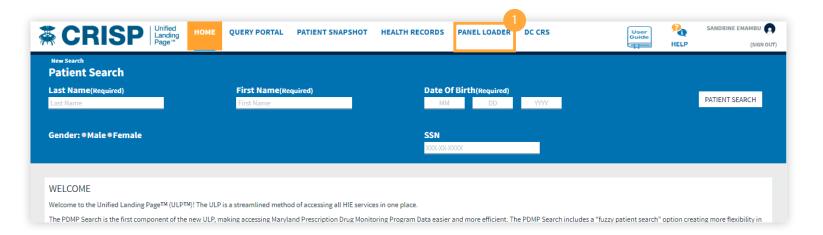# Self-Service Panel Loader
Starter Guide

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 loggedin, 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.

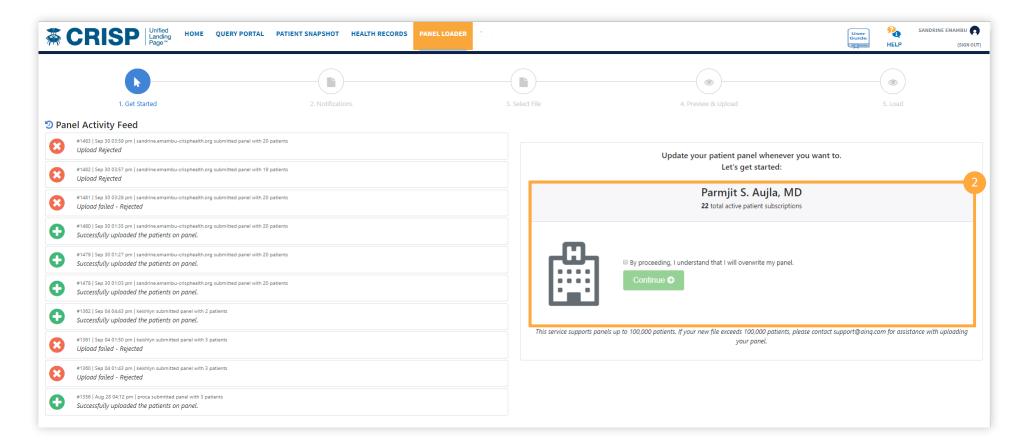# Self Service Panel Loader Starter Guide

② **Using the Panel Loader Tab**
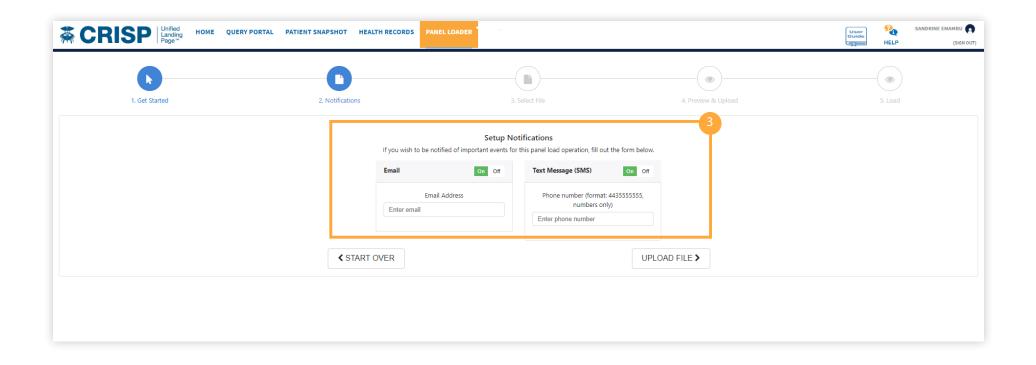
Click the Panel Loader tab:

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.

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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.

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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

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(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.
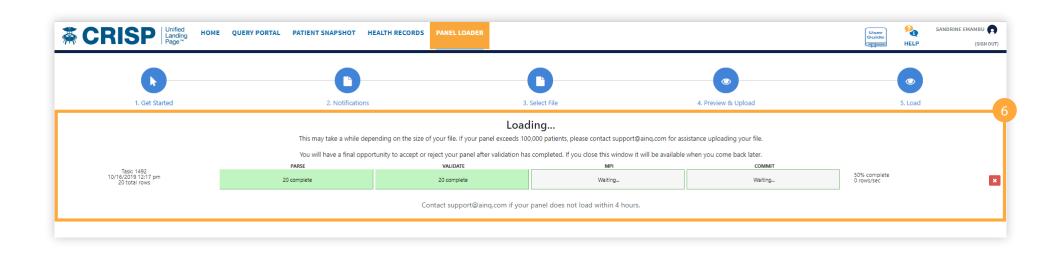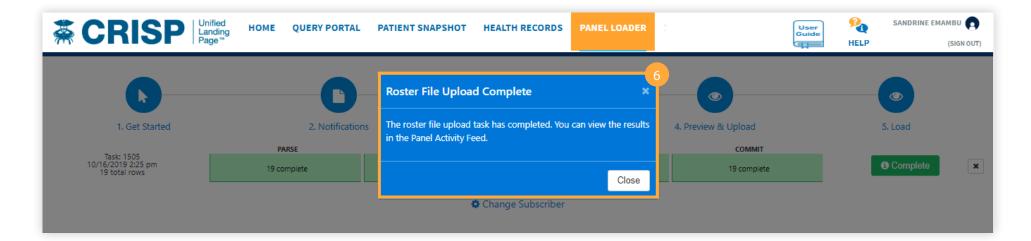
Then click on upload new file.

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.
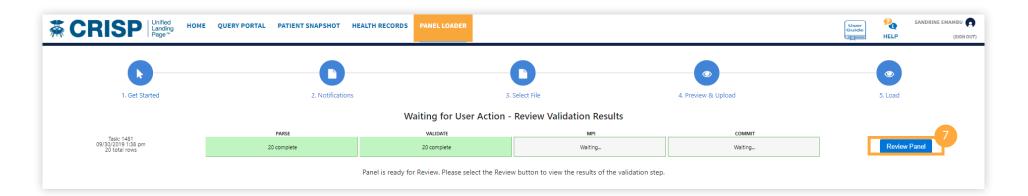Click the close button to proceed

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

(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
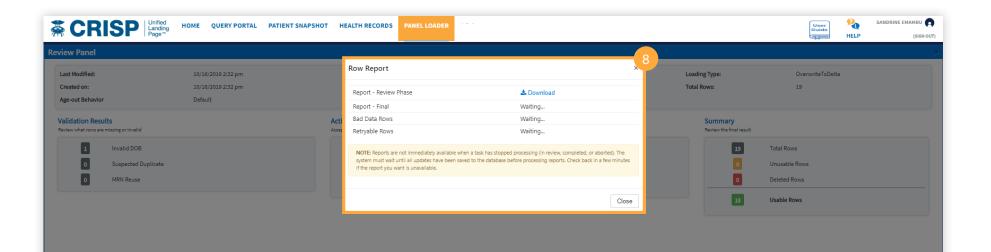
⑧ **Review Row Report**

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

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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.
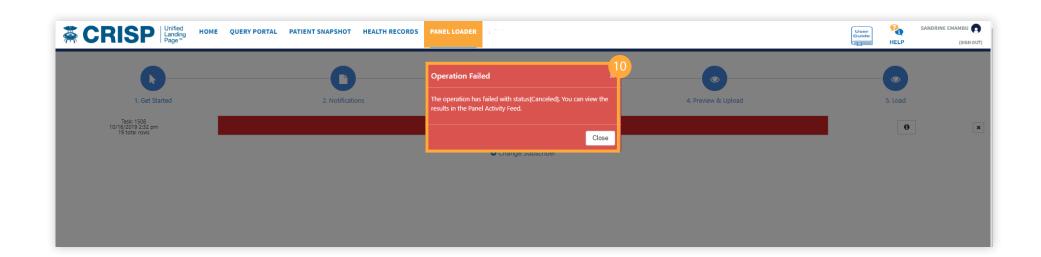
10 **Panel Fails**

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

(11) **Confirmation Emails**

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

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(11)

From: donotreply@crisp-ainq.com <donotreply@crisp-ainq.com>
Sent: Wednesday, September 25, 2019 10:01 AM
To: .
Subject: Washington 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.