



# CEND & Population Explorer

## User Guide Overview

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# 1 Overview

Population Explorer is a module of the HIE Portal that enables near-real time encounter, logic-based, and preventive services notifications from CRISP Shared Services (CSS), as well as functionality to filter, view details, track notification status, and export notifications of interest. This document serves as a general user guide to assist in navigating Population Explorer and using its functionality to full effect.

Population Explorer offers a user-friendly interface for clinicians and care teams to review patients' encounters, providing access to the latest encounters and six-month encounter history. It is integrated directly in the CRISP Portal Homepage. To learn more, visit our [CEND and Population Explorer website page](#).

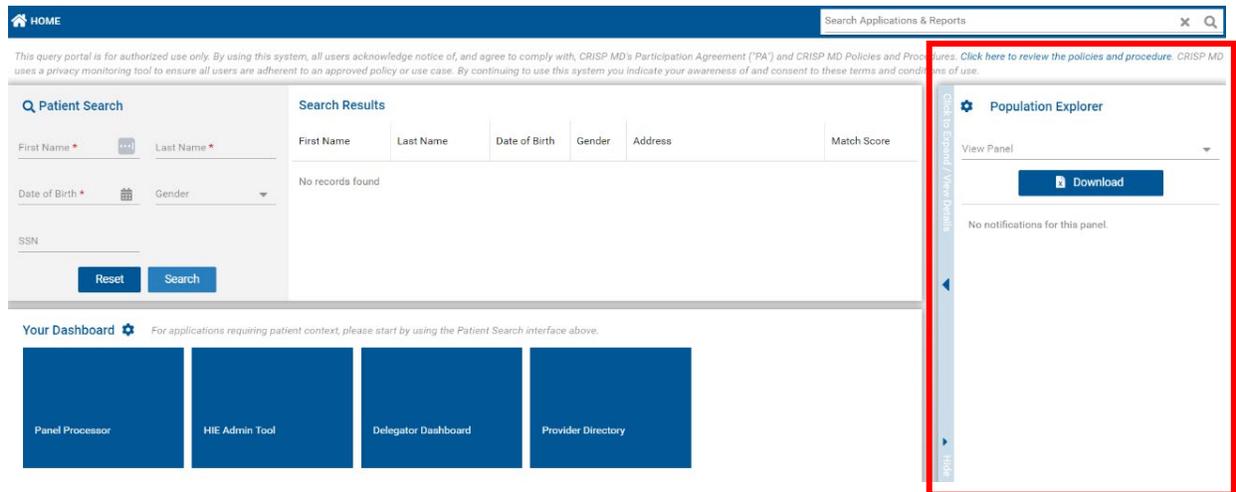
## 1.1 Accessing Population Explorer

Access to the Population Explorer module is granted by an organization's HIE Admin from the CSS Salesforce HIE Admin Tool. Once a user has been granted access, it will natively appear in the HIE Portal Landing page as a new widget on the right-hand side of the screen. Contact the organizational HIE Admin, if a user does not have access to Population Explorer and believes they should.

Once a user has access to Population Explorer itself, access to patient notifications is managed via Panel Subscriptions. For more information on creating and managing panels, users can contact their account manager.

## 2 Population Explorer Functionalities

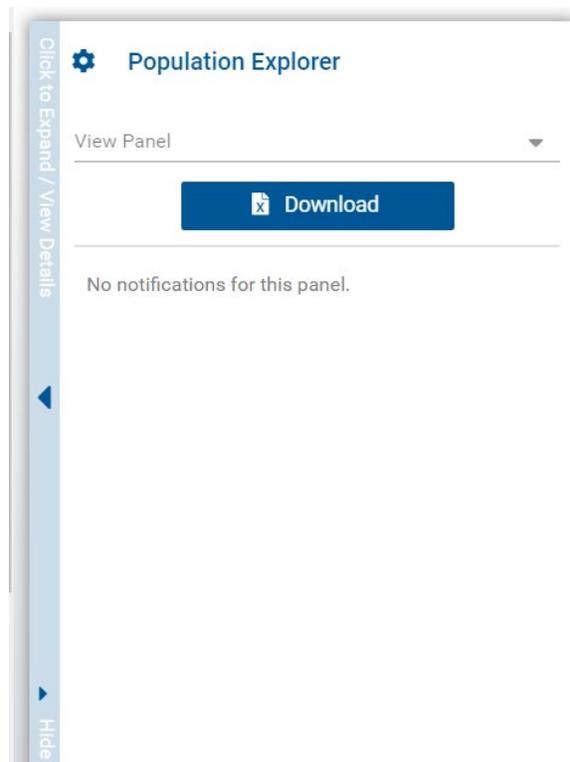
After logging into the CRISP Portal once Population Explorer access has been granted, users will see a new widget pane appear on the right-hand side of the screen, as shown below.



### 2.1 Panel Selection & Notification Timing

To select what notifications to currently display, users can access the drop-down menu at the top of the pane with the label 'View Panel.' All currently assigned panels, along with any advanced filters a user has created (see section 2.8.2 below) or any global filters that have been created for all users will be available here. Advanced filters are indicated by a list icon to the left of the display name, while global filters are indicated by a small globe.

The Population Explorer panel populates with encounter, preventive services, and logic-based notifications for that panel and its associated patients. Encounters are shaded white, logic-based notifications are shared yellow, and preventive services are shaded green for easy visual identification. Note that encounter data includes near-real time EMS data as well as traditional consolidated ADT messages; due to a differing data source, different data elements may be available for such notifications. See section 3.2 for more information on logic-based and preventive services notifications.



Notification updates are fetched every twenty minutes but are not loaded to the interface automatically to avoid disrupting user workflows. A notification icon will appear in the upper right-corner of the Population Explorer after a notification sync, informing users that new notifications may be available. Click the icon to load any new notifications. Twenty-five notifications load at a time; simply scroll down to load additional notifications. If no notifications are available, a 'No data to display' message will show.

To download the current list of notifications, click the 'Download' button below the panel selection dropdown menu.

## 2.2 Population Explorer Settings

Clicking the gear icon in the upper left corner of the Population Explorer pane will bring up the user preference settings for the module. This allows users to set their preferred defaults, including the default view on load for the Population Explorer, default panel to select on opening, default filter to select on opening, and default number of records included in downloaded extracts. Users can also set whether they would like to hide notification status management and enable advanced panels here. Notification auto-load is currently disabled and cannot be turned on.

### Population Explorer Settings ×

Default panel  
WVHIN Demo2 - Ambulatory Panel (WV\_D2\_AMB\_P) ▼

---

Default filter ▼

---

Default widget view  
Normal View ▼

---

Download size  
500 ⬆️⬆️

---

Hide notification status management features:

Enable notification auto load:

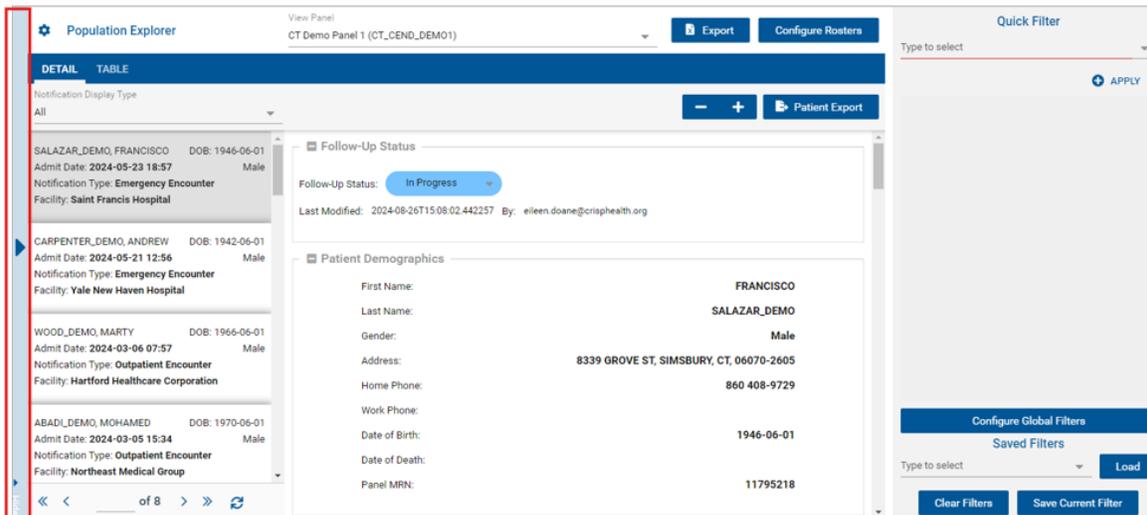
Enable advanced panel builder:

[RESET ALL](#) [DISCARD CHANGES](#) [SAVE CHANGES](#) [CLOSE](#)

## 2.4 Expanded View

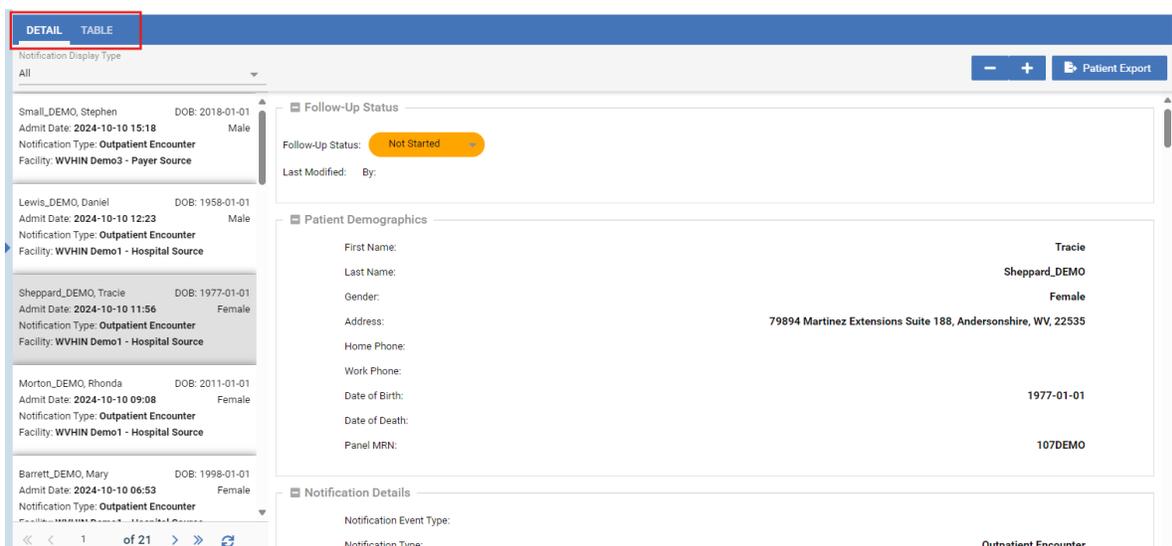
To expand the Population Explorer widget and access additional functionality, click the blue expansion bar on the left-hand side of the pane. Clicking the expansion bar again will collapse, then hide the pane entirely. Clicking again will restore the pane to its default view.

The Expanded View shows the current notification list, Detail View, and Quick Filter interfaces all in one location, as shown below. Users can also toggle between viewing encounters, logic-based notifications, preventive services, or any combination thereof using the 'Display Type' selector in the upper left-hand corner of the window. These items are described in greater detail in the sections that follow.



## 2.5 Detail View

To view the details for a notification, users can click on the notification they want to review. This will bring up a Notification Detail View that contains additional information on the notification, as shown below.

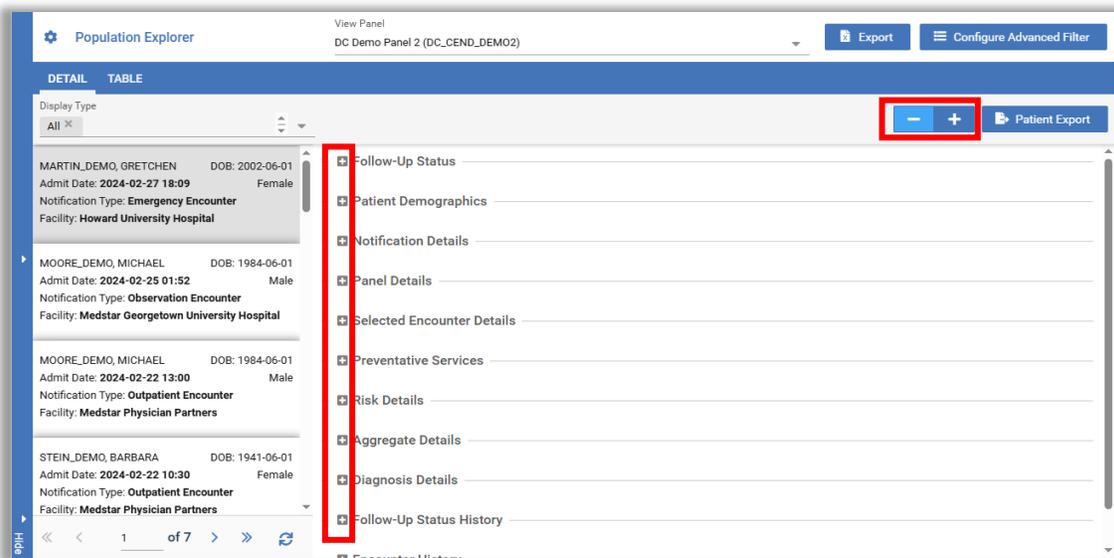




The information available in Detail View will depend on the notification type (encounter, logic-based, or preventive services) and elements available in the underlying data source. Sections that do not apply to the selected notification will be auto collapsed.

Along with the encounter details for the selected notification, the Detail View will contain all other notifications for the selected patient, loading history for the past 6 months by default. Clicking on any one of these past notifications will switch to the detail view for that notification. If users scroll down in the Detail View window, they will also see an expanded list of all diagnosis codes associated with that event.

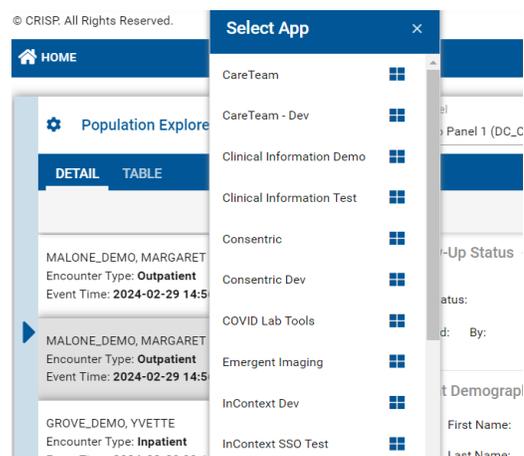
Users can expand or collapse all sections of the Detail View panel using the plus and minus buttons at the top of the screen, respectively.



To export the current Detail view, users can click on the Patient Export button to export it in their preferred format. Additional information on the export functionality is available in section 2.8 below.

## 2.6 Launching Patient Information into Clinical Information or Other Apps

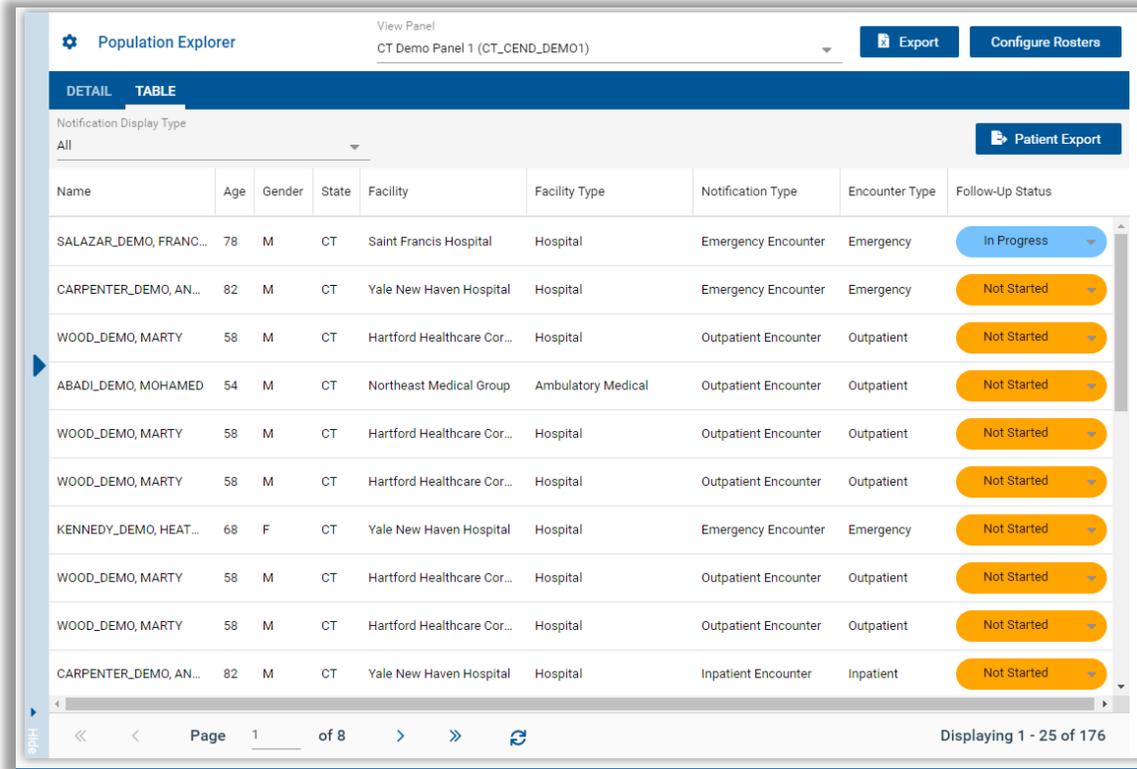
When a user right-clicks on a patient in either the expanded or collapsed view, they can easily access the selected patient's clinical information within the portal. This method also allows users to launch other applications, although only applications such as Clinical Information or Snapshot, which are intended for use with a single patient, will automatically display the selected patient's data.



*To learn more, visit our CEND and Population Explorer website page.*

## 2.7 Table View

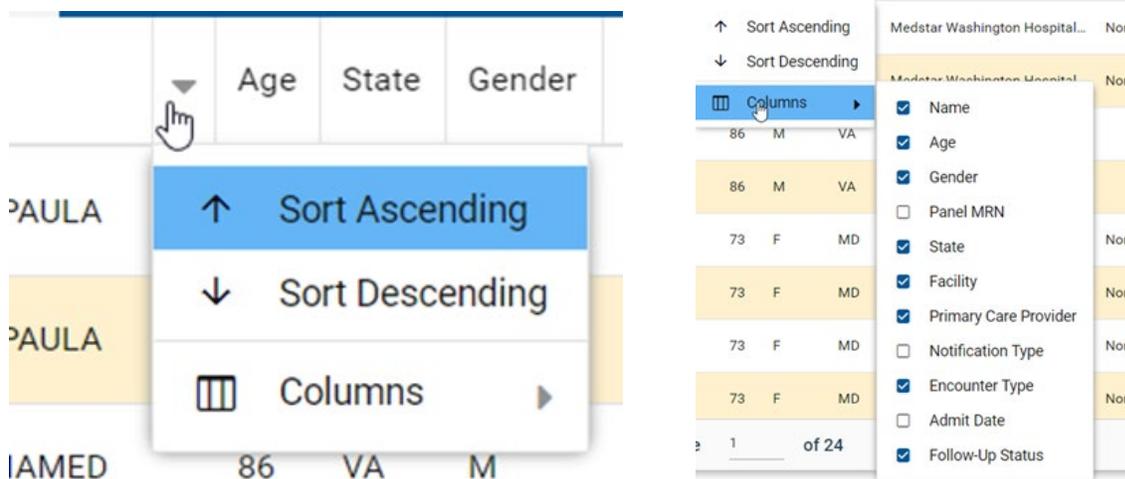
Using the tabs in the upper left corner of the Expanded View, users can switch between Detail View and Table View. Table View presents users with a customizable list of notifications. The column headers allow users to edit what data is shown for the notification and the order in which notifications are sorted.



The screenshot shows the 'Population Explorer' interface with the 'TABLE' view selected. The table displays a list of notifications with columns for Name, Age, Gender, State, Facility, Facility Type, Notification Type, Encounter Type, and Follow-Up Status. The 'Follow-Up Status' column contains dropdown menus with options like 'In Progress' and 'Not Started'. The interface includes navigation controls at the bottom, such as 'Page 1 of 8' and 'Displaying 1 - 25 of 176'.

Name	Age	Gender	State	Facility	Facility Type	Notification Type	Encounter Type	Follow-Up Status
SALAZAR_DEMO, FRANC...	78	M	CT	Saint Francis Hospital	Hospital	Emergency Encounter	Emergency	In Progress
CARPENTER_DEMO, AN...	82	M	CT	Yale New Haven Hospital	Hospital	Emergency Encounter	Emergency	Not Started
WOOD_DEMO, MARTY	58	M	CT	Hartford Healthcare Cor...	Hospital	Outpatient Encounter	Outpatient	Not Started
ABADI_DEMO, MOHAMED	54	M	CT	Northeast Medical Group	Ambulatory Medical	Outpatient Encounter	Outpatient	Not Started
WOOD_DEMO, MARTY	58	M	CT	Hartford Healthcare Cor...	Hospital	Outpatient Encounter	Outpatient	Not Started
WOOD_DEMO, MARTY	58	M	CT	Hartford Healthcare Cor...	Hospital	Outpatient Encounter	Outpatient	Not Started
KENNEDY_DEMO, HEAT...	68	F	CT	Yale New Haven Hospital	Hospital	Emergency Encounter	Emergency	Not Started
WOOD_DEMO, MARTY	58	M	CT	Hartford Healthcare Cor...	Hospital	Outpatient Encounter	Outpatient	Not Started
WOOD_DEMO, MARTY	58	M	CT	Hartford Healthcare Cor...	Hospital	Outpatient Encounter	Outpatient	Not Started
CARPENTER_DEMO, AN...	82	M	CT	Yale New Haven Hospital	Hospital	Inpatient Encounter	Inpatient	Not Started

Users can also click the panel expander to add or cut certain data criteria and filters, as well as sort the data. Note that currently only data in the current view will be sorted. CSS will be adding functionality to sort large result sets in-place in an upcoming update.



This image shows a close-up of the table view. On the left, a dropdown menu is open over the 'Age' column header, offering 'Sort Ascending' (indicated by an upward arrow), 'Sort Descending' (indicated by a downward arrow), and 'Columns' (indicated by a grid icon). On the right, the 'Columns' dropdown menu is open, showing a list of columns with checkboxes: Name, Age, Gender, Panel MRN, State, Facility, Primary Care Provider, Notification Type, Encounter Type, Admit Date, and Follow-Up Status. The 'Columns' menu is currently open over the 'Age' column header.

## 2.8 Filters

Filters are used in Population Explorer in two ways: through Quick Filters and through the Advanced Filter Builder.

### 2.8.1 Creating and Managing Quick Filters

Users can create, manage, save, and apply quick filters to the notification list using the 'Quick Filter' bar on the right-hand side of the screen.

To add a new filter, users can click "type to select" then begin typing the data element they would like to filter on, select the desired filter criteria, and then click the 'Apply' button to apply that filter. Different selection interfaces will appear depending on the selected data element; for example, a date picker will appear allowing a user to set desired date ranges for data elements that represent datetimes. If the text for a filter criteria is longer than the visible area, simply hover over it to view the full description.

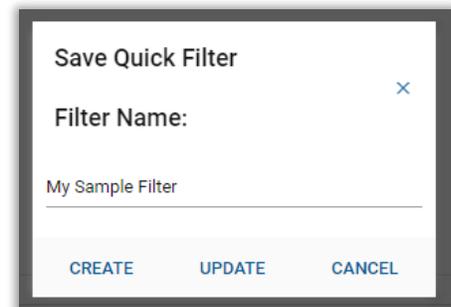
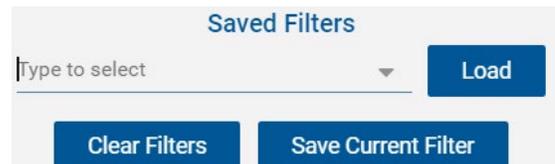
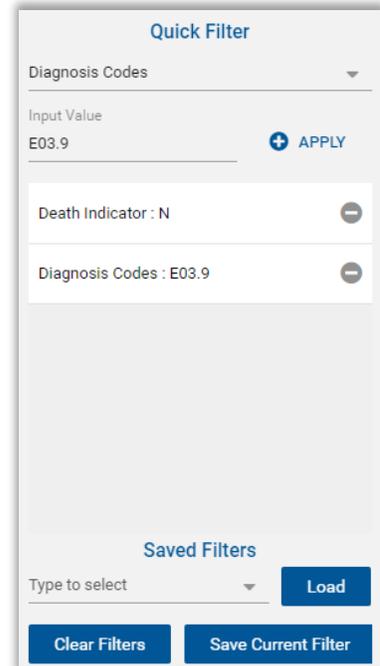
The current list of notifications will then be automatically filtered according to the created criteria. Users can apply as many filters as they would like; in the quick filter view, all filters are applied as 'AND' criteria. Appendix A provides a list of all the data elements available for filtering, along with the criteria that can be applied.

To remove a previously applied filter criteria, users can navigate to the list of current filters then click the Delete icon next to the filter they would like to remove. To clear all current filters, click the 'Clear Filters' button in the bottom left corner of the Quick Filter pane. This will remove all current filters but will not change or delete any previously saved filters.

To save the current set of filters so that it can be reused later, click the 'Save Current Filter' button in the bottom right corner of the Quick Filter pane.

Once saved, users will be able to access the filter under "Saved Filters". Commonly used filters available to all users are called "Global Filters". Global Filters will also appear in this list underneath a user's personal filters, with a globe icon next to the name indicating that they are global filters.

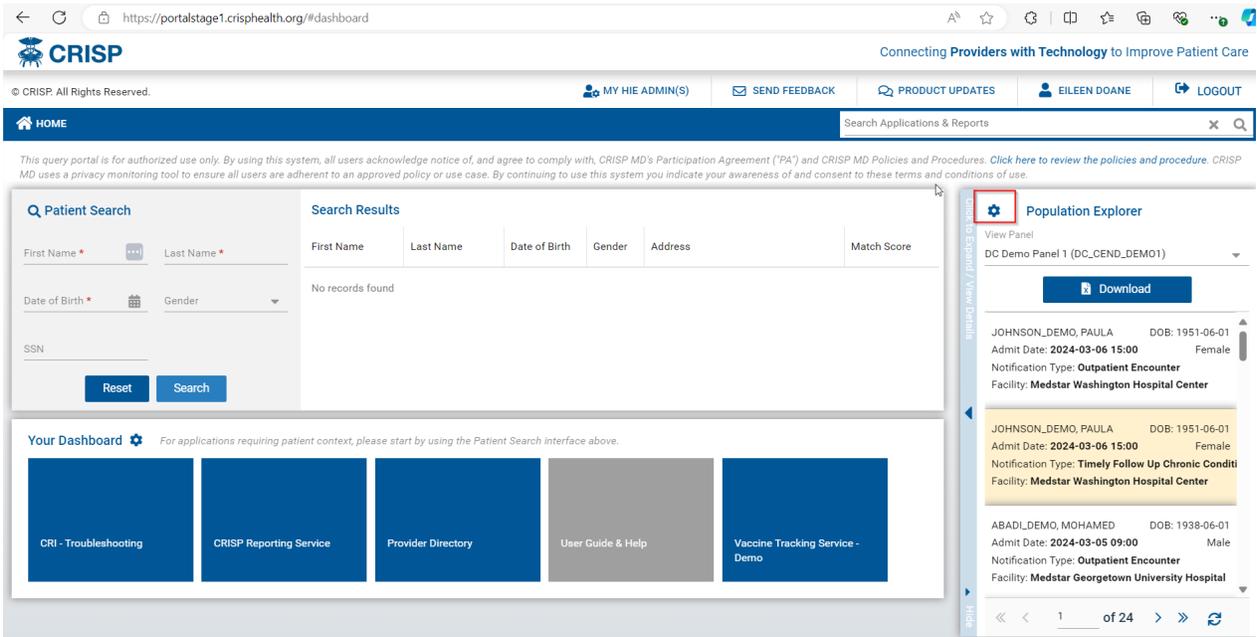
To apply a previously saved filter, select it from the 'Saved Filters' dropdown, then click the 'Load' button. The criteria from the save filter will then appear in the 'Current Filters' list. Note that this will override any filters in place at the time the saved filter was applied.



## 2.8.2 Advanced Filter Builder

The Advanced Filter Builder (AFB) allows users to flexibly create much more complex criteria definitions for filtering patient populations by combining panels and applying Boolean logic operators to any of the data elements available in Population Explorer. This is useful in situations where the Quick Filter functionality does not offer sufficient granularity for targeting a desired set of beneficiaries or events. The Advanced Panel Builder must be enabled before first use.

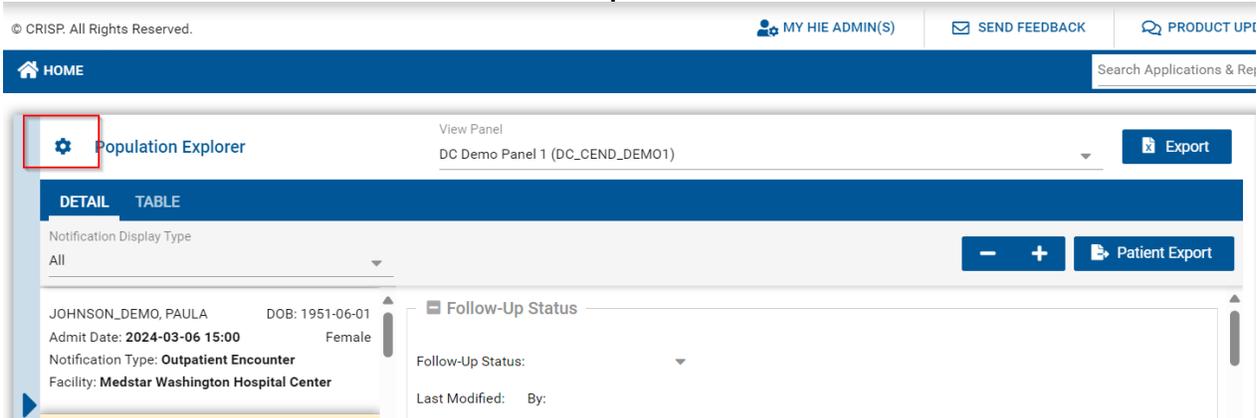
To do this, first navigate to settings menu:



The screenshot shows the CRISP dashboard with the following elements:

- Header:** CRISP logo, navigation links (MY HIE ADMIN(S), SEND FEEDBACK, PRODUCT UPDATES, EILEEN DOANE, LOGOUT), and a search bar for Applications & Reports.
- Left Sidebar:** Patient Search form with fields for First Name, Last Name, Date of Birth, Gender, and SSN. Below it is a "Your Dashboard" section with tiles for CRI - Troubleshooting, CRISP Reporting Service, Provider Directory, User Guide & Help, and Vaccine Tracking Service - Demo.
- Main Content Area:** Search Results table (currently empty) and a "Population Explorer" sidebar.
- Population Explorer Sidebar:** Contains a settings gear icon (highlighted with a red box), a "View Panel" dropdown, a "Download" button, and a list of patient records with details like name, DOB, admit date, notification type, and facility.

OR in Expanded View



The screenshot shows the expanded view of the Population Explorer settings menu with the following elements:

- Header:** CRISP logo, navigation links, and search bar.
- Left Sidebar:** "Population Explorer" settings gear icon (highlighted with a red box).
- Main Content Area:** "Population Explorer" settings panel for "View Panel DC Demo Panel 1 (DC\_CEND\_DEMO1)". It includes a "DETAIL" / "TABLE" toggle, a "Notification Display Type" dropdown set to "All", and a "Patient Export" button. Below these are sections for "Follow-Up Status" and "Last Modified: By:".



Select "Enable Advanced Panel Builder" and save changes:

The image shows a 'Population Explorer Settings' dialog box with a close button (X) in the top right corner. It contains several settings:

- Default panel: [Dropdown arrow]
- Default filter: [Dropdown arrow]
- Default widget view: Normal View [Dropdown arrow]
- Download size: 5000 [Dropdown arrow]
- Hide notification status management features:
- Enable notification auto load:
- Enable advanced filter builder:  (This option is highlighted with a red border)

At the bottom of the dialog, there are four buttons: RESET ALL, DISCARD CHANGES, SAVE CHANGES, and CLOSE.

"Configure Advanced Filter" is now an option. Users will not need to enable Advanced Filter Builder every time they access Population Explorer. This will now be the new default setting.

After a user has enabled the Advanced Filter Builder, they can access it by clicking the 'Configure Advanced Filters' button in the upper right corner of the Detail View pane.

The screenshot shows the Population Explorer interface. At the top, there is a 'View Panel' dropdown set to 'DC Demo Panel 2 (DC\_CEND\_DEMO2)'. To its right are 'Export' and 'Configure Advanced Filter' buttons. The 'Configure Advanced Filter' button is highlighted with a red border. Below this is a 'DETAIL TABLE' section with a 'Display Type' dropdown set to 'All'. The main content area shows patient details for two patients:

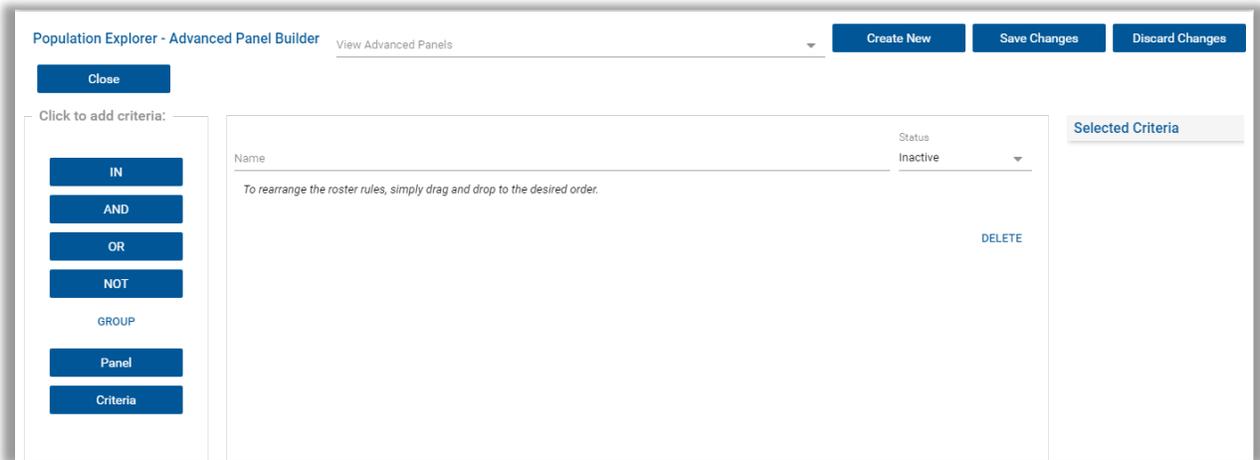
- MARTIN\_DEMO, GRETCHEN** (DOB: 2002-06-01, Female)  
Admit Date: 2024-02-27 18:09  
Notification Type: Emergency Encounter  
Facility: Howard University Hospital
- MOORE\_DEMO, MICHAEL** (DOB: 1984-06-01, Male)  
Admit Date: 2024-02-25 01:52  
Notification Type: Observation Encounter  
Facility: Medstar Georgetown University Hospital

On the right side, there are two panels: 'Follow-Up Status' (Complete) and 'Patient Demographics' (Address: 6868 PAXTON LN, UPPERMARLBORO, MD, 20772; Date of Birth: 1984-06-01).

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After opening the Advanced Filter Builder, users will be presented with a new AFB template, as shown below. To edit an existing advanced filter, select from the 'View Advanced Filters' dropdown at the top of the screen. Otherwise, users can enter the name for their advanced filter and hit 'Save Changes' to create a new advanced filter. Criteria can then be added, as described below.



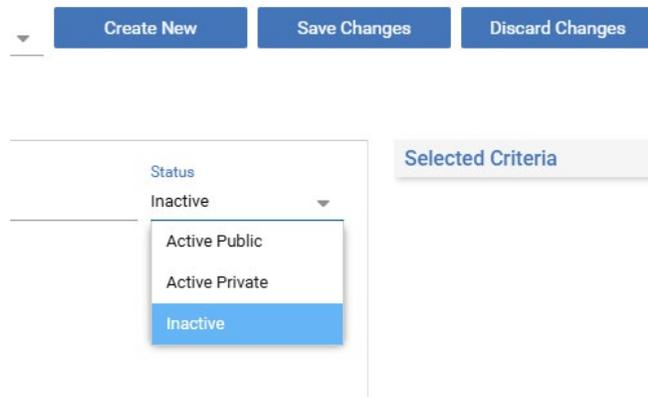
To discard any unsaved changes on the currently selected filter, hit the 'Discard Changes' button. To create a new filter and open a blank AFB template after editing or creating a filter, simply click the 'Create New' button.

Users can set the status of an advanced filter using the Status dropdown to the right of the name field in the creation dialogue interface. There are 3 status options to set a filter to: Active Public, Active Private, and Inactive.

Active Public – Setting the status to 'Active Public' will enable any user with access to all of the included panels to use that advanced filter. It is important users ONLY set a filter to 'Active Public' if it should be shared with others. This is useful for sharing common advanced filters with others in the organization, so they do not have to individually re-create them.

Active Private – Setting the status to 'Active Private' will enable the user who created the filter to see it throughout the interface. No other user will be able to see this filter.

Inactive – Setting the status to 'Inactive' means that a user will be able to see the previously saved filter in the Advanced Filter Builder – but NOT throughout the rest of the interface.





The buttons along the left-hand side of the interface allow users to add panels, criteria, and logical operators to the Advanced Filter. Click the 'Panel' button first to add a selection interface that allows users to choose one or more panels as the basis for the advanced filter. Any beneficiaries included on any of the selected panels will be evaluated for inclusion in the advanced filter.

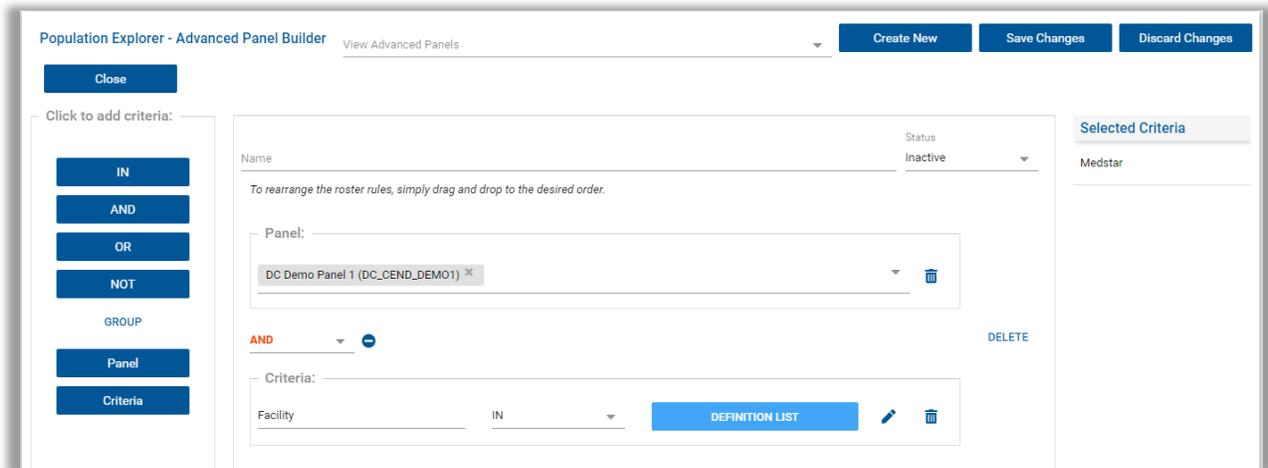
To add a filter criteria, just click the Criteria button. This will bring up an additional interface, shown at right, that allows users to select the data element that will define the criteria, as well as the list of values to be considered. Users can manually click on the right-hand side Definition List to add, edit, or remove values, or 'Clear' the list by clicking the corresponding button.

If a data element has a defined set of values, these will pre-populate in the right-hand side of the dialogue box; simply click the trash can icon to remove values which are not wanted. For data elements that include a long criteria list (such as diagnosis codes), users can download a template, populate the values in Excel, and then upload the populated template to generate the criteria list rather than entering them one by one.



Users may add as many criteria as needed to define the advanced filter. Use the logical operators above (IN, AND, OR, NOT) between criteria to join them. If a set of criteria needs to be considered together (for example, “A AND (B OR C)”), use the Group operator to create containing parentheses sets. Any criteria or operators can be dragged and dropped vertically in the UI to re-order them after they have been placed, and clicking the trash can icon or Delete button on the right-hand side of the screen will remove the selected element.

A definition list for any criteria can be viewed by simply clicking the ‘Definition List’ button after it has been created, and likewise, existing definition lists can be edited by clicking the pencil icon next to the Definition List button.



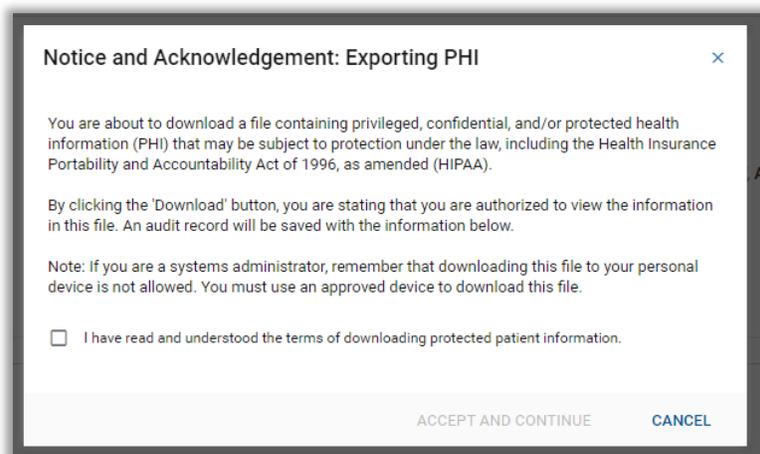
After a user finishes creating or editing the advanced filter, they can simply click the ‘Close’ button in the upper left corner to return to the Detail View of Population Explorer.

Please see [Appendix B](#) for step-by-step example of how users can create their own filter in Advanced Filter Builder.

## 2.8 Data Exports

Data can be exported from most views of Population Explorer simply by hitting the ‘Export’ button. This will allow users to create Excel or PDF versions of the data they are currently viewing, as appropriate.

Prior to exporting, users must read and acknowledge the terms for exporting protected health information. All



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exports must be handled in accordance with HIPAA and appropriate security safeguards for this type of information.

After agreeing, users will be presented with the Export Interface. This interface allows users to select which fields they would like to include in the created extract by selecting from the available fields. 'Select All' and 'Select None' buttons are made available to quickly change the selection status for all fields. Additionally, users can 'Save Selected Fields As My Default' after making their choices so that the selected fields will auto-select for all future exports that they create. Users can always modify the included fields and their defaults at the time of subsequent exports as desired.

Some fields are required to generate the extract; these will be displayed on the left-hand side of the interface but cannot be changed.

After customization of the data fields for the export is complete, users can simply select the desired export type, PDF or Excel, the extract will be generated, and they will be allowed to save the file locally according to the settings of the internet browser they are using. Some export options (such as the table view) will only allow export via Excel, given the amount of data to be included.

**Population Explorer - Export Interface** ×

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

Required Fields	Optional Fields		
<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> ACO	<input checked="" type="checkbox"/> Address	<input checked="" type="checkbox"/> Home Phone
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> Work Phone	<input checked="" type="checkbox"/> Admit Date / Time	<input checked="" type="checkbox"/> Admit Source
<input checked="" type="checkbox"/> Gender	<input type="checkbox"/> Care Manager	<input checked="" type="checkbox"/> Care Manager Email	<input checked="" type="checkbox"/> Care Program
	<input type="checkbox"/> Date of Birth	<input checked="" type="checkbox"/> Date of Death	<input checked="" type="checkbox"/> Death Indicator
	<input checked="" type="checkbox"/> Discharge Date / Time	<input checked="" type="checkbox"/> Discharge Disposition	<input checked="" type="checkbox"/> Discharge To Location
	<input checked="" type="checkbox"/> Encounter Type	<input checked="" type="checkbox"/> Facility	<input checked="" type="checkbox"/> ER Last 30 Days
	<input checked="" type="checkbox"/> ER Last 60 Days	<input checked="" type="checkbox"/> ER Last 90 Days	<input checked="" type="checkbox"/> ER Last 180 Days
	<input checked="" type="checkbox"/> Follow up Status	<input checked="" type="checkbox"/> Group	<input checked="" type="checkbox"/> Inpatient Last 30 Days
	<input checked="" type="checkbox"/> Inpatient Last 60 Days	<input checked="" type="checkbox"/> Inpatient Last 90 Days	<input checked="" type="checkbox"/> Inpatient Last 180 Days
	<input checked="" type="checkbox"/> Insurance From ADT	<input checked="" type="checkbox"/> Insurance Type	<input checked="" type="checkbox"/> Location
	<input checked="" type="checkbox"/> National Provider Identifier (NPI)	<input checked="" type="checkbox"/> Notification Event Type	<input checked="" type="checkbox"/> Notification Type
	<input checked="" type="checkbox"/> OBS (Observation) Last 30 Days	<input checked="" type="checkbox"/> OBS (Observation) Last 60 Days	<input checked="" type="checkbox"/> OBS (Observation) Last 90 Days
	<input checked="" type="checkbox"/> OBS (Observation) Last 180 Days	<input checked="" type="checkbox"/> Outpatient Last 30 Days	<input checked="" type="checkbox"/> Outpatient Last 60 Days
	<input checked="" type="checkbox"/> Outpatient Last 90 Days	<input checked="" type="checkbox"/> Outpatient Last 180 Days	<input checked="" type="checkbox"/> Panel MRN

**Select All**   **Select None**

**Save Selected Fields As My Default**

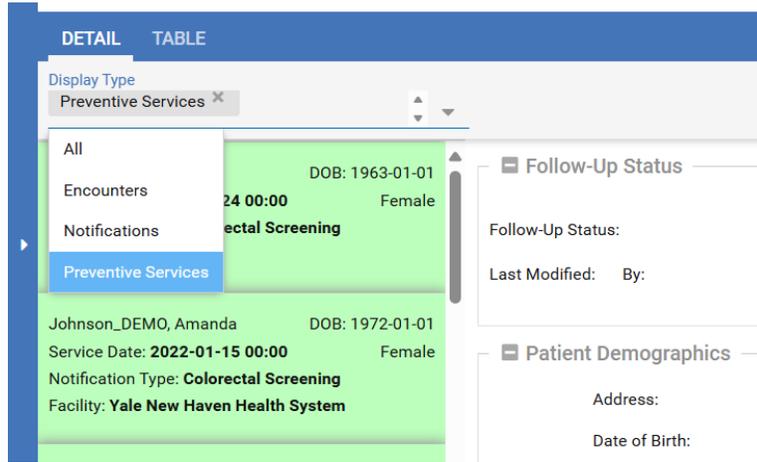
**Excel**

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).

To learn more, visit our [CEND and Population Explorer website page](#).

### 3 Notification Display Types

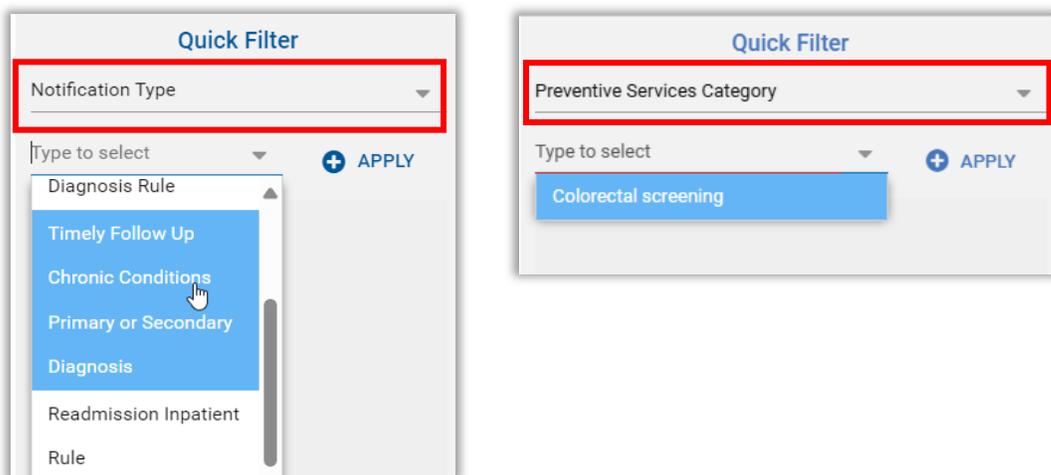
As described earlier, notifications come in three varieties: encounters, logic-based notifications, and preventive services. Encounter and preventive services data are available for all users; logic-based notifications will only be available for display for current subscribers. These can be added as a feature later for organizations that do not currently have them.



Users can filter the display type by selecting from among the different types using the drop-down in the upper left-hand corner of the screen. The notifications can then be further filtered by the logic used to generate the alert by selecting the appropriate filter criteria within the Quick Filter box, selecting Notification Type or Preventive Services Category as appropriate for the search desired, as shown below.

Some data elements may have additional information available when displayed; CRISP is continuing to add new functionality over time. For such elements, additional information will display when hovering over that element in Detail View; for example, currently the Preventive Services Data Source field will provide additional tooltip information when hovering over this field.

Additional technical documentation on the underlying data sources and logic used in creating logic-based and preventive services alerts is available from CRISP upon request.



## 3.1 Patient Encounter Information

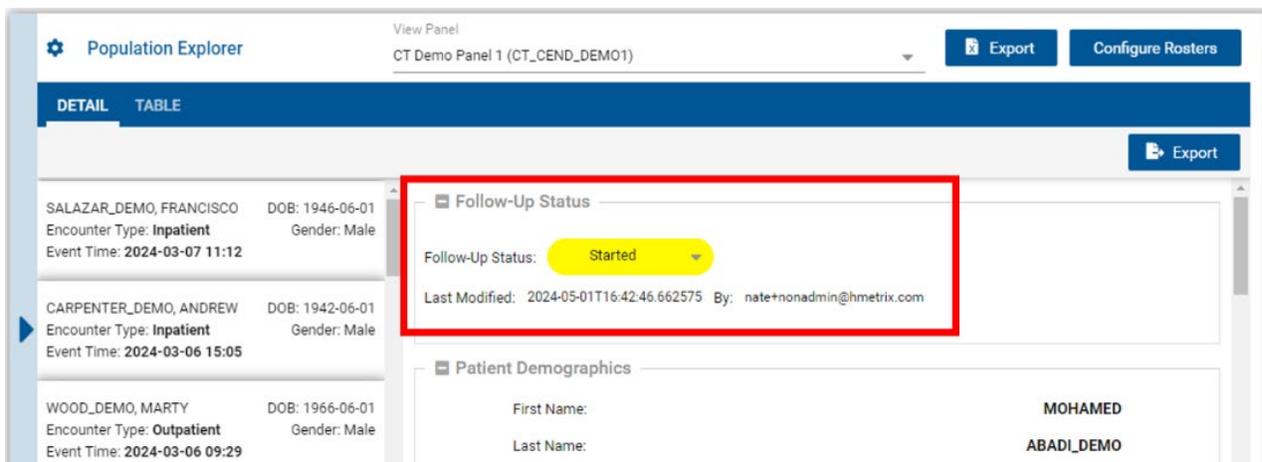
In the expanded view of Population Explorer, users can scroll to see the follow sections: Follow Up Status; Patient Demographics; Selected Encounter Details; Diagnosis Details; Follow Up Status History; Encounter History

### 3.1.1 Event Notification Display

In Population Explorer, all related patient events will be consolidated into a single encounter line item. This provides one complete encounter with the patient's latest status.

### 3.1.2 Follow Up Status

This functionality allows users to track the follow-up status of a notification within the Population Explorer interface and is automatically activated in the UI.



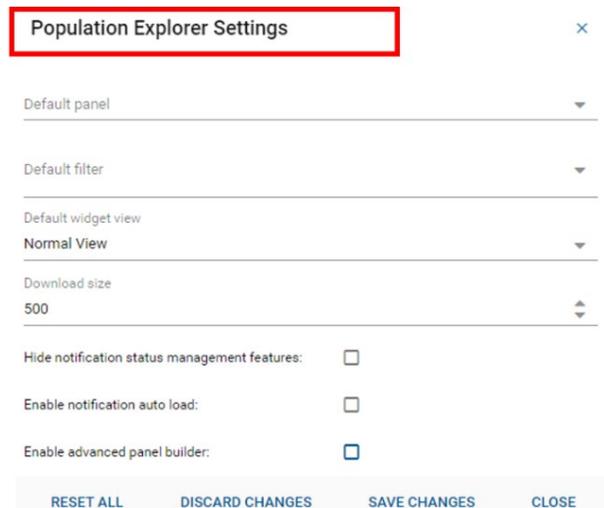
The screenshot shows the 'Population Explorer' interface. At the top, there's a 'View Panel' dropdown set to 'CT Demo Panel 1 (CT\_CEND\_DEMO1)' and buttons for 'Export' and 'Configure Rosters'. Below this is a navigation bar with 'DETAIL' and 'TABLE' tabs. A table lists patient encounters:

Patient Name	DOB	Encounter Type	Gender	Event Time
SALAZAR_DEMO, FRANCISCO	1946-06-01	Inpatient	Male	2024-03-07 11:12
CARPENTER_DEMO, ANDREW	1942-06-01	Inpatient	Male	2024-03-06 15:05
WOOD_DEMO, MARTY	1966-06-01	Outpatient	Male	2024-03-06 09:29

Below the table, a 'Follow-Up Status' section is highlighted with a red box. It shows a dropdown menu currently set to 'Started' and 'Last Modified: 2024-05-01T16:42:46.662575 By: nate+nonadmin@hmetrix.com'. Below that is a 'Patient Demographics' section showing 'First Name: MOHAMED' and 'Last Name: ABADI\_DEMO'.

To opt-out of notification status, users can click the gear icon in the upper left corner of the Population Explorer pane and check the 'Hide Notification Status Management features.' Note that this will not change or remove any statuses that have been set; it simply determines whether the functionality displays in the UI so that users who do not need this functionality can hide it to keep their interface clean. By default, this is enabled.

If enabled, a Status drop-down menu will be available for each encounter in both the Detail View and Table view along with Last Edited information. The available status values are 'Not Started', 'In Progress', and 'Complete', and a set status will be shared with all users who have access to the specific panel and notification.



The screenshot shows the 'Population Explorer Settings' dialog box. It has a red border and a close button (X) in the top right corner. The settings are as follows:

- Default panel: (Dropdown menu)
- Default filter: (Dropdown menu)
- Default widget view: Normal View (Dropdown menu)
- Download size: 500 (Slider)
- Hide notification status management features:
- Enable notification auto load:
- Enable advanced panel builder:

At the bottom, there are four buttons: 'RESET ALL', 'DISCARD CHANGES', 'SAVE CHANGES', and 'CLOSE'.

Population Explorer View Panel  
WVHIN Demo2 - Ambulatory Panel (WV\_D2\_AMB\_P) Export Configure Advanced Panel

DETAIL TABLE

Notification Display Type: All Patient Export

Name	Age	Gender	State	Encounter Type	Follow-Up Status
Smail_DEMO, Stephen	6	M	WV	Outpatient	In Progress
Lewis_DEMO, Daniel	66	M	WV	Outpatient	Complete
Sheppard_DEMO, Tracie	47	F	WV	Outpatient	Not Started
Morton_DEMO, Rhonda	13	F	WV	Outpatient	Not Started
Barrett_DEMO, Mary	26	F	WV	Outpatient	In Progress
Ellis_DEMO, Judy	80	F	WV	Outpatient	Not Started
Sheppard_DEMO, Tracie	47	F	WV	Outpatient	Not Started
Sheppard_DEMO, Tracie	47	F	WV	Outpatient	Not Started
Sheppard_DEMO, Tracie	47	F	WV	Outpatient	Not Started
Sheppard_DEMO, Tracie	47	F	WV	Outpatient	Not Started

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The last user to make a change to the status will be displayed next to the current status, along with the time of the change. Status values will persist for a given notification until a user changes the value and are for informational purposes only. CRISP does not edit or otherwise maintain these statuses – they are entirely user-driven. The status for patients can be included as a data element in exported extracts along with other information, as described in section 2.8 above.

### 3.1.3 Patient Demographics

The ‘Patient demographics’ section aggregates the demographic information CRISP has in the ‘Master Patient Index (MPI)’ for a patient. Data in the MPI is pulled from multiple sources and organizations for the patient.

The Patient Demographics section contains:

- Patient First Name
- Patient Last Name
- Gender
- Address
- Patient Date of Birth
- Home Phone\*
- Work Phone\*

Patient Demographics

First Name:	MARGARET
Last Name:	MALONE_DEMO
Gender:	Female
Address:	25 RIBBON ST, CHEVY CHASE, MD, 20815
Date of Birth:	1942-06-01
Home Phone:	
Work Phone:	

\*This field will be filled if applicable.



### 3.1.4 Selected Encounter Details

The Selected Encounters section provides information on the specific encounter for the patient.

The Selected Encounters section contains:

- Admit Time and Date:
- Event Time and Date:
- Admit Source:
- Care Manager:
- Care Manager Email:
- Care Program:
- Discharge Date:
- Discharge Disposition:
- Discharge to Location:
- Insurance Type:
- Encounter Type:
- Patient Class:
- Patient Complaint:
- Point of Care:
- Primary Diagnosis Code:
- Primary Diagnosis Description:

Selected Encounter Details	
Admit Date / Time:	2024-02-29 14:55
Event Date / Time:	2024-02-29 14:56
Admit Source:	RP
Care Manager:	
Care Manager Email:	
Care Program:	
Discharge Date:	
Discharge Disposition:	
Discharge To Location:	
Insurance Type:	AARP HEALTHCARE OPTIONS MEDICARE SUPPLEMENT -- Supplemental Policy
Encounter Type:	Outpatient
Patient Class:	0
Patient Complaint:	XR
Point of Care:	Medstar Surgery Center At Lafayette
Primary Diagnosis Code:	
Primary Diagnosis Description:	

### 3.1.5 Diagnosis Details

The Diagnosis Details contains ICD-10 codes and other diagnostic code information of the event if available.

#### Diagnosis Details

Diagnosis Code	Diagnosis Description
I10	Essential primary hypertension
E03.9	Hypothyroidism, unspecified

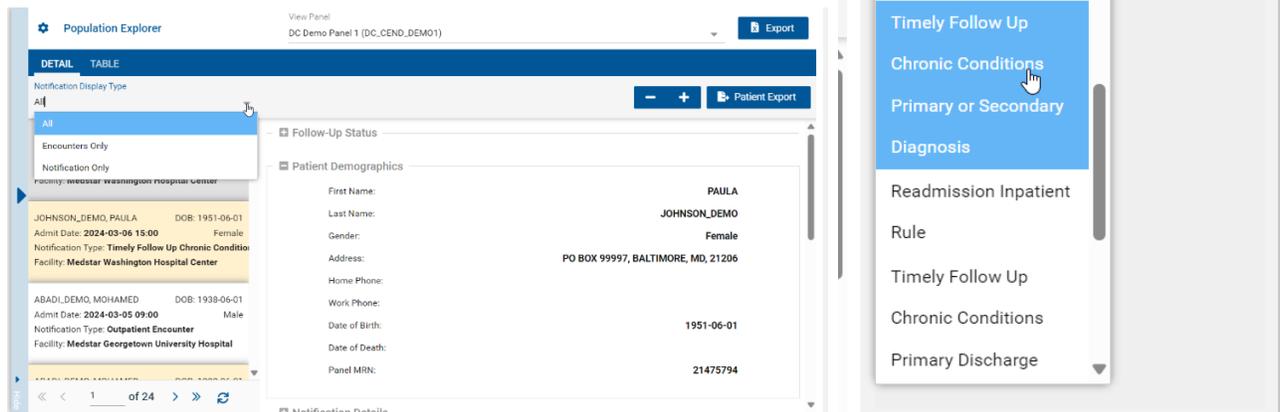
## 3.1.6 Encounter History

In Encounter History, users will be able to see encounter history dating back to the last six months for the selected patient.

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

## 3.2 Logic-Based Alerts in Population Explorer

These filters are broken up between encounters and notifications. Users can filter by Logic notification and type, the two critical factors. These filters will display for current subscribers only and can be added as a feature later, as seen below.

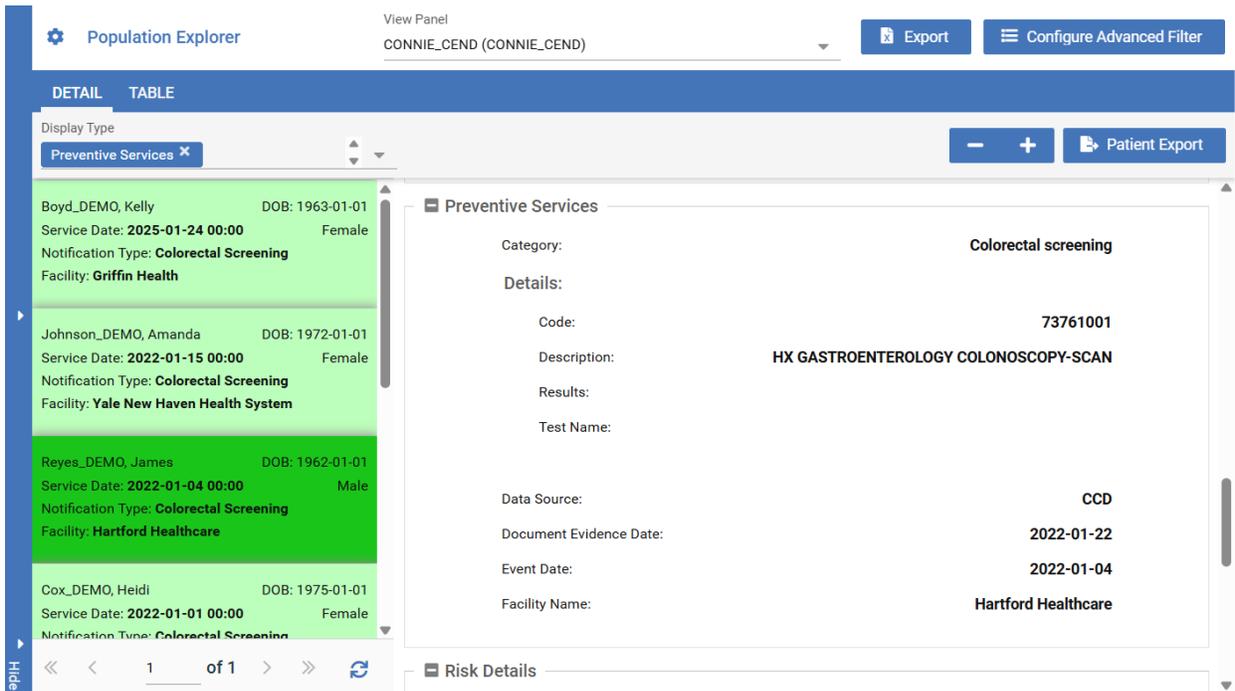


The screenshot shows the Population Explorer interface. On the left, a list of patients is displayed, including JOHNSON\_DEMO, PAULA and ABADI\_DEMO, MOHAMED. The main area shows patient demographics for JOHNSON\_DEMO, PAULA, including DOB, gender, and address. On the right, a 'Quick Filter' dropdown menu is open, showing various notification types such as 'Timely Follow Up', 'Chronic Conditions', and 'Primary or Secondary'.

### 3.3 Preventive Services Detail Section

The Preventive Services Section provides information about the notification and where a user can find the corresponding source document in the Clinical Information Section of the CRISP Portal/InContext. For notifications with Data Source of CCD, users should look in the Structured Documents Tab (using the Document Evidence Date). For notifications with Data Source of Diagnostic Reports, users should look in the Health Records Tab (using the Event Date).

Preventive Services Field	Description
Category	Type of preventive service
Code	Procedure/diagnosis code if available
Description	Description associated with code
Results	Indicates whether results are available – currently blank for all records
Test Name	Additional test name available or title associated with diagnostic report
Data Source	Type of data source – CCD, ADT, Diagnostic Reports. Hover over this field for more information about where to find the corresponding document
Document Evidence Date	Date of the corresponding CCD (if applicable)
Event Date	Date of the preventive service
Facility Name	Facility reporting the preventive service



The screenshot displays the 'Population Explorer' interface. At the top, it shows 'View Panel CONNIE\_CEND (CONNIE\_CEND)' and buttons for 'Export' and 'Configure Advanced Filter'. Below this, there are tabs for 'DETAIL' and 'TABLE'. A 'Display Type' dropdown is set to 'Preventive Services'. On the left, a list of records is shown, including: Boyd\_DEMO, Kelly (DOB: 1963-01-01, Service Date: 2025-01-24 00:00, Female, Notification Type: Colorectal Screening, Facility: Griffin Health); Johnson\_DEMO, Amanda (DOB: 1972-01-01, Service Date: 2022-01-15 00:00, Female, Notification Type: Colorectal Screening, Facility: Yale New Haven Health System); Reyes\_DEMO, James (DOB: 1962-01-01, Service Date: 2022-01-04 00:00, Male, Notification Type: Colorectal Screening, Facility: Hartford Healthcare); and Cox\_DEMO, Heidi (DOB: 1975-01-01, Service Date: 2022-01-01 00:00, Female, Notification Type: Colorectal Screening). The right pane shows a detailed view for the first record, 'Preventive Services', with the following information: Category: Colorectal screening; Code: 73761001; Description: HX GASTROENTEROLOGY COLONOSCOPY-SCAN; Results: (blank); Test Name: (blank); Data Source: CCD; Document Evidence Date: 2022-01-22; Event Date: 2022-01-04; Facility Name: Hartford Healthcare. At the bottom, there is a 'Risk Details' section.

## 4 Appendix A: Filter Data Elements & Criteria

Below is the list of data elements currently available in the Quick Filter, as well as the criteria that can be applied to each data element type.

### 4.1 Table 1: Filter Data Elements

Note that data elements will only filter if they are present in the underlying encounter data; not all data elements made available in the Population Explorer are fully populated in the originating data feed.

Name	Data Source	Data Type
ACO	Panel	Text
Admit Date/Time	ADT	Date
Admit Source	ADT	Text
Care Manager	Panel	Text
Care Manager Email	Panel	Text
Care Program	Panel	Text
Date of Birth	Panel	Date
Date of Death	ADT	Date
Death Indicator	ADT	Text
Diagnosis Codes	ADT	Alpha-numeric
Diagnosis Descriptions	ADT	Text
Discharge Date/Time	ADT	Date
Discharge Deposition	ADT	Text
Discharge to Location	ADT	Text
Encounter Date	ADT	Date
Encounter Type	Derived field	Picklist
Facility	ADT	Text
ER Last 30 Days	Calculated field - does not include current visit	Numeric
ER Last 60 Days	Calculated field - does not include current visit	Numeric
ER Last 90 Days	Calculated field - does not include current visit	Numeric
ER Last 180 Days	Calculated field - does not include current visit	Numeric
Facility	ADT	Text
Facility Type	Mapped from Facility Source Code	Text
Follow Up Status	User defined field	Picklist
Group	Panel	Text



Inpatient Last 30 Days	Calculated field - does not include current visit	Numeric
Inpatient Last 60 Days	Calculated field - does not include current visit	Numeric
Inpatient Last 90 Days	Calculated field - does not include current visit	Numeric
Inpatient Last 180 Days	Calculated field - does not include current visit	Numeric
Insurance From ADT	ADT	Text
Insurance Type	Panel	Text
Location	Panel	Text
Medical Record Number (MRN)	ADT	Alpha-numeric
National Provider Identifier (NPI)	Panel	Numeric
Notification Type	Predefined Alert Type	Picklist
OBS (Observation) Last 30 Days	Calculated field - does not include current visit	Numeric
OBS (Observation) Last 60 Days	Calculated field - does not include current visit	Numeric
OBS (Observation) Last 90 Days	Calculated field - does not include current visit	Numeric
OBS (Observation) Last 180 Days	Calculated field - does not include current visit	Numeric
Outpatient Last 30 Days	Calculated field - does not include current visit	Numeric
Outpatient Last 60 Days	Calculated field - does not include current visit	Numeric
Outpatient Last 90 Days	Calculated field - does not include current visit	Numeric
Outpatient Last 180 Days	Calculated field - does not include current visit	Numeric
Panel MRN	Panel	Alpha-numeric
Patient Class	ADT	Text
Patient Complaint	ADT	Text
Patient Name	Panel	Text
Practice	Panel	Text
Preventive Services Category	Preventive Services Feed (CCD or Diagnostic Report)	Picklist
Preventive Services Code	Preventive Services Feed (CCD or Diagnostic Report)	Text

Preventive Services Data Source	Preventive Services Feed (CCD or Diagnostic Report)	Text
Preventive Services Description	Preventive Services Feed (CCD or Diagnostic Report)	Text
Preventive Services Document Evidence Date	Preventive Services Feed (CCD or Diagnostic Report)	Date
Preventive Services Event Date	Preventive Services Feed (CCD or Diagnostic Report)	Date
Preventive Services Facility Name	Preventive Services Feed (CCD or Diagnostic Report)	Text
Preventive Services Results	Preventive Services Feed (CCD or Diagnostic Report)	Text
Preventive Services Test Name	Preventive Services Feed (CCD or Diagnostic Report)	Text
Primary Care Provider	Panel	Text
Primary Diagnosis Codes	ADT	Alpha-numeric
Primary Diagnosis Description	ADT	Text
Provider	ADT	Text
Risk Methodology 1	Panel	Text
Risk Methodology 2	Panel	Text
Risk Score 1	Panel	Numeric
Risk Score 2	Panel	Numeric

## 4.2 Table 2: Data Type Filter Criteria

Data Element Type	Available Criteria
Boolean	Is, Is Not
Date / Time	Before, After, Exact Date, Range
Code	Equals, Does Not Equal, In, Not In
Fixed Value Set	Equals, Does Not Equal, In, Not In
Free Text	Starts With, Ends With, Contains, Does Not Contain, Equals, Does Not Equal

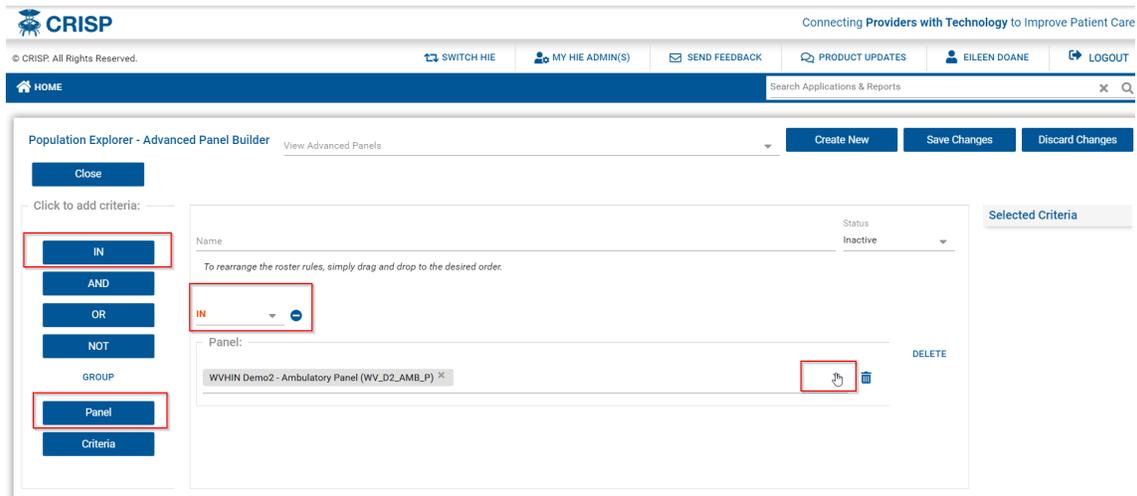
## 5 Appendix B: Advanced Filter Builder Example

Below is a step-by-step example of how to build a filter in Advanced Filter Builder. Advanced Filter Builder is to be utilized by a small subset of users whose needs may not be met through the other filter options. Users can apply any combination of filters to criteria contained in encounters or notifications and customize what is displayed. This tool can be used to include or exclude lists of criteria (i.e. diagnosis codes) or select multiple values to be evaluated and view at one time (i.e. discharges OR admits in the last X number of days).

Step 1: *This step is only for users with multiple panels!* If a user has multiple panels and wants the criteria to apply to all of them, then skip to step 2.

Start with panel selection:

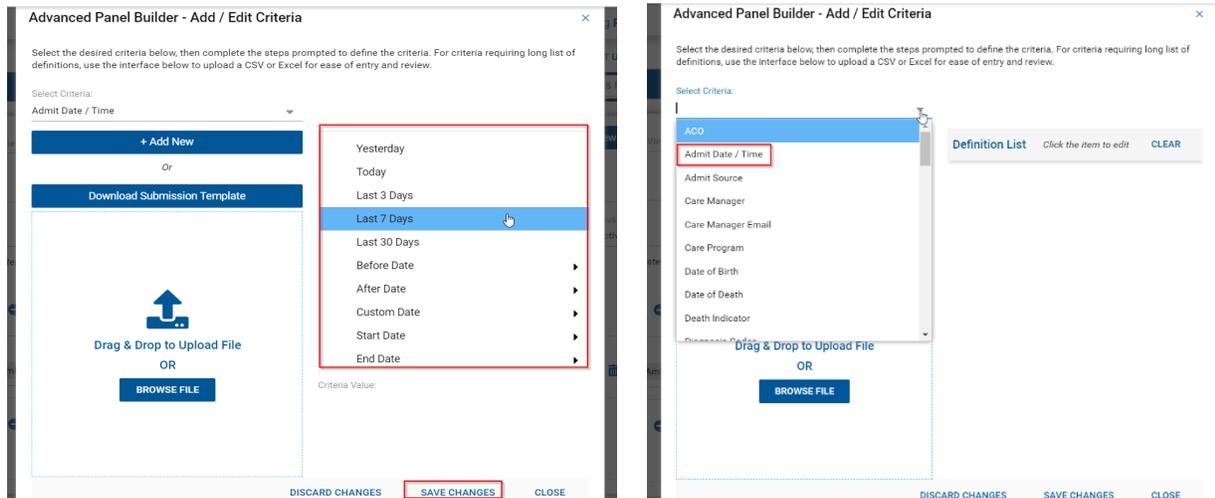
- Click IN on the left-hand menu
- Click PANEL on the left-hand menu
- Click the drop-down arrow and select the panel(s) the user want as their starting patient population.



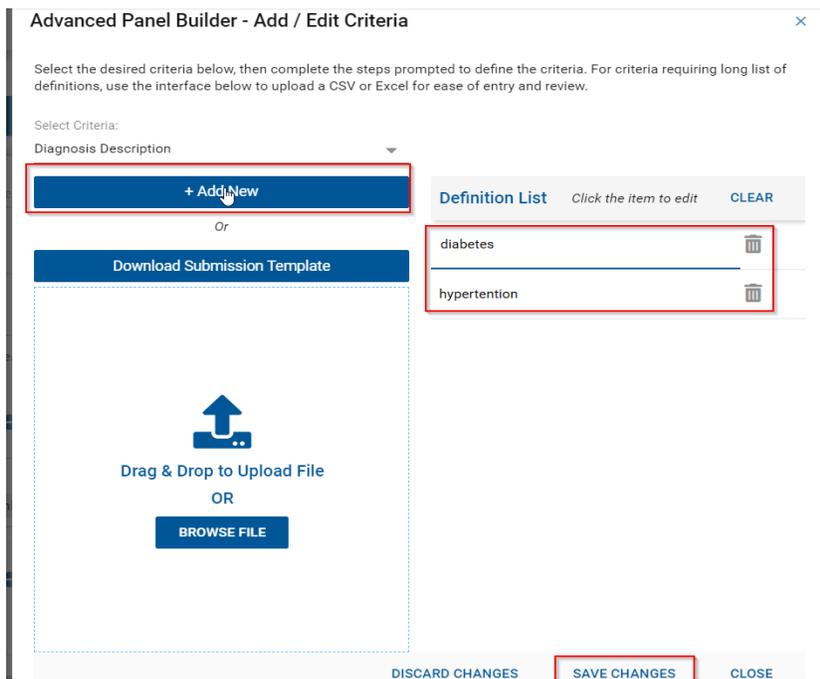
Step 2: Select any additional filter criteria the user would like to place on their patient population. Sample filters are at the end of the guide.

1. Click operator (AND, OR)
2. If the user would like to use multiple criteria, use the GROUP button and begin a parenthesis prior to criteria selection.
3. Click CRITERIA on the left-hand menu and select which field the user would like to filter on.
4. Click the drop-down arrow under "Select Criteria" and scroll down to the criteria the user wants to select.

Once a user selects which criteria they want to add, if the selection is a list, they will be presented with a list of choices.



1. Make a selection from the drop-down menu.
2. Click "Add New."
3. Type the entry (NOT case sensitive).
4. To add additional entries, click "Add New" and type additional entries.
5. Repeat as many times as necessary.
6. If the criteria selection is not a



- predefined picklist, the user will enter the definition list (what they would like to filter on – see screenshot below).
7. If the user has a long list of criteria, they may also Click "Download Submission Template", enter their multiple criteria (one per row), Save and then use the "Drag and Drop" or "BROWSE FILE" to upload the file. The Definition List will populate with the contents of this file. This feature is especially helpful if users have a list of diagnosis codes.



Once a user clicks "SAVE CHANGES", they will be brought back to the Advanced Panel Builder module.

- The default filter will be "IN" which means the user should look for an exact match on their criteria list.
- If the user wants to do "Contains" rather than an exact match, change the "IN" to "LIKE"

Criteria: Facility Type LIKE DEFINITION LIST

- To view the definitions users have specified for their criteria, click "DEFINITION LIST" and the definitions will population on the right-hand side of the screen.

Name Inactive Selected Criteria long term

To rearrange the roster rules, simply drag and drop to the desired order.

NOT

Criteria: Facility LIKE DEFINITION LIST DELETE

- To Exclude values contained in the definition list, click "NOT" before selecting criteria.
- Criteria and operators can be rearranged by dragging and dropping them into the correct spot.

Below is an example of how a user could create a filter that will filter through 2 panels (Connie Demo and CRISPDC Demo) of specified (in the definition list) encounter types and exclude a specified (in the definition list) facility. For example, users could filter to just Inpatient and Emergency Encounter Types, and exclude a single named source facility (user doesn't want to see the discharges from their own facility, for example).

1. Build the list of multiple panels (IN button, then PANEL button)
2. Build the list of encounter type (AND button, the CRITERIA button, then delete the Encounter Types that are not wanted). Save Changes
3. Build the excluded facility criteria (AND button, NOT button, then CRITERIA button, then Add New, then type out the Facility Name exactly. Save Changes

*To learn more, visit our [CEND and Population Explorer website page](#).*



4. Save the filter with status "Inactive" - then change the status to "Active Private" so users can complete their testing.

Note: If the status is set to "Active Public", this will enable any user with access to all of the included panels to use this advanced filter. This is useful for sharing common advanced filters with others in the organization, so they do not have to individually re-create them.

Population Explorer - Advanced Filter Builder

View Advanced Filters

Example #1 Advanced Filter Builder

Create New Save Changes Discard Changes

Close

Click to add criteria:

- IN
- AND
- OR
- NOT
- GROUP
- Panel
- Criteria

Example #1 Advanced Filter Builder

Active Public

To rearrange the roster rules, simply drag and drop to the desired order.

IN

Panel:

CONNIE Demo (CONNIE\_DEMO) CRISP DC Demo test (CRISPDC\_DEMO)

AND

Criteria:

Encounter Type IN DEFINITION LIST DELETE

Selected Criteria

Emergency

Population Explorer - Advanced Filter Builder

View Advanced Filters

Example #1 Advanced Filter Builder

Create New Save Changes Discard Changes

Close

Click to add criteria:

- IN
- AND
- OR
- NOT
- GROUP
- Panel
- Criteria

AND

Criteria:

Encounter Type IN DEFINITION LIST DELETE

AND

NOT

Criteria:

Facility IN DEFINITION LIST DELETE

Selected Criteria

\*Insert Facility Name\*

To learn more, visit our [CEND and Population Explorer website page](#).