

Closed Loop Referral Workflow

Front End Workflow

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1 Login

End User logs in to Unified Landing Page (ULP)



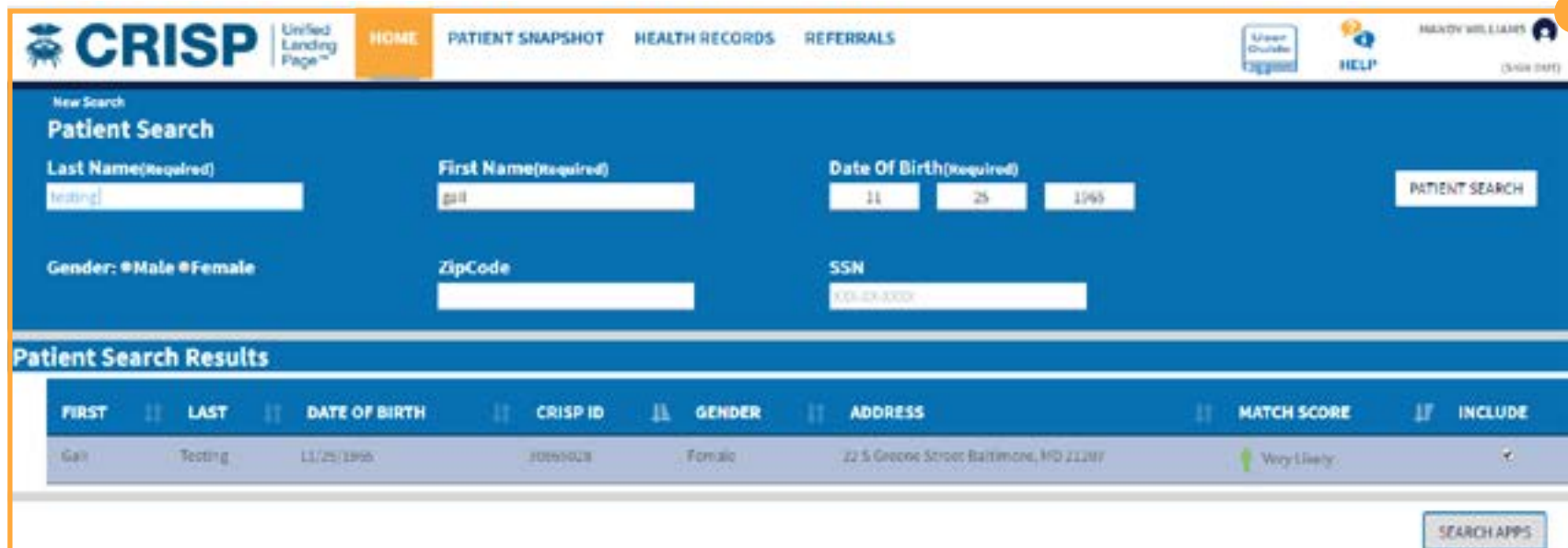
The screenshot displays the login interface for the CRISP Unified Landing Page. At the top left, the CRISP logo is visible next to the text "Unified Landing Page". In the top right corner, there is a "User Profile" button and a "Logout" link. The main content area is titled "Sign In" and contains two input fields: "Email address" and "Password". Below these fields is a blue "Sign In" button and a link for "Forgot Password". A large grey rectangular area is positioned below the "Forgot Password" link. An orange circle with the number "1" is located in the top right corner of the screenshot, indicating the first step in the workflow.

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2 Choose Patient

Patient information is provided, select Search and choose the desired (Very Likely) option, then choose the appropriate tab (Referrals) from the available list in the drop down menu.



The screenshot displays the CRISP Patient Search interface. At the top, there is a navigation bar with the CRISP logo, a 'Unified Landing Page™' label, and tabs for 'HOME', 'PATIENT SNAPSHOT', 'HEALTH RECORDS', and 'REFERRALS'. A user profile for 'MARTIN WILLIAMS' is visible in the top right corner. The main search area is titled 'New Search Patient Search' and contains several input fields: 'Last Name (required)' with the value 'Testing', 'First Name (required)' with the value 'Gail', 'Date Of Birth (required)' with a date picker set to 11/25/1995, 'Gender: #Male #Female', 'ZipCode', and 'SSN' with a masked value 'XXX-XX-XXXX'. A 'PATIENT SEARCH' button is located to the right of the date field. Below the search area, the 'Patient Search Results' section shows a table with the following data:

FIRST	LAST	DATE OF BIRTH	CRISP ID	GENDER	ADDRESS	MATCH SCORE	INCLUDE
Gail	Testing	11/25/1995	30891028	Female	22 S Greoce Street Baltimore, MD 21207	Very Likely	

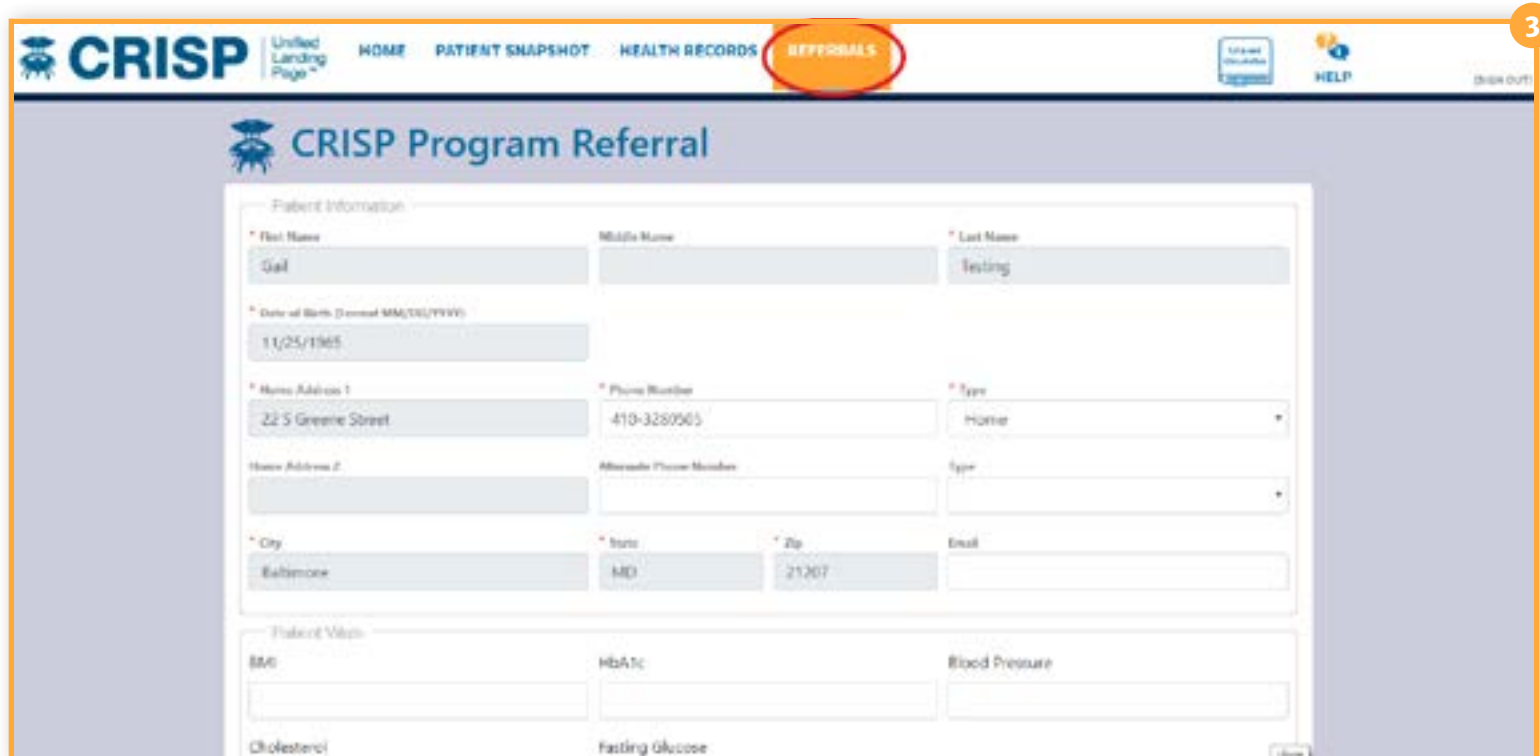
A 'SEARCH APPS' button is located at the bottom right of the results section.

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3 Referrals Tab

The Referrals tab opens with patient demographic information prepopulated



The screenshot displays the 'CRISP Program Referral' form. The 'REFERRALS' tab is highlighted in the top navigation bar. The form is prepopulated with the following information:

Patient Information			
* First Name	Middle Name	* Last Name	
Gail		Testing	
* Date of Birth (Format MM/DD/YYYY)			
11/25/1965			
* Home Address 1	* Phone Number	* Type	
22 S Greene Street	410-3280563	Home	
Home Address 2	Alternate Phone Number	Type	
* City	* State	* Zip	Email
Baltimore	MD	21207	
Patient Vitals			
BMI	HbA1c	Blood Pressure	
Cholesterol	Fasting Glucose		

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4 Patient Vitals

The five fields in the Patient Vitals section will need to be manually filled

The end user:

- 1) Selects from the drop down (ProgramNames)
- 2) Types in the Notes box
- 3) Checks Patient Consent
- 4) Clicks Submit

The screenshot shows a web form with the following sections:

- City, State, Zip, Email:** Four input fields. City is pre-filled with "Baltimore", State with "MD", and Zip with "21207".
- Patient Vitals:** A section containing five input fields for "BMI", "HbA1c", "Blood Pressure", "Cholesterol", and "Fasting Glucose".
- Referral Program:** A section with a dropdown menu for "ProgramNames" (currently showing "National Diabetes Prevention Program Life") and a text area for notes. A red note below the text area says "Please keep a copy of this referral for your records."
- Buttons:** "Submit" (blue), "Clear" (red), and "Patient Consent" (checkbox) with a help icon.

A large orange number "4" is overlaid on the top right corner of the form.

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5 Patient Consent

The end user must check the Patient Consent box before he/she is able to successfully Submit the e-Referral. There is a tool tip to explain what Consent is expected to be obtained before submitting.

Should the end user attempt to submit the referral form without checking the Patient Consent box, they will receive an error message.

The screenshot shows a web form for a referral. The 'Patient Vitals' section contains input fields for BMI (22.6), HbA1c (5.8), Blood Pressure (120/80), Cholesterol (147), and Fasting Glucose (117). The 'Referral Program' section has a dropdown menu set to 'National Diabetes Prevention Program Life' and a text area with a placeholder example. At the bottom, there are 'Submit' and 'Clear' buttons, and a 'Patient Consent' checkbox which is currently unchecked. A red circle highlights the 'Patient Consent' checkbox, and a tooltip points to it with the text: 'Does the patient consent to having their information shared with the chosen prevention program and additional party processing the referral?'. A small orange circle with the number '5' is in the top right corner of the form area.

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6 Submit

Once the Submit button is selected:

(6a) A confirmation page presents to the referrer

(6b) A copy of the referral is sent via Direct secure email to the provided endpoint

(6c) The referrer also receives the below confirmation of successful referral to their email inbox

6b CRISP Referral Program - to "Program Provider" <francy.ortiz@med.crispdirect.org> (11/25/16)

Hello,
Thank you for participating in CRISP Referral Services. You have received a new referral below:
First Name: Gal
Middle Name:
Last Name: Testing
Date of Birth: 11/25/1965
Home Address 1: 22 S Greene Street
Home Address 2:
City: Baltimore
State: MD
Zip: 21207
Phone: 410-3280905 (Home)
Email:
Referral Program: National Diabetes Prevention Program Lifestyle Change Program
Notes: Test
Referring Physician:
Organization:
Sincerely,
CRISP - Chesapeake Regional Information System for our Patients
Program Referral Services

CRISP United Landings Health
WORK PATIENT EXPERIENCE HEALTH RECORDS REFERRALS
CRISP Program Referral
Thank you for using CRISP Referral Services. Below is the referral you submitted. Please take a copy for your records.
First Name: Gal
Middle Name:
Last Name: Testing
Date of Birth: 11/25/1965
Home Address 1: 22 S Greene Street
Home Address 2:
City: Baltimore
State: MD
Zip: 21207
Phone: 410-3280905 (Home)
Email:
Referral Program: National Diabetes Prevention Program Lifestyle Change Program
Notes: Test

6a

6c

Referral Confirmation
CRISP Referrals
Thank you for using CRISP Referral Services. Your referral submission has been sent to National Diabetes Prevention Program Lifestyle Change Program.
Sincerely,
CRISP - Chesapeake Regional Information System for our Patients Program Referral Services.
The contents of this e-mail and any attachments are intended solely for the use of the named addressee(s) and may contain confidential and/or privileged information. Any unauthorized use, copying, disclosure, or distribution of the contents of this e-mail is strictly prohibited. If you are not the intended recipient, please notify the sender immediately and delete this email.
Thank you.

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

Closed Loop Referral Workflow

The Middle Workflow

Between the e-referral being submitted and the patient panel submission to close the referral loop, the workflow in the middle entails

- 1) The third party team to receive the e-referral to their Direct email address
- 2) Review the information provided and then
- 3) Contact/enroll the patient into the program/service.

Closed Loop Referral Workflow The Middle Workflow

The program/service who received the referral then contacts the patient for enrollment. All patient related information (program participation) is to be captured by the third-party. The third party is responsible to automatically generate and assign a unique numerical identifier that will serve as the patient's MRN. This numerical ID is required on the patient panel submission.

Group	Member_Status	Patient_ID	First_Name	Middle_Name	Last_Name	Name_Suffix	Address_1	Address_2	City	State	Zip	Birthdate	Gender	SSN	Home_Phone
		1000002	Gail	A	Testing		13 main st	apt 45	baltimore	MD	21230	11/25/1965	F	999-99-9999	3014448888
		1000004	Gilbert	B	Grape		34 main st	apt 46	baltimore	MD	21230	1/1/1984	M	999-99-9999	3025557777
		1000003	Amanda	C	WellT		35 main st	apt 47	baltimore	MD	21230	12/31/1903	F	999-99-9999	4102223333
Required															
Optional - these fields will appear on your ENS alerts if you include them in the panel															
Required for delta panels only															
Provide this information if it is available															
Required for Prevention Program															
Optional for Prevention Program															
Files should be CSV (Comma delimited)															

(This screen is displaying the Patient Panel Template:)

Closed Loop Referral Workflow

The Back End Workflow

- 1) The patient panel (csv file) is completed, zipped and sent via Direct secure email to PreventionProgram@Crispdirect.org
- 2) A poller instance pulls the file and sends to the MIRTH Connect Channel(s) for the translation and delivery of the discrete data elements needed to trigger notifications and updates to the ULP Patient SnapShot tab.
- 3) The Patient SnapShot tab is updated in three places:

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1a Snapshot

Patient SnapShot tab/Encounters From ADT widget is updated to reflect the patient attended an appointment to the prevention program. A blue circle displays in the widget indicating an Outpatient event occurred. Below the chart is a table that identifies the date of the appointment, Source (will always be Prevention Program), Event Type (will always be Outpatient A01), Reason (will list the name of the prevention program), and Diagnosis (will always be Pre-Diabetic).

The screenshot displays the CRISP Patient Snapshot interface. The top navigation bar includes 'HOME', 'PATIENT SNAPSHOT', 'HEALTH RECORDS', and 'REFERRALS'. The 'PATIENT SNAPSHOT' tab is active. The patient's name is 'Aracelis Padilla' and the date of birth is '12-21-1983'. The 'Encounters From ADT' widget shows a calendar view with a blue circle on the 21st of August, indicating an outpatient event. Below the calendar is a table of encounters with the following columns: Date, Source, Event Type, Reason, and Diagnosis. The table contains several rows of data, all with 'Prevention Program' as the source and 'Pre-Diabetic' as the diagnosis.

Date	Source	Event Type	Reason	Diagnosis
08/21/2018	Prevention Program	Outpatient A01	Pre-Diabetic	Pre-Diabetic
08/22/2018	Prevention Program	Outpatient A01	Pre-Diabetic	Pre-Diabetic
08/23/2018	Prevention Program	Outpatient A01	Pre-Diabetic	Pre-Diabetic
08/24/2018	Prevention Program	Outpatient A01	Pre-Diabetic	Pre-Diabetic
08/25/2018	Prevention Program	Outpatient A01	Pre-Diabetic	Pre-Diabetic
08/26/2018	Prevention Program	Outpatient A01	Pre-Diabetic	Pre-Diabetic
08/27/2018	Prevention Program	Outpatient A01	Pre-Diabetic	Pre-Diabetic
08/28/2018	Prevention Program	Outpatient A01	Pre-Diabetic	Pre-Diabetic
08/29/2018	Prevention Program	Outpatient A01	Pre-Diabetic	Pre-Diabetic
08/30/2018	Prevention Program	Outpatient A01	Pre-Diabetic	Pre-Diabetic

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1b Patient Snapshot Tab / Care Team widget

Patient SnapShot tab/Care Team widget is updated with the prevention program name and any other data that is supplied in the patient panel (csv) file that is submitted. These fields show up as optional on the patient panel template and if left blank, only the name of the prevention program will present.

The screenshot shows the 'Patient Snapshot' interface. At the top, it displays patient information: 'Patient Snapshot', 'Patient Name: Call Writing', 'Gender: Female', and 'Date of Birth: 01/25/1962'. On the right, there are links for 'Profile Section' and 'Collapse/Expand All'. The main content area is divided into several sections. The 'Care Team' section is highlighted with a red circle. It contains a table with the following columns: 'Participant Name', 'Program', 'Participant Phone', 'Gender', 'Married', 'Age', 'ACP', 'Care Manager', and 'Care Manager Phone'. The 'Participant Name' field is currently blank. Below the 'Care Team' section, there is a 'Clinical Documents' section with columns for 'Doc', 'Description', and 'Date'. The 'Immunization History' section is also visible at the bottom.

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2a Different Events

Patient SnapShot tab/Care Alerts widget – two different events can occur with the Care Alert

The screenshot displays the CRISP Patient Snapshot interface for a patient named Andrew Frank. The interface includes a navigation bar with 'HOME', 'PATIENT SNAPSHOT', and 'HEALTH RECORDS'. The 'PATIENT SNAPSHOT' tab is active. Below the navigation bar, there is a search bar and a patient summary section with the following details: Patient Name: Andrew Frank, Gender: Female, Date of Birth: 12-31-1915.

The 'Patient Demographics' section shows the following information:

Field	Value
Name	Andrew Frank
Address	35 main st balltown, MD 21230
Gender	Female
D.O.B.	12-31-1915
Phone	(410) 665-1117

The 'Care Alerts' section is highlighted with a red circle and contains a table with the following data:

Date	Source	Description
8/26/2019	PVL_PROM	Andrew was enrolled in the diabetes prevention program on 8/23/2019 and missed their diabetes prevention program appointment on 8/25/2019.DPP3,THRD TEST CARE NOTE

A yellow arrow points to the date '8/26/2019' in the Care Alerts table. The 'Encounters From ADT' section is also highlighted with a red circle and shows a calendar view for August 2019. The calendar includes a legend for 'Emergency' (red triangle), 'Inpatient' (yellow square), and 'Outpatient' (blue circle). The calendar shows dates from Friday, August 23 to Tuesday, August 27. The 'Inpatient' button is highlighted with a red circle. The calendar shows no encounters for the displayed period.

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2b Care Team widget

Care Alert widget is updated to reflect the enrollment into a prevention program as well as the text that was placed in the Notes section from the e-referral. The date the csv file was submitted will populate, the Source will always indicate Prevention Program (PVN_PRGM), and the Description will be the Note itself from the e-Referral.

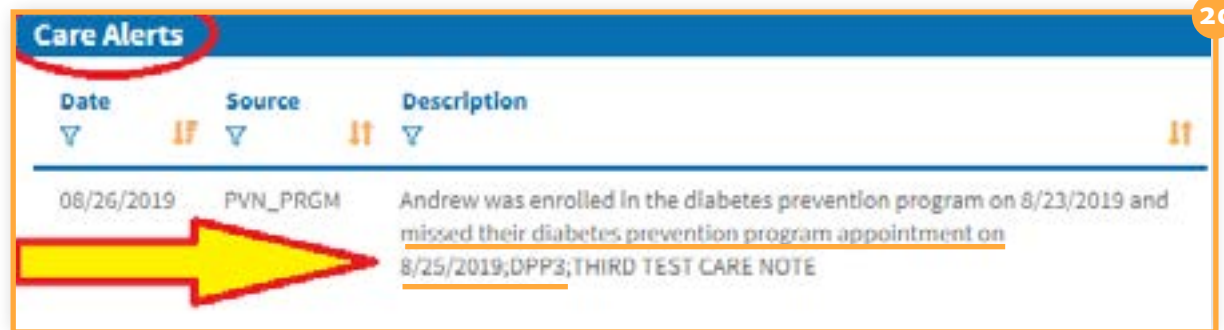


Care Alerts		
Date	Source	Description
05/26/2019	PVN_PRGM	Mandy was enrolled in the diabetes prevention program on 8/23/2019;DPP1;TEST CARE NOTE 1

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2c Care Team widget

Care Alert widget is updated to reflect the missed appointment to a prevention program as well as the text that was placed in the Notes section on the e-referral.



The screenshot shows a 'Care Alerts' widget with a table. The table has three columns: 'Date', 'Source', and 'Description'. The 'Date' column has a dropdown arrow and a '17' icon. The 'Source' column has a dropdown arrow and a '11' icon. The 'Description' column has a dropdown arrow and a '11' icon. The first row of data shows the date '08/26/2019', the source 'PVN_PRGM', and the description 'Andrew was enrolled in the diabetes prevention program on 8/23/2019 and missed their diabetes prevention program appointment on 8/25/2019;DPP3;THIRD TEST CARE NOTE'. A yellow arrow points to the 'Description' column of this row.

Date	Source	Description
08/26/2019	PVN_PRGM	Andrew was enrolled in the diabetes prevention program on 8/23/2019 and missed their diabetes prevention program appointment on 8/25/2019;DPP3;THIRD TEST CARE NOTE

Closed Loop Referral Workflow The Back End Workflow

3a Triggering of ENS notifications

The final step in this workflow is the triggering of ENS notifications to the subscribed parties. There are four possible ways to receive these closed loop referral, ENS alerts:

1. Direct email
2. Prompt
3. Doc Halo (secure text)
4. SFTP folder

PROMPT is accessed via ULP login. It is a role-based access tab and therefore, only users who have access will be able to view it. Below is an example of how that encounter notification populates.

The screenshot displays the CRISP (United Levee) system interface. The navigation bar includes 'HOME', 'PATIENT SNAPSHOT', 'PROMPT', 'HEALTH RECORDS', and 'REFERRALS'. The 'PROMPT' tab is highlighted with a red circle. Below the navigation bar, there is a search bar and a filter dropdown menu, both also circled in red. The main content area shows a list of encounters for patient ALEXANDROS AARON (00001240). One encounter is circled in red, showing the following details:

Provider Program
08-28-2018 12:00 AM
OP Site
DFFI

The right side of the screen contains a disclaimer: "The information contained in this system is privileged and confidential and/or protected health information (PHI) and may be subject to protection under the law, including the Health Insurance Portability and Accountability Act of 1996, as amended (HIPAA). This system is intended for the sole use of the individual or entity to whom it is addressed. If you are not the intended user of this system, you are notified that any use, dissemination, distribution, printing or copying of this transmission is strictly prohibited and may subject you to criminal or civil penalties."

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3b Filter on PROMPT


The user will filter on the right and the notification populates on the left. The user will be able to filter on appointment type: Enrolled (S12) or Missed (S26). Once selected, the notifications will populate on the left side of the screen. All notifications that fit the filtered criteria (Enrolled and Missed), for any patient on the providers panel, participating in the PreventionLink program will display.

The screenshot displays the CRISP system interface. The top navigation bar includes 'HOME', 'PATIENT SNAPSHOT', 'PROMPT', 'HEALTH RECORDS', and 'REFERRALS'. The 'PROMPT' tab is active. Below the navigation bar, there are search and filter options: 'View by Normal or Missed', 'Any Participant (1)', 'Saved Custom Filters', and 'Event Type equals'. A dropdown menu is open for 'Event Type equals', showing a list of values: 'A01: Admission', 'A01: Discharge', 'A04: Patient Registration', 'A06: Transfer', 'S12: Enrollment', and 'S26: Missed Appointment'. The 'S12: Enrollment' and 'S26: Missed Appointment' options are circled in red. On the left side of the screen, there are two notification cards for 'GAIL TESTING (1800002)'. Each card shows 'Prevention Program', '08/23/2019 12:00 AM', 'OP Enrollment', and 'DPP1'. A central warning message is visible: 'The information contained in this system is privileged and confidential under the law, including the Health Insurance Portability and Accountability Act (HIPAA). This system is intended for use by authorized personnel only. Any use, distribution, printing or copying of this transmission is strictly prohibited. Users are notified that any use, distribution, printing or copying of this transmission is strictly prohibited and may be subject to civil penalties.'

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4 Direct Email

The other option for receiving this ENS notification is via Direct, secure email. An example of that notification is shown here.



Encounter Notifications

Gilbert Grape Outpatient S26 at Prevention Program

Patient Information:
Patient Name: Gilbert Grape
Gender: Male
DOB: 01/01/1984
Address: 35 main st
baltimore, MD 21230
Home Phone: (302) 555-7777
Work Phone: (443) 555-6666
Cell Phone: (410) 444-3333
Primary care provider: Dr. Smith

Facility Information:
Hospital/Org. Name: Prevention Program
Hospital MRN: 1000004
Event: Outpatient S26
Event Time: 08/25/2019 00:00:00

Additional Information:
Admit Source:
Admit Reason: DPP3
Death Indicator:
Death Date:
Diagnosis Code:
Diagnosis Description:
Discharge Disposition:
Discharge To Location:
Hospital Service:
Race:
Ethnicity:

Past Encounter Information:
Past Emergency Visits: 0
Past Inpatient Visits: 19

Your Facility Site:
Your Facility MRN: 1000004

Additional Info: [CRISP_Query_Portal_Link](#)

You are receiving this message because you have requested Encounter Notifications from the statewide health information exchange for your patient panel.
Any questions/concerns can be sent to: support@crisphealth.org

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