

Population Explorer Filtering Webinar October 2024



Background

Background - CEND



CRISP Event Notification Delivery (CEND)









- CEND is a complete re-thinking of decade old push alerting technology.
- Using our data lake infrastructure we create curated data sets based on our participant's customizations and deliver them through methods they can support.
- Far beyond ADT we can provide real-time push extracts based on A1C levels, diabetes risk factors, hospitalizations, and social needs data



- CRISP
- I am a social needs provider and want to receive a notification into FindHelp when my client experiences a new Z-Code Diagnosis (like food insecurity)
- I am a primary care provider and want to know if my patient experiences a lab-sourced glucose reading over 200. I want to receive that notification to the secure texting provider my health system uses.
- I am a maternal health provider and I want to receive a notice when my patient, who is an expecting mother, has an emergency room encounter that could impact her labor and delivery



Background - Panel

- CRISP
- What is a panel? A panel is an excel spreadsheet pulled from an offices EMR that includes patients from the past 18 months. This is what CRISP considers an "active" patient.
- What is the purpose of a panel? A panel serves multiple purposes. First, it establishes a patient relationship between CRISP and your organization. This gives CRISP an idea of what patients you are going to query. You can always search patients outside of your panel with a legitimate reason (ie care coordination, new patients etc) but you will get an "attestation" warning that the patient is not on your panel. A panel is also how CEND notifications are established. We pull notifications for patients on your panel.
- What fields are required for a panel? All panels must include Patient ID, First Name, Last Name, Address, City, State, Zip, DOB and Gender. The panel will not load without these fields.
- <u>https://www.crisphealth.org/what-is-a-panel/</u>



Background – CEND Delivery Methods

- Service Level MFT & SFTP Accounts
- EMR Integrations
- CRISP Portal through Population Explorer





Population Explorer



Population Explorer is integrated directly into the CRISP Portal, enabling users to view, filter, and export CEND generated notifications. It also allows seamless access to patient data in the Clinical Information tool.

CRISP					Connecting Pro	viders with Technology to Im	prove Patient Care
© CRISP. All Rights Reserved.			🛃 MY HIE ADMIN(S)	SEND FEEDBACK			C LOGOUT
👚 номе					Search Applications & Repo	orts	хQ
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Q Patient Search	Search Results				Î	Population Explorer	
First Name * Last Name *	First Name Last Name	Date of Birth	Gender Address	Ν	Natch Score	View Panel DC Demo Panel 1 (DC_CEND_DE	M01) 👻
Date of Birth * 🛗 Gender 👻	No records found					Downloa	ad
SSN						MALONE_DEMO, MARGARET Encounter Type: Outpatient Event Time: 2024-02-29 14:56	DOB: 1942-06-01 Gender: Female
Reset Search Your Dashboard For applications requiring path	ient context, please start by using the Patie	ent Search interface a	above.			MALONE_DEMO, MARGARET Encounter Type: Outpatient Event Time: 2024-02-29 14:56	DOB: 1942-06-01 Gender: Female
						GROVE_DEMO, YVETTE Encounter Type: Inpatient Event Time: 2024-02-29 09:14	DOB: 1935-06-01 Gender: Female
HIE Admin Tool CRISP Role Manag	ger Reports	Medis	olv	2023 eCQMs Developme	ent	GROVE_DEMO, YVETTE Encounter Type: Inpatient	DOB: 1935-06-01 Gender: Female



Population Explorer Guide - Panel Selection

To choose a panel, use the drop-down menu labeled 'View Panel' at the top of the pane. All your available panels will be listed here. The pane will then display encounter notifications for the selected panel. Notification updates are fetched every twenty minutes, with new notifications appearing automatically in a red icon above the table. Twenty-five notifications load at a time; simply scroll down to load more. If no notifications are available, a 'No data to display' message will show. If there are new notifications in a panel you're not viewing, a small red icon appears in the upper-right corner. To download the current list of notifications, click the 'Download' button below the panel selection dropdown menu.



Population Explorer Guide – Patient Record/Other App Launching

When right clicking on a patient within the expanded or collapsed view, you're able to link back to their clinical information available in the portal.



Population Explorer Guide – Expanded View

۵	Population Explorer	View Panel DC Demo Panel 1 (DC_CEND_DEMO1)	🗸 📓 Export
DE	AIL TABLE		
lotif ca All	cation Display Type		- + Patient Export
IOH IS Idmit Iotitic	SON_DEMO, PAULA DOB: 1951-06-01 Date: 2024-03-06 15:00 Female cation Type: Outpatient Encounter ty: Medstar Washington Hospital Center	■ Follow-Up Status Follow-Up Status: Complete ▼ Last Modified: 2024-09-04T11:13:40.744404 By: joi.perry@crisphealth.org	
IOH IS Idmit	ISON_DEMO, PAULA DOB: 1951-06-01 t Date: 2024-03-06 15:00 Female cation Type: Timely Follow Up Chronic Condition	- Patient Demographics	
acilty	ty: Medstar Washington Hospital Center	First Name:	PAULA JOHNSON DEMO
BA	LDEMO, MOHAMED DOB: 1938-06-01	Gender:	Female
lotii c	cation Type: Outpatient Encounter	Address:	PO BOX 99997, BALTIMORE, MD, 21206
acilty	ty: Medstar Georgetown University Hospital	Home Phone:	

Using the arrows on the side of population explorer you can expand or collapse the view. The expanded displays more about the patient, so you'll be able to see their demographics, encounter details, and follow up status.



Population Explorer	View Panel DC Demo Panel 1	(DC_CEND_DEMO	1)					Export
DETAIL TABLE								
Notification Display Type All								Patient Export
Name	Age Gender	Panel MRN	MRN	State	Primary Care Provider	Notification Type	Encounter Type	Follow-Up Status
JOHNSON_DEMO, PAULA	73 F	21475794	3342188	MD	Non LBH, Provider	Outpatient Encounter	Outpatient	Complete 🔷
JOHNSON_DEMO, PAULA	73 F	21475794	3342188	MD	Non LBH, Provider	Timely Follow Up Chr	Outpatient	Complete 👻
ABADI_DEMO, MOHAMED	86 M	1318007	0693070	VA		Outpatient Encounter	Outpatient	Not Started
ABADI_DEMO, MOHAMED	86 M	1318007	0693070	VA		Timely Follow Up Chr	Outpatient	In Progress 🛛 👻
JOHNSON_DEMO, PAULA	73 F	21475794	3342188	MD	Non LBH, Provider	Outpatient Encounter	Outpatient	Complete 👻
JOHNSON_DEMO, PAULA	73 F	21475794	3342188	MD	Non LBH, Provider	Timely Follow Up Chr	Outpatient	In Progress 🛛 👻
JOHNSON_DEMO, PAULA	73 F	21475794	3342188	MD	Non LBH, Provider	Outpatient Encounter	Outpatient	Not Started
« < Page 1 of 24 > »								Displaying 1 - 25 of 580

Population Explorer Guide – Follow Up Status

Follow-Up Status
Follow-Up Status: Complete
Last Modified: 2024-05-03T11:29:53.926304 By: joi.perry@crisphealth.org

Users can use the follow up status drop-down value to provide updates to other users of your panel to reflect resolving each notification. A full history of changes to the follow up status can be seen by scrolling.

Follow-Up Status History						
101101	op otatas mo	lory				
	Updated Date	Updated By	Status			
	05/03/2024	joi.perry@crisphealth.org	In Progress			
	04/24/2024	anishpk+admin@hmetrix.com	Not Started			

Options:		
	Not Started	•
	In Progress	•
	Complete	-



	Patient Demographice
ANDREW	First Name:
CARPENTER_DEMO	Last Name:
Male	Gender:
222 SAMPLE ST, LANHAM, MD, 20706	Address:
	Home Phone:
	Work Phone:
<mark>1</mark> 964-06-01	Date of Birth:
	Date of Death:
41894	Panel MRN:



Notification Display Type	
All	~
All	
Encounters Only	
Notification Only	





Panel Deta	Panel Details					
ACO						
Grou	ib:					
Insu	rance Type:					
Loca	ation:					
Nati	onal Provider Identifier (NPI):					
Prac	tice:					
Prim	nary Care Provider:					

Population Explorer Guide – Selected Encounter Details

Se Se	elected Encounter Details		_
	Admit Date / Time:	2021-08-25 15:41	
	Event Date / Time:	2021-10-18 12:27	
	Admit Source:	TA	
	Care Manager:		
	Care Manager Email:		
	Care Program:		
	Death Indicator:		
	Discharge Date:	2021-09-04 12:30	
	Discharge Disposition:	AHR	
	Discharge To Location:		
	Encounter Type:	Inpatient	
	Facility:	NATIONAL REHABILITATION HOSPITAL I	
	Facility Type:	Hospital	
	Insurance From ADT:		
	Patient Class:	1	
	Patient Complaint:	AMP	
	Primary Diagnosis Code:		
	Primary Diagnosis Description:		
	Provider:		
	rionael.		

Population Explorer Guide – Risk & Aggregate Details

Risk De	tails								
	Risk Methodology 1:								
	Risk Methodology 2:								
	Risk Score 1:					5.78			
	Risk Score 2:					4.65			
Aggreg	Aggregate Details								
	Visit Type	Past Visits - Excludes Current Visit In Last:							
		30 Days	60 Days	90 Days	180 Days				
	Inpatient	0	0	0	0				
	Outpatient	0	0	0	0				
	ER	0	0	0	0				
	OBS(Observation)	0	0	0	0				



Diagnos	Diagnosis Details						
	Diagnosis Code	Diagnosis Description					
	Z99.2	DEPENDENCE ON RENAL DIALYSIS					
	G47.00	INSOMNIA, UNSPECIFIED					
	E11.42	TYPE 2 DIABETES MELLITUS WITH DIABETIC POLYNEUROPATHY					
	Z87.01	PERSONAL HISTORY OF PNEUMONIA RECURRENT					
	150.22	CHRONIC SYSTOLIC CONGESTIVE HEART FAILURE					
	G89.18	OTHER ACUTE POSTPROCEDURAL PAIN					
	Z74.09	OTHER REDUCED MOBILITY					



Population Explorer Guide – Encounter History

Encour	nter History	
	GROVE_DEMO, YVETTE Encounter Type: Inpatient	DOB: 1935-06-01 Gender: Female
	Event Time: 2024-02-29 09:14	
	GROVE_DEMO, YVETTE	DOB: 1935-06-01
	Encounter Type: Inpatient Event Time: 2024-02-29 05:37	Gender: Female
	GROVE_DEMO, YVETTE Encounter Type: Inpatient Event Time: 2024-01-08 13:41	DOB: 1935-06-01 Gender: Female
	GROVE_DEMO, YVETTE Encounter Type: Inpatient Event Time: 2023-11-09 09:36	DOB: 1935-06-01 Gender: Female

In Encounter History, you will be able to see encounter history dating back to the last six months



Population Explorer Settings		×
Default panel		•
Default filter		-
Default widget view		
Normal View		•
Download size		
500		*
Hide notification status management features:		
Enable notification auto load:		
DISCARD CHANGES	SAVE CHANGES	CLOSE



Population Explorer	View Panel DC Demo Panel 1 (DC_CEND_DEMO1)		Export	-
DETAIL TABLE				
Notification Display Type All JOHNSON_DEMO, PAULA DOB: 1951-06-01 Admit Date: 2024-03-06 15:00 Female Notification Type: Outpatient Encounter Facility: Medstar Washington Hospital Center JOHNSON_DEMO, PAULA DOB: 1951-06-01 Admit Date: 2024-03-06 15:00 Female Notification Type: Timely Follow Up Chronic Conditi- Facility: Medstar Washington Hospital Center ABADI_DEMO, MOHAMED DOB: 1938-06-01 Admit Date: 2024-03-05 09:00 Male Notification Type: Outpatient Encounter Facility: Medstar Georgetown University Hospital	Follow-Up Status Follow-Up Status: Last Modified: 2024-09-04T11:13:40.744404 By: joi.perry@crisphealth.org Patient Demographics First Name: Last Name: Gender: Address: Home Phone:	The bottom 'Patient Export' button allows for export of the selected patients encounter. PDF & CSV options are available for a single patient.	PAULA PAULA JOHNSON_DEMO Female PO BOX 99997, BALTIMORE, MD, 21206	The top 'Export' button allows for export of all encounters associated to the selected panel. Only export to CSV is available for all encounters



Population Explorer		View Pane DC Demo	Panel 1 (DC_CEND_DEMO1)	x Export
DETAIL TABLE			Notice and Acknowledgement: Exporting PHI ×	
ALONE_DEMO, MARGARET counter Type: Outpatient ent Time: 2024-02-29 14:56	DOB: 1942-06-01 Gender: Female	Follow-Up	You are about to download a file containing privileged, confidential, and/or protected health information (PHI) that may be subject to protection under the law, including the Health Insurance Portability and Accountability Act of 1996, as amended (HIPAA). By clicking the 'Download' button, you are stating that you are authorized to view the information in this file. An audit record will be saved with the information below.	Export
LONE_DEMO, MARGARET counter Type: Outpatient ent Time: 2024-02-29 14:56	DOB: 1942-06-01 Gender: Female	Last Modi	Note: If you are a systems administrator, remember that downloading this file to your personal device is not allowed. You must use an approved device to download this file.	
OVE_DEMO, YVETTE counter Type: Inpatient ent Time: 2024-02-29 09:14	DOB: 1935-06-01 Gender: Female		ACCEPT AND CONTINUE CANCEL	
OVE_DEMO, YVETTE counter Type: Inpatient	DOB: 1935-06-01 Gender: Female		Gender: Address:	

Read and accept Notice and Acknowledgement for Exporting PHI

Population Explorer Guide – Data Exports

Choose the optional fields you want to include in the export. You can also save the selected fields as your Default export settings by clicking 'Save Selected Fields as my Default'. Please note that PDF printing is only available for a single patient selection, not for exporting a whole panel.

Population Explorer - Export Interface

Select the data elements below that you would like to include in the exported extract. Some fields are required for successfull export and may not be deselected.

×

Doguizod Fieldo	0	tional Fieldo					
Required Fields		tional Fields					
 First Name 		ACO		Address		Home Phone	•
Last Name		Work Phone		Admit Date / Time		Admit Source	l
Gender		Care Manager		Care Manager Email		Care Program	
		Cell Phone	~	Date of Birth		Date of Death	
		Death Indicator		Discharge Date / Time		Discharge Disposition	
		Discharge To Location		Encounter Type		Facility	
		ER Last 30 Days		ER Last 60 Days	~	ER Last 90 Days	
		ER Last 180 Days		Facility Type		Follow up Status	
		Group		Inpatient Last 30 Days		Inpatient Last 60 Days	
		Inpatient Last 90 Days		Inpatient Last 180 Days		Insurance From ADT	
Select All Select None		Insurance Type	~	Location		MRN	
Save Selected Fields As My Default		National Provider Identifier (NPI)		Notification Event Type		Notification Type	
Excel		OBS (Observation) Last 30 Days		OBS (Observation) Last 60 Days		OBS (Observation) Last 90 Days	
An approved device must be used to download this file. In downloading this data, you agree to CSS's terms for downloading protected patient information(PHI).		OBS (Observation) Last 180 Days		Outpatient Last 30 Days		Outpatient Last 60 Days	•

B Population Explorer Guide – Data Exports

	🐺 CRI	SP																
	Ро	pulatio	on Explore	r - Enc	ounter D	etails					Р	DF E	xpor	t				
	Patient Name Date of Birth	: MALONE : 1942-06-0	_DEMO, MARGARI 01	ET		Gende	: Female											
	Patient Demogra First Name: MARGARE' Last Name: MALONE_D Gender: Female Address: 25 RIBBON St Date of Birth: 1942-06-0	aphics: т ремо т, снеvy сн и	IASE, MD, 20815															
	Selected Encour	nter Detai	ls:															
	Diagnosis Detail	ls																
	Diagnosis Code		Diagnos	is Description	า													
	Encounter Histor	ory																
	First Name Last Na	lame	DOB	Gender	Encounter Type	Event Tim	e											
	MARGARET MALO	NE_DEMO	06/01/1942 00:00:00	Female	Outpatient	02/29/2024	14:56:00											
	MARGARET MALO	NE_DEMO	06/01/1942 00:00:00	Female	Outpatient	02/27/2024	03:42:44											
	MARGARET MALO	NE_DEMO	06/01/1942 00:00:00	Female	Outpatient	02/18/2024	08:27:47											
	MARGARET MALON	NE_DEMO	06/01/1942 00:00:00	Female	Outpatient	02/10/2024	03:41:47											
	MARGARET MALON	NE DEMO	06/01/1942 00:00:00	Female	Outpatient	02/06/2024	15:00:12											
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			AI	Clipboard I	$i \times f_x$	First Name	121	Alignment	Number	121	styles	Cells	· E	diting	Sensitivit	/ Add-ins	1	
Exc	el Expor	t		A First Name MARGARET	B Last Name MALONE_DEMC	C Gender Female	Address 25 RIBBON ST, CHE	D VY CHASE, MD, 208:	Date o	E F of Birth = 942-06-01,	G	H I	L	к	L	м	N	0
	-		k S															
			5															
			3															
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			1															
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			6															
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			0															
			1															
			3															
			5															

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Visit_Details Encounter_History About



Filters



Qui	ck Filter	
Diagnosis Codes		~
Input Value E03.9		APPLY
Death Indicator : N		0
Diagnosis Codes : E	03.9	0
Save	d Filters	
Type to select	~	Load
Clear Filters	Save Cu	urrent Filter

- Use the 'Quick Filter' bar on the right side of the screen to create, manage, save, and apply filters.
- To add a new filter, use the drop-down menu to select the element you want to filter on. Click 'Apply' to add the filter to the current panel.
- Use the delete icon next to filter criteria to remove a singular filter item.
- You can apply as many filters as you like; each additional different filter item is applied as 'AND' criteria in relation to other filter items. If it's the same filter it will be an 'OR' fuction.
 - Note: it is possible to combine both 'AND' and 'OR' criteria



- Use the 'Save Current Filter' button to save the current set of filters for future use.
- To use a previously saved filter, select it from the 'Saved Filters' dropdown, and click the 'Load' button. Note that this will override any filters already in place.
- Use the 'Clear Filters' button to clear all currently applied filters.





- Free text field these are fields that users need to type in an input. It will work as an includes function meaning it search for all text that include the inputs given.
- **Time Field** these fields are related to a date or time and will have the following selection options:
- Selection/Input Field will include preset selections, values or flags users can select between



Filtering Workarounds

- If future events are populating for your panel
 - Use the 'Quick Filter' pane and select the 'before date' option from the filter menu. From the calendar, select the following day to view only current events
- When using the 'Facility Type' filter
 - This filter is currently a manual free-type style with a 'contains' logic. Refer to the 'Facility Type' section within individual messages to find values for this filter.

	Search Applications & Reports		хQ
	B. Ernort	Quick Filt	ter _
		Admit Date / Time	
		^	
	🕒 Export	Last 1 Day	
		Last 7 Days	
		Lest 30 Days	
		Before Date •	
		After Date	O APPLY
		Custom Date	
		Start Date 🕨	
		End Date	
		Filter Value:	
Quick Filt	er		- 1
lmit Date / Time	~		
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ter Value:	ADDIV		
fore 08/08/2024	V AFFLI		
1016 00/00/2024		Saved Filt	ers
		Type to select	✓ Load
Admit Date / Time : Before 0	18/08/2024		





Filter Name	Data Source	Definition	Field Type
ACO	Panel	An Accountable Care Organization (ACO) is a network of healthcare providers that collaboratively manage and coordinate care for a specific patient population, aiming to improve outcomes and reduce costs, often through shared savings programs.	Free Text
Admit Date/Time	ADT	The date and time which a patient was first admitted for an event	Time Field
Admit Source	ADT	Source of the admission from the ADT	Free Text
Care Manager	Panel/CRISP Data	The name of the Care Manager for a patient in any given event	Free Text
Care Manager Email	Panel/CRISP Data	The email address of the Care Manager for a patient in any given event	Free Text
Care Program	Panel	A care program is a structured healthcare initiative designed to provide coordinated, comprehensive services to improve patient outcomes for specific conditions or populations.	Free Text



Filter Name	Data Source	Definition	Field Type
Date of Birth	ADT/CRISP Data	The day, month, and year on which the patient for a given event was born	Time
Date of Death	MD Vital Stats	The day, month, and year on which the patient expired according to MD Vital Statistics	Time
Death Indicator	MD Vital Stats	Flag to indicate if a patient is expired	Selection – Y/N
Diagnosis Code	ADT	The code for any of the diagnoses the patient received (ex: COVID 19 code is U07.1)	Free Text
Diagnosis Description	ADT	The name of any of the diagnoses the patient received	Free Text
Discharge Date/Time	ADT	The date and time which a patient was discharged for an event	Time





Filter Name	Data Source	Definition	Field Type
Discharge Disposition	ADT	Discharge disposition in an ADT message refers to the patient's post-discharge status or the location they are sent to, such as home, rehab, or another care facility.	Free Text
Discharge to Location	ADT	Specific location a patient is discharge too if available	Free text
Encounter Date	ADT	The date which a patient encounter occurred	Time
Encounter Type	ADT	The type of encounter for a given patient event (ex: Emergency, Inpatient, Observation, Outpatient)	Selection
Facility	ADT	The name of the facility at which a patient event occurred	Free Text
Facility Type	ADT	The type of facility at which a patient event occurred (ex: hospital)	Free Text





Filter Name	Data Source	Definition	Field Type
Follow up status	Population Explorer Input	The status set by your organization for an individual patient event	Selection Field: Not Started, In Progress, Complete
Group	Panel Only		Free Text
Insurance From ADT	ADT	refers to the patient's coverage details, including the insurer and plan information used for billing and medical services during their care.	Free Text
Insurance Type	ADT	refers to the category of healthcare coverage or insurance plan the patient has, such as private, Medicare, Medicaid, or self-pay.	Free Text
Location	Panel Only	User defined panel field	Free Text
MRN	ADT	MRN (Medical Record Number) in an ADT message is a unique identifier assigned to a patient within a healthcare facility's records, used to track their medical history and treatments	Free Text

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Filter Name	Data Source	Definition	Field Type
National Provider Identifier (NPI)	Panel	The provider associated with a patient encounter, by NPI number	Free Text
Panel MRN	Panel	MRN (Medical Record Number) provided from the user panel	Free Text
Notification Type	CEND	Different types of Intelligent alerts users can select by if configured	Selection
Patient Class	ADT	indicates the patient's status or type of care being provided, such as inpatient, outpatient, emergency, or observation.	Selection
Patient Complaint	ADT	The issue a patient described experiencing upon admission for an event (ex: chest pains)	Free Text
Patient Name	ADT/CRISP Data	The name of the patient associated with a given event	Free Text
Practice	Panel	User defined panel field where the patient is assigned to	Free Text
Primary Care Provider	Panel/CRISP Data	PCP input by the panel or filled in by CRISP data	Free Text



Filter Name	Data Source	Definition	Logic
Primary Diagnosis Code	ADT	identifies the main medical condition or reason for the patient's treatment, represented by a standardized code such as ICD-10. (ex: COVID 19 code is U07.1)	Free Text
Provider	ADT	refers to the healthcare professional or organization responsible for delivering care to the patient, including physicians, nurses, or clinics.	Free text
Risk Methodology 1	Panel Only	User defined Risk Methodology submitted on the panel	Free Text
Risk Methodology 2	Panel Only	User defined Risk Methodology submitted on the panel	Free Text
Risk Score 1	Panel Only	User defined Risk score submitted on the panel	Free Text
Risk Score 2	Panel Only	User defined Risk score submitted on the panel	Free Text





Aggregate Details				
Visit Type	Past Visits - Excludes Current Visit In Last:			
	30 Days	60 Days	90 Days	180 Days
Inpatient	0	0	0	0
Outpatient	0	0	0	0
ER	0	0	0	0
OBS(Observation)	0	0	0	0

Q	uick Filter	
OBS (Observation) Last	30 Days	Ŧ
Input Value		
3	\$	APPLY

ER Last 30 Days	Inpatient Last 30 Days	OBS (Observation) Last
FR Last 60 Dava	Inpatient Last 60 Days	OBS (Observation) Last
ER Last 00 Dava	Inpatient Last 90 Days	Outpatient Last 30 Days
ER Last 190 Dave	Inpatient Last 180 Days	Outpatient Last 60 Days
En Last 100 Days		Outpatient Last 00 Days



	OBS (Observation) Last 90 Days
	OBS (Observation) Last 180 Days
	Outpatient Last 30 Days
	Outpatient Last 60 Days
	Outpatient Last 90 Days
	Outpatient Last 180 Days



Questions?

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