

Self-Service Panel Loader Starter Guide

Self-Service Panel Loader (SSPL), is a panel management tool available to all designated panel loaders looking to upload a new patient panel for their organization. SSPL provides an easy, fast, and convenient method for submitting panels for practices, an immediate response when panels are loaded successfully or incorrectly, and prevents ENS services from being terminated due to late panel submissions

Please email support@crisphealth.org for any issues, suggestions or defects.



Self Service Panel Loader Starter Guide

1 Using Self Service Panel Loader in ULP

To submit a panel, log into to your ULP account at ulp.crisphealth.org using your existing credentials.

Once logged in, locate the “Panel Loader” tab at the top of the screen. This tab can only be seen by the person designated as the Practice’s Panel Loader. Click the Panel Loader tab to begin loading your panel.

CRISP Unified Landing Page™

User Guide SIGN IN

Sign In

Email Address
sandrine.emambu@crisphealth.org

Password

Sign In

Forgot Password

CRISP Unified Landing Page™

HOME QUERY PORTAL PATIENT SNAPSHOT HEALTH RECORDS PANEL LOADER DC CRS

User Guide HELP SANDRINE EMAMBU (SIGN OUT)

New Search

Patient Search

Last Name(Required) First Name(Required) Date Of Birth(Required)

Last Name First Name MM DD YYYY

PATIENT SEARCH

Gender: Male Female

SSN
XXX-XX-XXXX

WELCOME

Welcome to the Unified Landing Page™ (ULP™)! The ULP is a streamlined method of accessing all HIE services in one place.

The PDMP Search is the first component of the new ULP, making accessing Maryland Prescription Drug Monitoring Program Data easier and more efficient. The PDMP Search includes a “fuzzy patient search” option creating more flexibility in

Please email support@crisphealth.org for any issues, suggestions or defects.

Self Service Panel Loader Starter Guide

2 Using the Panel Loader Tab

Click the Panel Loader tab:

The left-hand side of the screen will show the status of your panel, whether it was successfully loaded or not. The right-hand side will show all participants that are accessible based upon the patient relationship.

Select the desired organization, check the radio button (By proceeding, I understand that I will overwrite my panel) and click Continue.

The screenshot displays the CRISP Panel Loader interface. At the top, there is a navigation bar with the CRISP logo and a 'Unified Landing Page™' label. The navigation menu includes 'HOME', 'QUERY PORTAL', 'PATIENT SNAPSHOT', 'HEALTH RECORDS', and 'PANEL LOADER' (highlighted in orange). On the right side of the navigation bar, there are links for 'User Guide', 'HELP', and 'SANDRINE EMAMBU (SIGN OUT)'. Below the navigation bar is a progress bar with five steps: 1. Get Started (active), 2. Notifications, 3. Select File, 4. Preview & Upload, and 5. Load. The main content area is divided into two sections. On the left is the 'Panel Activity Feed' with a list of recent panel uploads, each with a status icon (red X for rejected/failed, green plus for successful) and a brief description. On the right is a 'Preview & Upload' modal for 'Parmjit S. Aujla, MD' with '22 total active patient subscriptions'. The modal includes a checkbox for 'By proceeding, I understand that I will overwrite my panel.' and a green 'Continue' button. A red circle with the number '2' is overlaid on the modal. At the bottom of the modal, there is a note: 'This service supports panels up to 100,000 patients. If your new file exceeds 100,000 patients, please contact support@ainq.com for assistance with uploading your panel.'

Please email support@crisphealth.org for any issues, suggestions or defects.

Self Service Panel Loader Starter Guide

3 Push Notifications

Turn on the email or text notification to be notified once panel loading is completed. Enter email to be used. Then click on “upload file” to attach panel.

The screenshot displays the CRISP Panel Loader interface. At the top, the navigation bar includes the CRISP logo, 'Unified Landing Page™', and menu items: HOME, QUERY PORTAL, PATIENT SNAPSHOT, HEALTH RECORDS, and PANEL LOADER (highlighted in orange). On the right, there are links for 'User Guide', 'HELP', and a user profile for 'SANDRINE EMAMBU (SIGN OUT)'. Below the navigation bar is a progress indicator with five steps: 1. Get Started, 2. Notifications, 3. Select File, 4. Preview & Upload, and 5. Load. Step 2 is currently active. The main content area shows the 'Setup Notifications' form, which is highlighted with an orange border and a '3' in a circle. The form includes two sections: 'Email' and 'Text Message (SMS)'. Each section has an 'On' (green) and 'Off' (grey) toggle switch. Below the 'Email' toggle is a text input field labeled 'Email Address' with the placeholder 'Enter email'. Below the 'Text Message (SMS)' toggle is a text input field labeled 'Phone number (format: 4435555555, numbers only)' with the placeholder 'Enter phone number'. At the bottom of the form are two buttons: '< START OVER' and 'UPLOAD FILE >'. The 'UPLOAD FILE >' button is highlighted with an orange circle and the number '3'.

Please email support@crisphealth.org for any issues, suggestions or defects.

Self Service Panel Loader Starter Guide

4 Patient Panel Template

If you need the most updated Patient Panel Template, click the “Download Template File” Link to download a panel template.

In order to prevent panels from failing when being loaded:

Ensure that all required fields are filled in

- o MRN
- o First Name
- o Last Name
- o Address 1
- o City
- o State
- o Zip
- o Birth Date
- o Gender

Ensure all information is in the right format:

- o Click “View Formatting Information link” for each field

File must be saved using the following naming structure:

- o ENS Source Code-1-z-date of submission
Example: ENS_TEST-1-z-09-23-2019

File must be saved as:

- o .CSV prior to uploading

The screenshot displays the CRISP Panel Loader interface. The top navigation bar includes the CRISP logo, a 'Unified Landing Page' indicator, and menu items: HOME, QUERY PORTAL, PATIENT SNAPSHOT, HEALTH RECORDS, and PANEL LOADER (highlighted in orange). On the right, there are links for User Guide, HELP, and a user profile for SANDRINE EMAMBU with a (SIGN OUT) option. Below the navigation bar is a progress indicator with five steps: 1. Get Started, 2. Notifications, 3. Select File (highlighted with an orange circle and the number 4), 4. Preview & Upload, and 5. Load. The main content area shows a box for selecting a file. It contains the text 'Select a file containing your patient panel.' followed by two links: 'Download Template file' and 'View Formatting Information'. Below this is a dashed box for file upload with the text 'Drag and drop a CSV file here' and 'Or choose a CSV file from your computer'. A file icon is shown with the note 'Maximum file size: 260 MB'.

Please email support@crisphealth.org for any issues, suggestions or defects.

Self Service Panel Loader Starter Guide

5 Preview

After attaching the file, the system will show a preview of the rows to be loaded.

Review the fields to ensure the headings match the data

It will also show the number of new patients that will replace the current patient panel and the correct naming convention.

Then click on upload new file.

The screenshot displays the CRISP Panel Loader interface. At the top, there is a navigation bar with the CRISP logo and a 'Unified Landing Page' tag. The main menu includes 'HOME', 'QUERY PORTAL', 'PATIENT SNAPSHOT', 'HEALTH RECORDS', 'PANEL LOADER' (highlighted), and 'DC CRS'. A user profile for 'SANDRINE EMAMBU' is visible in the top right corner.

A progress indicator at the top shows five steps: 1. Get Started, 2. Notifications, 3. Select File, 4. Preview & Upload (current step), and 5. Load.

The main content area features a message: 'A sample of your panel is available to review in the table below. Please make sure data appears to be in the correct columns. Previewing a sample of 10 rows from the file containing patient information:'

Standard Field (Your Field)	Address_1 (Address_1)	Account_Number (Account_Number)	ACO (ACO)	Address_2 (Address_2)	Birthdate (Birthdate)	Care_Manager (Care_Manager)	Care_Manager_Email (Care_Manager_Email)	Care_Manager_ID (Care_Manager_ID)	Care_Manager_Phone (Care_Manager_Phone)	Care_Program_EndDt (Care_Program_EndDt)	Care_Program (Care_Program)	CareProgramDuration (CareProgramDuration)	City (City)	Cell_Phone (Cell_Phone)
	0 Sycamore Pass	478789		Suite R	1975-01-17								Sioux Falls	605-121-4700
	74581 Springs Park	981515			1923-09-27								Honolulu	808-471-6028
	76 Norway Maple Junction	536381			1915-05-30								Newark	302-176-3501
	24 Spenser Parkway	310964			1987-04-09								San Mateo	805-128-6164
	0 Towne Center	937134			1911-07-20								Peoria	309-413-7492
	407 Lakewood Gardens Court	373061		Bldg. 5	2017-11-23								Austin	361-576-0874
	86048 Tennyson Park	658338			1969-04-13								Oakland	510-492-4539
	3679 Crownhardt Trail	443721			1967-09-20								Washington	202-634-2147
	6 Dorton Parkway	509435			2006-11-09								White Plains	914-971-4763
	21 Mitchell Trail	704506			1963-12-23								Reading	610-187-6443

Below the table, there are two summary boxes:

- Current Panel:** Active Patients: 0
- New Panel:** Patients in queue: 20, File Name: ENS_ALED-1-z-9-30-2019.csv

At the bottom, there are two buttons: 'CHOOSE ANOTHER FILE' and 'UPLOAD NEW PANEL FILE'.

Please email support@crisphealth.org for any issues, suggestions or defects.

Self Service Panel Loader Starter Guide

6 Status Bar

A status bar will appear showing the progress of the upload. Once the panel is loaded successfully, the “roster file upload complete” notification will appear. Click the close button to proceed

CRISP Unified Landing Page™

HOME QUERY PORTAL PATIENT SNAPSHOT HEALTH RECORDS **PANEL LOADER**

User Guide HELP SANDRINE EMAMBU (SIGN OUT)

1. Get Started 2. Notifications 3. Select File 4. Preview & Upload 5. Load

Loading...

This may take a while depending on the size of your file. If your panel exceeds 100,000 patients, please contact support@ainq.com for assistance uploading your file.

You will have a final opportunity to accept or reject your panel after validation has completed. If you close this window it will be available when you come back later.

Task: 1492 10/16/2019 12:17 pm 20 total rows	PARSE 20 complete	VALIDATE 20 complete	MPI Waiting...	COMMIT Waiting...	50% complete 0 rows/sec

Contact support@ainq.com if your panel does not load within 4 hours.

CRISP Unified Landing Page™

HOME QUERY PORTAL PATIENT SNAPSHOT HEALTH RECORDS **PANEL LOADER**

User Guide HELP SANDRINE EMAMBU (SIGN OUT)

1. Get Started 2. Notifications 4. Preview & Upload 5. Load

Roster File Upload Complete

The roster file upload task has completed. You can view the results in the Panel Activity Feed.

Close

Task: 1505 10/16/2019 2:25 pm 19 total rows	PARSE 19 complete	VALIDATE	MPI	COMMIT 19 complete	Complete

Change Subscriber

Please email support@crisphealth.org for any issues, suggestions or defects.

Self Service Panel Loader Starter Guide

7 Review Panel

Some panels may require additional review prior to upload completion.

To review click the “Review Panel” button. The review button will show the number of rows that must be reviewed and verified.

If your file contains 35% more or fewer rows than the previous submitted panel. You will be required to verify those changes. Select the thumbs up button to accept or the thumbs down button to reject all changes

The screenshot shows the CRISP Panel Loader interface. The navigation bar includes: CRISP Unified Landing Page™, HOME, QUERY PORTAL, PATIENT SNAPSHOT, HEALTH RECORDS, and PANEL LOADER (highlighted). The user is identified as SANDRINE EMAMBU (SIGN OUT). The progress bar shows five steps: 1. Get Started, 2. Notifications, 3. Select File, 4. Preview & Upload, and 5. Load. The current step is 4. Below the progress bar, a status bar indicates: "Waiting for User Action - Review Validation Results". The status bar shows: PARSE (20 complete), VALIDATE (20 complete), MPI (Waiting...), and COMMIT (Waiting...). A "Review Panel" button is highlighted with a red circle and the number 7. Below the status bar, a message states: "Panel is ready for Review. Please select the Review button to view the results of the validation step."

The screenshot shows the Review Panel interface. The top bar is labeled "Review Panel" with a red circle and the number 7. The interface is divided into three main sections: Validation Results, Actions Required, and Summary. The Validation Results section shows: Invalid DOB (0), Suspected Duplicate (0), and MRI Reuse (0). The Actions Required section shows: No Action (Invalid DOB), No Action (Suspected Duplicate), and No Action (MRI Reuse). The Summary section shows: New Summary, Total Rows (19), Unusable Rows (0), Deleted Rows (0), and Usable Rows (19). The bottom bar shows: "This panel deviates greatly from previous load." (33% deviation), "New Patients Action Required", and "Verify the changes to your panel." (thumbs up/down buttons), "New Patients Action Required".

Self Service Panel Loader Starter Guide

8 Review Row Report

Click the “View Row Report” button then select the download link to view specifics rows within the panel that requires additional review.

The screenshot displays the CRISP Panel Loader interface. The main page is titled 'Review Panel' and shows a table of validation results. A modal window titled 'Row Report' is open, displaying a table with columns for report type and status. The modal also includes a 'Download' link and a 'Close' button. The background page shows a navigation menu with 'HOME', 'QUERY PORTAL', 'PATIENT SNAPSHOT', 'HEALTH RECORDS', and 'PANEL LOADER'. The 'PANEL LOADER' menu item is highlighted. The main content area shows 'Validation Results' with a table of 1 Invalid DOB, 0 Suspected Duplicate, and 0 MRN Reuse. A 'Summary' section shows 19 Total Rows, 0 Unusable Rows, 0 Deleted Rows, and 18 Usable Rows. The user's name 'SANDRINE EMAMBU' and a 'SIGN OUT' link are visible in the top right corner.

Report - Review Phase	Status
Report - Review Phase	Download
Report - Final	Waiting...
Bad Data Rows	Waiting...
Retryable Rows	Waiting...

NOTE: Reports are not immediately available when a task has stopped processing (in review, completed, or aborted). The system must wait until all updates have been saved to the database before processing reports. Check back in a few minutes if the report you want is unavailable.

Count	Category
1	Invalid DOB
0	Suspected Duplicate
0	MRN Reuse

Count	Category
19	Total Rows
0	Unusable Rows
0	Deleted Rows
18	Usable Rows

Please email support@crisphealth.org for any issues, suggestions or defects.

Self Service Panel Loader Starter Guide

9 Accept or Reject Panel

After reviewing the report, select the thumbs up button to accept or the thumbs down button to reject the panel;

Accepting the Panel = Panel will be uploaded without the rows with the errors

Rejecting the Panel = Upload task will be cancelled, allowing user to make corrections before re-uploading.

The screenshot shows the 'Review Panel' interface in the CRISP system. A modal dialog box titled 'Accept Panel?' is open, asking 'Are you sure you want to accept this panel?' with 'Accept Panel' and 'Cancel' buttons. The background interface includes a navigation bar with 'HOME', 'QUERY PORTAL', 'PATIENT SNAPSHOT', 'HEALTH RECORDS', and 'PANEL LOADER'. The main content area is divided into three sections: 'Validation Results' (showing 2 Invalid Patient ID, 0 Invalid DOB, 0 Suspected Duplicate, 0 MRN Reuse), 'Actions Required' (showing Unusable, No Action, No Action, No Action for Invalid Patient ID, Invalid DOB, Suspected Duplicate, and MRN Reuse), and 'Summary' (showing 20 Total Rows, 2 Unusable Rows, 0 Deleted Rows, and 18 Usable Rows). The 'Loading Type' is 'OverwriteToDelta' and 'Total Rows' is 20.

The screenshot shows the 'Review Panel' interface in the CRISP system. A modal dialog box titled 'Reject Panel?' is open, asking 'Are you sure you want to reject this panel?' with 'Reject Panel' and 'Cancel' buttons. The background interface is similar to the previous screenshot, but the 'Validation Results' section shows 1 Invalid DOB, 0 Suspected Duplicate, and 0 MRN Reuse. The 'Actions Required' section shows thumbs up/down buttons and 'No Action' buttons for Invalid DOB, Suspected Duplicate, and MRN Reuse. The 'Summary' section shows 19 Total Rows, 0 Unusable Rows, 0 Deleted Rows, and 18 Usable Rows. The 'Loading Type' is 'OverwriteToDelta' and 'Total Rows' is 19.

Self Service Panel Loader Starter Guide

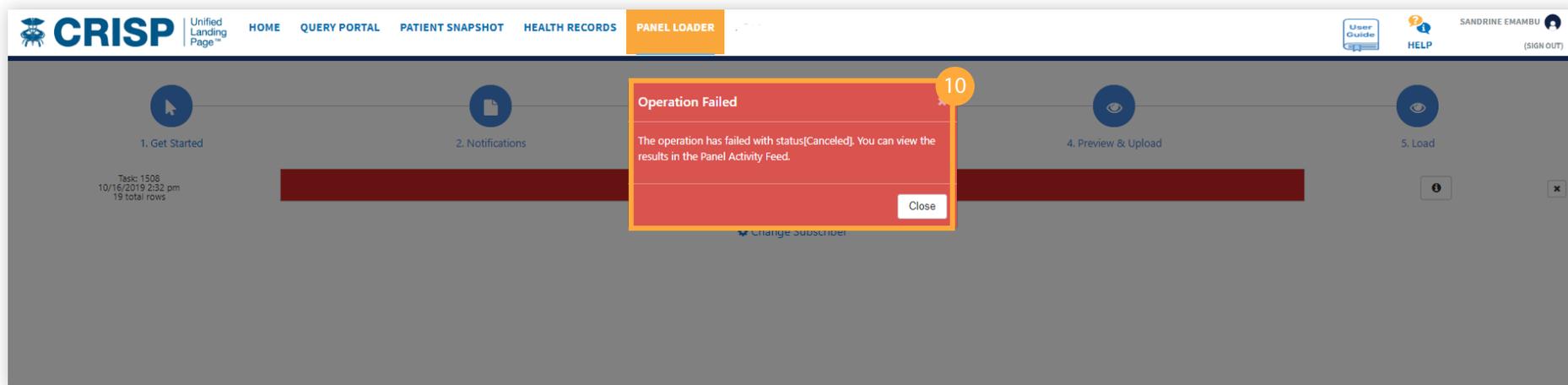
10 Panel Fails

If a panel fails after the review and loading stage:

- o Open to the Panel Activity Feed
- o Locate the panel fail notification
- o Click on the “X” button on the notification
- o Review rows and failure reasons by clicking on the View Row Error Report button

Common reasons why panels fail:

- o File is not saved as .CSV format
- o Headers/Column Names in Patient Panel Tablet have been altered.
Download a patient panel template and use as is.
- o Review rows and failure reasons by clicking on the View Row Error Report button
- o File naming convention is incorrect



Please email support@crisphealth.org for any issues, suggestions or defects.

Self Service Panel Loader Starter Guide

11 Confirmation Emails

System will send a confirmation email to panel loader after every successful upload.

From: donotreply@crisp-ainq.com <donotreply@crisp-ainq.com>
Sent: Wednesday, September 25, 2019 10:01 AM
To: _____
Subject: Wasnington Adventist Hospital patient panel load status: Published

Published rows: 19

WARNING: This email originated outside of CRISP. Even if this looks like a CRISP email, it is not. DO NOT CLICK links or attachments unless you are positive the content is safe. -----

--- This email originates from outside your organization. Do not click on any links or open attachments unless you recognize the sender and have verified that the contained content is safe.

11