# CRISP Patient Panel Checklist

## Section 1: Account and POC Information

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| **Account 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, please send your patient panel at least every 90 days.**

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

## Section 3: Patient Panel – Submission

**Medical Record Number/Unique Patient ID:**

Participant-specific MRN

Hospital/System MRN (If checked, please specify which hospital/system): Click or tap here to enter text.

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

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| --- | --- |
| Self-Service Panel Loader (recommended) – please indicate max of 2 submitters on bulk load sheet | SFTP  CRISP hosted  Participant hosted |
| Secure email  CRISP Direct secure email (CRISP will provide credentials) – please indicate max of 2 submitters on bulk load sheet | ADT/SIU feed to CRISP |

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

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| --- | --- |
| 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

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| 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 on the corresponding User Bulk Upload Sheet. |
| \*\*If you have a specific request or use case outside of the default settings above, contact your account representative.\*\* | |

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| FOR INTERNAL USE ONLY: ENS team, please confirm that the following items have been completed: | | |
| **SUD status** | **ENS Recipient Objects created** | **Source Code sent to outreach** |