



# CRISP Panel Formatting

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# Agenda

- Introduction to CRISP panels and FAQ
- Helpful Resources
- Sandbox Tutorial
- Questions

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# CRISP Panels - FAQ

## **What is a panel?**

A panel is an excel spreadsheet pulled from an offices EMR that includes patients from the past 18 months. This is what CRISP considers an “active” patient.

## **What is the purpose of a panel?**

A panel serves multiple purposes. First, it establishes a patient relationship between CRISP and your organization. This gives CRISP an idea of what patients you are going to query. You can always search patients outside of your panel with a legitimate reason (ie care coordination, new patients etc) but you will get an “attestation” warning that the patient is not on your panel.

A panel is also how ENS notifications are established. We pull notifications for patients on your panel.

## **What fields are required for a panel?**

All panels must include Patient ID, First Name, Last Name, Address, City, State, Zip, DOB and Gender. The panel will not load without these fields.



# CRISP Panels - FAQ

## **Does a panel expire?**

Yes, all panels do expire. Typically they expire after 2 years but for some programs (ie MDPCP) they expire after 90 days. Please check with your Outreach Representative to establish your panel expiration date.

## **What happens when a panel expires?**

When a panel expires you will lose access to clinical records. You will still have access to PDMP.

## **How often should I upload a panel?**

Ultimately, this decision is up to you. We recommend to upload a new panel quarterly or every 90 days. But if you are a new practice and getting new patients frequently you can upload it sooner. Or, if you want you can upload it every 2 years.



# Helpful Resources

<https://www.crisphealth.org/onboarding-training-materials/>

Onboarding Materials

User Guides

Fact Sheets



ENS Sample Panel



Panel Processor



Questions?





**CRISP**

*Thank You*

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