundel County (Northern 2/3rds)', 'Home Delivered Meals - Meals on Wheels of Baltimore City', 'Home Delivered Meals - Meals on Wheels of Baltimore County', and 'Home Delivered Meals - Meals on Wheels of Carroll County'. Below the dropdowns, there is a text area for entering patient information, with an example provided: 'Example: Luke Skywalker is a 44 y.o. male who presented to ABC Family Practice and qualifies for enrollment into a DPP. Per most recent encounter on 4/1/19, BMI is 32, HbA1c level is 6.2. No previous diagnosis of DM1 or DM2. Counseled patient on lifestyle changes including healthy eating habits and fitness regimens.' The character count is 'Characters remaining: 200'. At the bottom, there are 'Submit' and 'Clear' buttons, and a 'Patient Consent' checkbox with a question mark icon.

4

Referral Program

* Organization

Meals on Wheels

Meals on Wheels of Central Maryland provides home delivered meals, isolation reduction, and supportive services to seniors, individuals with disabilities, and other homebound adults throughout central Maryland.

Programs

Home Delivered Meals - Meals on Wheels of Anne Arundel County (Northern 2/3rds)

Home Delivered Meals - Meals on Wheels of Baltimore City

Home Delivered Meals - Meals on Wheels of Baltimore County

Home Delivered Meals - Meals on Wheels of Carroll County

* Please enter all relevant information that you would like relayed to the accepting provider below:

Example: Luke Skywalker is a 44 y.o. male who presented to ABC Family Practice and qualifies for enrollment into a DPP. Per most recent encounter on 4/1/19, BMI is 32, HbA1c level is 6.2. No previous diagnosis of DM1 or DM2. Counseled patient on lifestyle changes including healthy eating habits and fitness regimens.

Characters remaining: 200

Please keep a copy of this referral for your records.

Submit Clear Patient Consent ?

Community Based Organization (CBO) Workflow



This section will outline the eReferral workflow for sites receiving referrals.



Please email support@crisphealth.org for any issues, suggestions or defects.

CRISP eReferral Tool - Community Based Organization (CBO) Workflow

1 ULP Login and Referrals Tab

Log into the CRISP Unified Landing Page (ULP) at ulp.crisphealth.org then click the “CBO Referral Worklist” tab at the top of the screen. *The additional highlighted sections below will be discussed further in the document.*

The screenshot displays the CRISP Unified Landing Page (ULP) interface. At the top left is the CRISP logo with the text "Unified Landing Page™". Below the logo is a horizontal navigation menu with the following items: HOME, PDMP, PATIENT SNAPSHOT, ENS PROMPT, EMERGENT IMAGING, IMAGING WORKLIST, REFERRALS, and HEALTH RECORDS. The "CBO REFERRAL WORKLIST" tab is highlighted with an orange box and a circled "1".

Below the navigation menu, there are three icons: "User Guide", "HELP", and "(SIGN OUT)".

The main content area features a blue header bar. Below it, there is a "Referrals Overview" section. This section includes an "Auto Reject" toggle switch, a "Filter by Status" dropdown menu (currently showing "Pending (+1 other)"), and a "Look up Referral" input field.

CRISP eReferral Tool - Community Based Organization (CBO) Workflow

2 Referrals Overview Page

The Referrals Overview page provides a comprehensive list of all patients referred to the CBO through the CRISP Referral tool along with a host of other identifiers such as the patient's referral status and the referring provider.

Auto Reject

Filter by Status

Pending (+1 other) ▼

2

Referrals Overview

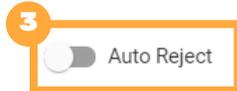
Look up Referral

Name (last, first)	Gender	DOB	Doctor	Health Org.	Ref. Date	Referral Status ↓	Accepted Date	Programs
AutoReject7, Test7		Apr 24, 2000	Dr. Minnie Mouse	Yono Hospitals	Sep 30, 2020	Change Status Pending ▼		0 / 0 / 2
Tester84, Someone		May 2, 1963	Dr. Minnie Mouse	Meghan Hospitals	Sep 30, 2020	Change Status Pending ▼		0 / 0 / 3
AutoReject3, Test3		Apr 24, 2000	Dr. Minnie Mouse	Yono Hospitals	Sep 30, 2020	Change Status Pending ▼		0 / 0 / 2
AutoReject2, Test2		Apr 24, 2000	Dr. Minnie Mouse	Yono Hospitals	Sep 30, 2020	Change Status Pending ▼		0 / 0 / 2

CRISP eReferral Tool - Community Based Organization (CBO) Workflow

3 Referrals Overview Page: Auto Rejection

If the CBO can no longer accommodate new referrals, toggle the “Auto Reject” button to enable the auto rejection functionality. Auto Rejection will automatically communicate to the referring person that the submitted referral has been rejected.



Filter by Status
Pending (+1 other) ▼

Referrals Overview

Look up Referral

Name (last, first)	Gender	DOB	Doctor	Health Org.	Ref. Date	Referral Status ↓	Accepted Date	Programs
AutoReject7, Test7		Apr 24, 2000	Dr. Minnie Mouse	Yono Hospitals	Sep 30, 2020	Change Status Pending ▼		0 / 0 / 2
Tester84, Someone		May 2, 1963	Dr. Minnie Mouse	Meghan Hospitals	Sep 30, 2020	Change Status Pending ▼		0 / 0 / 3
AutoReject3, Test3		Apr 24, 2000	Dr. Minnie Mouse	Yono Hospitals	Sep 30, 2020	Change Status Pending ▼		0 / 0 / 2
AutoReject2, Test2		Apr 24, 2000	Dr. Minnie Mouse	Yono Hospitals	Sep 30, 2020	Change Status Pending ▼		0 / 0 / 2

CRISP eReferral Tool - Community Based Organization (CBO) Workflow

4 Referrals Overview Page: Filtering and Status Updates

Each column can be filtered for optimized viewing. Navigate to the top right corner of the screen to select desired filtering from the filters button provided.

(4a) The patient's referral status can be updated by clicking the dropdown and (4b) filtered by selecting the appropriate status indicator.

Auto Reject

Referrals Overview

Look up Referral

Name (last, first)	Gender	DOB	Doctor ↑	Health Org.	Ref. Date	Referral Status	Accepted Date	Programs
Tester11_Someone	Female	Jan 1, 2001	Dr. Brown		Aug 14, 2020	4a Pending		0 / 0 / 2
AutoReject7_Test7		Apr 24, 2000	Dr. Minnie Mouse	Yono Hospitals	Sep 30, 2020	Change Status Pending		0 / 0 / 2
AutoReject4_Test4		Apr 24, 2000	Dr. Minnie Mouse	Yono Hospitals	Sep 30, 2020	Change Status Accepted	Sep 30, 2020	0 / 0 / 2
Tester84_Someone		May 2, 1963	Dr. Minnie Mouse	Meghan Hospitals	Sep 30, 2020	Change Status Pending		0 / 0 / 3
AutoReject3_Test3		Apr 24, 2000	Dr. Minnie Mouse	Yono Hospitals	Sep 30, 2020	Change Status Pending		0 / 0 / 2

Filter by Status

- Pending
- Accepted
- Rejected
- Completed

4b Filter by Status
Pending (+1 other)

Programs Completed / Programs Enrolled / Programs Referred

CRISP eReferral Tool - Community Based Organization (CBO) Workflow

5 Advanced Search

To search for a specific referral (patient, provider, etc.) navigate to the “Look up Referral” field in the top left corner of the screen to begin search. Please note, when searching dates the following format is required: MM/DD/YYYY.

Auto Reject

Filter by Status
Pending (+1 other) ▼

5 Referrals Overview

Look up Referral
purpl

Name (last, first)	Gender	DOB	Doctor	Health Org.	Ref. Date	Referral Status ↓	Accepted Date	Programs
Tester13_Someone	Female	Jan 1, 2001	Dr. Purple		Aug 14, 2020	Change Status Accepted ▼	Sep 23, 2020	1 / 1 / 2
Tester12_Someone	Prefer Not to Say	Jan 1, 2001	Dr. Purple		Aug 14, 2020	Change Status Accepted ▼	Sep 23, 2020	0 / 2 / 2

Export to Excel

Items per page: 25 ▼ 1 - 2 of 2 |< < > >|

CRISP eReferral Tool - Community Based Organization (CBO) Workflow

6 Export To Excel

To download a report of referred patients and additional datasets, click the green “Export to Excel” button at the bottom of the Referrals Overview page.

Tester13_Someone	Female	Jan 1, 2001	Dr. Purple	Aug 14, 2020	Change Status Accepted	Sep 23, 2020	1 / 1 / 2
Tester12_Someone	Prefer Not to Say	Jan 1, 2001	Dr. Purple	Aug 14, 2020	Change Status Accepted	Sep 23, 2020	0 / 2 / 2
Tester9_Someone	Female	Jan 1, 2001	Dr. Olive	Aug 14, 2020	Change Status Accepted	Sep 23, 2020	1 / 1 / 2
Tester7_Someone	Male	Jan 1, 2001	Dr. Olive	Aug 12, 2020	Change Status Accepted	Aug 4, 2012	0 / 1 / 2

Items per page: 25 1 - 14 of 14 < > >>

Export to Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	confirmationNumber	firstName	middleI	lastName	dateOfBirth	phoneNumber	phoneN	alternat	alternat	homeAddress1	homeA	city	state	country	zip	bmi	hba1c	bloodPt	cholest	fastingC	referrin
2	1d1d1216-559b-4251-1f15-afc6723d3b21	Test7		AutoReject7	04/24/2000																Dr. Minn
3	1d1d1216-559b-4251-1f15-afc6723d3b21	Test7		AutoReject7	04/24/2000																Dr. Minn
4	1d4d7776-559b-4251-9f55-afc6723d3b21	Test4		AutoReject4	04/24/2000																Dr. Minn
5	1d4d7776-559b-4251-9f55-afc6723d3b21	Test4		AutoReject4	04/24/2000																Dr. Minn
6	1032c917-7c3f-48c4-8bcd-7adbe29c7084	Someone	middletest	Tester84	05/02/1963	301-222-5555	work	301-222-2;home			Los Angele	CA			33333	20		100	normal		Dr. Minn
7	1032c917-7c3f-48c4-8bcd-7adbe29c7084	Someone	middletest	Tester84	05/02/1963	301-222-5555	work	301-222-2;home			Los Angele	CA			33333	20		100	normal		Dr. Minn
8	1032c917-7c3f-48c4-8bcd-7adbe29c7084	Someone	middletest	Tester84	05/02/1963	301-222-5555	work	301-222-2;home			Los Angele	CA			33333	20		100	normal		Dr. Minn
9	1d5d7366-559b-4251-9f55-afc6723d3b21	Test3		AutoReject3	04/24/2000																Dr. Minn
10	1d5d7366-559b-4251-9f55-afc6723d3b21	Test3		AutoReject3	04/24/2000																Dr. Minn
11	1b5b7367-789b-4241-9f94-afc6723d3b21	Test2		AutoReject2	04/24/2000																Dr. Minn
12	1b5b7367-789b-4241-9f94-afc6723d3b21	Test2		AutoReject2	04/24/2000																Dr. Minn
13	1032c917-7c3f-48c4-8bcd-7adbe29c7083	Someone	middletest	Tester83	05/02/2000	301-222-5555	work	301-222-2;home			Los Angele	CA			33333	20		100	normal		Dr. Minn
14	1032c917-7c3f-48c4-8bcd-7adbe29c7083	Someone	middletest	Tester83	05/02/2000	301-222-5555	work	301-222-2;home			Los Angele	CA			33333	20		100	normal		Dr. Minn
15	1032c917-7c3f-48c4-8bcd-7adbe29c7083	Someone	middletest	Tester83	05/02/2000	301-222-5555	work	301-222-2;home			Los Angele	CA			33333	20		100	normal		Dr. Minn
16	1032c917-7c3f-48c4-8bcd-7adbe29c7082	Someone	middletest	Tester82	01/22/1972	301-222-5555	work	301-222-2;home			Springfield	MO			33333	20		100	normal		Dr. Minn
17	1032c917-7c3f-48c4-8bcd-7adbe29c7082	Someone	middletest	Tester82	01/22/1972	301-222-5555	work	301-222-2;home			Springfield	MO			33333	20		100	normal		Dr. Minn
18	1032c917-7c3f-48c4-8bcd-7adbe29c7082	Someone	middletest	Tester82	01/22/1972	301-222-5555	work	301-222-2;home			Springfield	MO			33333	20		100	normal		Dr. Minn
19	1c4a7384-688a-4221-9f74-afc7723b3c07	Someone		Tester15	01/01/0001	9858745445				123 eutaw street		Baltimore	MD		500058	25		2547	5478G		Dr. Yello

CRISP eReferral Tool - Community Based Organization (CBO) Workflow

7 Patient Details Overview

To view patient details, select the appropriate patient to review the “Referral Details” which includes all the details captured by the referring provider at the time of referral. Referral Status updates can be completed on the Referral Details page as well.

Save Cancel

Referral Details

Confirmation Number 1c4a7384-688a-4221-9f74-afc7723b3c03	Group (CBO ID) 555	*Referral Status Pending Pending Accepted Rejected Completed
--	------------------------------	--

Patient Information

*Patient ID alpha2	First Name Someone	Middle Name
------------------------------	------------------------------	--------------------

CRISP eReferral Tool - Community Based Organization (CBO) Workflow

8 Patient Details Overview

The “Save” and “Cancel” buttons are visible on this page. Click “Cancel” to return to the Referrals Overview page. Information you have entered will NOT be saved.

Click “Save” to ensure that all the information you enter will be saved to this form.



Referral Details

Confirmation Number 1c4a7384-688a-4221-9f74-afc7723b3c03	Group (CBO ID) 555	*Referral Status Pending Pending Accepted Rejected Completed
--	------------------------------	--

Patient Information

*Patient ID alpha2	First Name Someone	Middle Name
------------------------------	------------------------------	--------------------

CRISP eReferral Tool - Community Based Organization (CBO) Workflow

Patient Information

Certain fields must be completed by an CBO in order to successfully complete the Web Form. A patient ID and the patient's gender must be entered into the "Patient Information" section in order to save this document.

[Save](#) [Cancel](#)

Referral Details

Confirmation Number

1d1d1216-559b-4251-1f15-afc6723d3b21

Group (CBO ID)

555

*Referral Status

Pending

Patient Information

*Patient ID

Populated by CBO

Patient ID is required.

Name Suffix

First Name

Test7

Middle Name

Last Name

AutoReject7

Date of Birth

Apr 24, 2000

*Gender

Populated by CBO

Gender is required.

SSN

####

CRISP eReferral Tool - Community Based Organization (CBO) Workflow

10 Patient Contact Details

If the end user has the patient's home phone number, work number, and/or cell phone, it can be entered in the "Patient Contact Details" section. The blue boxed sections/fields, Phone, Email, and Alternate Phone will be pre-populated (and not editable) if the referring person completes fields within the referral Web Form.

The screenshot displays the "Patient Contact Details" form. At the top right, there are "Save" and "Cancel" buttons. The form is divided into several sections:

- Home Phone:** A text input field containing "Populated by CBO" and a masked phone number "### ### ####".
- Work Phone:** A text input field containing "Populated by CBO" and a masked phone number "### ### ####".
- Cell Phone:** A text input field containing "Populated by CBO" and a masked phone number "### ### ####".
- Alternate Phone (From Referral):** A text input field containing "Auto-populated from Web Form".
- Phone (From Referral):** A text input field containing "Auto-populated from Web Form".
- Email (From Referral):** A text input field containing "Auto-populated from Web Form".

The Home Phone, Work Phone, and Cell Phone fields are highlighted with an orange border. The Alternate Phone, Phone (From Referral), and Email (From Referral) fields are highlighted with a blue border.

CRISP eReferral Tool - Community Based Organization (CBO) Workflow

11 Clinical Fields

The Patient Clinical Fields will be pre-populated (and not editable) with data from the referral Web Form.

11

Patient Clinical Fields

BMI <input type="text"/>	HbA1c <input type="text"/>	Blood Pressure <input type="text"/>	Cholesterol <input type="text"/>
Fasting Glucose <input type="text"/>			

CRISP eReferral Tool - Community Based Organization (CBO) Workflow

12 Referring Physician and PCP Information

The “Referring Physician Information” section captures the contact information for the referring provider. Additionally, any notes that the referrer added to the Web Form will be shown here. These fields are also not editable.

12 Referring Physician Information

Referring Physician Name Dr. Minnie Mouse	NPI 1032c917-7c3f-48c4-9999-7adbe29c7964	Organization Yono Hospitals	Referring Provider/Person Notes Free text note from referring person.
Referring Person Name Rohan			Referring Person Email rohan@gmaol.com

Primary Care Provider Information

Practice	Location	PCP

CRISP eReferral Tool - Community Based Organization (CBO) Workflow

13 Program Referred to Section

The “Program Referred To” section will show each program within the CBO to which a patient was referred. Click the inverted arrow to open program details.

(13a) The Opt-Out button should be utilized when one of the following two choices are made:

- If the patient chooses to participate but does not wish to have their information shared with CRISP
- If the patient chooses to not receive the treatment AND does not wish to share that information with CRISP.

Program(s) Referred To

Tester One	13
Dev Two	

Program(s) Referred To

Tester One

Program Referred
Tester One

13a Opt Out the Program
Note: This prevents data sharing with CRISP.

*Enrollment Status Pending	Enrollment Date	Program End Date	Appointment Date Choose a date
Program Care Manager	Program Care Manager Phone # ### ### ####	Program Care Manager Email	Note/Care Alert

CRISP eReferral Tool - Community Based Organization (CBO) Workflow

14 Program Referred To Enrolled View

Patient enrollment status can be changed here. Once “Enrolled” has been selected an enrollment date will populate.

Please note, if the referral status was changed to “Accepted” on the Referrals Overview page, the enrollment date will auto-populate in this field.

Program(s) Referred To

Tester One

Program Referred

Tester One

Opt Out the Program
Note: This prevents data sharing with CRISP.

14 *Enrollment Status: Enrolled

Enrollment Date: 10/20/2020

Program End Date

Appointment Date: Choose a date

Program Care Manager

Program Care Manager Phone #: ### ### ####

Program Care Manager Email

Note/Care Alert

CRISP eReferral Tool - Community Based Organization (CBO) Workflow

15 Care Manager Fields

The CBO can leave a note in the free text section. CRISP will display this note in the ULP.

*Enrollment Status Pending	Enrollment Date	Program End Date	Appointment Date Choose a date
Program Care Manager	Program Care Manager Phone # ### ### ####	Program Care Manager Email	Note/Care Alert Free text note from CBO to referring person. Shows up as a Care Alert in Snapshot in CRISP's ULP.

15 CBO Note back to referring person example:
Patient with sudden weight loss/fatigue, but hasn't called doctor. Needs help understanding medications or a possible adjustment could be needed. May recommend looking at dosage or immediate follow-up.

Referring Person Workflow

Workflow for individuals who have submitted a referral and are interested in learning the outcome of that referral.

Important Note:

Users can still pull down referral outcome information using the Snapshot tab in the CRISP Unified Landing Page (ULP). This is simply an additional (more efficient means) for obtaining the same information.



CRISP eReferral Tool - Referring Person Workflow

1 Login

Log into CRISP's Unified Landing Page (ULP) and click the Referral Portal tab.



HOME PATIENT SNAPSHOT ENS PROMPT REFERRALS HEALTH RECORDS



Filter by Status
Pending (+1 other) ▼

Referrals Overview

Look up Referral

Name (last, first)	Gender	DOB	CBO	Ref. Date	Referral Status ↓	Accepted Date	Programs →
PatientOne, Sample		May 23, 1945	Sample CBO One	Nov 24, 2020	Pending		0 / 0 / 2

CRISP eReferral Tool - Referring Person Workflow

2 Referrals Overview

Review the Referrals Overview page. Here, you will find a queue of all patients you have referred using the CRISP Referral tool.

Filter by Status
Pending (+1 other) ▾

2 Referrals Overview

[Look up Referral](#)

Name (last, first)	Gender	DOB	CBO	Ref. Date	Referral Status ▾	Accepted Date	Programs
Fields, Minie		Jun 30, 1990	Min CBO	Jul 17, 1997	Pending		0 / 0 / 2
Fields, Schema		Jan 1, 2001	Min CBO	Aug 26, 2020	Pending		0 / 0 / 2
optOut_test	Prefer Not to Say	Jun 30, 1990	Min CBO	Sep 15, 2020	Pending		0 / 0 / 2
Tester82_Someone	Male	Jan 22, 1972	CBO 1	Sep 24, 2020	Pending		0 / 0 / 3
Tester84_Someone		May 2, 1963	CBO 1	Sep 30, 2020	Pending		0 / 0 / 3
Tester83_Someone	Female	May 2, 2000	CBO 1	Sep 24, 2020	Accepted	Sep 24, 2020	0 / 2 / 3

[Export to Excel](#)Items per page: 25 ▾1 - 6 of 6⏪ ⏩

CRISP eReferral Tool - Referring Person Workflow

3 Referrals Overview Page Description

Each column can be filtered for optimized viewing. Navigate to the top right corner of the screen to select desired filtering from the filters dropdown.

3

Filter by Status

- Pending
- Accepted
- Rejected
- Completed

Referrals Overview

Look up Referral

Name (last, first)	Gender	DOB	CBO	Ref. Date	Referral Status ↓	Accepted Date	Programs
Fields, Minie		Jun 30, 1990	Min CBO	Jul 17, 1997	Pending		0 / 0 / 2
Fields, Schema		Jan 1, 2001	Min CBO	Aug 26, 2020	Pending		0 / 0 / 2
optOut_test	Prefer Not to Say	Jun 30, 1990	Min CBO	Sep 15, 2020	Pending		0 / 0 / 2
Tester82_Someone	Male	Jan 22, 1972	CBO 1	Sep 24, 2020	Pending		0 / 0 / 3
Tester84_Someone		May 2, 1963	CBO 1	Sep 30, 2020	Pending		0 / 0 / 3
Tester83_Someone	Female	May 2, 2000	CBO 1	Sep 24, 2020	Accepted	Sep 24, 2020	0 / 2 / 3

Export to Excel

Items per page: 25 1 - 6 of 6 |< < > >|

CRISP eReferral Tool - Referring Person Workflow

4 Advanced Search

To search a specific referral (patient, provider, etc.) navigate to the “Look up Referral” field in the top left corner of the screen. Please note, when searching dates the following format is required: MM/DD/YYYY.

Filter by Status
Pending (+1 other) ▼

4 Referrals Overview

Look up Referral
som|

Name (last, first)	Gender	DOB	CBO	Ref. Date	Referral Status ↓	Accepted Date	Programs
Tester82, Someone	Male	Jan 22, 1972	CBO 1	Sep 24, 2020	Pending		0 / 0 / 3
Tester84, Someone		May 2, 1963	CBO 1	Sep 30, 2020	Pending		0 / 0 / 3
Tester83, Someone	Female	May 2, 2000	CBO 1	Sep 24, 2020	Accepted	Sep 24, 2020	0 / 2 / 3

Export to Excel

Items per page: 25 ▼ 1 - 3 of 3 |< < > >|

CRISP eReferral Tool - Referring Person Workflow

5 Export to Excel

To download a report of referred patients and additional datasets, click the green “Export to Excel” button at the bottom of the Referrals Overview page.

Filter by Status
Pending (+1 other) ▾

– Referrals Overview

Look up Referral

Name (last, first)	Gender	DOB	CBO	Ref. Date	Referral Status ↓	Accepted Date	Programs
Fields, Minie		Jun 30, 1990	Min CBO	Jul 17, 1997	Pending		0 / 0 / 2
Fields, Schema		Jan 1, 2001	Min CBO	Aug 26, 2020	Pending		0 / 0 / 2
optOut_test	Prefer Not to Say	Jun 30, 1990	Min CBO	Sep 15, 2020	Pending		0 / 0 / 2
Tester82_Someone	Male	Jan 22, 1972	CBO 1	Sep 24, 2020	Pending		0 / 0 / 3
Tester84_Someone		May 2, 1963	CBO 1	Sep 30, 2020	Pending		0 / 0 / 3
Tester83_Someone	Female	May 2, 2000	CBO 1	Sep 24, 2020	Accepted	Sep 24, 2020	0 / 2 / 3

Items per page: 25 ▾
1 - 6 of 6
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5 Export to Excel

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	
1	confirmationNumber	firstName	middlef	lastName	dateOfBirth	phoneNumber	phoneN	alternat	alternat	homeAddress1	homeAd	city	state	country	zip	bmi	hba1c	bloodPi	cholest	fastingC	referrin
2	1d1d1216-559b-4251-1f15-afc6723d3b21	Test7		AutoReject7	04/24/2000																Dr. Minn
3	1d1d1216-559b-4251-1f15-afc6723d3b21	Test7		AutoReject7	04/24/2000																Dr. Minn
4	1d4d7776-559b-4251-9f55-afc6723d3b21	Test4		AutoReject4	04/24/2000																Dr. Minn
5	1d4d7776-559b-4251-9f55-afc6723d3b21	Test4		AutoReject4	04/24/2000																Dr. Minn
6	1032c917-7c3f-48c4-8bcd-7adbe29c7084	Someone	middletest	Tester84	05/02/1963	301-222-5555	work	301-222-2:home			Los Angeles	CA		33333	20			100	normal	Dr. Minn	
7	1032c917-7c3f-48c4-8bcd-7adbe29c7084	Someone	middletest	Tester84	05/02/1963	301-222-5555	work	301-222-2:home			Los Angeles	CA		33333	20			100	normal	Dr. Minn	
8	1032c917-7c3f-48c4-8bcd-7adbe29c7084	Someone	middletest	Tester84	05/02/1963	301-222-5555	work	301-222-2:home			Los Angeles	CA		33333	20			100	normal	Dr. Minn	
9	1d5d7366-559b-4251-9f55-afc6723d3b21	Test3		AutoReject3	04/24/2000																Dr. Minn
10	1d5d7366-559b-4251-9f55-afc6723d3b21	Test3		AutoReject3	04/24/2000																Dr. Minn
11	1b5b7367-789b-4241-9f94-afc6723d3b21	Test2		AutoReject2	04/24/2000																Dr. Minn
12	1b5b7367-789b-4241-9f94-afc6723d3b21	Test2		AutoReject2	04/24/2000																Dr. Minn
13	1032c917-7c3f-48c4-8bcd-7adbe29c7083	Someone	middletest	Tester83	05/02/2000	301-222-5555	work	301-222-2:home			Los Angeles	CA		33333	20			100	normal	Dr. Minn	
14	1032c917-7c3f-48c4-8bcd-7adbe29c7083	Someone	middletest	Tester83	05/02/2000	301-222-5555	work	301-222-2:home			Los Angeles	CA		33333	20			100	normal	Dr. Minn	
15	1032c917-7c3f-48c4-8bcd-7adbe29c7083	Someone	middletest	Tester83	05/02/2000	301-222-5555	work	301-222-2:home			Los Angeles	CA		33333	20			100	normal	Dr. Minn	
16	1032c917-7c3f-48c4-8bcd-7adbe29c7082	Someone	middletest	Tester82	01/22/1972	301-222-5555	work	301-222-2:home			Springfield	MO		33333	20			100	normal	Dr. Minn	
17	1032c917-7c3f-48c4-8bcd-7adbe29c7082	Someone	middletest	Tester82	01/22/1972	301-222-5555	work	301-222-2:home			Springfield	MO		33333	20			100	normal	Dr. Minn	
18	1032c917-7c3f-48c4-8bcd-7adbe29c7082	Someone	middletest	Tester82	01/22/1972	301-222-5555	work	301-222-2:home			Springfield	MO		33333	20			100	normal	Dr. Minn	
19	1c4a7384-688a-4221-9f74-afc7723b3c07	Someone		Tester15	01/01/0001	9858745445				123 eutaw street		Baltimore	MD		500058	25		2547	5478G	Dr. Yello	

CRISP eReferral Tool - Referring Person Workflow

6 Patient Details View

Select a patient from the Referrals Overview list to navigate to the Patient Details screen. This screen includes all the details captured by the referring person at the time of referral. Click “Cancel” to return to the previous page. Please note, the information provided in the fields cannot be edited. The “Referrals Overview” is designed to provide a read-only view of information sent to and received from the CBO.

6 Cancel

Referral Detail

Confirmation Number

1c4a7384-688a-4221-9f74-afc7723b3b01

Patient Information

First Name	Middle Name	Last Name	Date of Birth
Minie	jones	Fields	Jun 30, 1990

Patient Address

Home Address 1	Home Address 2	City	State

CRISP eReferral Tool - Referring Person Workflow

7 Patient Contact and Clinical Fields

The fields in these sections are populated with information provided in the Web Form.

Cancel

7

Patient Contact Details

Phone

0

Email

Alternate Phone

0

Patient Clinical Fields

BMI

HbA1c

Blood Pressure

Cholesterol

Fasting Glucose

CRISP eReferral Tool - Referring Person Workflow

8 Referring Physician Information

The fields in these sections are populated with information provided in the Web Form.

8 Referring Physician Information

Referring Physician Name Dr. Minnie Mouse	NPI 1032c917-7c3f-48c4-9999-7adbe29c7964	Organization Meghan Hospitals	Provider Information (Notes)
Referring Person Name Rahul		Referring Person Email rahul@gmail.com	

Referral Information

Referral Submitted Date Jul 17, 1997	Referral Status Pending
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Note: Please click in to the individual programs below to check the status of each separate program.

CRISP eReferral Tool - Referring Person Workflow

9 Program Referred to Section

The “Program Referred To” section will show each program within the CBO to which a patient was referred. Click the inverted arrow to open program details.

(9a) These fields are populated by the CBO. This data is also accessible through CRISP’s ULP Snapshot tab.

Program(s) (Limit 5)

Mini One	▼
Mini Two	▼

9a Program(s) (Limit 5)

Mini One ^

Program ID min1	Program Name Mini One	Program Description	Program Care Manager
Program Care Manager Phone #			Program Care Manager Email
Program Start Date	Program End Date	Enrollment Status Pending	Appointment Date
Appointment Status			CBO Notes/Care Alert

Any additional questions, comments, or concerns?

Please email:

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Please email support@crisphealth.org for any issues, suggestions or defects.

