



Panel Processor User Guide

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Overview

The Panel Processor application allows users to upload panels into the HIE. The application allows users to upload panels for various services, like the CSS Event Notification Delivery (CEND) Solution. Panels drive access to provider patient lookup without needing to break the glass in the Portal. Panel Processor supports streamlined and easy access to patient lookup without attestation.

Panels are lists or rosters of patients with whom you or your organization has a treatment relationship.

The CSS Event Notification Delivery (CEND) solution provides users with real-time alerts about patients' hospital encounters by matching an organization's patient roster (or "panel") with up-to-date encounter ADT data. You can learn more about CEND at crisphealth.org.

Accessing the Panel Processor

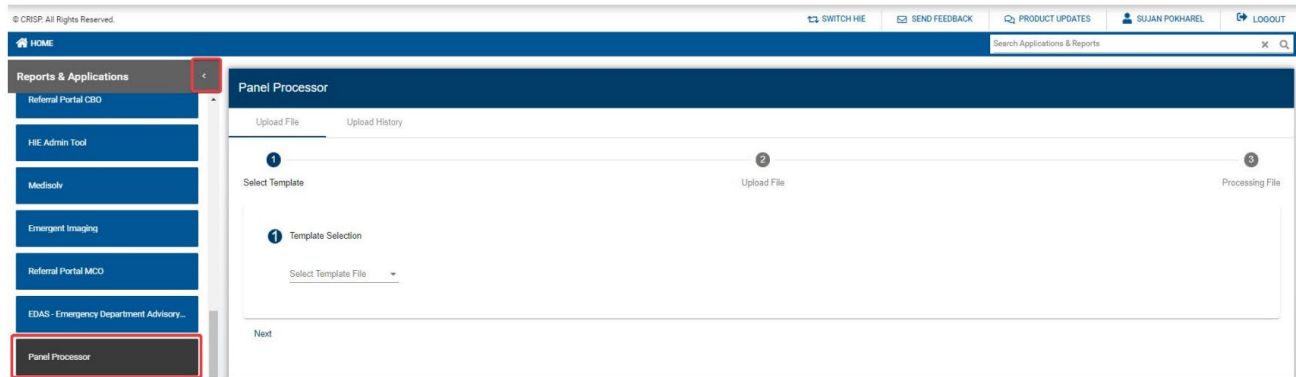
Users access the Panel Processor application within the HIE Portal. To access the Panel Processor, users must:

- Log into the HIE Portal with their username, password, and two-factor authentication credentials.
- Click the 'Panel Processor' service card from your dashboard to launch the application. Your dashboard will consist of all the services you have available to access. Each service displays on a card.

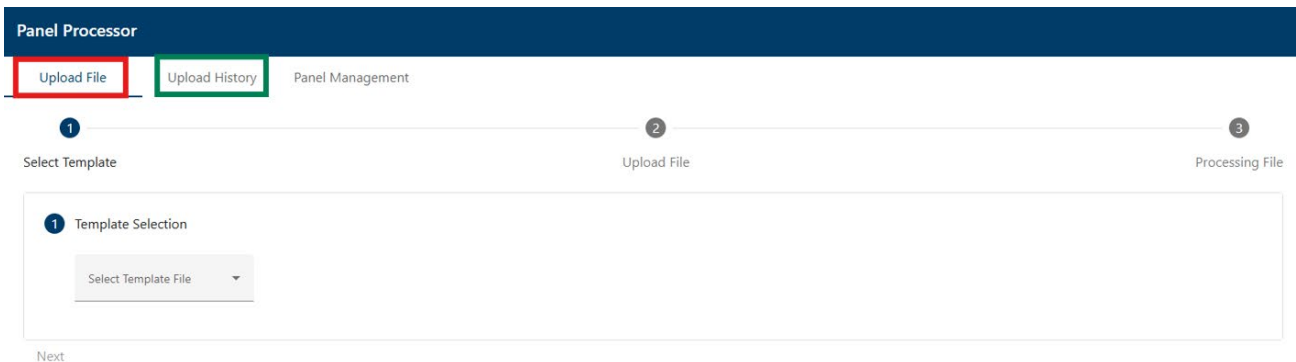
The screenshot shows the HIE Portal dashboard. At the top is a blue header with 'HOME' and a search bar. Below the header is a 'Patient Search' section with input fields for First Name, Last Name, Date of Birth, Gender, Address, and SSN, along with 'Reset' and 'Search' buttons. The main area is titled 'Your Dashboard' and contains a grid of service cards. The 'Panel Processor' card is highlighted with a red box and an arrow. An information icon (i) points to a note: 'Your dashboard may display different services depending on your access'. Other visible cards include Emergent Imaging, Prescription Reports, SBRIT, 2020 xCOMs, COVID-19 LTC Partnership, Population Explorer, HIE Admin Tool, Referral Portal, Referral Portal CBO, Referral Portal MCO, EDAS - Emergency Department Advisory System, COVID Lab Tools - No Patient, Medicare, Vaccine Tracking Service, Delegator Dashboard, and User Guide & Help.

Panel Processor Home Screen

The Panel Processor will display within an eye frame with the 'Reports & Applications' toolbar on the left side and the Portal toolbar at the top of the screen. You can expand the screen by clicking the arrow next to 'Reports & Applications' to collapse the side toolbar.



There are two tabs within the Panel Processor Application – 'Upload File' and 'Upload History'. The 'Upload File' tab is where users can submit a panel following the process prompts. Users can view the results of Previous successful and unsuccessful upload attempts in the 'Upload History' tab.



Templates

Templates are defined file formats with specific column fields and field data types. Users must select the appropriate template to submit a panel through the panel processor.



The CSS Patient Panel should be used by all organizations seeking clinical access. The Reporting Only Roster is used only for reporting purposes, where no clinical access is necessary. Users may also see the CONNIEPatientPanel, which should NOT be used by any Maryland-based organization.

Users can download a template within the Panel Processor. Once a template is selected, the Download Template button will appear.

1 Template Selection

Next

Select Template File

CSS Patient Panel

CONNIEPatientPanel

Reporting Only Roster

Panel Processor

Upload File Upload History Panel Management

1 Select Template 2 Upload File

✓ Template Selection

Select Template File

CSS Patient Panel

Selected Template: CSS Patient Panel

Download Template

2 Panel Selection

Please select the panel you would like to update

Please select panel code

Next

CSS Event Notification Delivery (CEND)

The CSS Event Notification Delivery (CEND) solution provides users with real-time alerts about patients' hospital encounters by matching an organization's patient roster (or "panel") with up-to-date encounter ADT data. These alerts are delivered directly into the organization's workflow, seamlessly integrating with the CRISP Portal via Population Explorer. You can learn more about CEND by visiting our website or clicking here.

The CEND panel template contains the required and optional fields to submit for processing. The table below highlights all available fields in the panel template. The



template is titled 'CEND Patient Panel' and will download in .xlsx or excel workbook format.

However, each CEND panel submission must be in a .csv file format. Please ensure your file as been converted to .csv file format before uploading. The file name of each submission must be in the following format:

- **[subscriber code]-1-z-MM-dd-yyyy (i.e: CEND_DEMO-1-z-08-05-2022)**

CEND Panel Template Values

Field Name	Required	Example Value	Notes
Group			
Member_Status		ADD	Values required for delta panels only
Patient_ID	X	999999	
First_Name	X	John	
Middle_Name		K	
Last_Name	X	Doe	
Name_Suffix		Mr.	
Address_1	X	33 Main St	
Address_2		Apt 45	Provide these values if available
City	X	Baltimore	
State	X	MD	
Zip	X	21230	
Birthdate	X	12/31/1900	
Gender	X	M	
SSN		999-99-9999	
Home_Phone		3025551212	
Work_Phone		3025551212	
Cell_Phone		3025551212	
Practice		Practice A	
Location		555 Healthy Way	
PCP		Dr. Smith	
NPI		1111111111	
TaxID		1111111111	
Insurance		Carefirst BCBS	
ACO		ACO 1	
Account_Number		8888888	
CEND_Startdate		9/27/2015	
Care_Program		Healthy Care	
Care_Program_StartDt		10/1/2014	
Care_Program_EndDt		9/1/2015	
Care_Manager		John Doe	
Care_Manager_Phone		111-111-1111	
Care_Manager_Email		John.doe@practicea.com	
RiskScore1		20	

RiskMethodology1		HCC	
RiskScore2		24	
RiskMethodology2		Risk Score A	
Region		Montgomery County	
Direct Email		abc@ainq.direct.org	
DocHaloID		123456	
Follow_Up_Date		9/20/2015	
Appointment_Missed_Date		9/5/2015	
Care_Alert		Patient may have experienced a controlled substance event on 9/6/2015 at hospital 4.	Values required for care alert panels
Assigning_Authority_Code		CEND_CODE	Values required for care alert panels

Submitting a Panel

To submit a panel through the Panel Processor user must:

1. Select the proper template for your organization. For panel submissions related to clinical access, select the template titled 'CSS Patient Panel'.
 - a. For CEND Panel Submissions, Select the panel you want to update. The Panel Processor will prompt you to select a panel by name and source code. A source code is a unique set of letters used within the HIE to identify a panel.

Panel Processor

Upload File
Upload History
Panel Management

1
 Select Template

2
 Upload File

✓

Template Selection

Select Template File
 CSS Patient Panel

Selected Template: CSS Patient Panel

Download Template

2

Panel Selection

Please select the panel you would like to update

Please select panel code

[Next](#)

1

2

3

Select Template

Upload File

Processing File

✓

Template Selection

Select Template File

CSS Patient Panel

Selected Template: CSS Patient Panel

Download Template

2

Panel Selection

There are no panels configured for you to update. If you feel this is an error, please contact CRISP Support at 877.952.7477 or support@crisphhealth.org

Next

1

2

3

Select Template

Upload File

Processing File

✓

Template Selection

Select Template File

CSS Patient Panel

Selected Template: CSS Patient Panel

Download Template

2

Panel Selection

Please select the panel you would like to update

Please select panel code

CRISP_DEMO (CRISP_DE...

Note: The panel you submit will fully overwrite your existing panel. Please carefully review your file prior to upload.

Note: File Naming Convention: [subscribercode]-1-z-MM-dd-yyyy

For Example: CRISP_DEMO-1-z-MM-dd-yyyy

Next

2. Navigate to the 'Upload File' step by clicking 'Next', 'Upload File', or directly on the number two icon.

3. Upload the completed file by dragging or clicking the grey box on the screen.

Panel Processor

Upload File

Upload History

1

2

3

Select Template

Upload File

Processing File

Upload File

Selected Template: CovidPointOfCare

Click Here Or Drop File

Reset

1 Select Template
2 Upload File
3 Processing File

Upload File

Selected Template: CovidPointOfCare

Files

EvanTestTemplate.xlsx

Reset

Remove

Submit

Reset

i User can reset or remove a selected file by clicking those respective buttons

4. **IF NECESSARY:** Perform panel mapping. This step is only required when using an *old version of the patient panel template*. Users can click and drag any mislabeled column headers to correctly align them with the corresponding templated column header. Once complete, proceed to the bottom of the page and select 'Continue'. The table below displays old template headers with the corresponding header in the new template.

Old Headers	New Headers
ENS_Startdate	CEND_Startdate
Follow Up Date	Follow_Up_Date
Appointment Missed Date	Appointment_Missed_Date

Applications

Processor

Managing - Dev

Directory

Dashboard - DEV

Effective

Dashboard

1 Scanning For Viruses
3 Validating File

Please map incorrect headers:

Standard Field	Your Field	Required
CEND_Startdate	ENS_Startdate	<input type="checkbox"/>
Follow_Up_Date	Follow Up Date	<input type="checkbox"/>
Appointment_Missed_Date	Appointment Missed Date	<input type="checkbox"/>

Correct mapping (no action is required)

Standard Field	Your Field	Required
Group	Group	<input type="checkbox"/>
Member_Status	Member_Status	<input type="checkbox"/>

[SWITCH HIE](#)
[MY HIE ADMIN\(S\)](#)
[SEND](#)

Care_Manager_Phone	Care_Manager_Phone	<input type="checkbox"/>
Care_Manager_Email	Care_Manager_Email	<input type="checkbox"/>
RiskScore1	RiskScore1	<input type="checkbox"/>
RiskMethodology1	RiskMethodology1	<input type="checkbox"/>
RiskScore2	RiskScore2	<input type="checkbox"/>
RiskMethodology2	RiskMethodology2	<input type="checkbox"/>
Region	Region	<input type="checkbox"/>
DirectEmail	DirectEmail	<input type="checkbox"/>
DocHaloID	DocHaloID	<input type="checkbox"/>
Care_Alert	Care_Alert	<input type="checkbox"/>
Assigning_Authority_Code	Assigning_Authority_Code	<input type="checkbox"/>

[Continue](#)
[Cancel](#)

4 Uploading for final validation

5 Pending final validation

[Reset back to Upload File](#)

5. Click 'Submit' to load the panel to the processor.

The processor will now perform an initial check to validate the file type and file size. These checks take only a few seconds. File type must be csv. File size can be no larger than 30 MB.

A successful file upload will advance the user to the 'Processing File' tab. While a failed upload will display an unsuccessful message on the screen.

Panel Processor

[Upload File](#)
[Upload History](#)

1 Select Template

2 Upload File

3 Processing File

Upload File

Selected Template: Alan

[Reset](#)

File Upload Failed. File content type is not supported.

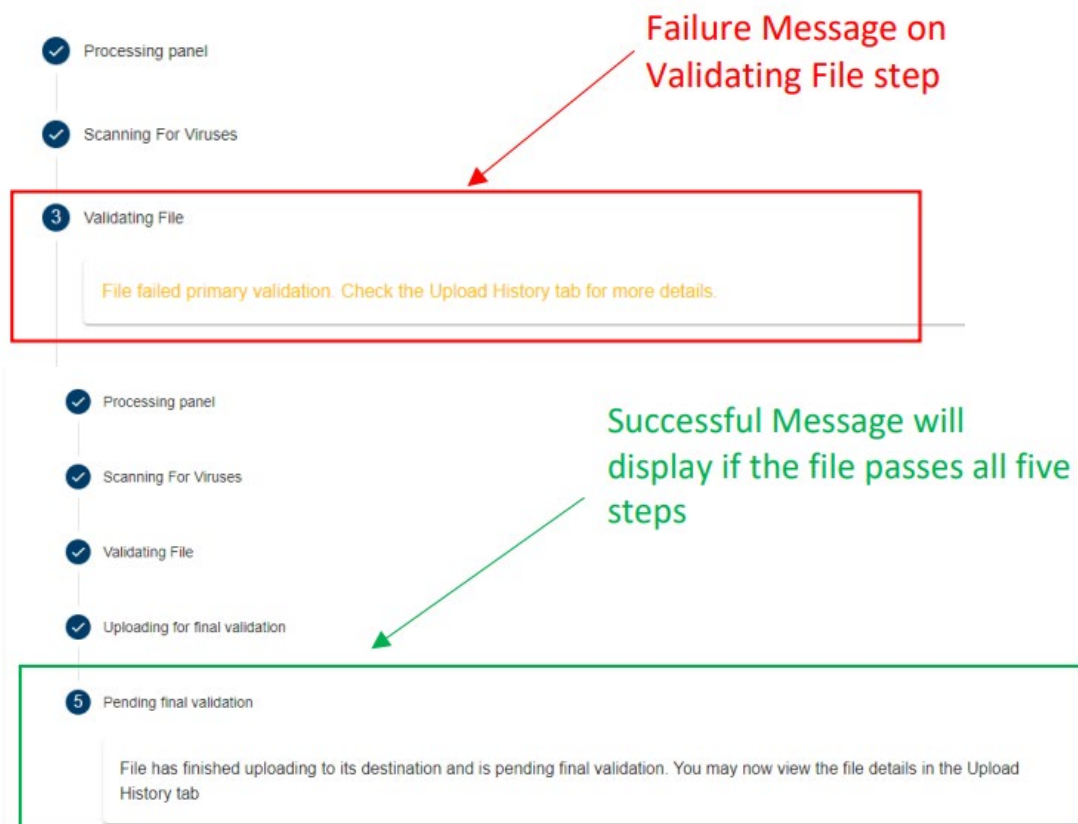
Unsuccessful Message



The Processing File step does not require any further action from the user. This step displays the real time actions the Panel Processor is performing to further validate and upload the file.

The steps the Panel Processor will take are the following:

1. Processing File – the processor will check to validate file type and file size
2. Scanning for Viruses – the processor will check for any viruses in the file.
3. Validating File – the processor will confirm data within the file are correct to the template specifications. See the CEND Template section above for how to correctly fill out the panel file.
 - a. If a file fails this step, users can view the error details in the 'Upload History' tab.
 - b. Even if one row fails out of one hundred rows, the whole file will fail to process.
4. Uploading for Final Validation – the processor will send the file to the correct database location within the HIE.
5. Pending Final Validation – the processor will confirm the file is received by the correct database successfully. **IF THERE IS AN ISSUE VALIDATING THE PANEL, the Account Manager assigned to your organization will contact you to assist in correcting the panel.**





Upload History

The 'Upload History' tab displays all file upload attempts which passed the initial check to validate the file type and size. In other words, the results of any upload attempt made by a specific user will appear here for that users to review.

Users will primarily use the 'Upload History' tab to understand why a panel file failed the 'Validating File' step. However, this tab can also be helpful to view when you last uploaded a panel to a particular source code.

The table on the 'Upload History' tab will contain a row for each file upload attempt. Each row contains the template used, the date and time of the attempted upload, the source code, the file name, the number of rows within the file, and file status.

Panel Processor					
Upload File	Upload History				
Template	Date/Time Added (UTC)	Source Code	File Name	Total Rows	Status
CovidPointOfCare	07/14/22 06:13 PM	CRISP_DEMO	Covid_Bulk_Upload_FileC.csv	9	Not Started
CovidPointOfCare	07/14/22 06:12 PM	CRISP_DEMO	Covid_Bulk_Upload_FileB.csv	9	Not Started
CovidPointOfCare	07/14/22 06:12 PM	CRISP_DEMO	Covid_Bulk_Upload_File10_rowscomma.csv	9	Not Started
CovidPointOfCare	07/14/22 06:12 PM	CRISP_DEMO	Covid_Bulk_Upload_FileA.csv	9	Not Started
CovidPointOfCare	07/14/22 05:20 PM	CRISP_DEMO	Covid_Bulk_Upload_File10_rowscomma.csv	9	Not Started
CovidPointOfCare	07/14/22 03:14 PM	CRISP_DEMO	2022-07-14T03-13-45-Covid_Bulk_Upload_File10_rowscomma.csv	9	Not Started

The file status refers to if the file is ready to be used in the desired service. The table below displays the possible statuses for panel uploads.

Status	Description
Error	There is an issue with the file. A support team member will reach out to explain and resolve the error.
Upload Complete: Awaiting Validation	Panel has been successfully submitted.

Users can click anywhere within a row to view additional details on the upload attempt. A popup box will appear displaying the number of total, successful, and unsuccessful rows. Failed rows will include an error message to assist the user in correcting for future submission attempts.

Successful Message:

Summary

Filename: DataTypesOptEnforceTemp.csv
Date Uploaded (UTC): 2022-07-26T18:54:55.8033333

1

Total Rows

0

Successful Rows

0

Failed Rows

Example Error Message:

Summary

Filename: EvanTestTemplate_testsources.csv
Date Uploaded (UTC): 2022-07-28T15:10:19.12

0

Total Rows

0

Successful Rows

0

Failed Rows

Row Number	Error
0	Missing Header from Column: MRN
0	Missing Header from Column: PatientAge
0	Missing Header from Column: PatientBirthWeight
0	Missing Header from Column: CompletedNewbornScreening?