# CRISP Patient Panel Checklist

## Section 1: Account and POC Information

|  |  |
| --- | --- |
| **Account Name:** Click to enter text.**Panel Name:** Click to enter text. | **Date:** Click to enter a date. |
| **Point of Contact Name (ENS/Panel Lead):** Click to enter text. |  |
| **Email:** Click to enter text. | **Phone Number:** Enter Phone #. |

**Which CRISP Services are you interested in?:**

[ ]  Clinical Data (If checked, disregard Section 4) [ ]  ENS notifications [ ]  ENS notifications + Clinical Data

## Section 2: Patient Panel – General Information

The patient panel that you submit informs many aspects of CRISP services/infrastructure including:

* Encounter Notifications (ENS): Informs CRISP of your active patients so we can notify you of hospital events.
* Care Team: CRISP is able to display your organization as a part of a patient’s active Care Team.
* User Audit: Under CRISP policy, users may only search for actively managed patients, as dictated by the patient panel. Frequent searching for patients that are not on your panel may result in a security flag.

**To ensure that CRISP accurately reflects your active patient roster,**

**we recommend you send your patient panel at least every 30 days.**

**Failure to submit timely panels may result in termination of user access to CRISP services.**

## Section 3: Patient Panel – Submission

**Assigning Authority Code**

[ ]  New Assigning Authority Code

[ ]  Existing Assigning Authority Code (Please provide the existing code to be used) : Click or tap here to enter text.

**How will you submit your patient panels?**

|  |  |
| --- | --- |
| [ ]  Self-Service Panel Loader (2 submitters max.)(**Available for MD/DC only**) | [ ]  SFTP **(Please provide more information on the next page)** |
|  | [ ]  ADT/SIU feed to CRISP**(Please provide more information on the next page)** |

**What kind of panel will you be submitting?: \*\*Please disregard if you checked ADT/SIU feed above**

|  |  |
| --- | --- |
| [ ]  Overwrite (Each panel will overwrite the last)* If you checked Self-Service Panel Loader, you must submit an Overwrite panel
 | [ ]  Delta (You will only send Add/Update/Delete rows) |

## Section 4: ENS Alerts – Delivery to CRISP Participant

|  |  |
| --- | --- |
| ENS Trigger Alerts | Notification Delivery |
| All users will receive notifications for the following trigger events:* Admission, Discharge, and Transfer messages for ED, Inpatient, and Outpatient settings
* Users will be able to filter for specific alert types in ENS PROMPT
 | ENS PROMPT for all users, as indicated by the HIE Admin**If your organization has chosen to submit panels or receive notifications outside of traditional methods, please provide more information in the Checklist Addendum** |

# CRISP Patient Panel Checklist Addendum

Please complete this addendum if your organization has chosen to submit panels or receive notifications outside of traditional methods (CRISP Direct or Self-Service Panel Loader), or if you would like to receive CCDAs

## **Inbound to CRISP**

Please choose one of the following:

[ ]  **SFTP**- Please provide additional information at the bottom of this page

[ ]  **Auto-Subscription** (Please refer to the appendix for ADT event types)

1. Has an ADT feed been set up for this source? If so, please provide the Jira ticket number:
2. What event trigger will be used to add patients? (Ex. A04): Click to enter text.
3. Do you want to include any specific trigger values (ex. Location)? If so, in which segment(s)? Click to enter text.

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## **Outbound to Participant**

Please choose one of the following:

[ ] SFTP- Please provide additional information at the bottom of this page

[ ]  TCP/IP

[ ]  Do we have an existing VPN?

[ ]  Yes

[ ]  IP and port for Test: Click to enter text.

[ ]  IP and port for Prod: Click to enter text.

[ ]  Technical Point of Contact (Full Name, Email and Phone): Click to enter text.

[ ]  No

[ ]  Technical Point of Contact (Full Name, Email and Phone): Click to enter text.

[ ] CCDA

[ ]  PCP Specific – CCDAs will be send directly to specific PCPs within a practice for their patients. Patient panel will need to have PCPs associated to each patient on panel.

[ ]  Practice Specific – CCDAs will be routed to practice based on how they want to ingest information (ex: Direct Address provided by practice or SFTP).

[ ]  Other (Please specify and provide more information): Click to enter text.

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**If you have selected SFTP (Inbound or Outbound), please provide additional information below:**

**Technical Point of Contact Name:** Click to enter text.

**Email Address:** Click to enter text.

**Phone Number:** Click to enter text.

[ ]  **CRISP hosted** – *Request will be submitted by technical personnel*

 [ ]  **User Account** (Manual Send/Retrieve of files)

 [ ]  **Service Account** (Using an application or script to send/retrieve files)

Authentication:

 ☐ Password

 ☐ Key Pair

 ☐ Password or Key Pair AND Whitelist

 ☐ **Existing**

 Existing Username: Click to enter text.

[ ]  **Participant hosted** –Following information to be provided by Participant: Host Name, Username, Password, and Port #

**Appendix**

1. ADT Event Types
2. A01- Admit
3. A02- Transfer
4. A03- Discharge
5. A04- Registration
6. A05- Preadmit
7. A06- Transfer Outpatient to Inpatient
8. A07- Transfer Inpatient to Outpatient
9. A08- Update
10. A11- Cancel Admit
11. A12- Cancel Transfer
12. A13- Cancel Discharge
13. A28- Add Patient Information
14. A29- Delete Patient Information
15. A31- Update Patient Information
16. Patient Panel Requirements
	1. File format: CSV
	2. Filename: [subscribercode]-1-z-mm-dd-yyyy
	3. Column headers: available in template
17. Panel ageout days by facility

(The number of days that the patients on the patient panel will maintain a relationship with the organization)

* 1. MD Ambulatory: 730 days
	2. DC/CT/AK Ambulatory: 90 days
	3. WV Ambulatory: 540 days
	4. Practices sending ADTs: 540 days
	5. Payors: 45 days
	6. ACO: 90 days
	7. Hospitals sending ADTs: 30 days