CSS Patient Panel Checklist

Section 1: Account and POC Information

Account Name: Click to enter text.   **Date:** Click to enter a date.

Panel Name: Click to enter text.

Point of Contact Name (Panel Lead): Click to enter text.

Email: Click to enter text.   **Phone Number:** Enter Phone #.

42CFR Part II? Click to enter text.

Which CSS Services are you interested in? Select all that apply:

☐ Clinical Data Only (If checked disregard Section 4)   ☐ Population Explorer + Clinical Data   ☐ Outbound Notifications

Section 2: Patient Panel – General Information

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

- CSS Event Notification Delivery (CEND): Informs CSS of your active patients so we can notify you of hospital encounters.
- Care Team: CSS will display your organization as a part of a patient's active Care Team.
- User Audit: Under CSS 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.

**We recommend you send your patient panel at least every 30 days
to ensure that CSS accurately reflects your active patient roster.
Failure to submit timely panels may result in termination of user access to CSS services.**

Section 3: Patient Panel – Submission

MPI Code

☐ New MPI Code

☐ Existing MPI (Please provide the existing code to be used): Click or tap here to enter text.

How will you submit your patient panels?

☐ CSS Panel Processor (2 submitters max.)	☐ MFT **(Please provide more information on the next page)** ☐ Auto-Subscription **(Please provide more information on the addendum)** ☐ Will you submit an initial physical panel? If yes, select the method above

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 Panel Processor, you must submit an Overwrite panel	☐ Incremental (You will only send Add/Update/Delete rows)

Section 4: Notifications– Delivery to CSS Participant

Notification Encounters	Notification Delivery
All users will receive encounters for the following trigger events: • Admissions and Discharges for Inpatient, and Outpatient settings • Users will be able to filter for specific alert types in Population Explorer	Population Explorer 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**

CSS Patient Panel Checklist Addendum

Please complete this addendum if your organization has chosen to submit panels or receive notifications outside of traditional methods (CSS Panel Processor and Population Explorer), or if you would like to receive CCDAs.

Inbound to CRISP
Please choose one of the following:
☐ **MFT** - Please provide additional information at the bottom of this page.
☐ **Auto-Subscription** (Please refer to the auto-subscription Addendum below)
_____

Outbound to Participant
Please choose one of the following:
☐ MFT - Please provide additional information at the bottom of this page.
     Frequency:
☐ Real-time (HL7 and CCD only)
☐ Daily
☐ Weekly
☐ 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.
☐ Other Click to enter text.

Outbound Notification Options (See appendix for descriptions)

☐ Templated ADT HL7
☐ Templated ADT Bulk File
☐ HL7 ADT Message Forwarding (Raw ADT – no panel information included)
☐ CCDA Message forwarding
☐ HL7 ORU Message forwarding
☐ Other (Please specify and provide more information): Click to enter text.

_____

If you have selected MFT (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** (Preferred) – *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 (REQUIRED):
        ☐ 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 (REQUIRED) :

- Host Name:
- Username:
- Password:
- Port #:

CSS Auto-Subscription Panel Checklist Addendum

Has an ADT feed been set up for this source? If so, please provide the Jira ticket number:
1. ADT Source Code: Click to enter text.

If no ticket has been created, please submit a new ADT Integration CSD ticket with the following information:
    What ADT events will be used to add patients to a panel?
- ☐ A01- Admit
- ☐ A03- Discharge
- ☐ A04- Registration
- ☐Other Click to enter text.

Would you like additional information captured on a panel?
- ☐PCP - PD1.4
- ☐Attending Provider – PV1.7
- ☐Patient Location – PV1.3.1
- ☐Insurance - IN1.1
- ☐Other Click to enter text.

Appendix

A. ADT Event Types
- A01- Admit
- A02- Transfer
- A03- Discharge
- A04- Registration
- A05- Preadmit
- A06- Transfer Outpatient to Inpatient
- A07- Transfer Inpatient to Outpatient
- A08- Update
- A11- Cancel Admit
- A12- Cancel Transfer
- A13- Cancel Discharge
- A28- Add Patient Information
- A29- Delete Patient Information
- A31- Update Patient Information

B. Patient Panel Requirements

- File format: CSV
- Filename: [subscribercode]-1-z-mm-dd-yyyy (overwrite), [subscribercode]-1-d-mm-dd-yyyy (incremental)
- Column headers: available in template

C. Panel age out days by facility
(The number of days that the patients on the patient panel will maintain a relationship with the organization)
Physical Panels:
- MD and CT Ambulatory: 730 days
- DC/AK Ambulatory: 90 days
- WV Ambulatory: 540 days
- Payors: 45 days
- ACO: 90 days

Auto-Sub Panels:
- Practices sending ADTs:
    i. MD: 730
    ii. DC/CT/AK/WV: 540 days
- Hospitals sending ADTs: 30 days

D. Outbound Notifications
- Templated ADT HL7 – Real-time panel and ADT based notifications via HL7 format
- Templated ADT Bulk File – Daily/Weekly CSV file of most recent hospital events
- HL7 ADT Message Forwarding - Raw ADT – no panel information included
- CCDA Message forwarding – Raw CCDA sent from data sender
- HL7 ORU Message forwarding – Raw ORU message sent from data sender