

# Social Needs Data

## User Guide

June 20th, 2024



**CRISP**

## Social Needs Data User Guide

### Contents

- Introduction..... 1
- Accessing Assessments and Z-Codes ..... 1
- Submit Referral via CRISP Portal..... 4
- InContext Users Only..... 4
- Referral History: ..... 8
- Managing Referrals : ..... 9

### Introduction

The CRISP MD HIE displays social needs data within the CRISP Portal and the CRISP InContext App in the EHR. Through the Social Needs data tab, CRISP connected providers can view social determinants of health (SDOH) assessments and ICD-10 codes that reflect social conditions. CRISP users may also search for resources to refer their patients to as well as directly submit a referral in CRISP to community-based organizations in the HIE Directory.

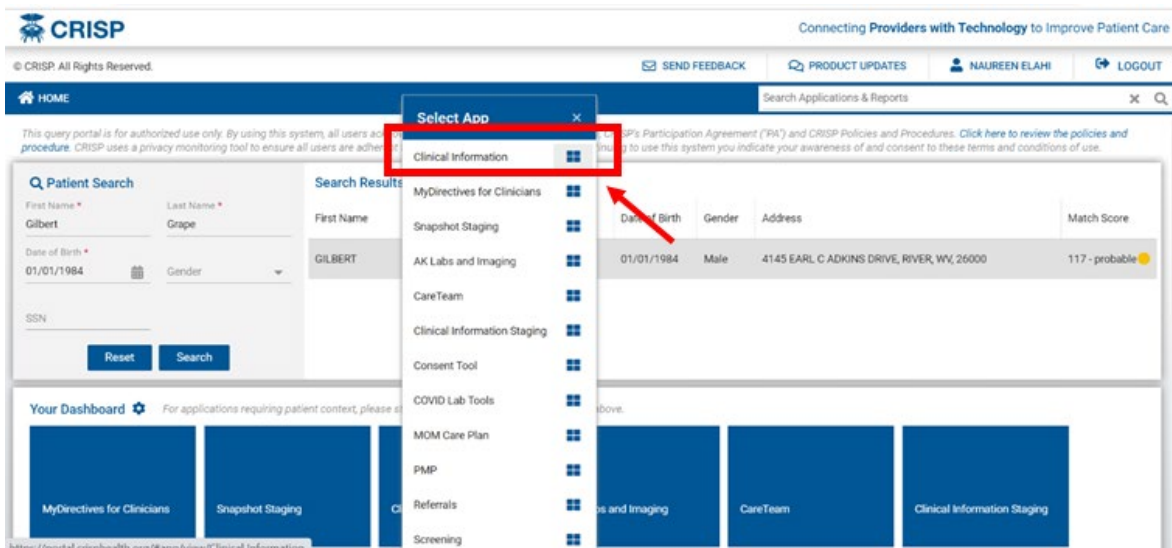
For any questions about CRISP social needs data, please reach out to the CRISP Technical User Support team at [support@crisphealth.org](mailto:support@crisphealth.org).

You can access the SDOH suite of tools via the CRISP Portal or through InContext.

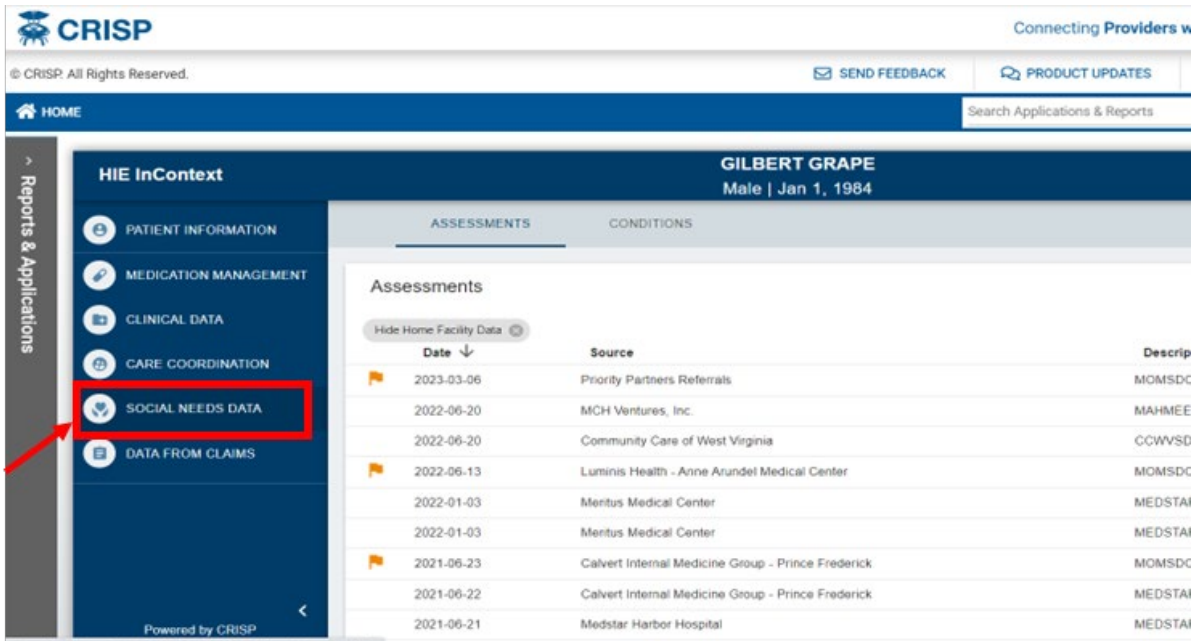
### Accessing Assessments and Z-Codes

Below are the steps for how to access the social needs data tab in the CRISP Portal.

**Step 1:** Search for patient, click on the patient’s row, and then click on the clinical information tile.



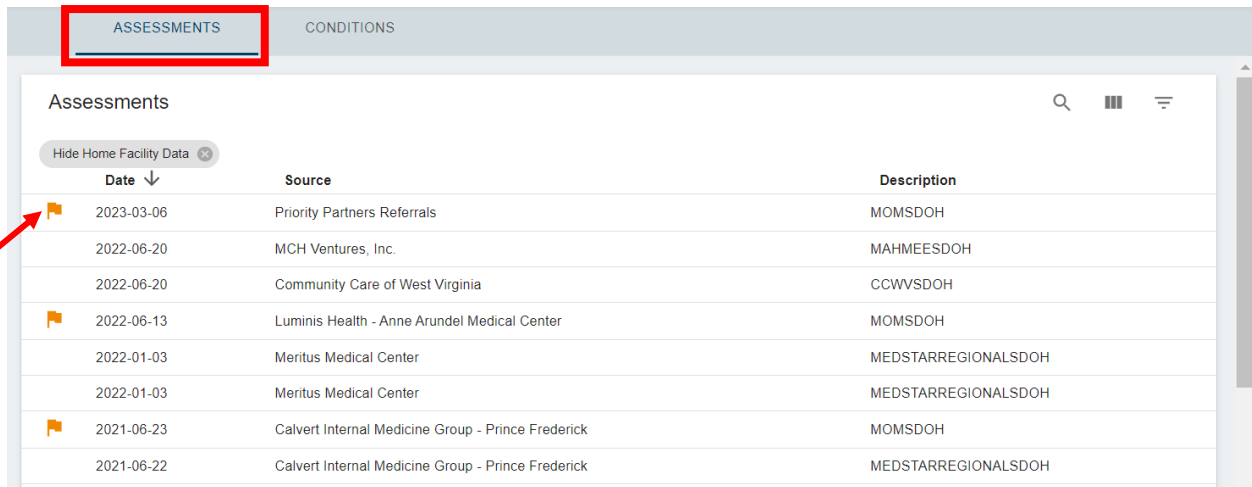
**Step 2:** Select the Social Needs Data tab.



The screenshot shows the CRISP HIE InContext interface for patient GILBERT GRAPE. The left sidebar contains a 'Reports & Applications' menu with the following items: PATIENT INFORMATION, MEDICATION MANAGEMENT, CLINICAL DATA, CARE COORDINATION, SOCIAL NEEDS DATA (highlighted with a red box and a red arrow), and DATA FROM CLAIMS. The main content area displays the 'ASSESSMENTS' subtab, showing a table of assessments with columns for Date, Source, and Description. An orange flag icon is visible next to the first assessment row.

Date	Source	Descrip
2023-03-06	Priority Partners Referrals	MOMSDC
2022-06-20	MCH Ventures, Inc.	MAHMEE
2022-06-20	Community Care of West Virginia	CCWVSD
2022-06-13	Luminis Health - Anne Arundel Medical Center	MOMSDC
2022-01-03	Meritus Medical Center	MEDSTAI
2022-01-03	Meritus Medical Center	MEDSTAI
2021-06-23	Calvert Internal Medicine Group - Prince Frederick	MOMSDC
2021-06-22	Calvert Internal Medicine Group - Prince Frederick	MEDSTAI
2021-06-21	Medstar Harbor Hospital	MEDSTAI

**Step 3:** Select the assessments subtab to view SDOH assessments. If a need is identified in the assessment an orange flag icon will appear.



This close-up view shows the 'ASSESSMENTS' subtab selected. The table below lists the assessments, with an orange flag icon next to the first row (2023-03-06) indicating a social domain need.

Date	Source	Description
2023-03-06	Priority Partners Referrals	MOMSDOH
2022-06-20	MCH Ventures, Inc.	MAHMEESDOH
2022-06-20	Community Care of West Virginia	CCWVSDOH
2022-06-13	Luminis Health - Anne Arundel Medical Center	MOMSDOH
2022-01-03	Meritus Medical Center	MEDSTARREGIONALSDOH
2022-01-03	Meritus Medical Center	MEDSTARREGIONALSDOH
2021-06-23	Calvert Internal Medicine Group - Prince Frederick	MOMSDOH
2021-06-22	Calvert Internal Medicine Group - Prince Frederick	MEDSTARREGIONALSDOH

**Step 4:** Select a row to view the assessment. Click on the drop-down arrow to view the questions and answers for each social domain. The orange flag will be displayed next to the domain and question where a need was indicated.

Assessments  
Priority Partners Referrals  
2023-03-06

- Living Situation
- Food
- Transportation
- Utilities
- Safety

Assessments  
Priority Partners Referrals  
2023-03-06

Living Situation


**What is your living situation today?**

I have a steady place to live

**Think about the place you live. Do you have problems with any of the following? CHOOSE ALL THAT APPLY**

Mold

**Viewing Z-Codes:** Under the Social Needs Data Tab and next to Assessments at the top, click on “Conditions,” where Z-codes providers have assigned will be visible. The source, Z-code and description of the Z-code will be displayed.

 Connecting **Providers with Technology** to Improve Patient Care

© CRISP All Rights Reserved. SEND FEEDBACK | PRODUCT UPDATES | NAUREEN ELAHI | LOGOUT

HOME Search Applications & Reports

HIE InContext

- PATIENT INFORMATION
- MEDICATION MANAGEMENT
- CLINICAL DATA
- CARE COORDINATION
- SOCIAL NEEDS DATA
- DATA FROM CLAIMS

Powered by CRISP

**GILBERT GRAPE**  
Male | Jan 1, 1984

ASSESSMENTS CONDITIONS

Date ↓	Source	Z-Code	Description
2022-01-27	ARS	Z59.1	Inadequate housing
2022-01-25	ARS	Z56.0	Unemployment, unspecified
2021-09-30	ARS	Z60.2	Problems related to living alone
2021-07-01	ARS	Z63.4	Disappearance and death of family member

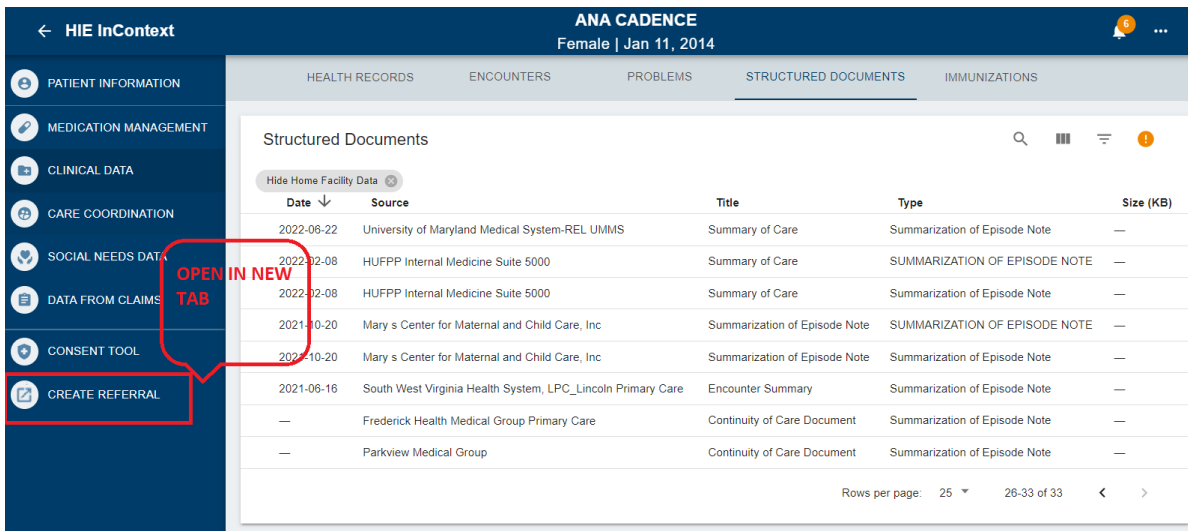
Rows per page: 25 | 1-4 of 4

## Submit Referral via CRISP Portal

To submit a referral via CRISP, please reference the steps below. Both web-based and InContext users may submit a referral directly in CRISP.

### InContext Users Only

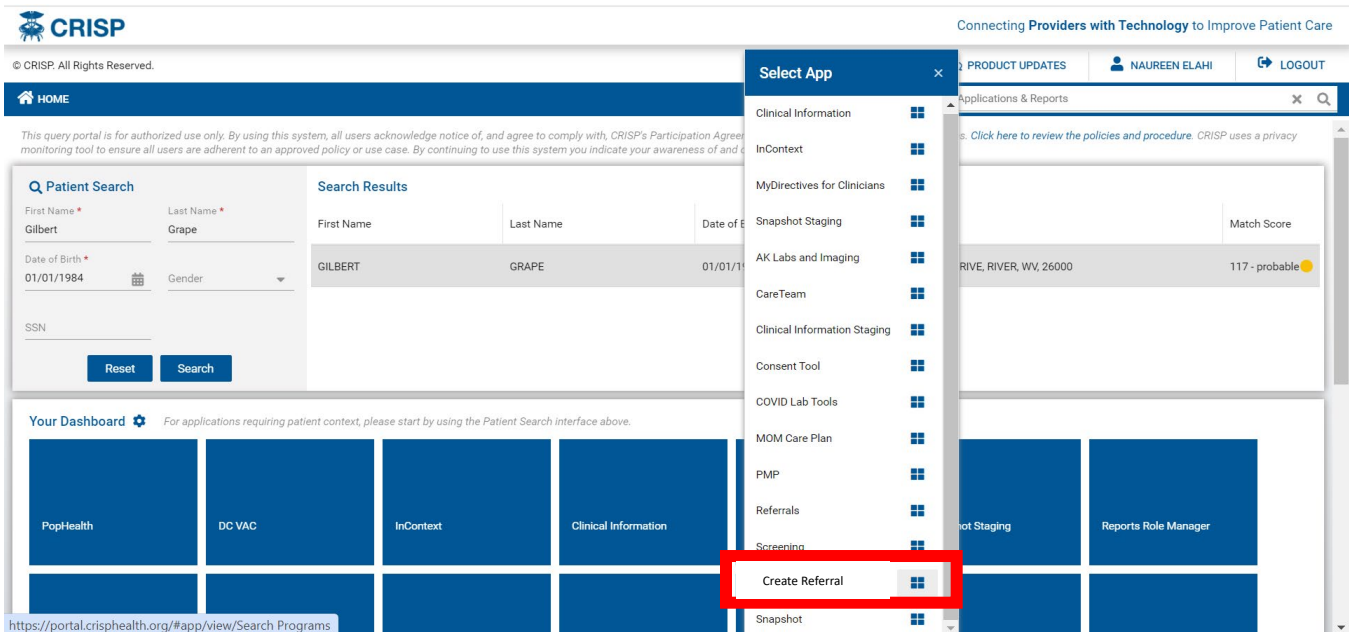
Launch CRISP through your EMR. Under Clinical information tile choose “APPS” and then “Create Referral.” Proceed to step 2 on the next page for additional instructions.



The screenshot shows the HIE InContext interface for patient ANA CADENCE, Female, dated Jan 11, 2014. The left sidebar contains navigation options: PATIENT INFORMATION, MEDICATION MANAGEMENT, CLINICAL DATA, CARE COORDINATION, SOCIAL NEEDS DATA, DATA FROM CLAIMS, CONSENT TOOL, and CREATE REFERRAL. The 'CREATE REFERRAL' option is highlighted with a red box and labeled 'OPEN IN NEW TAB'. The main content area displays a table of 'Structured Documents' with columns for Date, Source, Title, Type, and Size (KB).

Date	Source	Title	Type	Size (KB)
2022-06-22	University of Maryland Medical System-REL UMMS	Summary of Care	Summarization of Episode Note	—
2022-12-08	HUFPP Internal Medicine Suite 5000	Summary of Care	SUMMARIZATION OF EPISODE NOTE	—
2022-12-08	HUFPP Internal Medicine Suite 5000	Summary of Care	Summarization of Episode Note	—
2021-10-20	Mary s Center for Maternal and Child Care, Inc	Summarization of Episode Note	SUMMARIZATION OF EPISODE NOTE	—
2021-10-20	Mary s Center for Maternal and Child Care, Inc	Summarization of Episode Note	Summarization of Episode Note	—
2021-06-16	South West Virginia Health System, LPC_Lincoln Primary Care	Encounter Summary	Summarization of Episode Note	—
—	Frederick Health Medical Group Primary Care	Continuity of Care Document	Summarization of Episode Note	—
—	Parkview Medical Group	Continuity of Care Document	Summarization of Episode Note	—

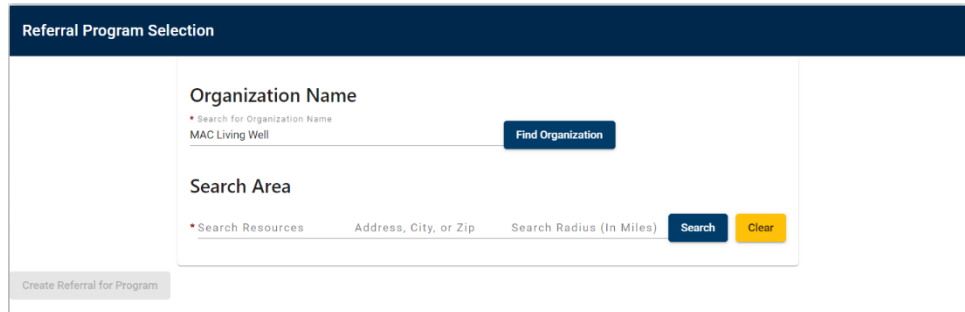
**Step 1:** For web-based users, search for patient, click on the patient’s row, and then click on the “Create Referral” tile in the list of applications.



The screenshot shows the CRISP portal home page. The top navigation bar includes the CRISP logo, user information (NAUREEN ELAHI), and a LOGOUT button. The main content area features a 'Patient Search' section with search results for 'GILBERT GRAPE'. Below the search results is a 'Your Dashboard' section with several application tiles. The 'Create Referral' tile is highlighted with a red box. A 'Select App' dropdown menu is open, showing a list of applications including 'Clinical Information', 'InContext', 'MyDirectives for Clinicians', 'Snapshot Staging', 'AK Labs and Imaging', 'CareTeam', 'Clinical Information Staging', 'Consent Tool', 'COVID Lab Tools', 'MOM Care Plan', 'PMP', 'Referrals', 'Screening', 'Create Referral', and 'Snapshot'.

**Step 2:** You can find a program you would like to refer your patient to by the following 2 options:

- **Option 1:** Utilize search bar with the “Organization Name” you are looking for and click “Find Organization”.
- **Option 2:** Utilize search bar with the “Search Area” and enter a resource category, location, and radius and click “Search”.

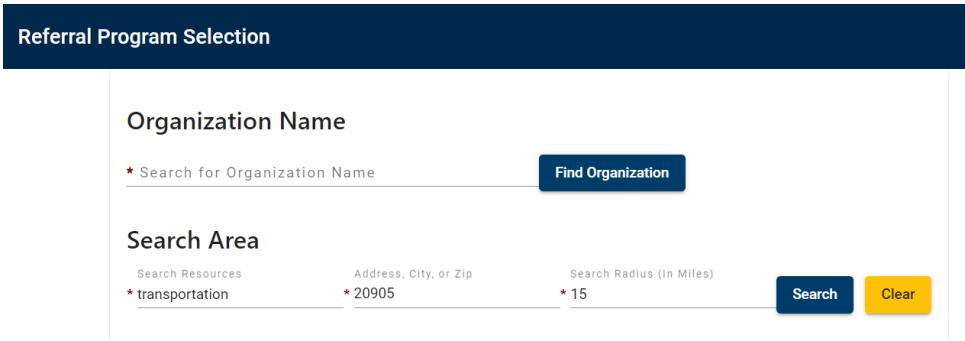


**Referral Program Selection**

Organization Name  
 \* Search for Organization Name  
 MAC Living Well Find Organization

Search Area  
 \* Search Resources    Address, City, or Zip    Search Radius (In Miles)    Search Clear

Create Referral for Program

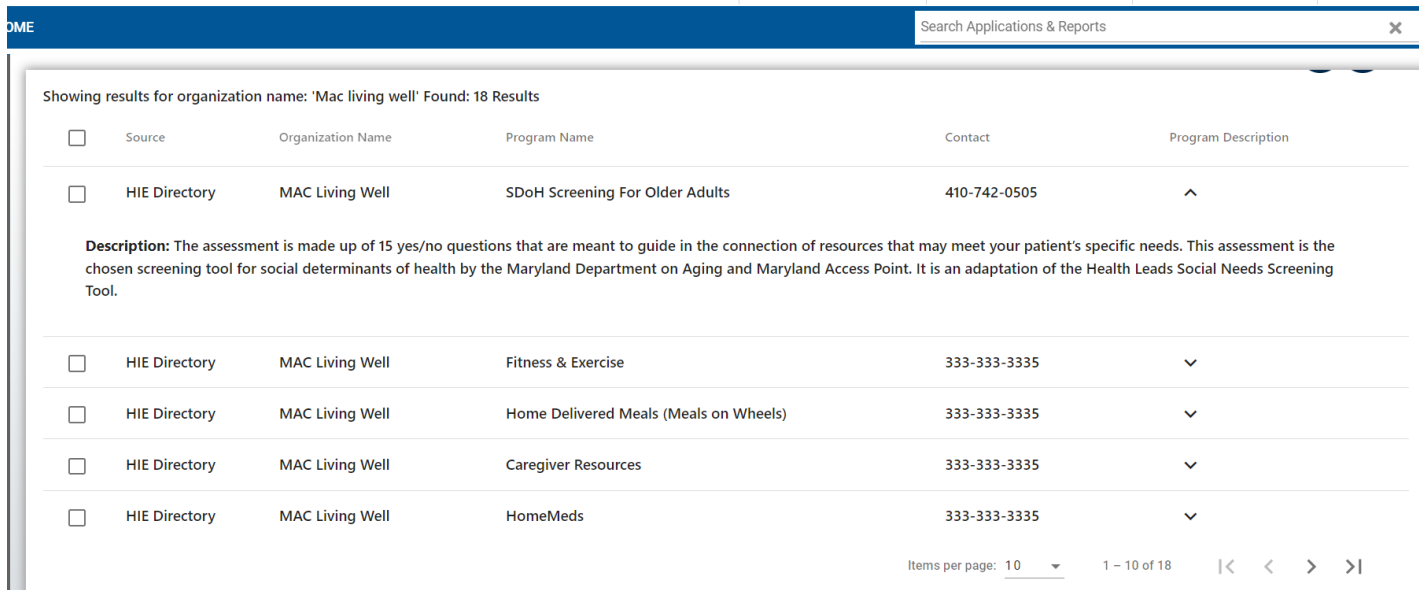


**Referral Program Selection**

Organization Name  
 \* Search for Organization Name Find Organization

Search Area  
 Search Resources    Address, City, or Zip    Search Radius (In Miles)  
 \* transportation    \* 20905    \* 15    Search Clear

**Step 3:** Scroll down to view the search results. The organization’s name, program name, contact number, and program description will populate under the search results. Click on the drop-down arrow under “Program Description” to see more details of each program.



Showing results for organization name: 'Mac living well' Found: 18 Results

<input type="checkbox"/>	Source	Organization Name	Program Name	Contact	Program Description
<input type="checkbox"/>	HIE Directory	MAC Living Well	SDoH Screening For Older Adults	410-742-0505	^
<b>Description:</b> The assessment is made up of 15 yes/no questions that are meant to guide in the connection of resources that may meet your patient's specific needs. This assessment is the chosen screening tool for social determinants of health by the Maryland Department on Aging and Maryland Access Point. It is an adaptation of the Health Leads Social Needs Screening Tool.					
<input type="checkbox"/>	HIE Directory	MAC Living Well	Fitness & Exercise	333-333-3335	v
<input type="checkbox"/>	HIE Directory	MAC Living Well	Home Delivered Meals (Meals on Wheels)	333-333-3335	v
<input type="checkbox"/>	HIE Directory	MAC Living Well	Caregiver Resources	333-333-3335	v
<input type="checkbox"/>	HIE Directory	MAC Living Well	HomeMeds	333-333-3335	v

Items per page: 10    1 - 10 of 18    < >

**Step 4:** If the program has “HIE Directory” under the “Source” column, you may submit a referral to the program directly in CRISP. To complete a referral, select the checkbox next to the program and then click the “Create Referral for Program” button. Please note, referrals are not able to be created to organizations with “MD211” under “Source,” but users may use the information as a resource for the patient. CRISP is directly connected with MD211’s database which contains more than 7,000 resources.

**Organization Name**

\* Search for Organization Name  
mac living well [Find Organization](#)

**Search Area**

\* Search Resources    Address, City, or Zip    Search Radius (In Miles)    [Search](#)    [Clear](#)

[Create Referral for Program](#)

Showing results for organization name: 'mac living well' Found: 17 Results

	Source	Organization Name	Program Name	Contact	Program Description
<input checked="" type="checkbox"/>	HIE Directory	MAC Living Well	Fitness & Exercise	333-333-3335	▼
<input type="checkbox"/>	HIE Directory	MAC Living Well	Home Delivered Meals (Meals on Wheels)	333-333-3335	▼

Items per page: 10    1 - 10 of 17    < >

**Step 5:** You will be led to the Referral Web form. Complete the form, all fields with an asterisk are required fields. Most of the patient information fields are auto populated from the patient search.

### Referral Program Selection

[Back to Program Selection](#)

**Patient Information**

First Name: GILBERT    Middle Name:    Last Name: GRAPE

Date Of Birth: 01/01/1984    HomeAddress1: 4145 EARL C ADKINS DRIVE    HomeAddress2:

City: RIVER    State: WV    Zip: 26000

Gender: M    Phone Number\*: 7889007666    Phone Number Type\*: Mobile ▼

Alt Phone Number:    Alt Phone Number Type:    Email:

Spoken Language:    Race or Ethnicity: ▼

**Step 6:** Complete the rest of the sections accordingly. Under the highlighted section below, you may enter any relevant information that was not captured in the referral (i.e lab results). You may attach any documents to the referral through the attachment button.



**Referral Programs**  
Organization: Hungry Harvest

**Program Name:** HarvestRx Online Grocery Store  
**Source:** HIE Directory  
**Description:** Hungry Harvest creates accounts for families to shop the online marketplace for home delivered food boxes with products of their choosing. The amount of credit, cadence, and type of available products on each marketplace can vary depending on household size or partner and client preferences. Clients fill their virtual shopping cart with produce and grocery items to fit taste, cultural, and dietary preferences and receive boxes directly to doorsteps.

Please enter all relevant information that you would like relayed to the accepting provider

No file chosen

**Step 7:** The “Referring Provider” section captures who is entering the referral in CRISP. Please complete accordingly. Please note, the patient agreement box needs to be checked off to successfully submit the referral. Press “Submit” to send the referral to the chosen program.

**Referring Provider**

I am referring this patient myself     I am referring this patient on behalf of a provider

**Provider Information**

First Name \*    Last Name \*    Organization \*    NPI \*    Phone Number \*

        I attest that the patient identified in this form (or his or her duly authorized representative, if applicable) (“Patient”) has granted permission to be referred, and has executed an authorization and consent for the disclosure of the health information listed in this form to the referral organization(s) and/or program(s) identified herein (“Authorization”). I further attest that such Authorization is compliant with all applicable laws and regulations, including but not limited to 45 C.F.R. Parts 160 and 164 (the “HIPAA Rules”) and 42 C.F.R. Part 2.

**Step 8:** You will be led to the confirmation page, which can be downloaded. You will also receive an email confirmation with the referral details. The referral will automatically be sent to the chosen community-based organization (CBO).

**Referral Program Selection**

[Back to Program Selection](#)

**Confirmation Page**  
2879bbf9-43eb-41a7-99fd-5ca78005bb58

**Patient Information**

First Name GILBERT	Middle Name	Last Name GRAPE
Date Of Birth 01/01/1984	HomeAddress1 4145 EARL C ADKINS DRIVE	HomeAddress2
City RIVER	State WV	Zip 26000
Gender M	Phone Number * 9999994349	Phone Number Type * Mobile
Alt Phone Number	Alt Phone Number Type OtherPhone	Email





### Referring Provider

I am referring this patient myself  I am referring this patient on behalf of a provider

### Provider Information

First Name \* Naureen Last Name \* Elahi Organization \* CRISP Internal Users - Break | NPI \* Phone Number \* 555-555-5555

Download



## Referral History:

To view a patient’s referral history, under clinical information, select the Care Coordination icon and the Referral History subtab to view referral data captured using the CRISP closed-loop referral tool and other connections CRISP has with referral systems. If you would like additional information about the referral select each row to view details.

HIE InContext		GILBERT GRAPE		
Male   Jan 1, 1984		13		
CARE TEAM	CARE ALERTS	REFERRAL HISTORY	ADVANCE DIRECTIVES	
Referral History				
Date of Referral	Source	Program Name	Status	Last Updated
2024-02-26	CRISPReferralUI	Weight Loss Program	Disenrolled	2024-05-24
2024-05-09	CRISPReferralUI	Weight Loss Program	Completed	2024-05-24
2024-05-16	CRISPReferralUI	Able Bodied Transport	Pending	2024-05-16
2024-05-16	CRISPReferralUI	Transportation ServeU	Pending	2024-05-16
2024-05-16	CRISPReferralUI	Transportation ServeU	Pending	2024-05-16
2024-05-16	CRISPReferralUI	Able Bodied Transport	Pending	2024-05-16
2024-02-27	CRISPReferralUI	Skilled Nursing service	Disenrolled	2024-05-15
2024-05-15	CRISPReferralUI	CT Meals on Wheels Partner Program	Pending	2024-05-15



### Referral Status Key:

Referral Status	Meaning
Pending	Initial and default status (awaiting a decision)
Accepted	Referral has been accepted by the organization
Rejected	Referral has been rejected by the organization
Enrolled	Patient has been enrolled into the program
Disenrolled	Patient has been disenrolled from the program
Completed	Referral activities and lifecycle has been completed

Click on the arrow for each section to view more details of the referral, such as referral sender, referral recipient, and the journal entries of the referral.

GILBERT GRAPE | Male | Jan 1, 1984

Referral History

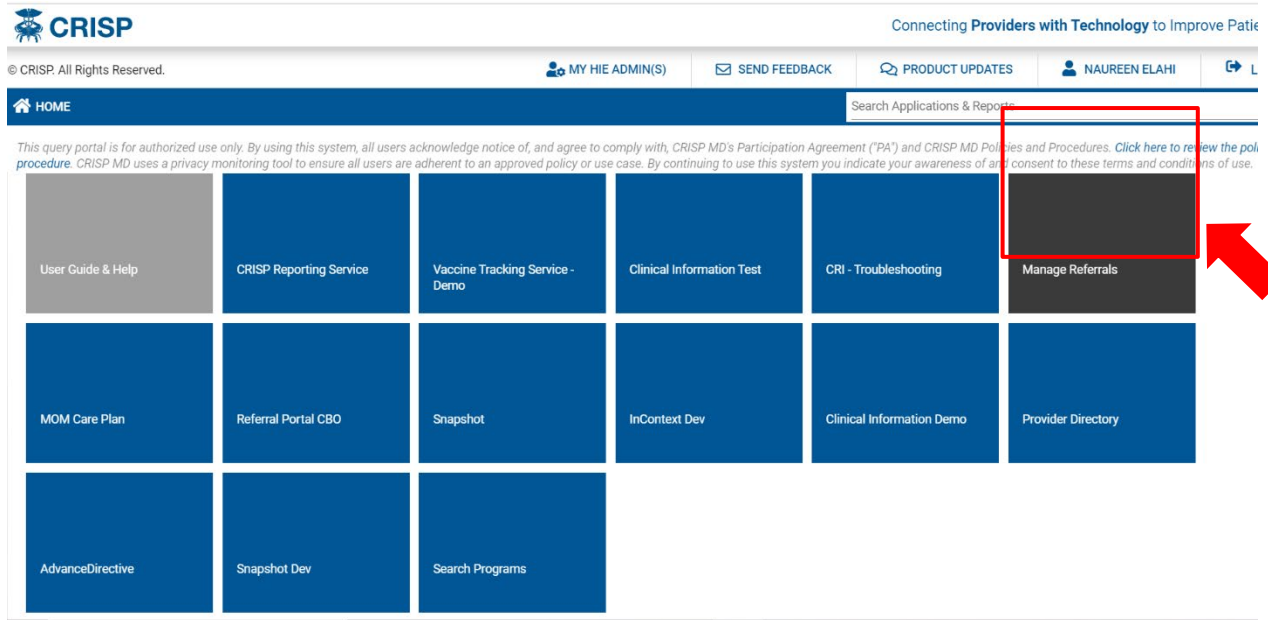
Weight Loss Program

Date Updated: 2024-05-24

- Referral Sender
- Referral Recipient
- Journal Entries

## Managing the Referral (CBO's ONLY):

**Step 1:** The CBO will receive an email notification that a referral has been sent to their program. The CBO then can manage and track referrals sent to their program(s) in the “Manage Referrals” application.



CRISP Connecting Providers with Technology to Improve Patient Care

© CRISP. All Rights Reserved. MY HIE ADMIN(S) SEND FEEDBACK PRODUCT UPDATES NAUREEN ELAHI

HOME Search Applications & Reports

This query portal is for authorized use only. By using this system, all users acknowledge notice of, and agree to comply with, CRISP MD's Participation Agreement ("PA") and CRISP MD Policies and Procedures. Click here to review the policy procedure. CRISP MD uses a privacy monitoring tool to ensure all users are adherent to an approved policy or use case. By continuing to use this system you indicate your awareness of and consent to these terms and conditions of use.

User Guide & Help	CRISP Reporting Service	Vaccine Tracking Service - Demo	Clinical Information Test	CRI - Troubleshooting	<b>Manage Referrals</b>
MOM Care Plan	Referral Portal CBO	Snapshot	InContext Dev	Clinical Information Demo	Provider Directory
AdvanceDirective	Snapshot Dev	Search Programs			

**Step 2:** You will be led to the “CBO Worklist” where you can view a list of all the referrals that have been sent to your programs. Click on the patient’s name to be led to the referral details.

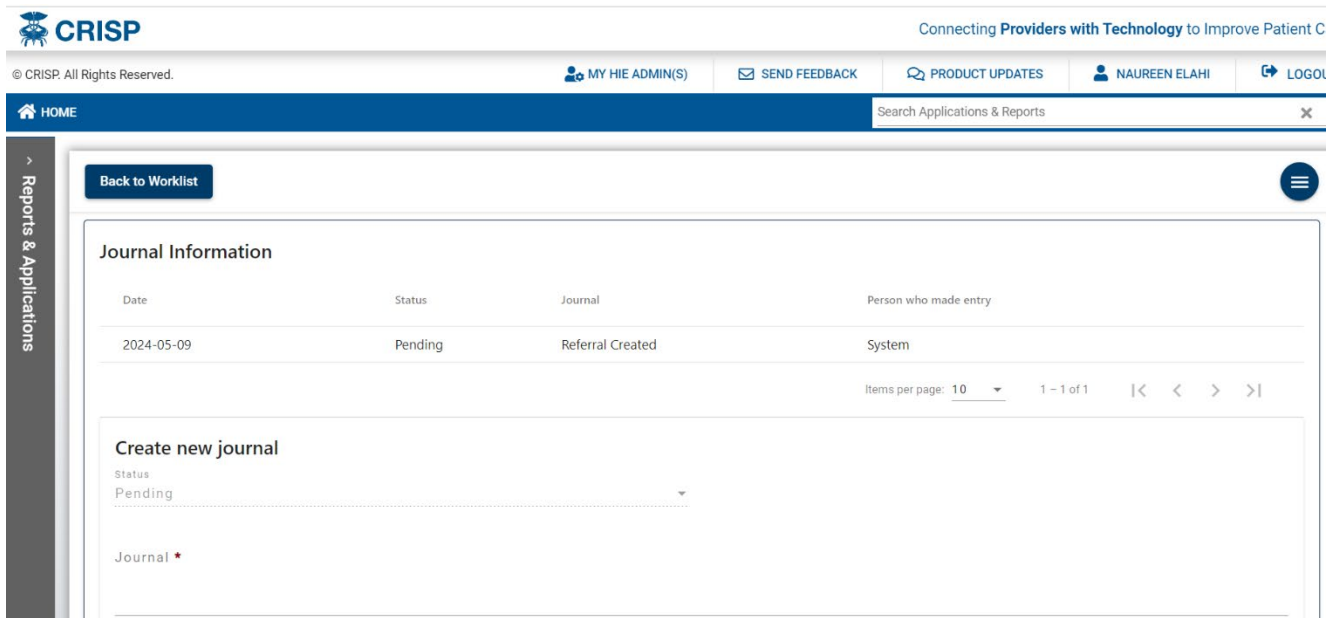
### CBO WorkList

[Download CSV](#)

Name	Gender	Date of Birth	Referring Provider	Referral Date ↓	Referral Status	Last Updated	Organization	Program Name
Gilbert Grape	M	1984-01-01	Janelle Thomas	2024-05-09 01:30:04 PM	Pending	2024-05-09 01:30:04 PM	Crisp Referrals Test-DC	Weight Loss Program
Gilbert Grape	M	1984-01-01	Janelle Thomas	2024-02-26 12:45:54 PM	Pending	2024-02-26 12:45:54 PM	Crisp Referrals Test-DC	Weight Loss Program

Items per page: 25 1 - 2 of 2

**Step 3:** Scroll down to the bottom of the page to view the “Journal Information” section. This is where you may document any updates and status changes for the referral at any time.

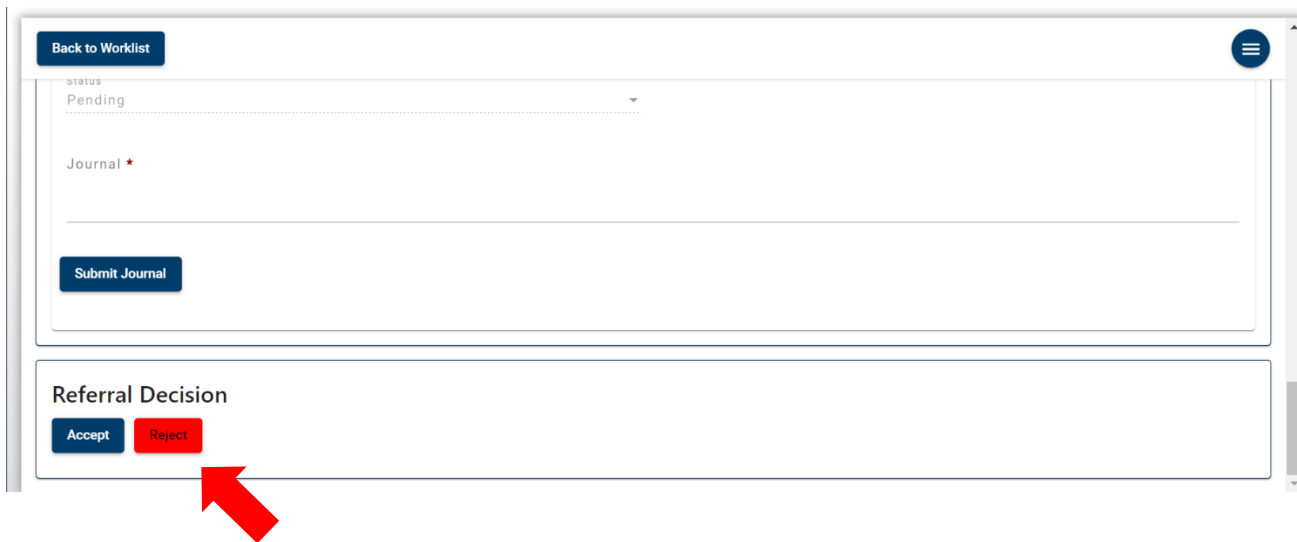


The screenshot shows the CRISP web application interface. At the top, there is a navigation bar with the CRISP logo, the tagline "Connecting Providers with Technology to Improve Patient Care", and user information for "NAUREEN ELAHI". Below the navigation bar is a search bar for "Applications & Reports". The main content area is titled "Journal Information" and contains a table with the following data:

Date	Status	Journal	Person who made entry
2024-05-09	Pending	Referral Created	System

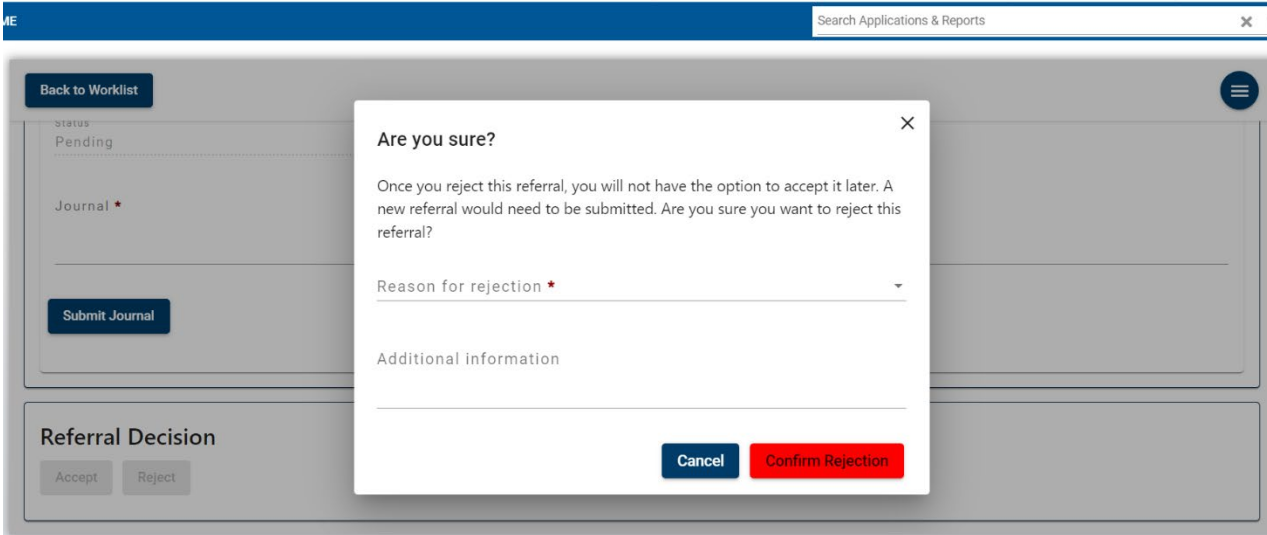
Below the table, there is a "Create new journal" form with a "Status" dropdown menu set to "Pending" and a "Journal" text input field. A "Submit Journal" button is located below the form.

At the bottom of the page, you may either Accept or Reject the referral. You should only click Accept when the patient has agreed to participate in the program. However, you can create Journal entries of your outreach attempts while in pending status.

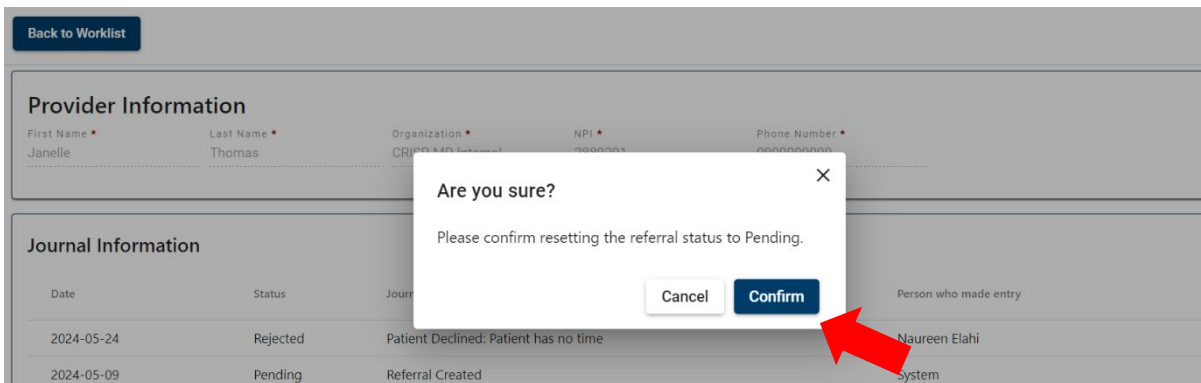
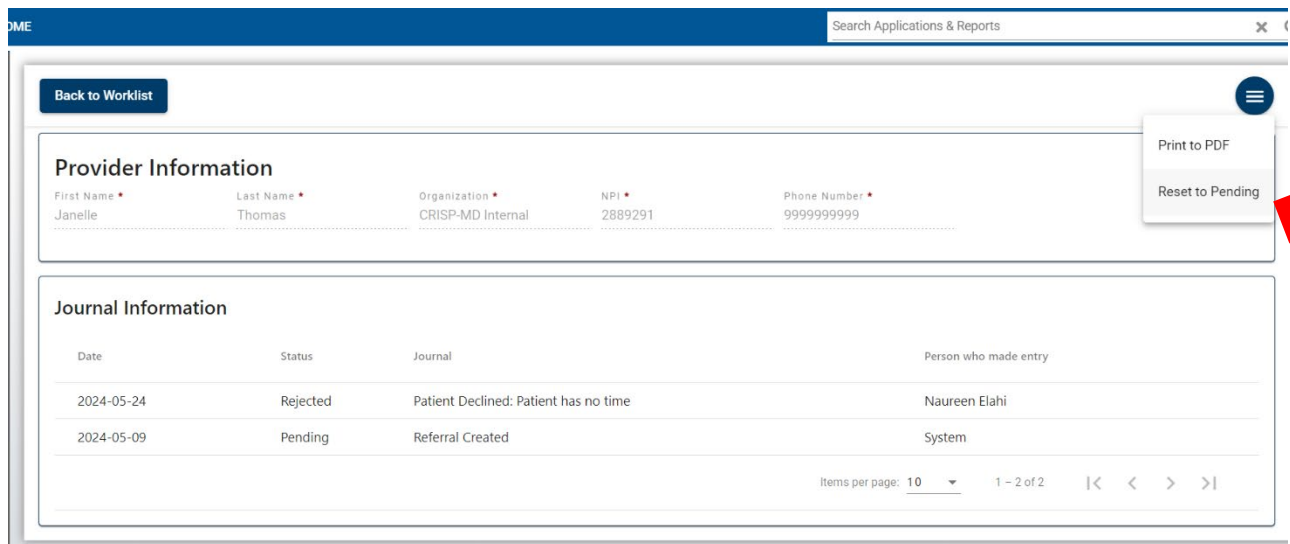


The screenshot shows the "Referral Decision" section of the CRISP web application. It features two buttons: "Accept" and "Reject". A red arrow points to the "Reject" button, indicating the action to be taken.

**Reject Referral:** If you need to reject the referral, a window will pop up asking to provide more information on why the referral was rejected. Complete fields accordingly.

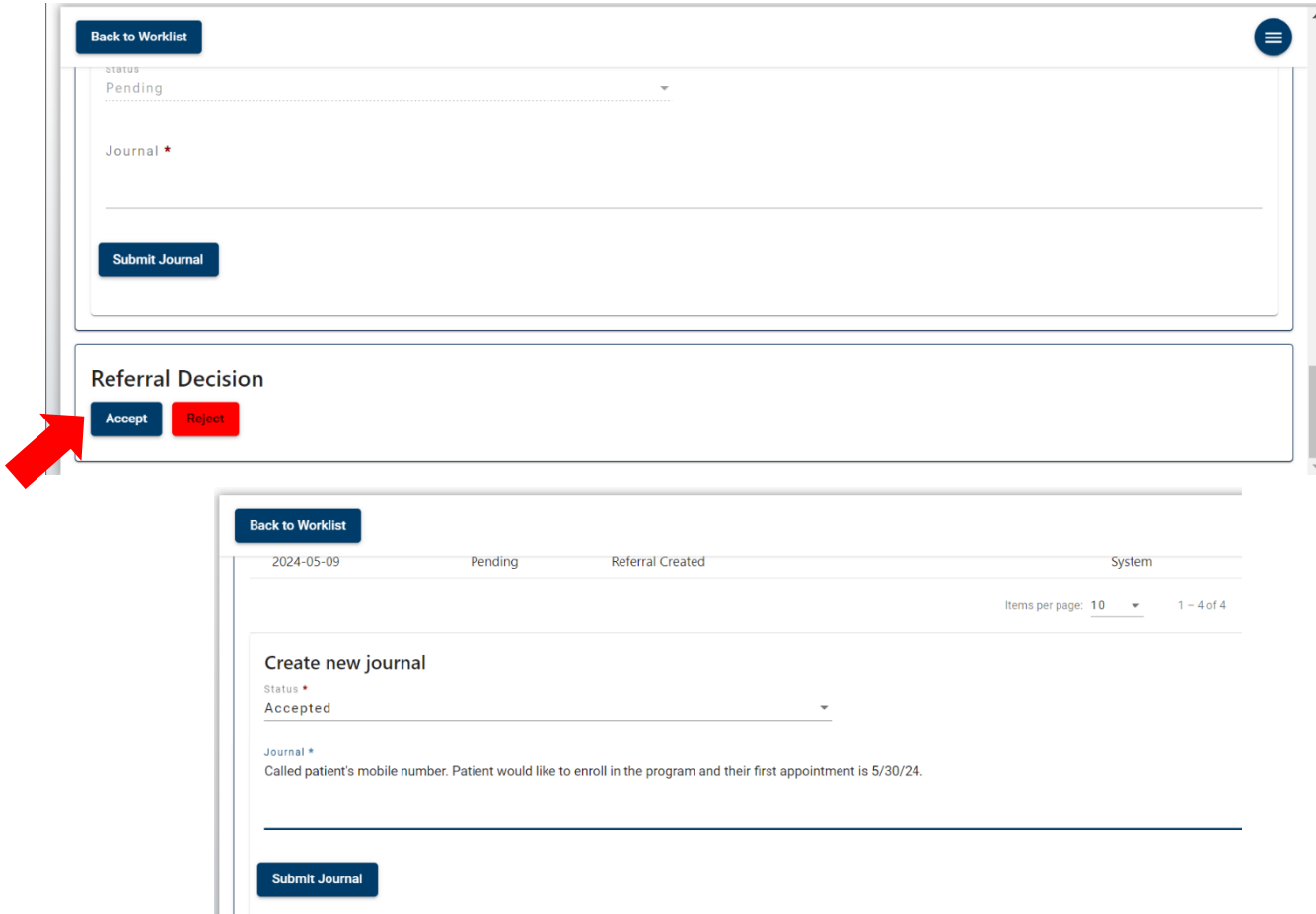


**Reset Status:** The Journal Information section will populate immediately with the rejected status and note. To revert the referral back to Pending state, you may click on the blue icon in the top right-hand corner and select “Reset to Pending”



**NOTE:** You can reset your referral status to pending if the referral's status is Rejected, Accepted, Enrolled, or Disenrolled. However, if you had chosen Completed, you are not able to reset the referral to pending. Please contact CRISP if you would need to reset that status.

**Accept Referral:** If you accept the referral, you will be led to add a note for this status change.



The screenshot shows the 'Referral Decision' section of the CRISP interface. It features two buttons: 'Accept' (blue) and 'Reject' (red). A red arrow points to the 'Accept' button. Below this section is a 'Create new journal' form with a 'Status' dropdown set to 'Accepted' and a 'Journal' text area containing the note: 'Called patient's mobile number. Patient would like to enroll in the program and their first appointment is 5/30/24.' A 'Submit Journal' button is located at the bottom of the form.

**Updates:** If there are any updates to the referral (ex. patient enrolling in the program), you may document those updates by changing the status of the referral and entering a note. The different statuses for a referral are: Enrolled, Completed, and Disenrolled. Once an update is submitted by clicking on "Submit Journal," the update will populate immediately in the Journal Selection.

Back to Worklist

2024-05-09 Pending Referral Created System

Items per page: 10 1 - 5 of 5

### Create new journal

Status \*  
Enrolled

Journal \*  
Enrolled 5/24/24

Submit Journal

Back to Worklist

### Journal Information

Date	Status	Journal	Person who made entry
2024-05-24	Enrolled	Enrolled 5/24/24	Naureen Elahi
2024-05-24	Accepted	Called patient's mobile number. Patient would like to enroll in the program and their first appointment is 5/30/24.	Naureen Elahi
2024-05-24	Accepted	Referral Accepted	Naureen Elahi
2024-05-24	Pending	Status was reset to Pending	Naureen Elahi
2024-05-24	Rejected	Patient Declined: Patient has no time	Naureen Elahi
2024-05-09	Pending	Referral Created	System

Items per page: 10 1 - 6 of 6

### Referral Status Key:

Referral Status	Meaning
Pending	Initial and default status (awaiting a decision)
Accepted	Referral has been accepted by the organization
Rejected	Referral has been rejected by the organization
Enrolled	Patient has been enrolled into the program
Disenrolled	Patient has been disenrolled from the program
Completed	Referral activities and lifecycle has been completed

**NOTE: Referrals that have been Pending for 90 days will expire. The status of the referral will automatically change to “Expired.” If the referral has not been updated for 365 days, the referral status will automatically change to “Closed.”**

If you need access to any of these tools, would like to join the program directory, or need troubleshooting assistance, please contact the CRISP Technical User Support team at [support@crisphealth.org](mailto:support@crisphealth.org).