



Snapshot

User Guide

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Snapshot



User Guide

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Overview

The Snapshot application was built to give end users a summary view of key patient data without having to filter or click through pages of data. Snapshot is available through the CRISP Portal. Users can see recent encounters, medications, and procedures, among many other widgets that provide critical information on their patient. These widgets display an aggregation of both clinical and non-clinical data for the selected patient and pulls this information from internal and external sources to provide an at-a-glance view of the patient's clinical history.

This user guide explains how to utilize features of the Snapshot app.

User Story

Physician – “Before I meet with my patient during a visit, I can use the Snapshot feature to identify potential issues that I need to be aware of and discuss with my patient. I can quickly see their care team, and any healthcare encounters they had in the past year. This provides me with a quick orientation before digging into my patient's details in preparation for our appointment.”

Sources of Data

CRISP receives data from participating healthcare organizations per Maryland state statute.

Data types include:

- Admit, discharge, or transfer (ADTs) information, which can include patient demographic, diagnostic, and insurance information
- Patient-specific clinical summary documents, called Continuity of Care Documents (CCDs)
- Radiology images and reports
- Laboratory results
- Immunizations
- List of an organization's patients
- Other clinical that include discharge summaries, care notes, and care alerts.

For a current list of the organizations sharing data, and the type of data they are sharing, visit our [website](#). Data also available, but not listed on the website, includes Continuity of Care Documents through National Networks.

Accessing Snapshot

To access Snapshot, users must login into the CRISP Portal by:

- Navigate to the CRISP Portal URL - <https://portal.crisphealth.org>
- Log into the CRISP Portal with their username, password, and two-factor authentication credentials.

Access

To gain access to Snapshot and the CRISP Portal, your organization must have a permitted participation agreement with CRISP. A HIE Admin at your organization must request or permission user access via a credentialing tool. If you are unsure if your organization has a participation agreement or you do not know who your HIE Admin is contact [Technical User Support](#).

Launching Snapshot

To launch the Snapshot app, users must perform a patient search. Users can search for patients directly from the CRISP Portal home screen. Users must enter a first name, last name, and date of birth to render search results. Gender and Social Security Number fields can be added to narrow the selection. Data entered is not case-sensitive, and dates do not need forward slashes separating the month data and year. Entering 050281 will result in 05/02/1981.

The results of the Patient Search will appear in order of most likely to least likely matches. Each result will contain a match score and match grade. Only patients matched using the required fields plus gender and social security number (SSN) will display as 'Certain'. The possible grades include:

1. Certain ●
2. Probable ●
3. Possible ●

Results						i This is fake patient data.
First Name	Last Name	DOB	Gender	Address	Match Score	
Anna	Cadence	11/19/1981	Female	1021 MAIN ST, COLUMBIA, MD, 21045	117 - probable	●
Anna	Cadence	11/19/1981	Female	1021 MAIN ST, COLUMBIA, MD, 21045	99 - possible	●

After a successful patient search, you can launch the Snapshot application by clicking directly on the desired patient. This action will cause a Selection App pop-up to appear. User can click the four-box icon next to the Snapshot application name to launch the application. Alternatively, users can click the x icon to close the selection app pop-up and select the blue Snapshot app tile from 'Your Dashboard'. *Note because the Snapshot app requires a single patient selection, the snapshot app tile will not appear in Your Dashboard until a patient search is conducted.

The screenshot displays the CRISP application interface. At the top, the CRISP logo and tagline "Connecting Providers with Technology to Improve Patient Care" are visible. Below this is a navigation bar with links for "HIE ADMINS", "SEND FEEDBACK", "PRODUCT UPDATES", and "LOGOUT". A search bar is present with the text "Search Applications & Reports".

The main content area is divided into two sections. On the left is the "Patient Search" form, which includes fields for "First Name" (Anna), "Last Name" (Cadence), "Date of Birth" (11/19/1981), and "Gender". Below these are "Reset" and "Search" buttons. On the right is the "Search Results" table, titled "Test Patient Data".

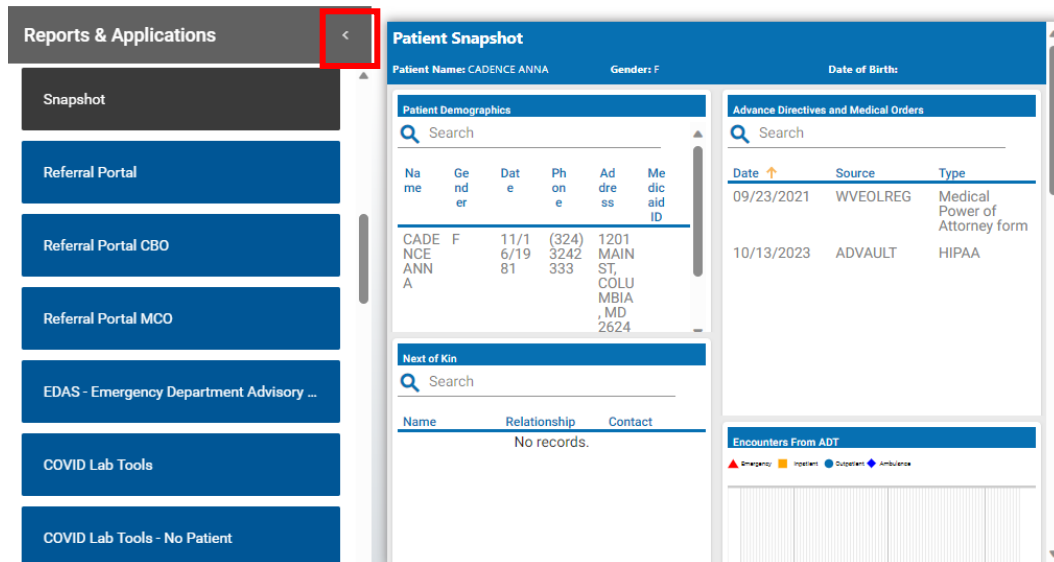
First Name	Last Name	Date of Birth	Gender	Address	Match Score
CADENCE	ANNA	11/16/1981	Female	1201 MAIN ST, COLUMBI...	117 - probable
Anna	Cadence	11/16/1981	Female		86 - possible

Below the search results is the "Your Dashboard" section, which contains several application tiles: "Snapshot", "Clinical Information", "Consent Tool", and "User Guide & Help".

A "Select App" pop-up window is overlaid on the right side of the dashboard. It lists various applications with a four-box icon next to each. The "Snapshot" application is highlighted with a red box. The list of applications includes: Snapshot, Clinical Information, Consent Tool, PMP, Referrals, MOM Care Plan, COVID Lab Tools, CareTeam, Screening, Clinical Information Staging, Search Programs, MyDirectives for Clinicians, and Snapshot Staging.

At the bottom of the dashboard, the "Snapshot" tile is also highlighted with a red box.

The Snapshot application (and all apps within the CRISP Portal) will display within the eye frame of the Portal as shown below. Users can navigate to another application by clicking the application title in the side tool bar. User can collapse the application side menu by clicking on the arrow next to Reports & Applications. The Home button at the top will navigate the page back to the Portal home screen.



Users who attempt to launch Snapshot for a patient whom they do not have an active treatment relationship for, (i.e. are not currently active on their organization’s Encounter Notification Service (ENS) Panel) will be presented with a warning message.

The user can choose to continue with viewing patient data, and they will be asked to enter a reason for attesting to the relationship. Please be aware that all these requests are recorded and audited under HIPAA guidelines.


Snapshot Features

The Snapshot Application will display the patient’s name, gender, and patient date of birth at the top of the screen. Snapshot contains twelve unique widgets which display key patient data by different data type or source. Each widget is searchable by key words at the top of the widget box. Not every patient will have data within each widget due to patient medical history. The twelve widgets are listed below. The following section contains a description of each widget.

- [Patient Demographics](#)
- [Advance Directives & Medical Orders](#)
- [Next of Kin](#)
- [Encounters from ADTs](#)
- [Encounters from Claims](#)
- [Medications from Claims](#)
- [Procedures from Claims](#)
- [Diagnoses from Claims](#)
- [Alerts](#)
- [Care Team](#)
- [Immunization History](#)
- [Assessments](#)



Patient Demographics

Patient demographic information includes the patient’s name, gender, date of birth (DOB), phone number, address, and (when available and applicable) Medicaid ID based on the most recent patient record provided to CRISP.

Patient Demographics						
 Search						
Name	Gender	Date	Phone	Address	Medicaid ID	
GILBERT GRAPE	M	01/01/1984	(999)9994349	4145 EARL C ATKINS DR, RIVER, WV 26200	M123765	

Advance Directives & Medical Orders

Any advance directives or medical orders this patient has on file will display here. Advance Directives available through CRISP are provided by mydirectives.com, a third-party website (separate from CRISP) that partners with patients to store their directives electronically. Users can click an entry in this table to launch and view a pdf copy of the directive or medical order.

Advance Directives and Medical Orders			
 Search			
Date 	Source	Type	
09/23/2021	WVEOLREG	Medical Power of Attorney form	
10/13/2023	ADVAULT	HIPAA	

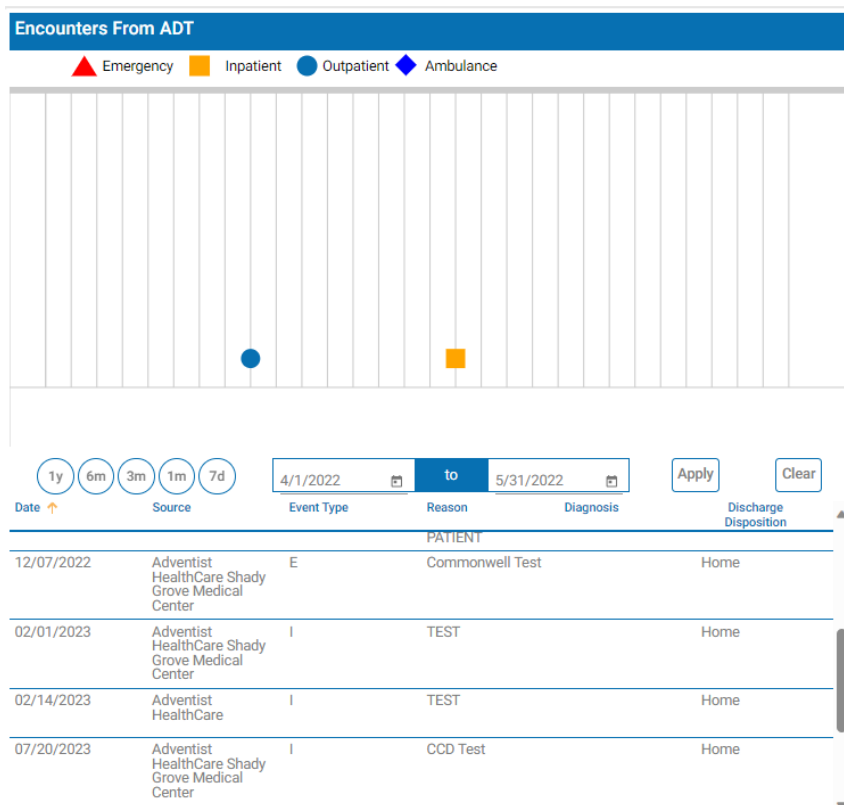
Next of Kin

Provides a list of closest living relatives to the patient on file from different sources. The Next of Kin widget will display their contact information if available. CRISP does not edit or filter these results but rather passes all next of kin information provided by CRISP participants regardless of data accurately or completeness.

Next of Kin		
 Search		
Name	Relationship	Contact
GIRLMOM ZZZSGAHREGRESSION		(301)111-1111
NELY GRAPE	U	444-555-5555

Encounters from ADTs

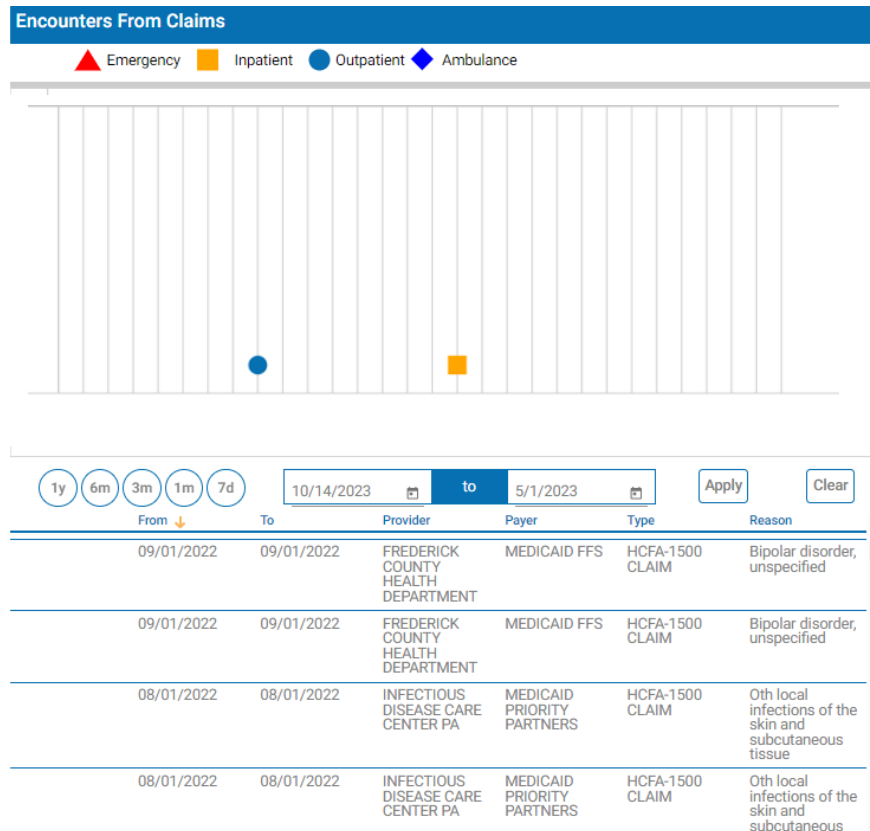
This widget displays patient’s emergency, inpatient, outpatient, and/or ambulance encounters as a histogram by encounter type across a flexible date range. Each encounter type will display on the histogram graph as a different color and shape symbol (icon key is above the graph). Users can use the date filters to change the date range displayed in the graph. Be sure to click apply once the dates in the date boxes are selected. The preset filter buttons (left side 1 year, 6 months, 3 months, 1 month, and seven days circles) apply only to the dates selected in the filter, not the current date. For example, if the date range selected is 4/1/2022 to 5/31/2022 and the user clicks the 1-month button – the graph will display the last month from the last date (5/31/2022) not from the current date. Users can hover over the symbol in the histogram to view the date, source, event type, reason, diagnosis, and discharge disposition for the encounter. This information for every encounter this patient had from the past three years is displayed in the table below the graph.



Encounters from Claims

Like the Encounters from ADTs widget, the Encounters from claims widget displays patient’s encounters as a histogram by encounter type across a flexible date range. The difference is the encounter data now is derived from insurance claim information. CRISP’s claim data arrives from MD Hospital All Payer, MD-DC-WV Medicaid, and MD Medicare (also displayed as CCLF) claims. Each encounter type will display on the histogram graph as a different color and shape symbol (icon key is above the graph). Users can use the date filters to change the date range displayed in the graph. Be sure to click apply once the dates in the date boxes are selected. The

preset filter buttons (left side 1 year, 6 months, 3 months, 1 month, and seven days circles) apply only to the dates selected in the filter, not the current date. For example, if the date range selected is 4/1/2022 to 5/31/2022 and the user clicks the 1-month button – the graph will display the last month from the last date (5/31/2022) not from the current date. Users can hover over the symbol in the histogram to view the date, provider, payer, claim type, and reason for the encounter. This information for every encounter this patient had from the past three years is displayed in the table below the graph.



Medications from Claims

This widget displays the patient’s medication history from MD Hospital All Payer, MD-DC-WV Medicaid, and MD Medicare (also displayed as CCLF) claims. The table here includes the prescribed date, medication name, quantity in units, supply of the prescription, and prescriber’s name.

The widget displays a table titled "Medications From Claims" with a search bar. The table lists medication history with columns for Date, Medication, Quantity, Supply, and Prescriber.

Date	Medication	Quantity	Supply	Prescriber
07/01/2014	sevelamer	270	90 day	FARZAD ASSAR
07/01/2014	mupirocin topical	22	10 day	VINU GANTI
07/01/2014	isosorbide mononitrate	90	90 day	REGINA M BECKER

Procedures from Claims

This widget displays the patient's procedures history from MD Hospital All Payer, MD-DC-WV Medicaid, and MD Medicare (also displayed as CCLF) claims. Procedures differ from Encounters as procedures are the billable events that may take place during an encounter. For example, the whole inpatient hospital stay would be an encounter which may include multiple procedures like electrocardiograms, medicine injections, blood panels etc. The table here includes the date range, source (location preformed), and description of the procedure.

Procedures From Claims			
From	To	Source ↑	Description
05/01/2018	05/01/2018	ADVENTIST HEALTHCARE, INC.	Hospital Observation Per Hr
06/01/2016	06/01/2016	ADVENTIST HEALTHCARE, INC.	Hospital Observation Per Hr
01/01/2019	01/01/2019	ADVENTIST HEALTHCARE, INC.	Hepatitis B Surface Ag Ia
01/01/2019	01/01/2019	ADVENTIST HEALTHCARE, INC.	Hemoglobin Glycosylated A1c
06/01/2016	06/01/2016	ADVENTIST HEALTHCARE, INC.	Hemoglobin Glycosylated A1c
05/01/2019	05/01/2019	ADVENTIST HEALTHCARE, INC.	Glucose Blood Test

Diagnoses from Claims

This widget displays the patient's diagnoses history from MD Hospital All Payer, MD-DC-WV Medicaid, and MD Medicare (also displayed as CCLF) claims. Diagnoses are conditions or disease states which identify the cause of the patient's symptoms to inform management and prognosis. Examples of diagnoses include Diabetes, Heart Failure, Anemia, Cancer, etc. The table here includes the date, condition, and diagnosis code.

Diagnoses From Claims		
<input type="text" value="Search"/>		
Date ↑	Condition	Diagnosis Code
08/26/2016	DepressiveDisorders	
09/07/2016	Diabetes	
09/07/2016	Hypertension	
06/27/2022	Anemia	





Alerts

The alerts widget contains information on patient referral, health base program enrollment/completion, clinical alerts of overdose events, and infectious disease testing and results. The table here includes the date, source code, description, and type of alert.

Alerts			
Date ↑	Source	Description	Type
		from this patient's visit under the Clinical Notes tab of Health Records.	
07/02/2021	ENS_UNITEMCO	Gilbert has been referred to a DIABETES PREVENTION PROGRAM on 3/1/2021 by the United MCO.; There are additional notes from this patient's visit under the Clinical Notes tab of Health Records.	CA
07/02/2021	ENS_MOFE	Gilbert has enrolled into GBMC/Movable Feast Nutrition Program on 4/1/2021; There are additional notes from this patient's visit under the Clinical Notes tab of Health Records.	CA

Care Team

The Care Team widget lists the organizations and providers that have a relationship with your patient. This can include your patient's care program and care manager and identifies the 'start date' and 'last updated' dates for a Care Team relationship. Care Team data is populated from ADTs and patient panels submitted to CRISP. Hover over the blue information icon (if available) to get contact information for providers and care managers. When the Care Team is identified as a 42 CFR Part 2 (substance use disorder treatment) facility, an orange icon symbol will appear at the beginning of the Care Team row. Clicking on the icon will show a disclaimer specifying that the information contained is subject to 42 CFR Part 2 rules. The table here includes the source of the information, associated care program, provider name, role, and date range of relationship.

Care Team						
<input type="text" value="Search"/>						
Source	Care Program	Provider	Role	Start Date	Last Updated	
Adventist HealthCare		ADEBOWAL E PREST	 Primary Care	2019-10-01	2021-08-25	
Adventist HealthCare Shady Grove Medical Center		ADEBOWAL E PREST	 Primary Care	2023-08-09	2023-08-09	
Danbury Hospital		 (804) 968-5700  MDTERP92@GMAIL.COM		2022-05-18	2022-05-18	
United MCO Referrals		Smith Dr.	Primary Care	2021-04-21	2021-04-21	

Immunization History

The immunizations (Vaccine) history widget displays all the patient’s immunizations reported to CRISP through the relevant state's Immunization Information System (IIS). Maryland’s IIS is ImmUNET. The table here displays the vaccine date, vaccine name, administering location, and expiration date of the immunization.

Immunization History			
Search			
Date ↑	Vaccine	Administered Location	Expiration Date
06/07/2001	HepB pediatric	UM Prince Georges Hospital Center	
03/15/2018	Pneumo-Conjugate 13	Adventist HealthCare Takoma Park Campus - Alternate Care Site	03/15/2019
05/12/2019	Hib-HbOC	Adventist HealthCare Takoma Park Campus - Alternate Care Site	
10/01/2019	Novel Influenza-H1N1-09, preserve-free	Adventist HealthCare Takoma Park Campus - Alternate Care Site	10/01/2020

Assessments

Any social determinants of health screening information shared with CRISP will display in this table. Social screening questionnaires and topics include Housing instability, food, living, transportation, utilities, safety, financial situation, employment, education, substance use, mental health, etc. Users can click on a record to load the entry and view the screening response.

Assessments

Search

Date ↓	Source	Description
12/14/2023	CRISP_ULP	AHC
12/05/2023	CRISP_ULP	MOMSDOH
12/05/2023	CRISP_ULP	AHC

AHC
CRISP_ULP
12/14/2023

Housing Instability/Homelessness

AHC
CRISP_ULP
12/14/2023

Housing Instability/Homelessness

What is your living situation today?

I have a steady place to live

Technical User Support Contact Information

Support Phone	Email Address	Portal URL
877.952.7477	support@crisphealth.org	https://portal.crisphealth.org