

CRISP MD General Onboarding

10480 Little Patuxent Parkway, Suite 800
Columbia, MD 21044
877.952.7477 | info@crisphealth.org
www.crisphealth.org



• Agenda

- CRISP HIE Background
- Onboarding Process
- Overview of Key Tools
 - InContext/Clinical Information Tool
 - Population Explorer Tool & CEND
 - Consent Tool
 - Referral Tool
 - Reporting Services Tools (CRISP Reporting Services)



Background on CRISP HIE

• What is CRISP?

- **Chesapeake Regional Information System for Our Patients**
- State-Designated Health Information Exchange
- Shared Infrastructure between MD, DC, WV, CT, AK

Mission: We will support the healthcare community of MD and our region to appropriately and securely share health information in order to facilitate care, reduce costs, and improve health outcomes.

Vision: To advance health and wellness by deploying health information technology solutions adopted through cooperation and collaboration.

• Importance of Health Information Exchange (HIE)

- Help doctors, hospitals, and other healthcare professionals deliver faster, better care by promoting medical data sharing across the region
- Assist the State in the evaluation of public health interventions and health equity
- Coordinate healthcare between different providers, ensuring a more cohesive healthcare experience for patients
- May lower patient healthcare costs by reducing repeated tests



• What Does CRISP Do?

- **Point of Care:** InContext & Clinical Information Service Information
 - Search for your patients' prior health records (labs, radiology reports, etc.)
 - Determine other members of your patient's care team
 - View external records in a SMART on FHIR app inside your EHR
- **Care Coordination:** Event Notifications (CEND)
 - Be notified when your patient is hospitalized in any regional hospital
 - Enhance workflows across multiple care settings and teams
- **Population Health Reports:** CRISP Reporting Services (CRS)
 - Using claims, public health, and clinical data to design dashboards and measure interventions
- **Program Administration**
 - Making policy discussions more transparent and informed
 - Disseminating evidence-based best practices and technology
- **Public Health & Health Data Utility**
 - Deploying services in partnership with health officials
 - Providing information and services to state and local health departments

Services	
Applications >	CRISP Portal
Prescription Drug Monitoring Program (PDMP)	InContext
CRISP Reporting Services	Consent Tool
Medicaid Redetermination	HIE Admin Tool
Advance Directives	Overdose Alerts
	Panel Processor
	Snapshot



Onboarding Process

- Onboarding Process

- Getting Started with CRISP
- Panel Processor
- HIE Admin Tool
- CRISP Portal

● Getting Started with CRISP

- Forms for organizations to eSign – more info can be found on the [CRISP Website](#)
 - Participation Agreement (PA)
 - Notice of Privacy Practices (NPP)
 - Substance Abuse Attestation (SUD)
 - LabCorp & Quest Feed
 - Patient Panel Submission
- Submitting a panel
 - Panels are excel spreadsheets that are pulled from healthcare offices' EMRs including patients from the last 18 months.
 - Most panels must be updated at least every two years to avoid expiration.
 - They can be submitted through the **Panel Processor Application**.

● Panel Processor

- The Panel Processor application allows users to upload panels for various services, like the CRISP Event Notification Delivery (CEND) Solution, into the HIE.
- 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
- Users must select a template to submit a panel through the Panel Processor.
 - Templates are defined file formats with specific column fields and field data types. Each service using the Panel Processor will have a unique template that can be downloaded in the Processor.

● Panel Processor

To submit a panel through the Panel Processor user must:

- (1) Select the template of the service your panel will be used for.
 - 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.
- (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.
- (4) Click 'Submit' to load the panel to the processor.
- (5) The processor will preform a quick initial check to validate the file type and file size.
 - File type must be csv, txt, or tsv. File size can be no larger than 100 MB

• Panel Processor

Panel Processor

Upload File Upload History Panel Management

1 2

Select Template 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

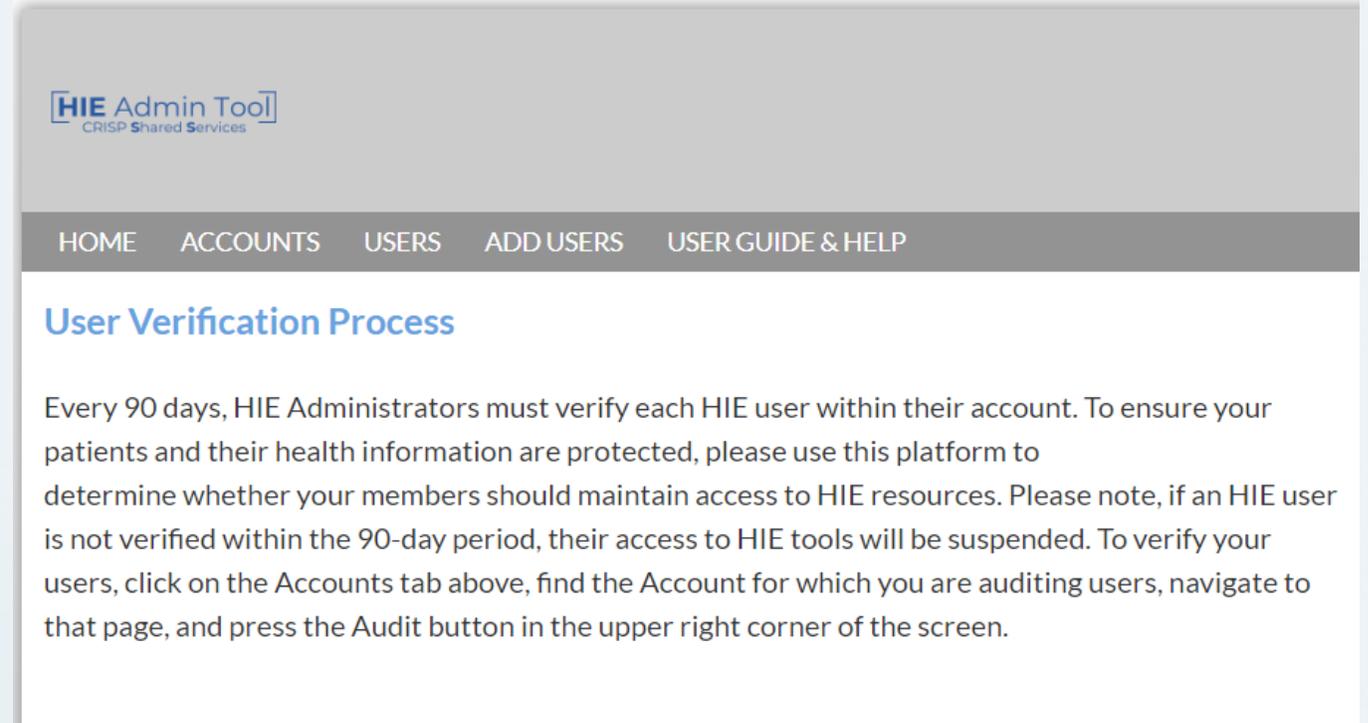
● HIE Admin Tool

- CRISP Participants are required to assign the HIE Administrator Role to one or more users at their organization.
- The Health Information Exchange (HIE) Admin Tool enables HIE Administrators to manage CRISP Portal accounts within their organization. The tool allows users to:
 - Create Users
 - Reactivate Suspended Users
 - Recreate Deactivated Users
 - Audit Users
 - Deactivate users who leave the organization/no longer require access
 - View Account Services
 - Provision Services to Users

[HIE Admin Tool]
CRISP **Shared Services**

• HIE Administrator Set Up

- HIE Administrators will receive a welcome email with instructions on how to activate their account. This includes creating an account and setting up two-factor authentication.
- After the account is set up, the admin can begin to verify users by selecting the “Accounts” tab.



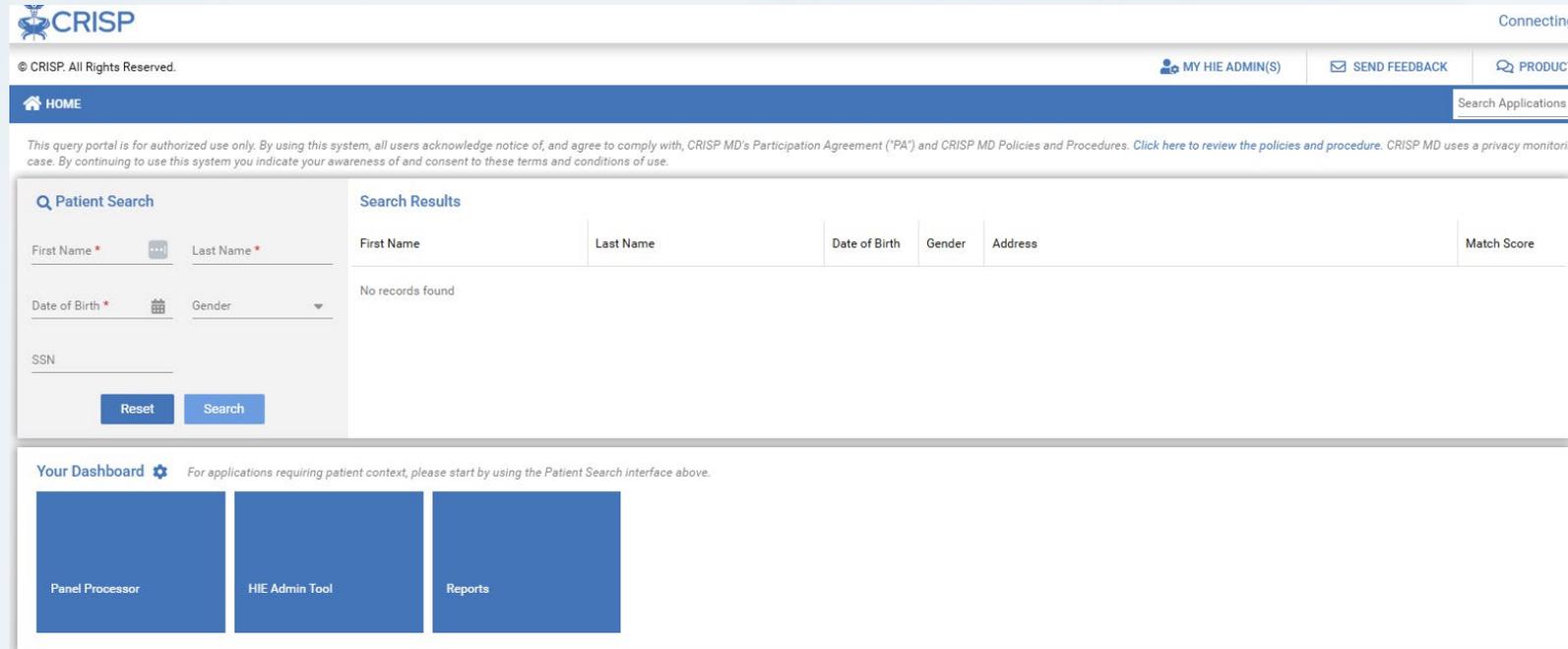
[HIE Admin Tool]
CRISP Shared Services

HOME ACCOUNTS USERS ADD USERS USER GUIDE & HELP

User Verification Process

Every 90 days, HIE Administrators must verify each HIE user within their account. To ensure your patients and their health information are protected, please use this platform to determine whether your members should maintain access to HIE resources. Please note, if an HIE user is not verified within the 90-day period, their access to HIE tools will be suspended. To verify your users, click on the Accounts tab above, find the Account for which you are auditing users, navigate to that page, and press the Audit button in the upper right corner of the screen.

- CRISP Portal
 - The CRISP Portal allows users to access the CRISP applications used by their organization.
 - Users can also search for a specific patient using the Patient Search menu.
 - Most CRISP Apps can be found under Your Dashboard.



CRISP

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MY HIE ADMIN(S) SEND FEEDBACK PRODUCT

HOME Search Applications

This query portal is for authorized use only. By using this system, all users acknowledge notice of, and agree to comply with, CRISP MD's Participation Agreement ("PA") and CRISP MD Policies and Procedures. Click here to review the policies and procedure. CRISP MD uses a privacy monitoring case. By continuing to use this system you indicate your awareness of and consent to these terms and conditions of use.

Q Patient Search

First Name * Last Name *

Date of Birth * Gender

SSN

Reset Search

Search Results

First Name	Last Name	Date of Birth	Gender	Address	Match Score
No records found					

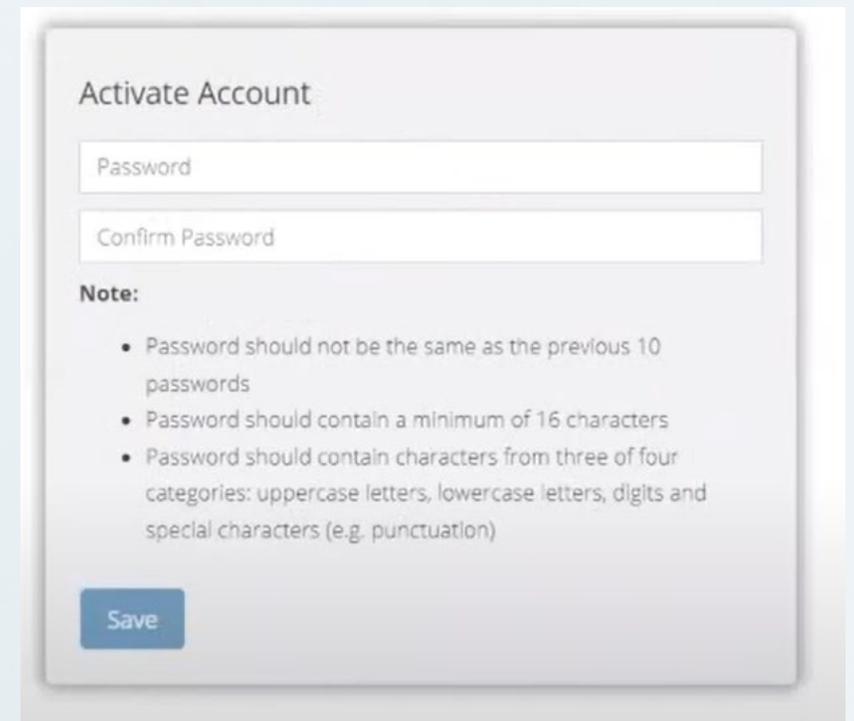
Your Dashboard For applications requiring patient context, please start by using the Patient Search interface above.

Panel Processor HIE Admin Tool Reports

Note: Some applications can only be accessed when searching a patient (i.e., Clinical Information).

• CRISP Portal Set Up

- New users will receive an email from 'donotreply@hmetrix.com' containing instructions on how to activate their portal account.
- CRISP places an emphasis on security and requires that all users set up two-factor authentication for their portal account. CRISP accepts most 2FA applications including:
 - 1) Twilio Authy Application
 - 2) Security Key (i.e., YubiKey)
 - 3) Other Authentication Applications (i.e., Google Authenticator, Microsoft Authenticator, Duo)



Activate Account

Password

Confirm Password

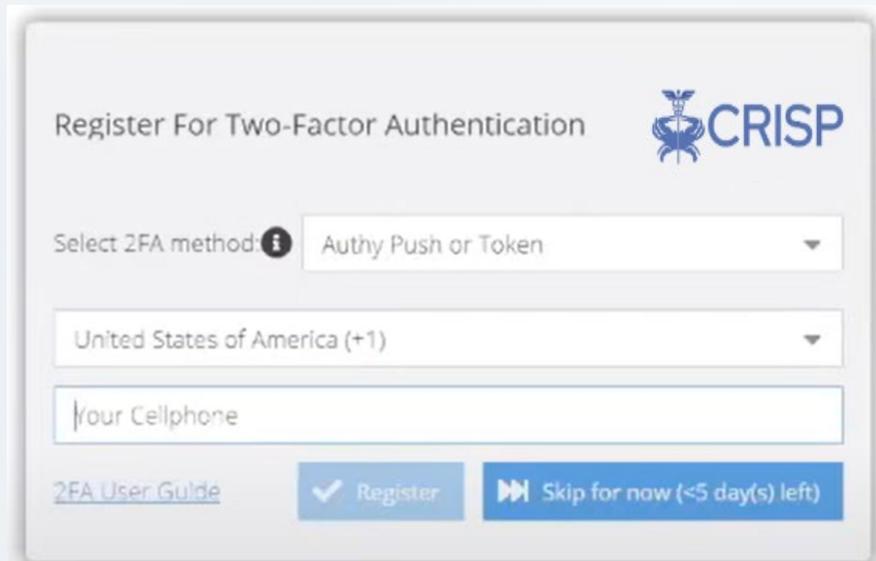
Note:

- Password should not be the same as the previous 10 passwords
- Password should contain a minimum of 16 characters
- Password should contain characters from three of four categories: uppercase letters, lowercase letters, digits and special characters (e.g. punctuation)

Save

CRISP Portal Set Up cont.

You will receive a text after you enter your phone number with a link to download the Twilio Authy App.



Register For Two-Factor Authentication 

Select 2FA method:  Authy Push or Token

United States of America (+1)

your Cellphone

[2FA User Guide](#)

To use another Authenticator, enter your phone number and scan the QR Code that appears using your Authenticator app.



Activate Two-Factor Authentication 

Preferred - Install Authy OR Scan the QR code using an alternative Authenticator app 

Enter the 6-digit token and click Activate 

Once a password and two-factor authentication are set up, users can log into the portal here:

<https://portal.crisphealth.org/>

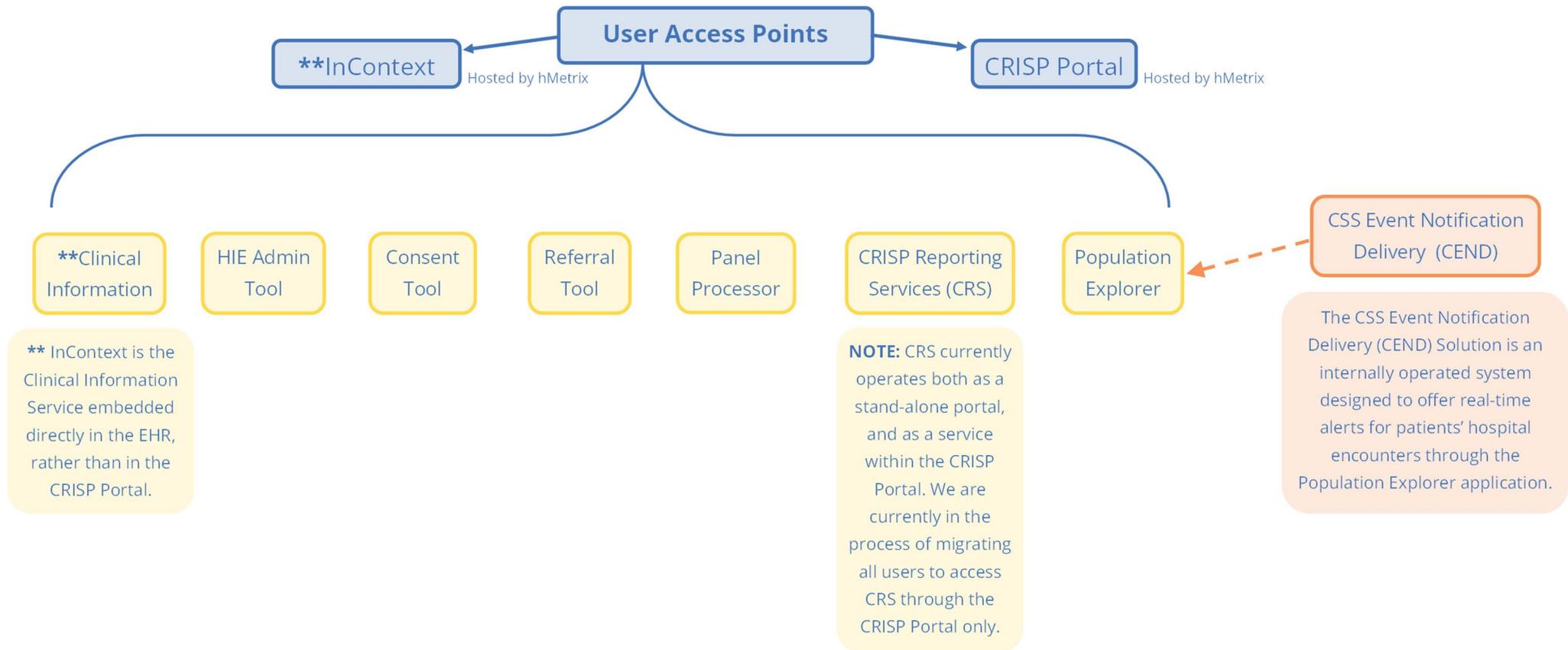


Overview of Key Tools

• Key Tools

- **InContext/Clinical Information Service**
(Slides 21-25)
- **Population Explorer and CSS Event Notification Delivery (CEND)**
(Slides 26-45)
- **Consent Tool**
(Slides 46-55)
- **Referral Tool**
(Slides 56-59)
- **CRISP Reporting Services (CRS)**
(Slides 60-64)

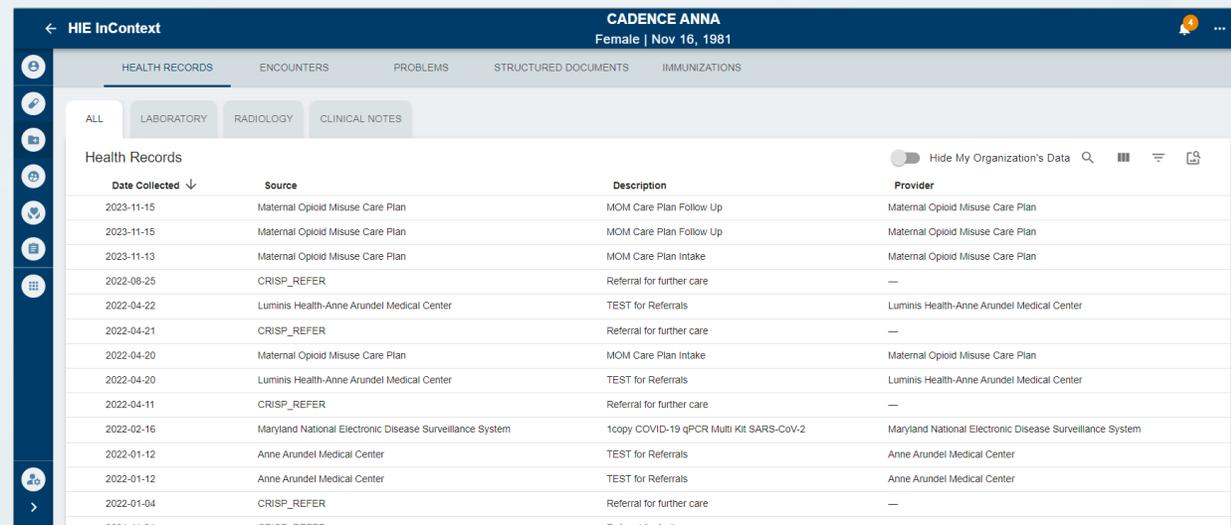
• Key Tools cont.



• InContext/Clinical Information

- CRISP InContext delivers real-time data from the CRISP HIE directly to healthcare provider workflows through their electronic healthcare record (EHR) system.
- InContext is an effective tool when a user needs information not found within their EMR.

- InContext can display in either of these two views. 



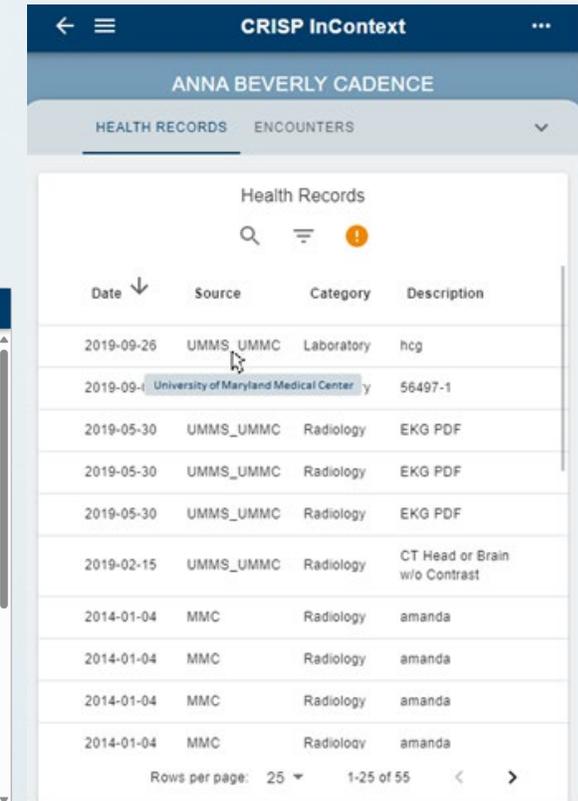
HIE InContext CADENCE ANNA
Female | Nov 16, 1981

HEALTH RECORDS ENCOUNTERS PROBLEMS STRUCTURED DOCUMENTS IMMUNIZATIONS

ALL LABORATORY RADIOLOGY CLINICAL NOTES

Health Records Hide My Organization's Data

Date Collected ↓	Source	Description	Provider
2023-11-15	Maternal Opioid Misuse Care Plan	MOM Care Plan Follow Up	Maternal Opioid Misuse Care Plan
2023-11-15	Maternal Opioid Misuse Care Plan	MOM Care Plan Follow Up	Maternal Opioid Misuse Care Plan
2023-11-13	Maternal Opioid Misuse Care Plan	MOM Care Plan Intake	Maternal Opioid Misuse Care Plan
2022-08-25	CRISP_REFER	Referral for further care	—
2022-04-22	Luminis Health-Anne Arundel Medical Center	TEST for Referrals	Luminis Health-Anne Arundel Medical Center
2022-04-21	CRISP_REFER	Referral for further care	—
2022-04-20	Maternal Opioid Misuse Care Plan	MOM Care Plan Intake	Maternal Opioid Misuse Care Plan
2022-04-20	Luminis Health-Anne Arundel Medical Center	TEST for Referrals	Luminis Health-Anne Arundel Medical Center
2022-04-11	CRISP_REFER	Referral for further care	—
2022-02-16	Maryland National Electronic Disease Surveillance System	1copy COVID-19 qPCR Multi Kit SARS-CoV-2	Maryland National Electronic Disease Surveillance System
2022-01-12	Anne Arundel Medical Center	TEST for Referrals	Anne Arundel Medical Center
2022-01-12	Anne Arundel Medical Center	TEST for Referrals	Anne Arundel Medical Center
2022-01-04	CRISP_REFER	Referral for further care	—
2021-11-24	CRISP_REFER	Referral for further care	—



CRISP InContext

ANNA BEVERLY CADENCE

HEALTH RECORDS ENCOUNTERS

Health Records

Date ↓	Source	Category	Description
2019-09-26	UMMS_UMMC	Laboratory	hcg
2019-09-26	University of Maryland Medical Center		56497-1
2019-05-30	UMMS_UMMC	Radiology	EKG PDF
2019-05-30	UMMS_UMMC	Radiology	EKG PDF
2019-05-30	UMMS_UMMC	Radiology	EKG PDF
2019-02-15	UMMS_UMMC	Radiology	CT Head or Brain w/o Contrast
2014-01-04	MMC	Radiology	amanda
2014-01-04	MMC	Radiology	amanda
2014-01-04	MMC	Radiology	amanda
2014-01-04	MMC	Radiology	amanda

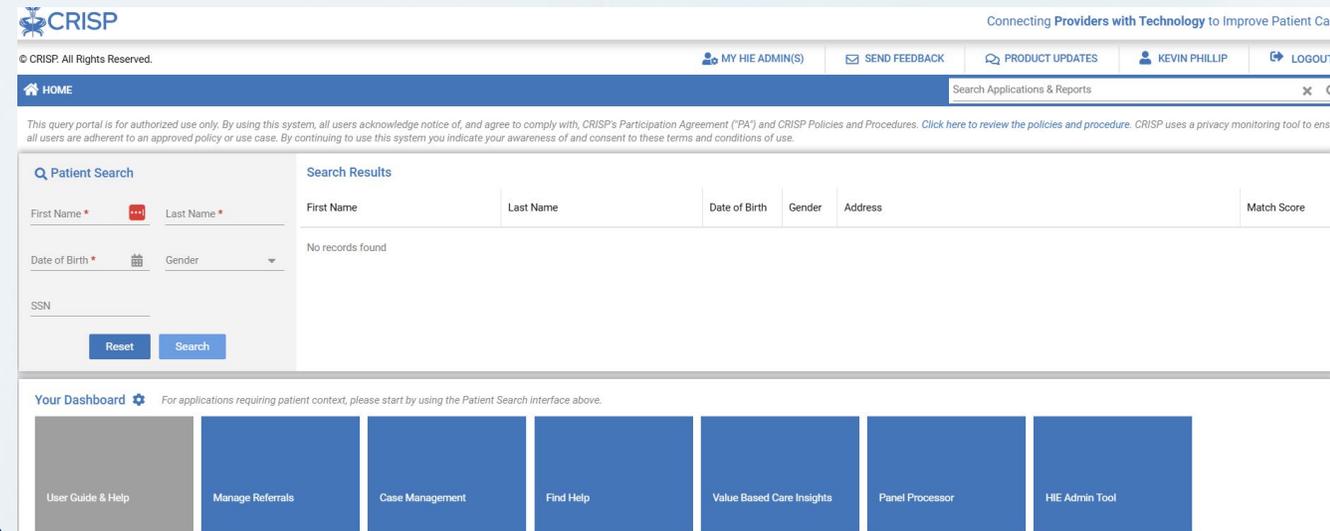
Rows per page: 25 1-25 of 55

• Accessing InContext

- When viewing a patient's EMR within the EHR, users can launch the InContext App by clicking the CRISP icon. The following EHR's are integrated with CRISP InContext:



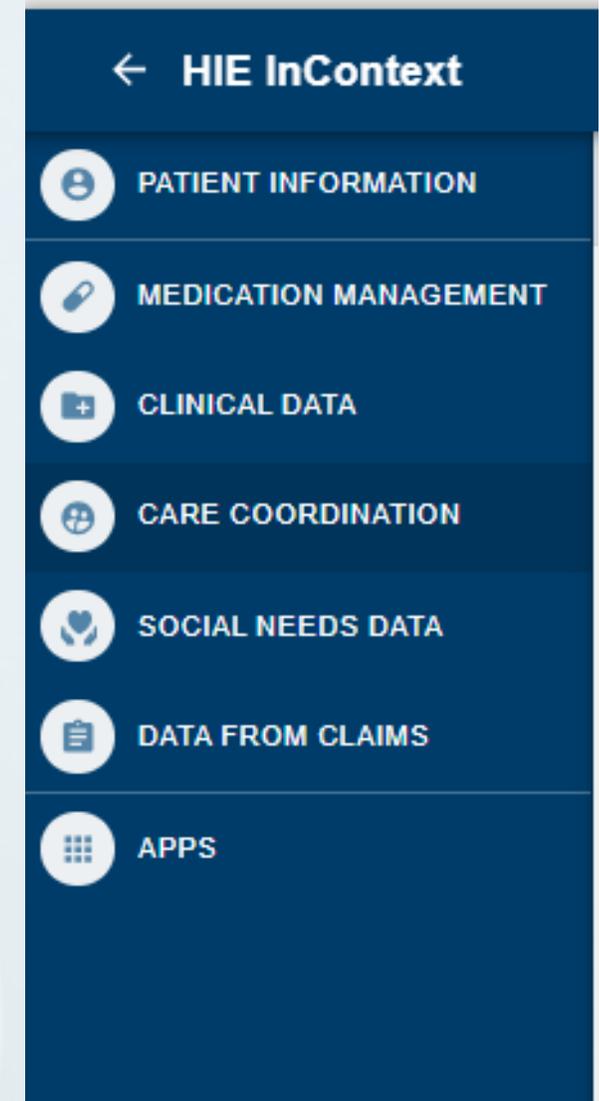
- If your EHR is not connected with InContext, you can access the App within a secure web-based site called **CRISP Portal**.



- To access the CRISP Portal, visit <https://portal.crisphealth.org>
- Within the CRISP Portal, InContext is called Clinical Information Service.

• InContext Tabs and Subtabs

- Patient Information
- Priority Alerts
- Medication Management
 - PDMP
 - PDMP Advisories
 - Reported Medications
- Clinical Data
 - Health Records
 - Encounters
 - Problems
 - Structured Documents (CCDAs)
 - Immunization
- Care Coordination
 - Care Team
 - Care Alerts
 - Referral History
 - Advance Directives
- Social Determinants
 - Assessment
 - Conditions
- Claims Data
- Apps from CRISP Portal



• InContext Features cont.

Priority alerts are found here. They include clinical alerts and infectious control alerts.

HIE InContext

- PATIENT INFORMATION
- MEDICATION MANAGEMENT
- CLINICAL DATA
- CARE COORDINATION
- SOCIAL NEEDS DATA
- DATA FROM CLAIMS

To toggle the InContext side bar, click this arrow.

HIE InContext Anna Cadence
Female | Nov 16, 1981

HEALTH RECORDS ENCOUNTERS PROBLEMS STRUCTURED DOCUMENTS IMMUNIZATIONS ALLERGIES

ALL LABORATORY RADIOLOGY CLINICAL NOTES

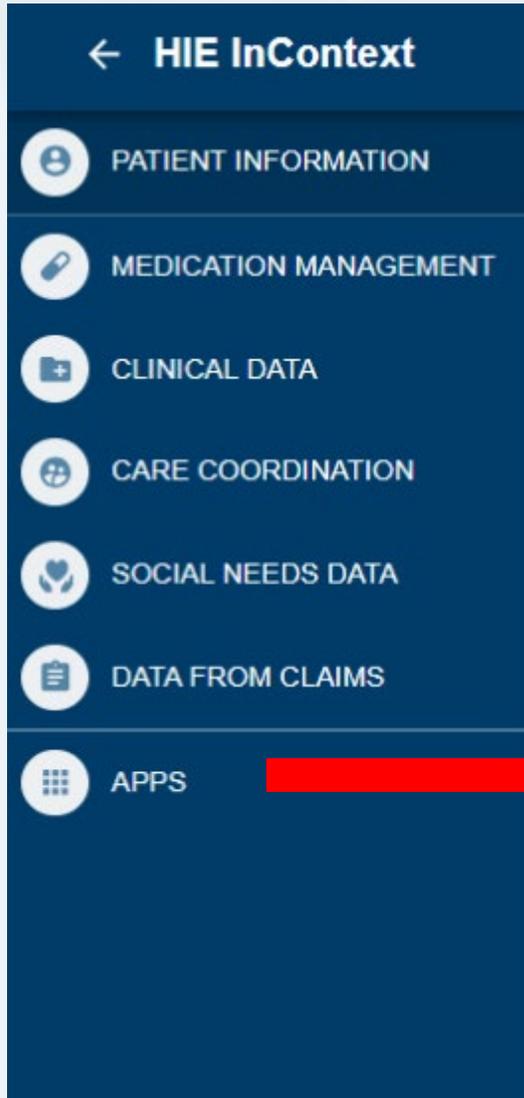
Health Records

Date Collected (ET) ↓	Source	Description	Provider
2025-01-21	Maryland National Electronic Disease Surveillance System	1copy COVID-19 qPCR Multi Kit SARS-CoV-2	Maryland National Electronic Disease Surveillance System
2025-01-21	Maryland National Electronic Disease Surveillance System	1copy COVID-19 qPCR Multi Kit SARS-CoV-2	Maryland National Electronic Disease Surveillance System
2025-01-21	Maryland National Electronic Disease Surveillance System	1copy COVID-19 qPCR Multi Kit SARS-CoV-2	Maryland National Electronic Disease Surveillance System
2024-07-12	Maternal Opioid Misuse Care Plan	MOM Care Plan Substantive Outreach	Maternal Opioid Misuse Care Plan
2024-07-12	Maternal Opioid Misuse Care Plan	MOM Care Plan Substantive Outreach	Maternal Opioid Misuse Care Plan
2023-11-15	Maternal Opioid Misuse Care Plan	MOM Care Plan Substantive Outreach	Maternal Opioid Misuse Care Plan
2023-11-15	Maternal Opioid Misuse Care Plan	MOM Care Plan Substantive Outreach	Maternal Opioid Misuse Care Plan
2023-11-14	Maternal Opioid Misuse Care Plan	MOM Care Plan Follow Up	Maternal Opioid Misuse Care Plan
2023-11-14	Maternal Opioid Misuse Care Plan	MOM Care Plan Follow Up	Maternal Opioid Misuse Care Plan
2023-11-13	Maternal Opioid Misuse Care Plan	MOM Care Plan Intake	Maternal Opioid Misuse Care Plan
2022-08-25	CRISP_REFER	Referral for further care	-
2022-04-22	Luminis Health-Anne Arundel Medical Center	TEST for Referrals	Luminis Health-Anne Arundel Medical Center
2022-04-21	CRISP_REFER	Referral for further care	-

- Feedback
- Glossary
- About

Feedback: send non-PHI feedback to our development staff
Glossary: definitions of terms used in the application
About: application version & release notes

- InContext Features cont.

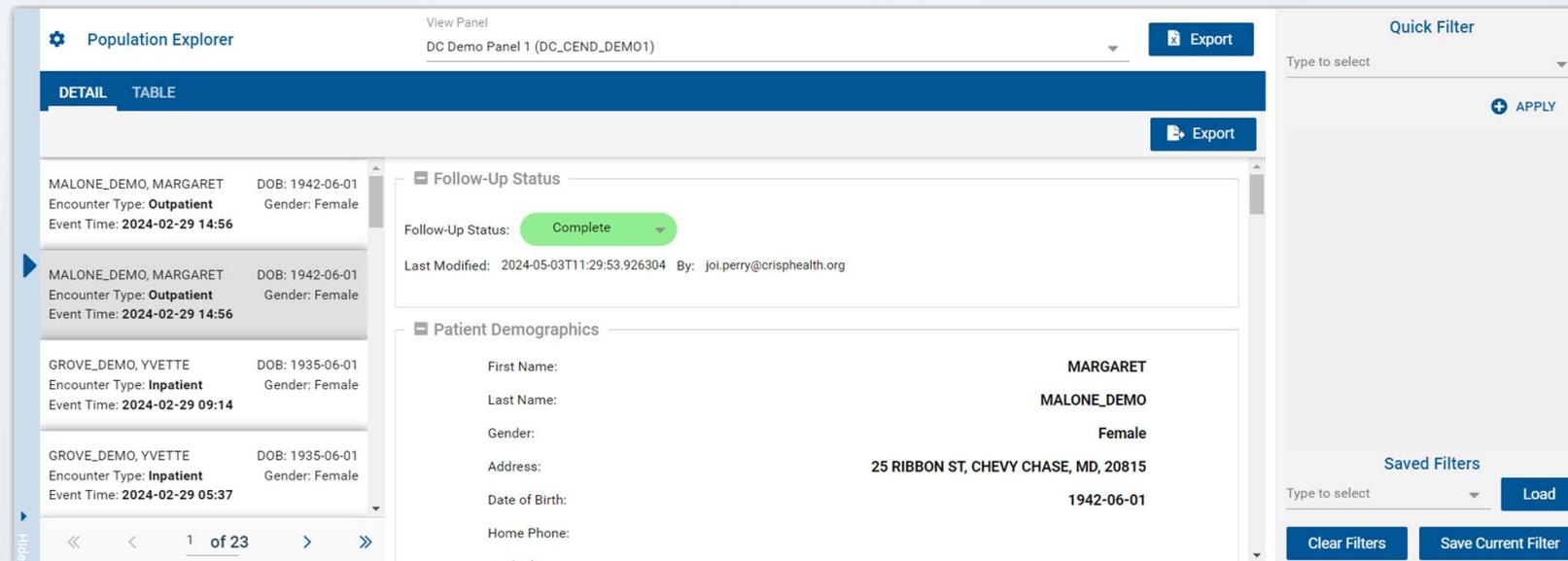


The apps widget allows users to launch CRISP applications via the CRISP Portal. Authorized users can launch the following apps:

1. Consent Tool
2. Referral Tool
3. MyDirectives DC (this is available only to DC-licensed providers)

● CEND & Population Explorer Tool

- The CRISP Event Notification Delivery (CEND) service offers real-time alerts for patients' hospital encounters.
- Population explorer integrates CEND into the CRISP Portal, providing an interface for clinicians and care teams to view patient encounters.



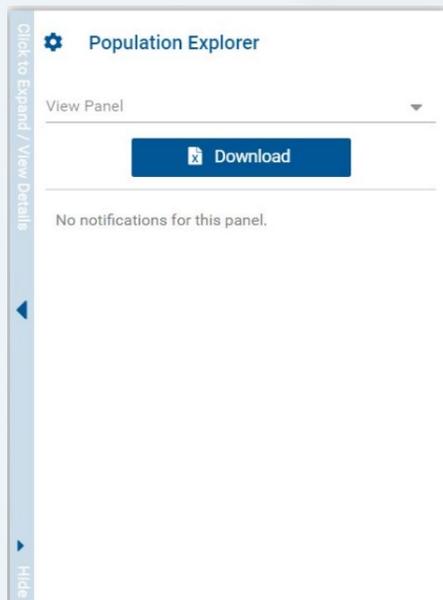
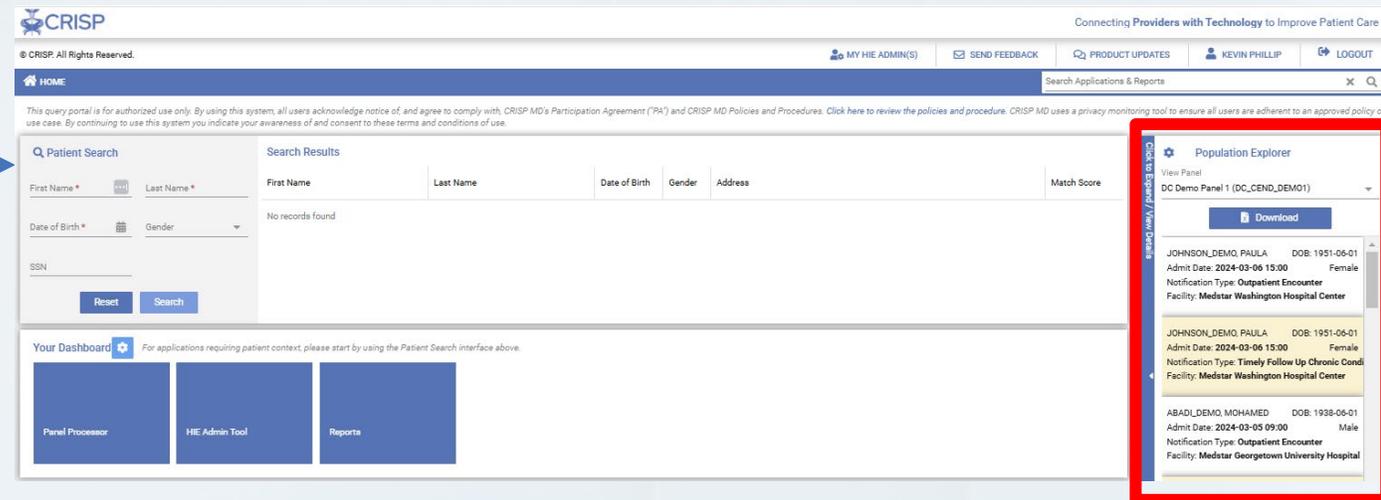
The screenshot displays the 'Population Explorer' interface. At the top, it shows 'View Panel' set to 'DC Demo Panel 1 (DC_CEND_DEMO1)' and an 'Export' button. Below this are tabs for 'DETAIL' and 'TABLE', with 'DETAIL' selected. A list of patient encounters is shown on the left, with the first two selected. The main area displays details for 'MALONE_DEMO, MARGARET', including her DOB (1942-06-01), Gender (Female), Encounter Type (Outpatient), and Event Time (2024-02-29 14:56). A 'Follow-Up Status' section shows 'Complete' and 'Last Modified: 2024-05-03T11:29:53.926304 By: joi.perry@crisphealth.org'. A 'Patient Demographics' section lists: First Name: MARGARET, Last Name: MALONE_DEMO, Gender: Female, Address: 25 RIBBON ST, CHEVY CHASE, MD, 20815, and Date of Birth: 1942-06-01. On the right, a 'Quick Filter' section is visible with an 'APPLY' button and a 'Saved Filters' section with a 'Load' button. At the bottom, there are 'Clear Filters' and 'Save Current Filter' buttons.

● Population Explorer Tool & CEND

- Key Features and Functionalities
 - Patient Record/Other App Launching
 - Expanded View
 - Follow Up Status
 - Patient Demographics
 - Selected Encounter Details
 - Diagnosis Details
 - Encounter History
 - Filters
 - Data Exports

• Accessing Population Explorer

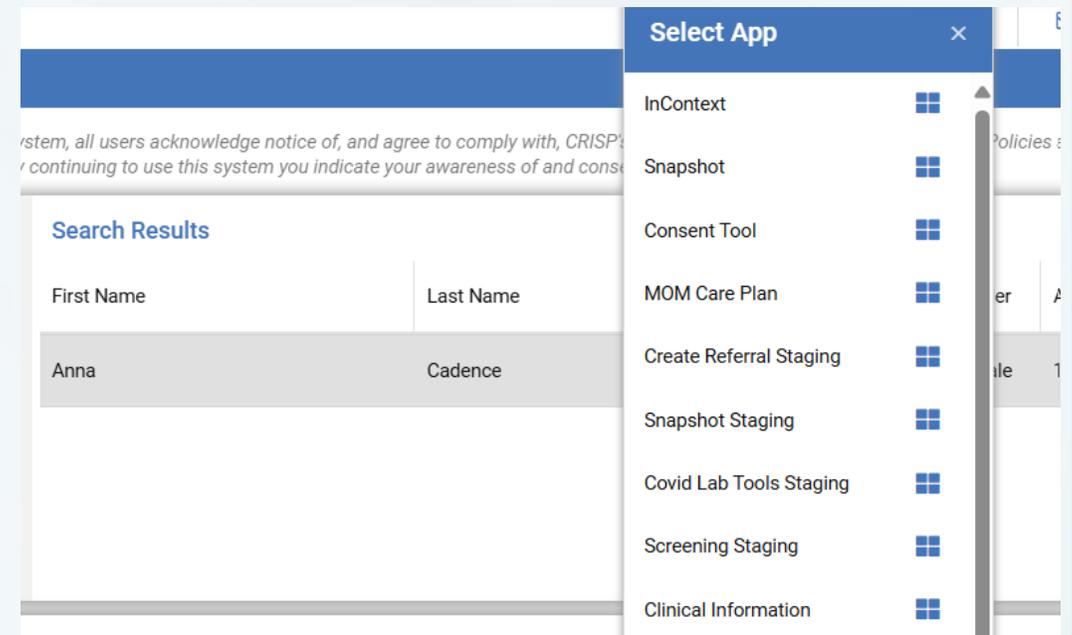
- To access Population Explorer, Log into the CRISP Portal. On the right-hand side of the screen, you will see the Population Explorer pane.



- To choose a panel, use the drop-down menu labeled "View Panel" at the top of the pane. After selecting a panel from the list of your available panel, the pane will display event notification for that panel.

Patient Record/Other App Launching

- You can link back to a patient's clinical information in the portal by right clicking on that patient within the expanded or collapsed view.



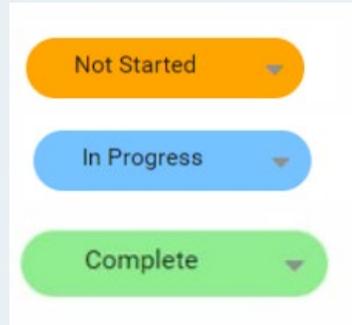
The screenshot shows a web interface with a search results table and a dropdown menu. The table has columns for 'First Name' and 'Last Name'. One row is highlighted with the names 'Anna' and 'Cadence'. The dropdown menu, titled 'Select App', lists several application options, each with a blue window icon to its right.

First Name	Last Name
Anna	Cadence

- InContext
- Snapshot
- Consent Tool
- MOM Care Plan
- Create Referral Staging
- Snapshot Staging
- Covid Lab Tools Staging
- Screening Staging
- Clinical Information

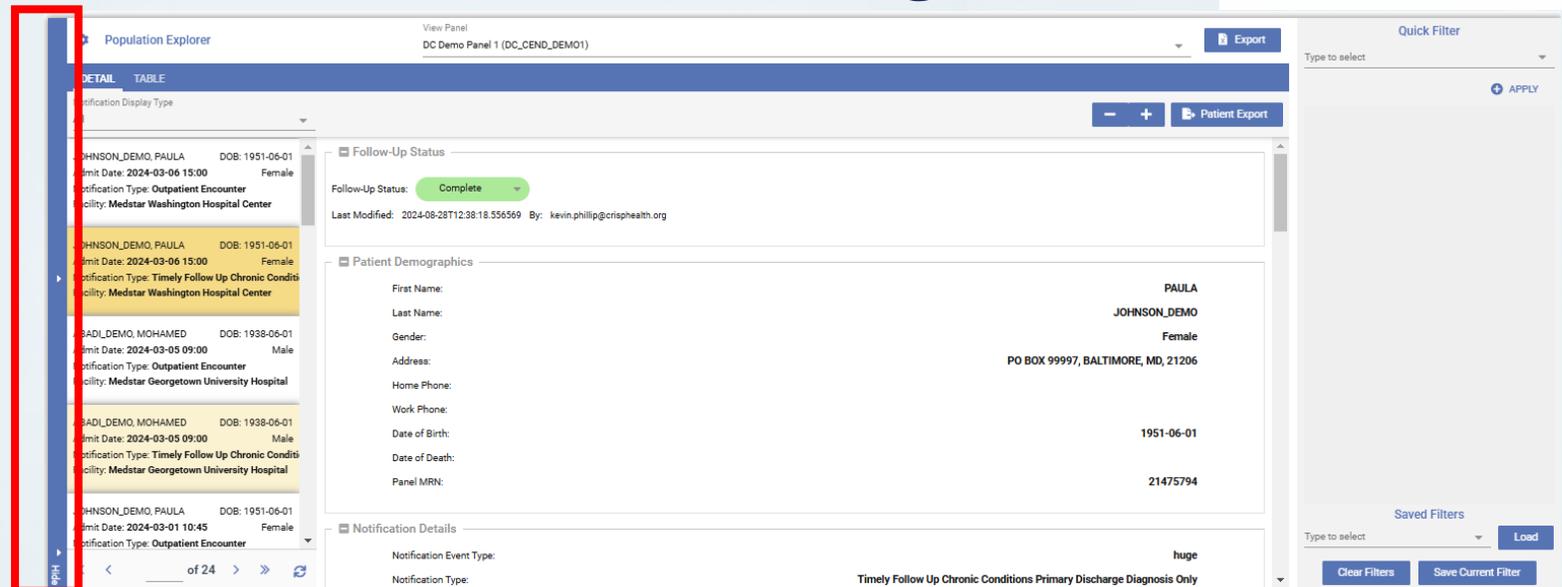
Expanded View and Follow Up Status

- To toggle between expanded or collapsed view, use the **arrows** on the side. In the expanded view, users can see more detailed information including



demographics, encounter details, and follow-up status.

- The follow-up status drop-down allows



The screenshot shows the 'Population Explorer' interface for 'DC Demo Panel 1 (DC_CEND_DEMO1)'. On the left, a table lists patients with columns for name, DOB, and gender. A red box highlights a vertical bar on the left side of this table, which contains expand/collapse arrows. The main view shows a patient's details, including a 'Follow-Up Status' section with a 'Complete' dropdown menu, 'Patient Demographics', and 'Notification Details'.

users to provide updates reflecting whether a notification has been resolved.

Expanded View cont.

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:

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: O
 Patient Complaint: XR
 Point of Care: Medstar Surgery Center At Lafayette
 Primary Diagnosis Code:
 Primary Diagnosis Description:

In Population Explorer, all related patient events are consolidated into a single encounter line item.

Encounter History

GROVE_DEMO, YVETTE Encounter Type: Inpatient Event Time: 2024-02-29 09:14	DOB: 1935-06-01 Gender: Female
GROVE_DEMO, YVETTE Encounter Type: Inpatient Event Time: 2024-02-29 05:37	DOB: 1935-06-01 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

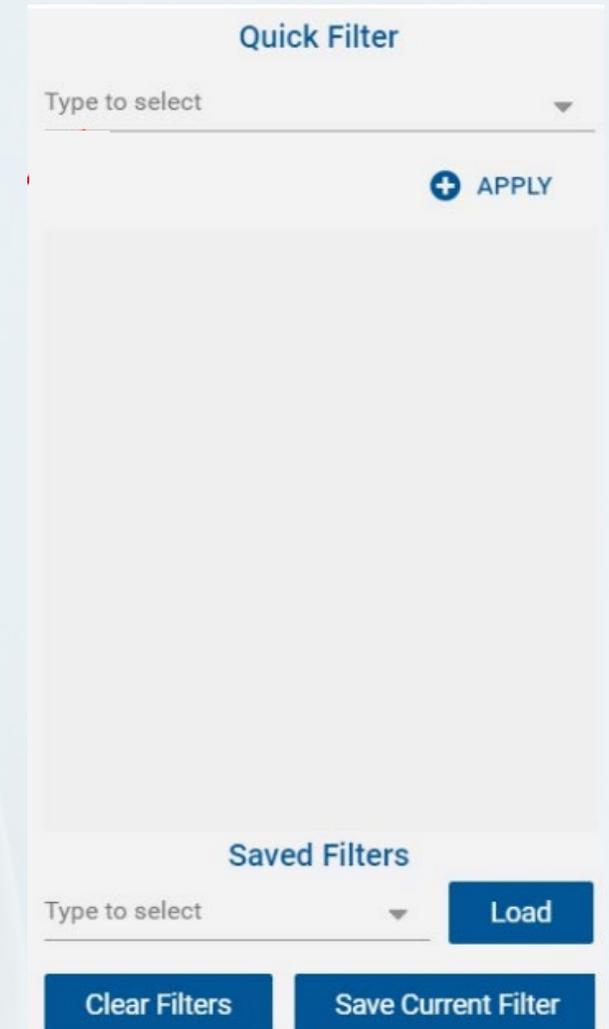
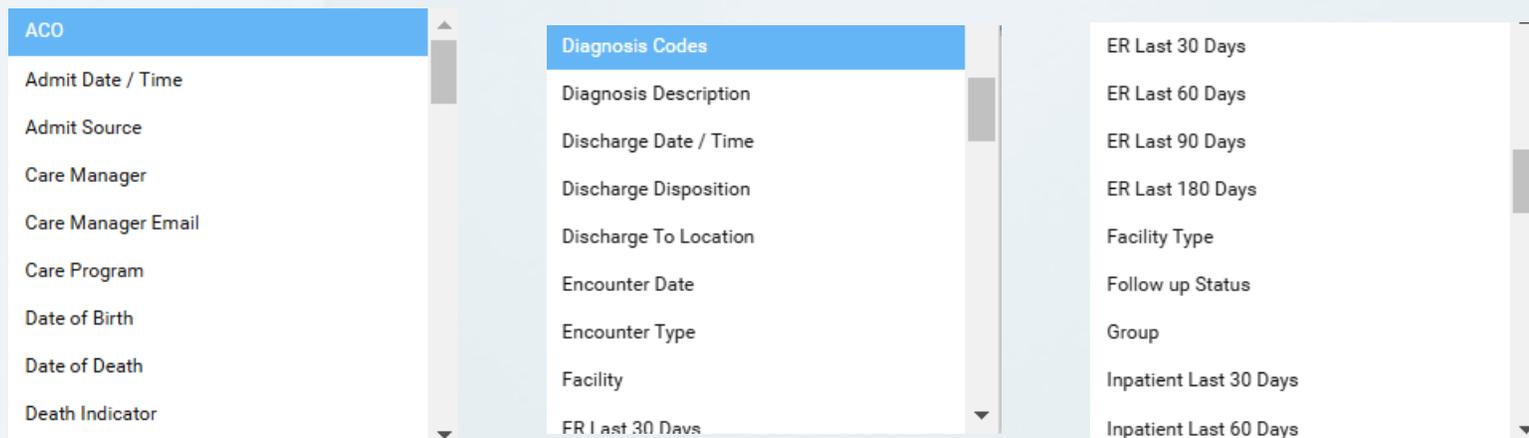
Under Encounter History, users can view encounter history from the last six months.

Diagnosis Details

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

● Filters

- Users can create, manage, save, and apply filters to the notification list using the “Quick Filter” bar on the right-hand side of the screen. Multiple filters can be applied at one time. The available filters are below.
- View a full filter list with definitions on the CRISP Website CEND Webpage, or by clicking [here](#).



• Filters (Cont.)

- Inpatient Last 180 Days
- Insurance From ADT
- Insurance Type
- Location
- MRN
- National Provider Identifier (NPI)
- Notification Type

- Risk Methodology 1
- Risk Methodology 2
- Risk Score 1
- Risk Score 2

- Panel MRN
- Patient Class
- Patient Complaint**
- Patient Name
- Practice
- Primary Care Provider
- Primary Diagnosis Codes
- Primary Diagnosis Description
- Provider

- OBS (Observation) Last 30 Days
- OBS (Observation) Last 60 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

Quick Filter

Type to select ▼

+ **APPLY**

Saved Filters

Type to select ▼

Load

Clear Filters
Save Current Filter

- # Advanced Panel Builder (APB)

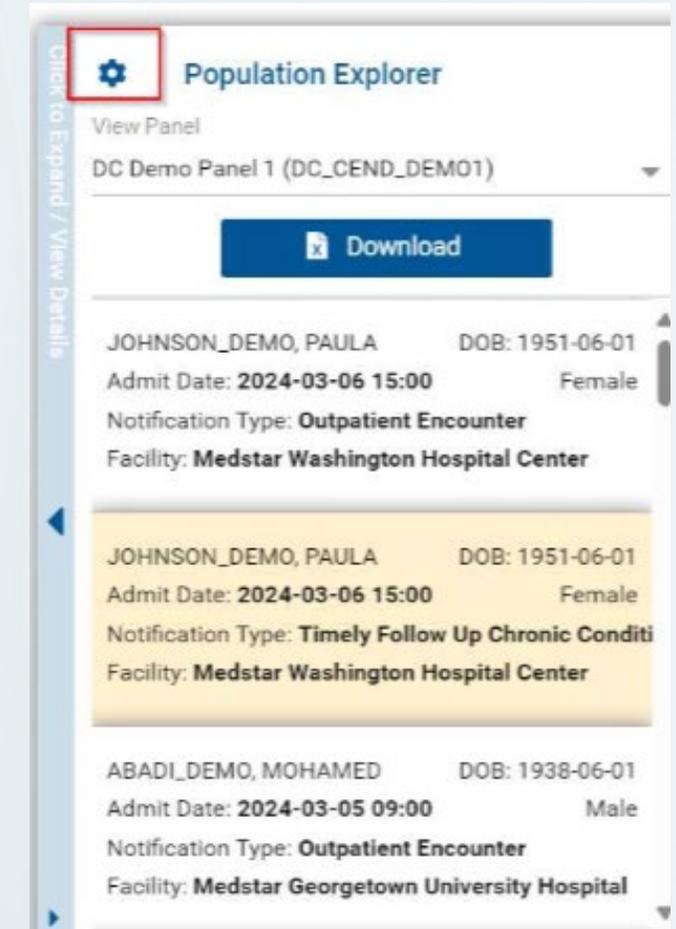
 - The APB allows users to flexibly create much more complex criteria definitions for filtering patient populations by combining panels and applying Boolean logic operators to any of the data elements available in Population Explorer.
 - Advanced Panels can be created using **either one or multiple panels** to which a user has access.
 - Useful in situations where the Quick Filter functionality does not offer sufficient granularity for targeting a desired set of beneficiaries or events.
 - Must first be enabled before use.

• Enabling & Accessing APB

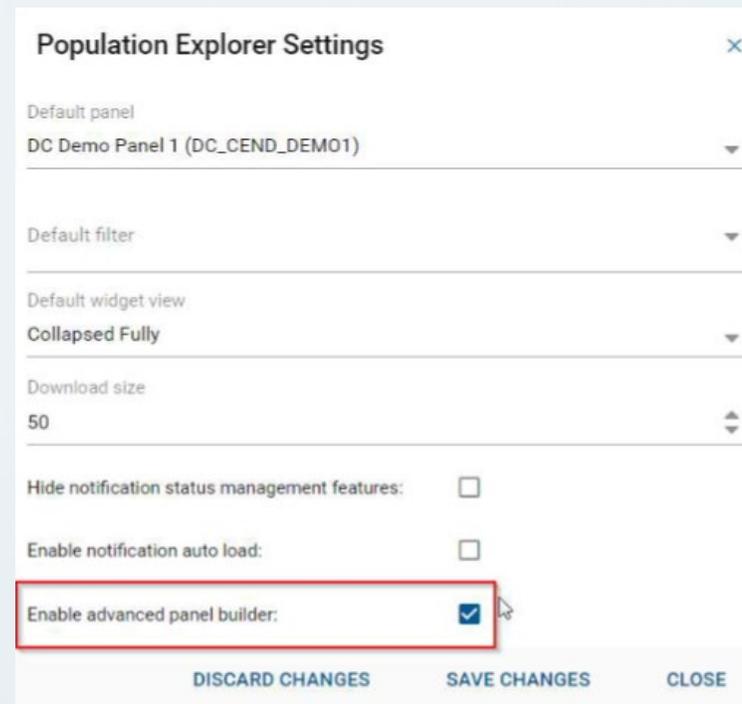
Expanded View



Default View

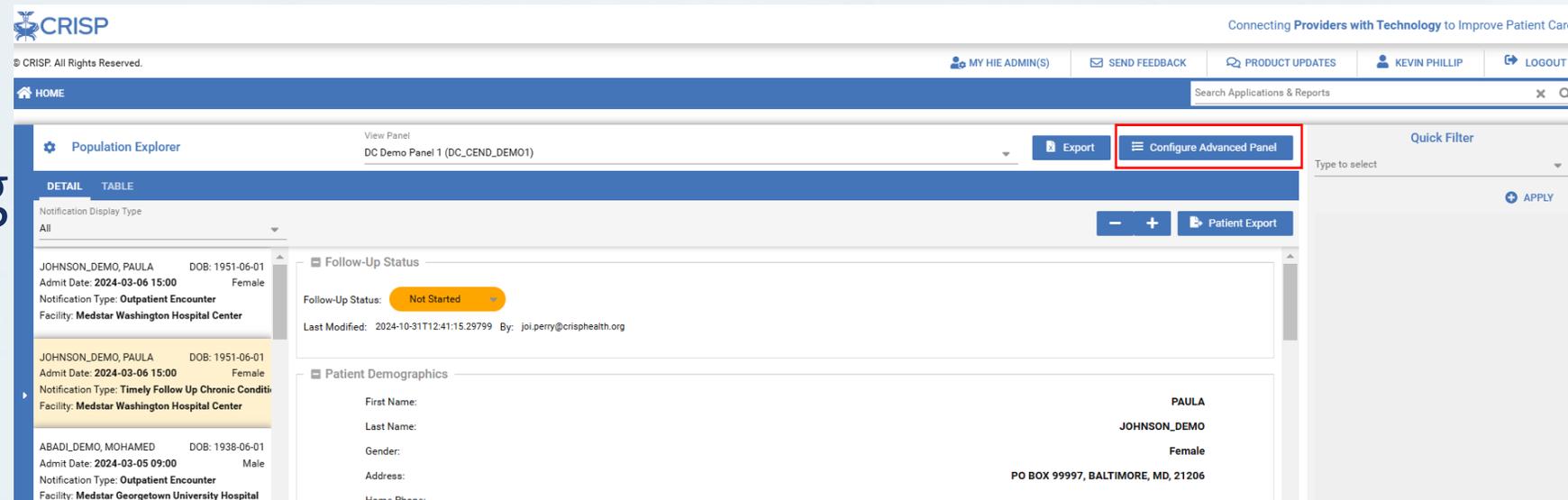


- Upon first use, navigate to settings menu.
- Select “Enable Advanced Panel Builder” and save changes.



• Enabling & Accessing APB

- Once enabled, APB is accessible using the “Configure Advanced Panels” button in the upper right corner of the Detail View Pane.



CRISP Connecting Providers with Technology to Improve Patient Care

© CRISP. All Rights Reserved. MY HIE ADMIN(S) SEND FEEDBACK PRODUCT UPDATES KEVIN PHILLIP LOGOUT

HOME Search Applications & Reports

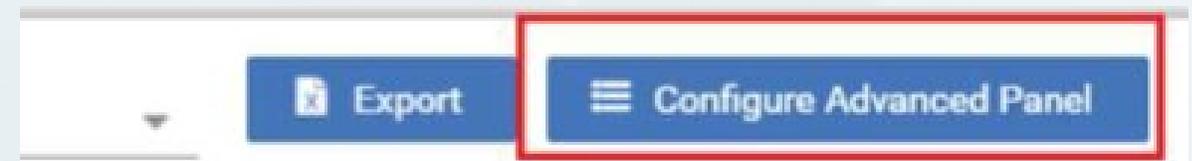
Population Explorer View Panel DC Demo Panel 1 (DC_CEND_DEMO1) Export Configure Advanced Panel

DETAIL TABLE Notification Display Type All

JOHNSON_DEMO, PAULA	DOB: 1951-06-01	Female
Admit Date: 2024-03-06 15:00		
Notification Type: Outpatient Encounter		
Facility: Medstar Washington Hospital Center		

Follow-Up Status
Follow-Up Status: Not Started
Last Modified: 2024-10-31T12:41:15.29799 By: joi.perry@crisphealth.org

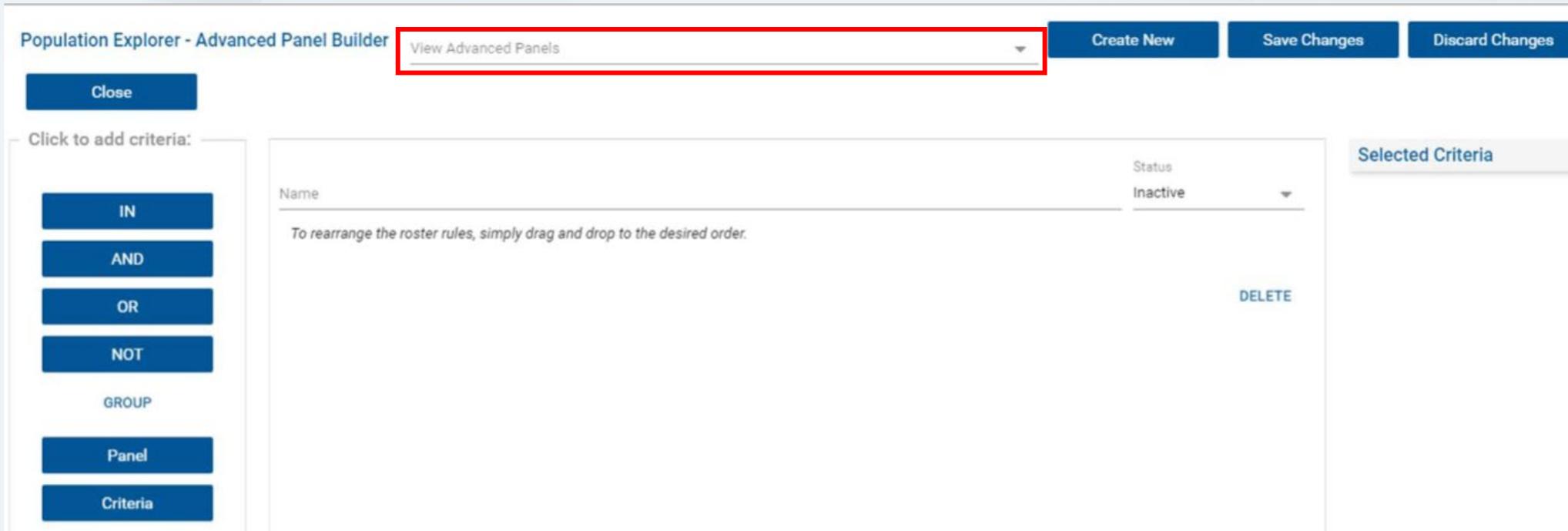
Patient Demographics
First Name: PAULA
Last Name: JOHNSON_DEMO
Gender: Female
Address: PO BOX 99997, BALTIMORE, MD, 21206



Export Configure Advanced Panel

• APB Interface

- Upon opening the Advanced Panel Builder, you will be presented with a new APB template, as shown below.
- To edit an existing advanced panel, select from the 'View Advanced Panels' dropdown at the top of the screen.



Population Explorer - Advanced Panel Builder

View Advanced Panels

Create New Save Changes Discard Changes

Close

Click to add criteria:

IN AND OR NOT GROUP Panel Criteria

Name

Status Inactive

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

DELETE

Selected Criteria

- APB Interface cont.

- To create a new panel, enter the **name** for your advanced panel and hit '**Save Changes**'. You can then add criteria.
- To discard any unsaved changes on the currently selected panel, hit the '**Discard Changes**' button.

Population Explorer - Advanced Panel Builder View Advanced Panels

Create New Save Changes Discard Changes

Close

Click to add criteria:

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

Name Status Inactive

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

DELETE

Selected Criteria

- APB Interface cont.

- To open a blank APB template after editing or creating a panel, simply click the 'Create New' button.
- Use the Status dropdown in the creation dialogue interface to set the status of an advanced panel as "Active" or "Inactive"



Population Explorer - Advanced Panel Builder View Advanced Panels

Close Create New Save Changes Discard Changes

Click to add criteria:

IN
AND
OR

Name

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

Status
Inactive

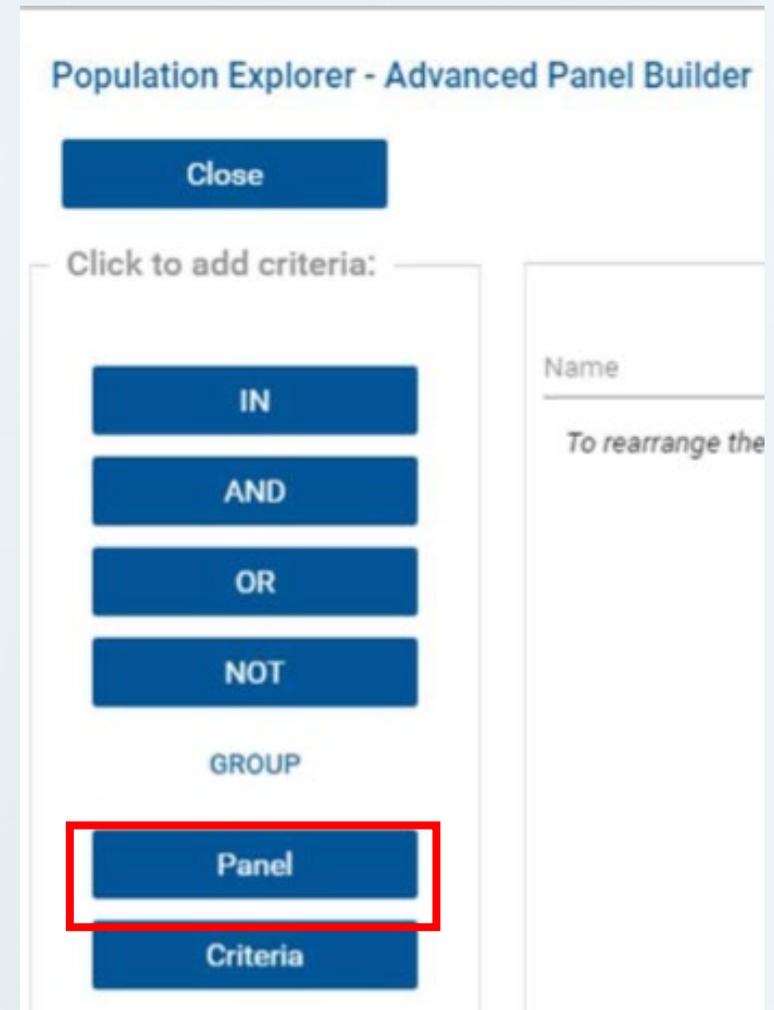
Selected Criteria

DELETE

- **NOTE:** Only Active advanced panels will appear in dropdowns throughout the Population Explorer. Set a panel to Inactive if you do not want it to appear in the interface, but do not want to delete it entirely.

APB Interface – Building Advanced Panels

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



Population Explorer - Advanced Panel Builder

Close

Click to add criteria:

IN

AND

OR

NOT

GROUP

Panel

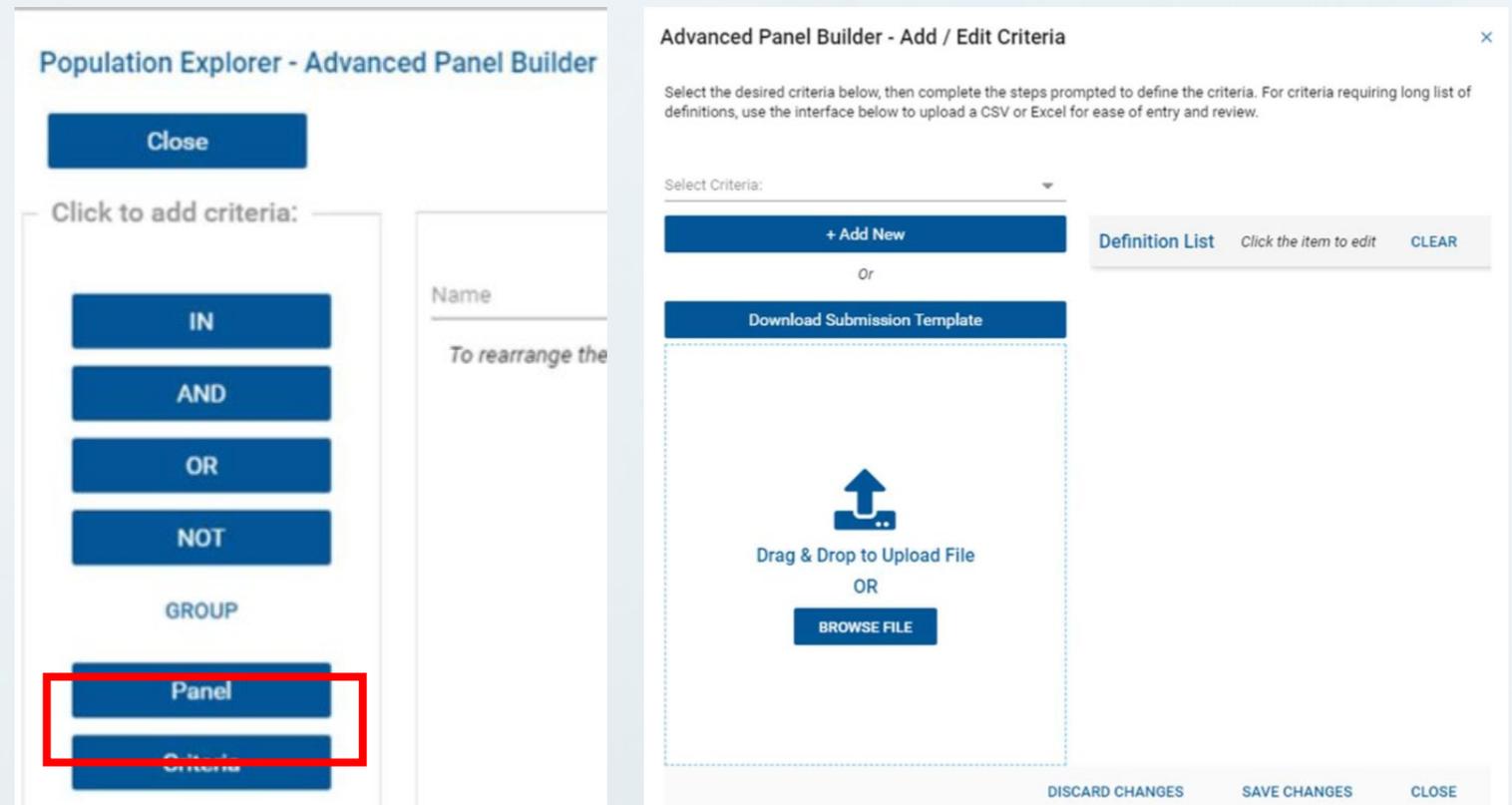
Criteria

Name

To rearrange the

APB Interface – Building Advanced Panels

- Click the **Criteria** button to add filter criteria. This will open a window, shown below on the right, that allows you to select the data element that will define the criteria, as well as the list of values to be considered.
- You 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.



Population Explorer - Advanced Panel Builder

Close

Click to add criteria:

IN

AND

OR

NOT

GROUP

Panel

Criteria

Name

To rearrange the

Advanced Panel Builder - Add / Edit Criteria

Select the desired criteria below, then complete the steps prompted to define the criteria. For criteria requiring long list of definitions, use the interface below to upload a CSV or Excel for ease of entry and review.

Select Criteria:

+ Add New

Or

Download Submission Template

Definition List Click the item to edit CLEAR

Drag & Drop to Upload File

OR

BROWSE FILE

DISCARD CHANGES SAVE CHANGES CLOSE

• Using APB

- 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.

Population Explorer - Advanced Panel Builder View Advanced Panels Create New Save Changes Discard Changes

Close

Click to add criteria:

IN
AND
OR
NOT
GROUP
Panel
Criteria

Name Status Inactive

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

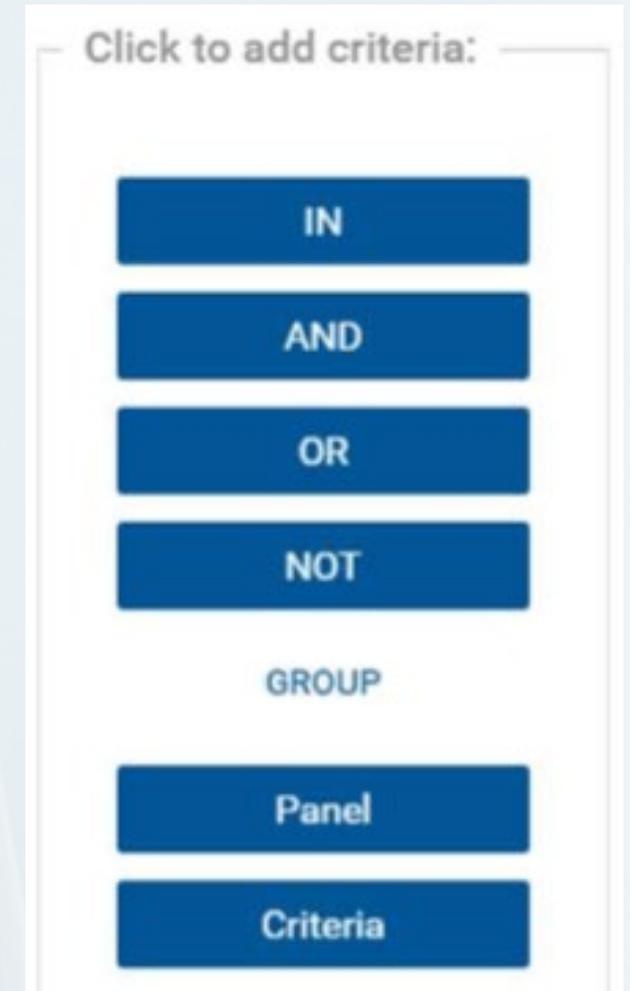
Panel: DC Demo Panel 1 (DC_CEND_DEMO1) ✕ 

AND DELETED

Criteria: Facility IN DEFINITION LIST  

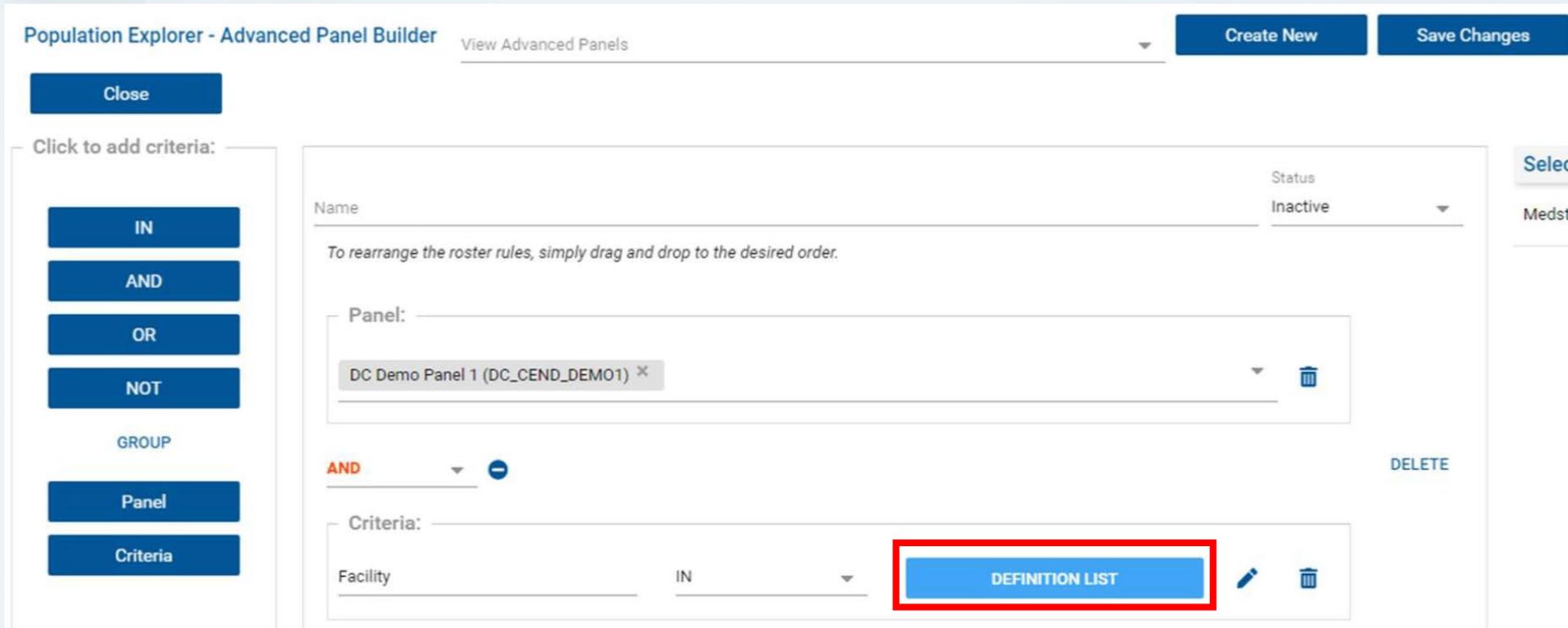
Selected Criteria
Medstar

- Using APB cont.
 - You may add as many criteria as needed to define the advanced panel. 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.



- Using APB cont.

- 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.



Population Explorer - Advanced Panel Builder View Advanced Panels Create New Save Changes

Close

Click to add criteria:

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

Name Status Inactive

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

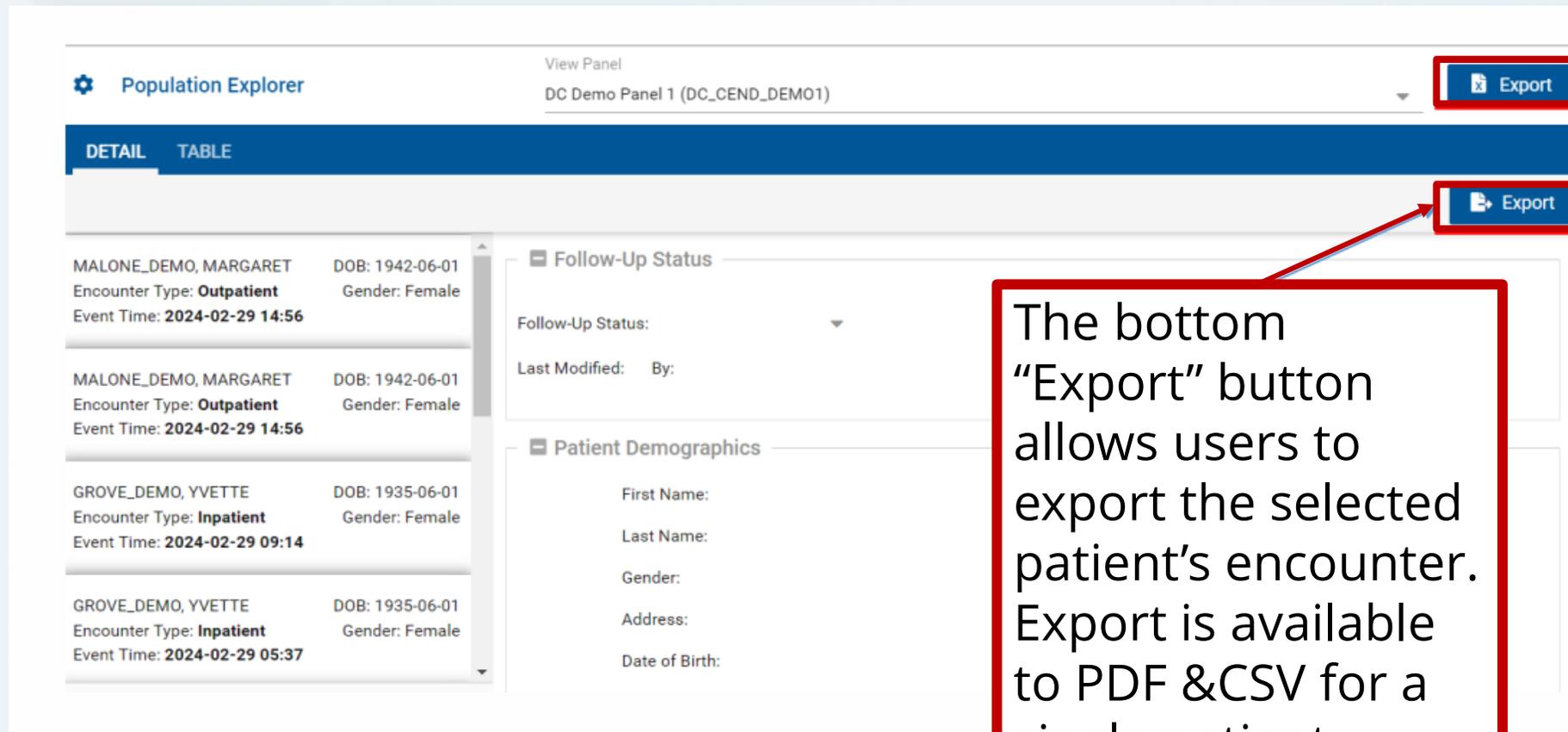
Panel: DC Demo Panel 1 (DC_CEND_DEMO1) ✕ DELETE

AND + DELETE

Criteria:

Facility IN DEFINITION LIST ✎ ✕

- Data Exports



Population Explorer

View Panel
DC Demo Panel 1 (DC_CEND_DEM01)

DETAIL TABLE

MALONE_DEMO, MARGARET	DOB: 1942-06-01
Encounter Type: Outpatient	Gender: Female
Event Time: 2024-02-29 14:56	
MALONE_DEMO, MARGARET	DOB: 1942-06-01
Encounter Type: Outpatient	Gender: Female
Event Time: 2024-02-29 14:56	
GROVE_DEMO, YVETTE	DOB: 1935-06-01
Encounter Type: Inpatient	Gender: Female
Event Time: 2024-02-29 09:14	
GROVE_DEMO, YVETTE	DOB: 1935-06-01
Encounter Type: Inpatient	Gender: Female
Event Time: 2024-02-29 05:37	

Follow-Up Status

Follow-Up Status:
Last Modified: By:

Patient Demographics

First Name:
Last Name:
Gender:
Address:
Date of Birth:

The bottom "Export" button allows users to export the selected patient's encounter. Export is available to PDF & CSV for a single patient.

The top "Export" button allows users to export all encounters associated with the selected panel. Export is only available to CSV for an entire panel.

• Consent Tool

- The CRISP Consent Tool was designed as a platform for providers and staff to register patient consents to share 42 CFR Part 2-protected data.
- This application has since grown to cover other unique scenarios where patients may need to "opt in" to sharing additional data types via the HIE
- What is my patient consenting to with a 42 CFR Part 2 consent?
 - To allow their 42 CFR Part 2-covered provider to share information about their Substance Use Disorder (SUD) treatment via the Health Information Exchange (HIE).
 - The HIE will then share it with other members of the patient's health care team who participate with CRISP HIEs
 - Including Maryland, DC, West Virginia, Connecticut, Alaska, Virginia, Rhode Island, and any HIE affiliates in the future.

• Consent Tool

Registering Consents Already on File

- If the consent has been captured outside of the HIE portal, a credentialed staff member may complete the registration in the Consent Tool, based on the patient's designation, before checking the "Attestation for Consent on File" box in the signature section.
- *Please keep the signed copy of the consent form on file. It is required by federal law to have a patient signature to share the patient's SUD information available upon request.*

Using the CRISP Consent Tool for In-Person Visits

- HIE user searches for their patient in HIE Portal or through SSO in their EHR.
- After launching the tool, provider explains the consent to their patient, educating them on what data they are sharing and with whom.
- Patient designates to share "all SUD data".
- Patient (or parent/guardian) signs directly in the tool during the in-person visit.
- The provider registers their own legal attestations in the tool and then adds their name before submitting the consent.

- Review the Information Section with patient, using the Accounting of Disclosures and FAQ links as needed

- <https://www.crisphealth.org/consent-tool/#sharing-data--faq>

 CRISP Consent Consent History

Consent Status: Opted to Disclose All SUD Treatment Data, Expiration Date: Does Not Expire Dismiss

Phone (240) 826-6000 Next

Information about this Consent

By completing and signing this form, you will be allowing your 42 CFR Part 2 – Substance Use Disorder treatment provider to share information about your 42 CFR Part 2 – Substance Use Disorder treatment with CRISP who may share it with other members of your health care team for purpose of treatment, payment, and health care operations (TPO).

Examples of who may see your information include, but may not be limited to, your primary care provider, hospital and emergency providers, case managers or care coordinators, your insurance company or payer, and other individuals who are involved in coordination or payment of your care. The information will be shared with members of your healthcare team who participate with the CRISP Shared Services affiliate HIEs including Maryland, DC, West Virginia, Connecticut, Alaska and any HIE affiliates in the future.

Anyone receiving your information must follow all state and federal laws to keep your information private; however, there is the potential for the records used or disclosed pursuant to the consent to be redisclosed by the entities receiving the information and the information may no longer be protected by 42 CFR Part 2 (the federal regulation which protects the privacy of substance use disorder (SUD) information). Once your SUD information is shared with members of your health care team for purposes of treatment, payment, or operations, they may incorporate it into their records and further share it with other health care providers, payers, or organizations that provide services for them. Your information may be redisclosed or shared in accordance with HIPAA regulations, except for uses and disclosures for civil, criminal, administrative, and legislative proceedings against you, the patient.

You can request a list of organizations who have received your information by completing an accounting of disclosures requests at <https://disclosures.crisphealth.org>. A list of Frequently Asked Questions (FAQ) about sharing 42 CFR Part 2 – Substance Use Disorder treatment data through CRISP can be found [here](#) and at [https://www.crisphealth.org/consent-tool/#:~:text=Sharing%20Your%20Substance%20Use%20Disorder%20\(SUD\)%20or%20Mental%20Health%20\(MH\)%20Treatment%20Data%20Through%20CRISP%20FAQ](https://www.crisphealth.org/consent-tool/#:~:text=Sharing%20Your%20Substance%20Use%20Disorder%20(SUD)%20or%20Mental%20Health%20(MH)%20Treatment%20Data%20Through%20CRISP%20FAQ).

CRISP does not require you to sign this consent, and it will not impact the sharing of any of your health information through the HIE, except for your 42 CFR Part 2 – Substance Use Disorder information. If you do not consent to the disclosure of your SUD information, it may not be readily available through CRISP to those who need the information to give you appropriate care, especially in an emergency.

• Patient must elect to share ALL SUD information with this form



CRISP

Consent

Consent History

Consent Status: Opted to Disclose All SUD Treatment Data, Expiration Date: Does Not Expire

Dismiss

Next

Type and Amount of Data and Purpose of Disclosure

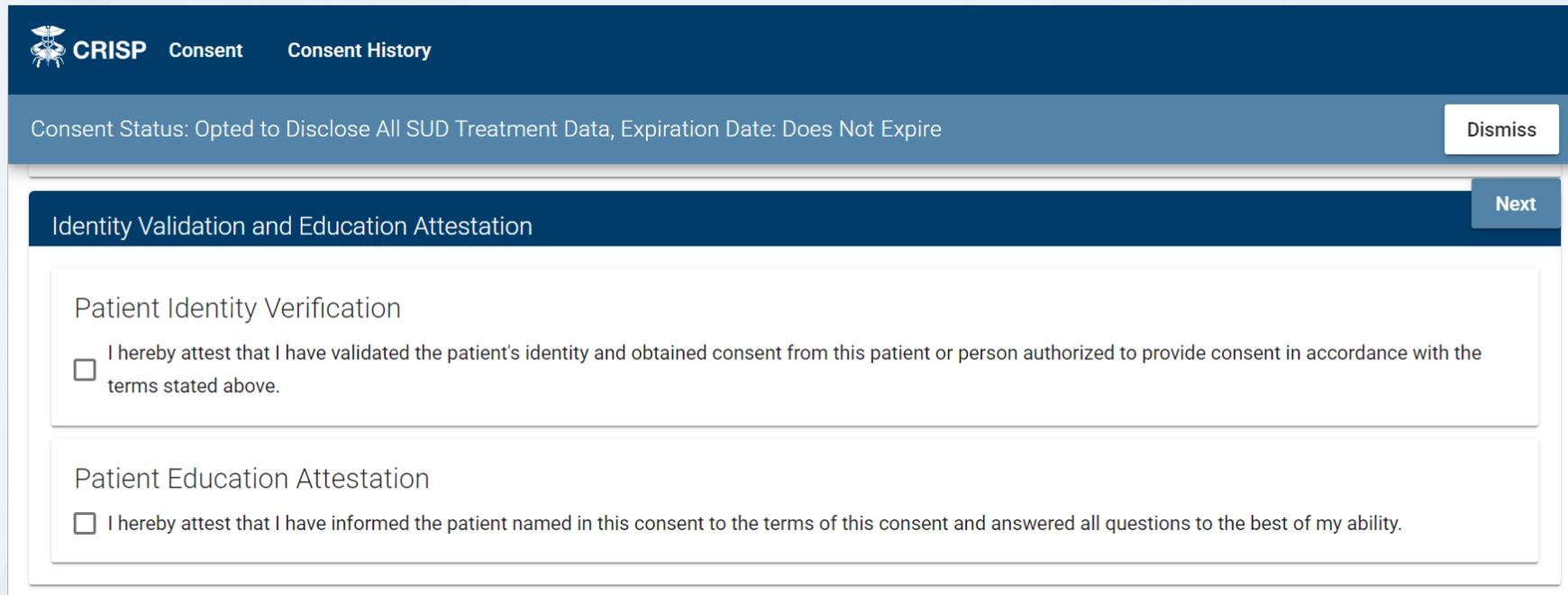
Purpose The information shared will be used for purposes of treatment, payment, and health care operations as defined by HIPAA. The information to be shared could include but may not be limited to clinical documents, lab results, hospital discharge summaries, medication information, and claims data relating to my Substance Use Disorder treatment.

Consent Options

- Disclose All Substance Use Disorder and Mental Health Data for TPO Purposes**
This information could include my treatment plan, medications, laboratory results, clinical notes, health care encounters, claims information, and other data about my Substance Use Disorder and/or Mental Health care.

• Complete Provider Attestations

- Providers/staff obtaining patient consent must attest that they have:
 - (1) Verified the patient identity and;
 - (2) Informed the patient of all terms of the consent.



CRISP Consent Consent History

Consent Status: Opted to Disclose All SUD Treatment Data, Expiration Date: Does Not Expire [Dismiss](#)

[Next](#)

Identity Validation and Education Attestation

Patient Identity Verification

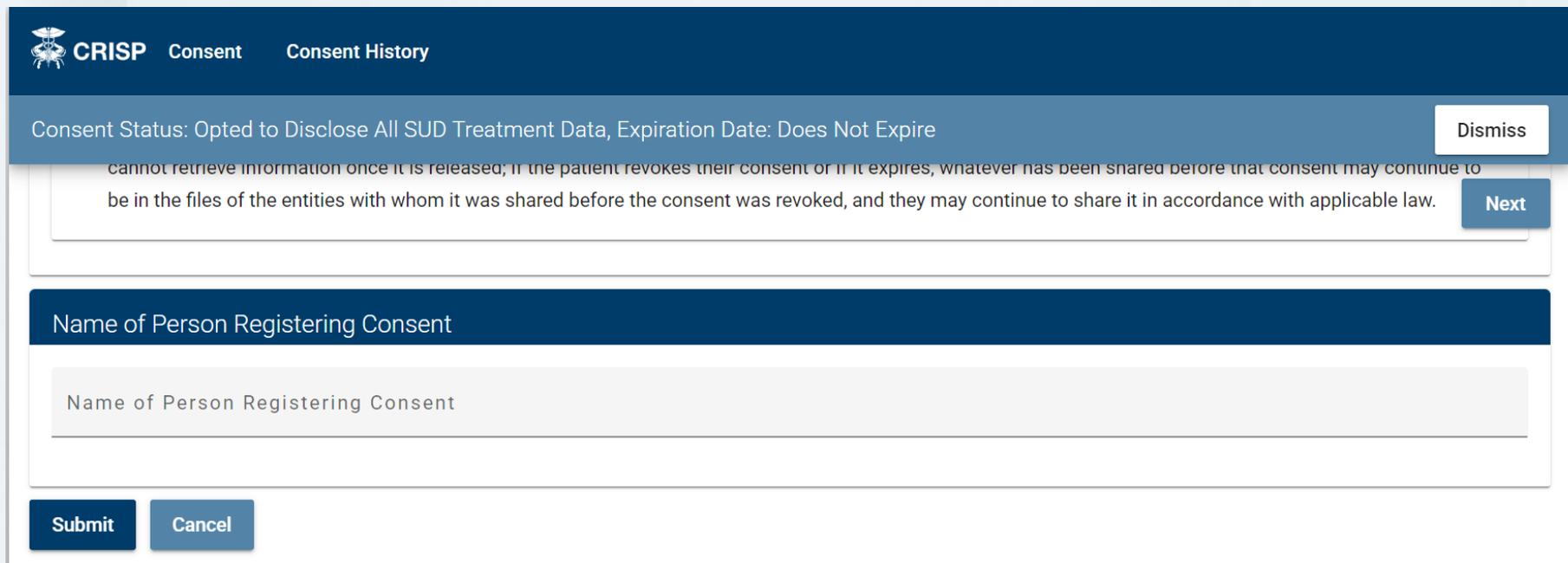
I hereby attest that I have validated the patient's identity and obtained consent from this patient or person authorized to provide consent in accordance with the terms stated above.

Patient Education Attestation

I hereby attest that I have informed the patient named in this consent to the terms of this consent and answered all questions to the best of my ability.

• Submit Consent

- Enter the name of the person registering this consent.
- Click **"Submit"** once – to avoid duplicate entries.
- Click **"Print and Exit"** or **"Exit."**



The screenshot shows the CRISP web interface for submitting consent. At the top, there is a dark blue header with the CRISP logo and the text 'Consent' and 'Consent History'. Below the header, a light blue banner displays the consent status: 'Consent Status: Opted to Disclose All SUD Treatment Data, Expiration Date: Does Not Expire'. To the right of this banner is a 'Dismiss' button. Below the banner, a white box contains a warning message: 'cannot retrieve information once it is released; if the patient revokes their consent or if it expires, whatever has been shared before that consent may continue to be in the files of the entities with whom it was shared before the consent was revoked, and they may continue to share it in accordance with applicable law.' To the right of this message is a 'Next' button. Below the warning box is a dark blue header with the text 'Name of Person Registering Consent'. Underneath this header is a large white text input field with the placeholder text 'Name of Person Registering Consent'. At the bottom of the form are two buttons: 'Submit' and 'Cancel'.

- Viewing Consent History
 - After searching for your patient, click "**Consent History.**"
 - Click on a row to open that consent.
 - A pop-up window will appear with the consent registration details.

User Email	Date	Type	Expiration Date	Status	
abby.lutz@crisphealth.org	Dec 18, 2024	Part II Provider	Does Not Expire	Active	Deactivate
miriam.hanks@crisphealth.org	Dec 17, 2024	Provider Consent – Patient Consent to Disclose SUD and MH Treatment Information	Does Not Expire	Active	Deactivate
abby.lutz@crisphealth.org	Dec 13, 2024	Part II Provider	Does Not Expire	Inactive	Deactivate

- # Printing a Consent Registration
- Providers may review, print, or save a registered consent as a file.
- Search for a patient and open a record in their consent history.
- Scroll to the bottom of the window and click "Print."
- A print preview will appear where providers can make selections for how to print the file.

• How to view a patient's SUD Data

- Once consent is submitted for a patient their SUD data covered by 42 CFR Part 2 will be identified within the CRISP HIE with an orange 'i'
- This makes the data easily identifiable amongst other clinical data within the HIE.

HIE InContext Gilbert Testpatient Grape
Male | Jan 1, 1984

HEALTH RECORDS ENCOUNTERS PROBLEMS STRUCTURED DOCUMENTS IMMUNIZATIONS ALLERGIES

ALL HOSPITAL OUTPATIENT

All Encounters

Date	Source	Patient Class	Diagnosis	Discharge Disposition
2024-03-28	Immaculate Medical Services, LLC	Ambulatory	-	-
2024-01-24	St. Mary's County Health Department Referrals	Ambulatory	Thrive by Three	-
2023-08-09	Adventist HealthCare Shady Grove Medical Center	Inpatient	Z02.89-Encounter for other administrative examinations; Z02.89-Encounter for other administrative examinations	Home
2023-08-03	Adventist HealthCare Shady Grove Medical Center	Ambulatory	E23.2-Diabetes insipidus; E23.2-Diabetes insipidus	-
2023-07-20	Adventist HealthCare Shady Grove Medical Center	Inpatient	Z02.89-Encounter for other administrative examinations; Z02.89-Encounter for other administrative examinations	Home
i 2023-02-14	Adventist HealthCare	Inpatient	Z02.9-Encounter for administrative examinations, unspecified; Z02.9-Encounter for administrative examinations, unspecified	Home
2023-02-01	Adventist HealthCare Shady Grove Medical Center	Inpatient	Z02.9-Encounter for administrative examinations, unspecified; Z02.9-Encounter for administrative examinations, unspecified	Home

42 CFR Part 2 prohibits unauthorized redisclosure of this information. A provider that receives 42 CFR Part 2 protected SUD information from the HIE may record information about the patient's SUD treatment in their medical record for clinical purposes, and in most cases, that would not cause the record to be subject to 42 CFR Part 2 restrictions, unless the provider is already subject to [42 CFR Part 2](#).

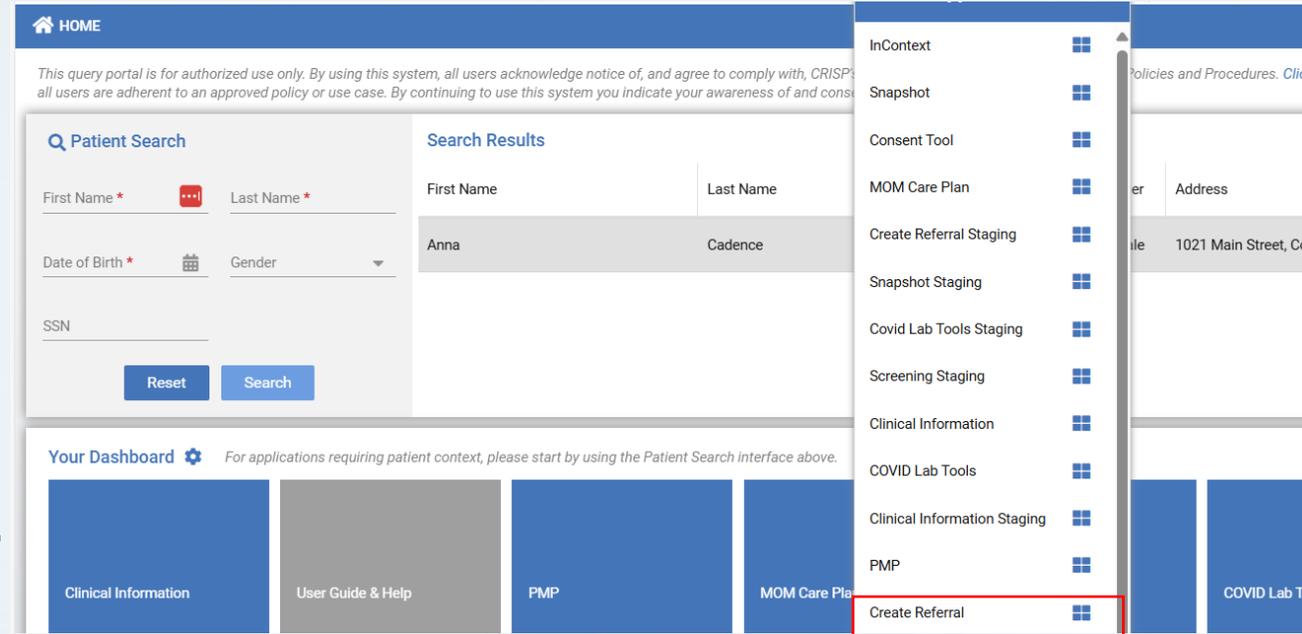
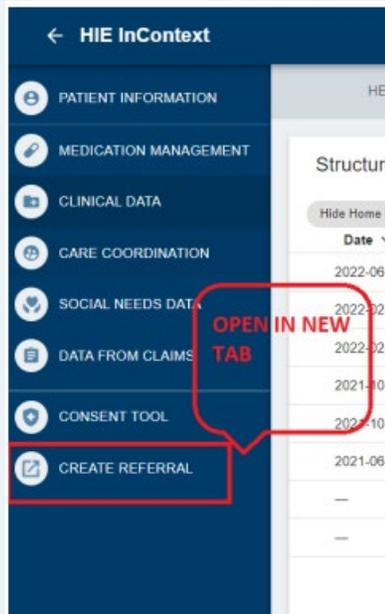
• Referral Tool

- CRISP offers a tool allowing providers to view and submit patient referrals directly in their EMR interface.
- Referrals can be submitted to any organization in the MD211's database, containing over 7,000 resources.
 - The MD211 database is a statewide network powered by the Maryland Information Network (MIN) aiming to connect MD residents to health and human services.
- The Referral Tool can be accessed both through the web-based CRISP Portal and through InContext.
 - To view patient referral history in both the CRISP Portal and InContext, select the Care Coordination tab after searching for the patient.



• Submitting a Referral

To submit a referral through InContext, launch CRISP through your EMR. Then, select “Create Referral” from the side bar. This will open the referral search in another tab.



To submit a referral through the CRISP Portal, search for the patient and click on their row. From the list of applications that pops up, select “Create Referral.”

• Submitting a Referral cont.

- In the form, you can either search for a specific organization, or you can search by resource category within a specific radius.
- Select the drop-down arrow to view more information about each program.
- Click the checkbox next to the program to which you want to submit the referral and select the “Create Referral for Program” button.

Organization Name

* Search for Organization Name Find Organization

Search Area

Search Resources Address, City, or Zip Search Radius (In Miles)

* transportation * 20905 * 15 Search Clear

Search Applications & Reports ×

Showing results for organization name: 'Mac living well' Found: 18 Results

<input type="checkbox"/>	Source	Organization Name	Program Name	Contact	Program Description
<input type="checkbox"/>	HIE Directory	MAC Living Well	SDoH Screening For Older Adults	410-742-0505	^
Description: The assessment is made up of 15 yes/no questions that are meant to guide in the connection of resources that may meet your patient's specific needs. This assessment is the chosen screening tool for social determinants of health by the Maryland Department on Aging and Maryland Access Point. It is an adaptation of the Health Leads Social Needs Screening Tool.					
<input type="checkbox"/>	HIE Directory	MAC Living Well	Fitness & Exercise	333-333-3335	v
<input type="checkbox"/>	HIE Directory	MAC Living Well	Home Delivered Meals (Meals on Wheels)	333-333-3335	v
<input type="checkbox"/>	HIE Directory	MAC Living Well	Caregiver Resources	333-333-3335	v
<input type="checkbox"/>	HIE Directory	MAC Living Well	HomeMeds	333-333-3335	v

Items per page: 10 1 - 10 of 18 << < > >>

• Submitting a Referral cont.

- Clicking “Create Referral for Program” will open the Referral Web form. All required fields in the form are marked with an asterisk. At the bottom of the page, users have the option to add relevant files.
- The “Referring Provider” section requires information about the user entering the referral in CRISP.
- After clicking submit, users will be led to a confirmation page with the option to download.

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

No file chosen

Referring Provider

I am referring this patient myself I am referring this patient on behalf of a provider

Provider Information

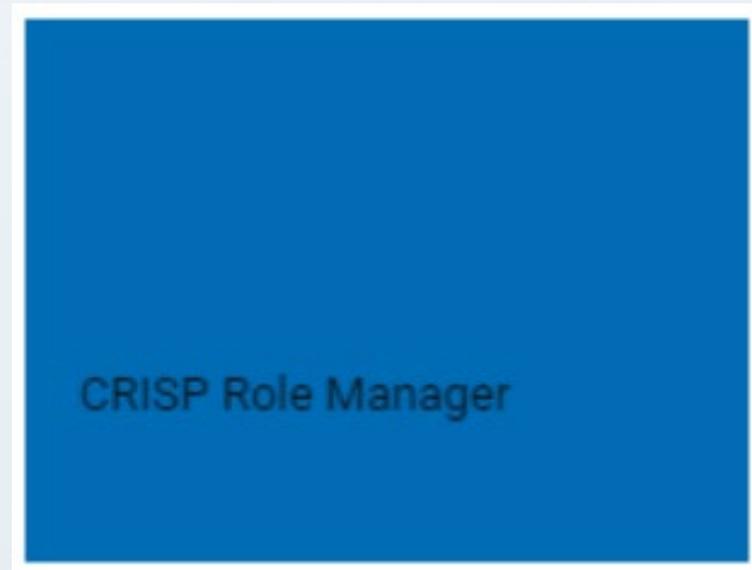
● CRISP Reporting Services (CRS)

- CRISP Reporting Services (CRS) built a reporting analytic tool focused on claims data (health care financial transactions for patient visits).
- CRS hosts a portal providing users with access to reporting tools to filter and query data from past claims and identify opportunities for improvement.
- Using multiple data sources, CRS offers a unique perspective on readmission rates, potentially avoidable utilization, and other critical measures.

- Access to CRS: Role Manager
 - The hMetrix Role Manager handles authorization management for all CRISP Reporting Services data and applications
 - Access to CRS via the CRISP Portal requires a separate CRS Administrator to provision access through the Role Manager service.
 - To access the Role Manager, the CRS Administrator must first be provided with the correct account permissions through Salesforce.
 - The CRS Admin must have an account in the HIE Portal and be granted the asset corresponding to the 'ReportingRM' product code. In the Role Manager itself, that user also needs to be granted the appropriate administrative user role.

• Access to CRS: Role Manager

- Once you have the correct permissions, you can access the Role Manager via the HIE Portal in the same fashion as any other integrated service provider, as follows:
 1. Sign into the HIE Portal for the appropriate environment you wish to administer using a modern web browser at <https://portal.crisphealth.org>.
 2. Click the “CRISP Role Manager” tile (shown at right).
 3. The Role Manager will open in a new tab of the browser



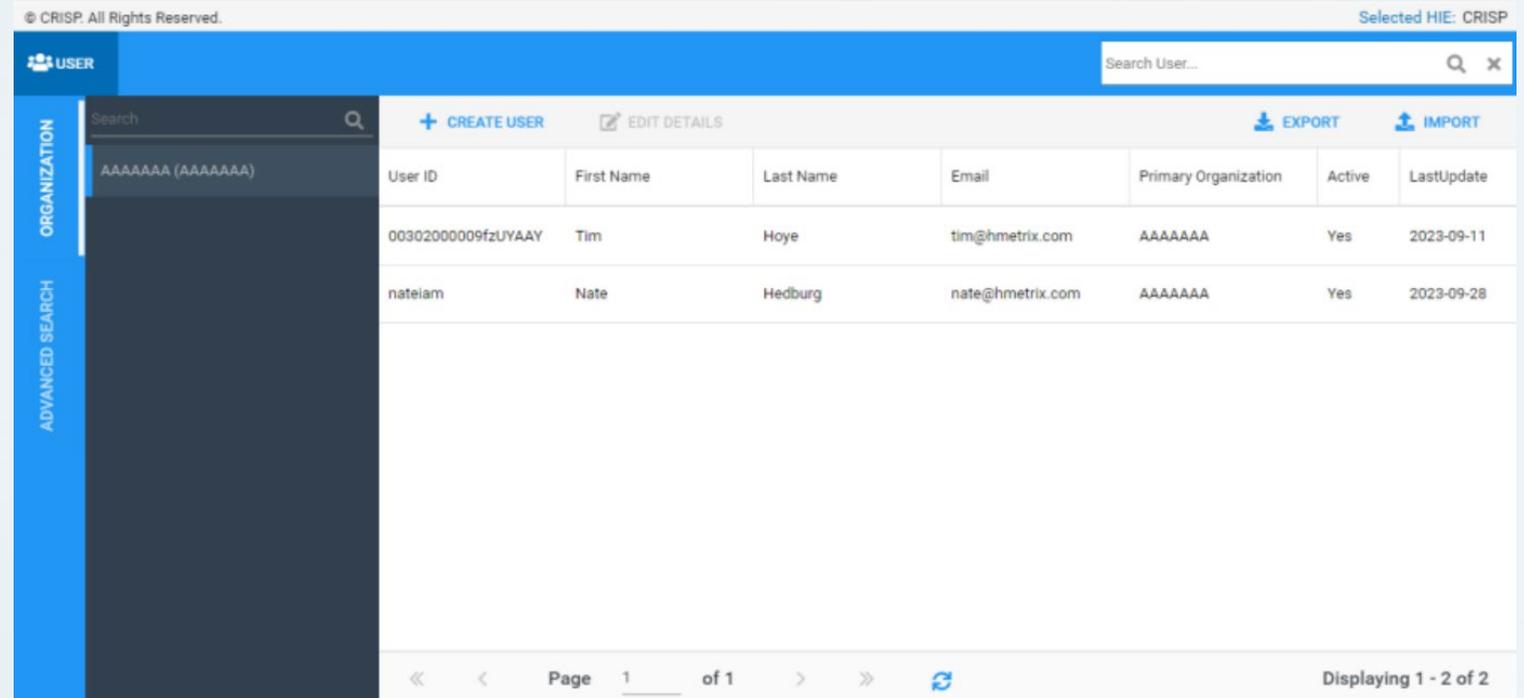
• Access to CRS: Role Manager

- The user section of the site allows for the assignment of roles, role profiles, and/or organization role profiles to a user or group of users. This is where the bulk of POCs workflows will take place.

Key Features:

1. Searching for users and organizations
2. Creating, editing, activating and deactivating users
3. Exporting and Importing Users

For more in depth information on how to use the Role Manager, view the user guide [here](#).



© CRISP. All Rights Reserved. Selected HIE: CRISP

USER Search User... Q X

ORGANIZATION Search AAAAAAA (AAAAAAA)

ADVANCED SEARCH

+ CREATE USER EDIT DETAILS EXPORT IMPORT

User ID	First Name	Last Name	Email	Primary Organization	Active	LastUpdate
00302000009fzUYAAY	Tim	Hoye	tim@hmetrix.com	AAAAAAA	Yes	2023-09-11
nateiam	Nate	Hedburg	nate@hmetrix.com	AAAAAAA	Yes	2023-09-28

Page 1 of 1 Displaying 1 - 2 of 2

• Available Reports

- All Payer Population Reports
 - Contain mostly claims data from the Maryland All Payer Case Mix dataset – some reports use datasets from Medicaid and Medicare.
- HSCRC Regulatory Reports
 - Monthly or quarterly regulatory reports produced together with the Maryland Health Services Cost Review Commission (HSCRC).
 - Reports monitor hospitals based on the HSCRC quality programs.
- Medicare Population Reports
 - Based on the Claim and Claim Line Feed (CCLF) data
- Public Health Reports
 - Reports that support Statewide Public Health Programs, Monitoring, and Research



CRISP

Chesapeake Regional Information
System for our Patients

Contact and Resources

Training materials,
recorded webinars,
and patient education
flyers can be found at:
<https://crisphealth.org/>

CRISP Support
support@crisphealth.org
877-952-7477



Questions?

10480 Little Patuxent Parkway, Suite 800
Columbia, MD 21044
877.952.7477 | info@crisphealth.org
www.crisphealth.org



**10480 Little Patuxent Parkway, Suite 800
Columbia, MD 21044
877.952.7477 | info@crisphealth.org
www.crisphealth.org**