

# Social Needs Data User Guid<u>e</u>

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# Social Needs Data User Guide

Table of Contents

INTRODUCTION	.1
ACCESSING ASSESSMENTS AND Z-CODES	.1
SUBMIT REFERRAL VIA CRISP PORTAL	.3
REFERRAL HISTORY	.7
MANAGING THE REFERRAL (CBOS ONLY)	.8

### Introduction

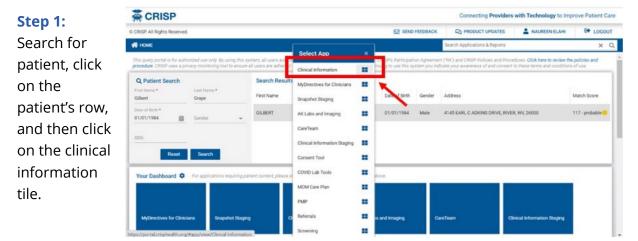
The CRISP MD HIE displays social needs data within the CRISP Portal and the CRISP InContext App in the EHR. Through the Social Needs data tab, CRISP connected providers can view social determinants of health (SDOH) assessments and ICD-10 codes that reflect social conditions. CRISP users may also search 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 <a href="mailto:support@crisphealth.org">support@crisphealth.org</a>.

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.





					0.000
RISP. All	Rights Reserved.			SEND FEEDBACK	R PRODUCT UPDATES
HOME					Search Applications & Reports
	HIE InContext			GILBERT GRAPE Male   Jan 1, 1984	
	PATIENT INFORMATION		ASSESSMENTS	CONDITIONS	
		Ass	sessments		
	E CLINICAL DATA	Hide	Home Facility Data 🔘		
	CARE COORDINATION		Date 4	Source	Desc
			2023-03-06	Priority Partners Referrals	MOMS
	SOCIAL NEEDS DATA		2022-06-20	MCH Ventures, Inc.	MAHM
	DATA FROM CLAIMS		2022-06-20	Community Care of West Virginia	CCWV
	UNINT HOM CLAIMS		2022-06-13	Luminis Health - Anne Arundel Medical Center	MOMS
			2022-01-03	Meritus Medical Center	MEDS
			2022-01-03	Mentus Medical Center	MEDS
			2021-06-23	Calvert Internal Medicine Group - Prince Frederick	MOMS
	14		2021-06-22	Calvert Internal Medicine Group - Prince Frederick	MEDS
	<		2021-06-21	Medstar Harbor Hospital	MEDSI

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

Assessments		< Ⅲ =
Hide Home Facility Data		
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

Step 4: Select a row to view the assessment. Click on the drop-down arrow to view the

questions and			
answers for	Assessments Priority Partners Referrals	×	
each social	2023-03-06		
domain. The	Living Situation	<b>*</b>	
orange flag will	Food	· · · · ·	
be displayed	Transportation	Assessments	×
next to the	Utilities	Priority Partners Referrals 2023-03-06	
domain and	Safety		
question where		Living Situation	
a need was		What is your living situation today? I have a steady place to live	
indicated.		Think about the place you live. Do you have problems with any of the following? CHOOSE ALL THAT APPLY	



**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 with be displayed.

SP. All Rights Reserve	d.				SEND FEEDBACK	Q PRODUCT UPDATES	A NAU	REEN ELAHI	C	LOGO
юме						Search Applications & Reports				×
HIE InCo	ntext			GILBERT GR. Male   Jan 1, 1					4	
	INFORMATION	ASSESSMEN	ITS CONDITIO	NS						
	TION MANAGEMENT	Conditions						Q	ш	Ŧ
	L DATA	Date 4	Source	Z-Code	Descript	ion				
💮 CARE C	OORDINATION	2022-01-27	ARS	Z59.1	Inadequate	1919111				
Social	NEEDS DATA	2022-01-25	ARS	Z56.0 Z60.2		nent, unspecified				
SOCIAL	NEEDS DAIA	2021-09-30	ARS	Z63.4		elated to living alone ance and death of family member				
😰 DATA FR	OM CLAIMS	2021-01-01	AK3	203.4	Usappear	Rows per pa	ie: 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.

٠	← HIE InContext				NA CADENCE ale   Jan 11, 20	14						4	•
8	PATIENT INFORMATION	HEALTH	RECORDS	ENCOUNTERS	PROBLEMS		STRUCTURED DOCUME	INTS	IMMUNI	ZATIONS			
0	MEDICATION MANAGEMENT	Structured D	ocuments							Q	ш	÷	0
	CLINICAL DATA	Hide Home Facility	Data 🕥										
B	CARE COORDINATION	Date 🗸	Source			Title		Туре				1	Size (KB)
	GARE COORDINATION	2022-06-22	University of M	laryland Medical System-REL	UMMS	Summ	ary of Care	Summa	rization of E	pisode No	te	-	
0	SOCIAL NEEDS DATA	IN NEW 2022-02-08	HUFPP Interna	al Medicine Suite 5000		Summ	ary of Care	SUMMA	ARIZATION	OF EPISO	DE NOT	E -	
	DATA FROM CLAIMS TAB	2022-02-08	HUFPP Interna	al Medicine Suite 5000		Summ	ary of Care	Summa	rization of E	pisode No	te	-	
		2021-10-20	Mary s Center	for Maternal and Child Care,	Inc	Summ	arization of Episode Note	SUMMA	ARIZATION	OF EPISO	DE NOT	E —	
	CONSENT TOOL	202-10-20	Mary s Center	for Maternal and Child Care,	Inc	Summ	arization of Episode Note	Summa	rization of E	pisode No	te	_	
	CREATE REFERRAL	2021-06-16	South West Vir	rginia Health System, LPC_Li	ncoln Primary Care	Encou	nter Summary	Summa	rization of E	pisode No	te	-	
		10 <del></del>	Frederick Healt	th Medical Group Primary Ca	re	Contin	uity of Care Document	Summa	rization of E	pisode No	te	-	
		0-	Parkview Medi	cal Group		Contin	uity of Care Document	Summa	rization of E	pisode No	te	-	
							Rows p	er page:	25 ¥	26-33 c	f 33	<	>

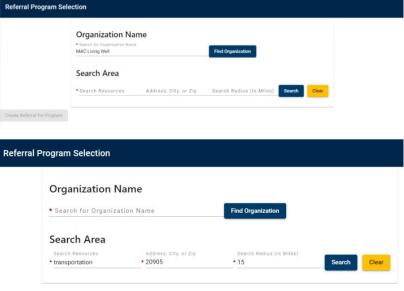


**Step 1:** For web-based users, search for patient, click on the patient's row, and then click on the "Create Referral" tile in the list of applications.

					-	and the second se	-			C.b
RISP. All Rights Reserved.						Select App		PRODUCT UPDATES	AUREEN ELAHI	C+ LOGOUT
HOME						Clinical Information		Applications & Reports		хQ
		rstem, all users acknowledge not wed policy or use case. By conti						s. Click here to review the p	olicies and procedure. CRIS	P uses a privacy
Q Patient Search		Search Results				MyDirectives for Clinicians				
rst Name * ilbert	Last Name * Grape	First Name	Last Nam	ė	Date of E	Snapshot Staging				Match Score
ate of Birth * 1/01/1984	Gender •	GILBERT	GRAPE		01/01/1	AK Labs and Imaging	•	RIVE, RIVER, WV, 26000		117 - probable 🦲
						CareTeam	-			
SN						Clinical Information Staging				
Reset	Search					Consent Tool				
(our Dashboard 🛱	For applications requiring pa	tient context, please start by usiv	no the Datient Search I	interface above		COVID Lab Tools				
iour businbourd 🌩	To opposition requiring pu		ng over anen oeuren			MOM Care Plan				
						PMP				
PopHealth	DC VAC	InContext		Clinical Information		Referrals		rot Staging	Reports Role Manager	
ropreattn	DC VAC	Incomext		Clinical Information		Screening		ot staging	Reports Hole Manager	
						Create Referral				
						Snapshot	a. 1			

**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".

**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	3 Results		
	Source	Organization Name	Program Name	Contact	Program Description
	HIE Directory	MAC Living Well	SDoH Screening For Older Adults	410-742-0505	^
	sen screening tool for		ions that are meant to guide in the connection of resources th he Maryland Department on Aging and Maryland Access Poin		
	HIE Directory	MAC Living Well	Fitness & Exercise	333-333-3335	~
	HIE Directory	MAC Living Well	Home Delivered Meals (Meals on Wheels)	333-333-3335	~
	HIE Directory	MAC Living Well	Caregiver Resources	333-333-3335	~
	HIE Directory	MAC Living Well	HomeMeds	333-333-3335	~
				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.

	Search Area			
	*Search Resources	Address, City, or Zip Search	Radius (In Miles) Search Cl	ear
eferral for Program	2			
				0
Source	Organization Name	Program Name	Contact	Program Description
HIE Directory	MAC Living Well	Fitness & Exercise	333-333-3335	~
HIE Directory	MAC Living Well	Home Delivered Meals (Meals on Wheels)	333-333-3335	~
	results for organiza Source HIE Directory	results for organization name: 'mac living well' Fo Source Organization Name HIE Directory MAC Living Well		

**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.

ferral 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	21p 26000	
Gender M	Phone Number * 7889007666	Phone Number Type • Mobile	•
Alt Phone Number	Alt Phone Number Type	▼ Email	
Spoken Language		▼ Race or E	thnicity



**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.

anization: Hur	gry Harvest
Program Nam	e: HarvestRx Online Grocery Store
Source: HIE Director	
Description: Hungry	Harvest creates accounts for families to shop the online marketplace for home delivered food boxes with products of
partner and client p	nount of credit, cadence, and type of available products on each marketplace can vary depending on household size or ferences. Clients fill their virtual shopping cart with produce and grocery items to fit taste, cultural, and dietary ve boxes directly to doorsteps.
partner and client p preferences and reco	ferences. Clients fill their virtual shopping cart with produce and grocery items to fit taste, cultural, and dietary
partner and client p preferences and reco	ferences. Clients fill their virtual shopping cart with produce and grocery items to fit taste, cultural, and dietary ve boxes directly to doorsteps.

**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.

eferring Provi	ider				
O I am referring th	nis patient myself 🛛 🗌 an	n referring this patient on beha	If of a provider		
Drovidor Info	rmation				
Provider Info	rmation				
		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).

ack to Program Selection			
	Confirmatio	n Page	
	2879bbf9-43eb-41a7-99	fd-5ca78005bb58	
Patient Information			
First Name		Last Name	
GILBERT	Middle Name	GRAPE	
late Of Birth	HomeÅddress1		
01/01/1984	4145 EARL C ADKINS DRIVE	HomeAddress2	
	State	Zio	
RIVER	wv	26000	
Gender	Phone Number •	Phone Number Type •	
М	9999994349	Mobile	
	Alt Phone Number Type		
Alt Phone Number	OtherPhone	Email	

Referring Pro	vider			
0				
I am referring	this patient myself	am referring this patient on behalf of a provider		
I am referring	this patient myself	am referring this patient on behalf of a provider		
I am referring     Provider Inf		am referring this patient on behalf of a provider		
-		am referring this patient on behalf of a provider	Phone Number •	

### **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.

$\leftarrow \equiv$ HIE InCor	ntext		GILBERT GRAPE Male   Jan 1, 1984			🥺
CARE TEAM	CARE ALERTS	REFERRAL HISTORY	ADVANCE DIRECTIVES			
Referral History	Source	Program Name		Status	Q III 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 Pr	ogram	Pending	2024-05-15	

<b>Referral Status</b>	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	×
eferral History	
leight Loss Program	
ate Updated: 2024-05-24	
Referral Sender	v
Referral Recipient	~
Journal Entries	~



# Managing the Referral (CBOs 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.

RISP. All Rights Reserved.		an MY HIE	ADMIN(S) SEND FEEDBACK		ACK Q PRODUCT UPDATES		s i	NAUREEN ELAHI	6
HOME					Sei	arch Applications & Report	e		
his query portal is for authorized use rocedure. CRISP MD uses a privacy r	e only. By using this system, all users i monitoring tool to ensure all users are	acknowledge notice of, and agree to c adherent to an approved policy or use	omply with, CRIS e case. By contin	SP MD's Participation Ag wing to use this system	greement vou indic	("PA") and CRISP MD Polic ate your awareness of and	ies and Pro consent to	cedures. Click here to re these terms and conditi	iew the po
User Guide & Help	CRISP Reporting Service	Vaccine Tracking Service - Demo	Clinical Info	rmation Test	CRI - Tr	oubleshooting	Manage	Referrals	
MOM Care Plan	Referral Portal CBO	Snapshot	InContext D	ev	Clinical	Information Demo	Provider	Directory	
							2		
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.

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



**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.

₩c	RISP				Connecting Providers w	ith Technology to Imp	rove Patient C
© CRISP. AI	l Rights Reserved.		Lo MY HIE ADMIN(S)	SEND FEEDBACK	R PRODUCT UPDATES	L NAUREEN ELAHI	C+ LOGO
👫 НОМЕ					Search Applications & Reports		×
> Rep	Back to Worklist						0
<ul> <li>Reports &amp; Applications</li> </ul>	Journal Information						
plicat	Date	Status	Journal		Person who made entry		
ions	2024-05-09	Pending	Referral Created		System		
					Items per page: 10 🔹 1 – 1 of	1 (< < >	>1
	Create new journal						
	Status Pending		-				
I	Journal *						

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.

Ŧ		

**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.

	Search Applications & Reports	
Back to Worklist		(
status Pending	Are you sure?	
Journal *	Once you reject this referral, you will not have the option to accept it later. A new referral would need to be submitted. Are you sure you want to reject this referral?	
Submit Journal	Reason for rejection • •	
	Additional information	
Referral Decision	Cancel Confirm Rejection	



**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"

				Search A	Applications & Reports	×
ack to Worklist						•
Provider Inform	ation					Print to PDF
Irst Name * Ianelle	Last Name * Thomas	Organization   CRISP-MD Internal	NPI • 2889291	Phone Number * 99999999999		Reset to Pending
ournal Informatio	n					
Date	Status	Journal			Person who made entry	
2024-05-24	Rejected	Patient Declined: Patient has	; no time		Naureen Elahi	
2024-05-09	Pending	Referral Created			System	
	_			Items per p	age: 10 💌 1-2 of 2	
Back to Worklist						
Provider I	nformation			1000101		
	nformation Last Name * Thomas	organization * CRIMINATION *	NPI *	Plane	Number *	
Provider I	Last Name * Thomas	Are you	3050003	00000	×	
Provider I First Name • Janelle	Last Name * Thomas	Are you	u sure?	00000	x	ntry
Provider I First Name * Janelie Journal Info	Last Name * Thomas	CRIPPE LINE ARE YOU Please co	u sure?	ral status to Pending	x	ntry

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	Back to Worklist	
Referral: If	Pending *	
vou accept the referral, you will be led to add a note for	Journal • 	
his status	Referral Decision	
hange.		
	Back to Worklite 2024-05-09 Pending Referral Created System	
	items per page: 10 👻	1-4 of 4
	Create new journal United * Accepted * Journal* Called patient's mobile number. Patient would like to enroll in the program and their first appointment is 5/30/24.	



**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.

2024-05-09	Pending F	eferral Created	System	
		Items per page: 10 👻 1 – 5	of 5  < < >>	
reate new j	ournal			_
nrolled 5/24/24				
a la la companya da l				
Submit Journal				
Submit Journal				
			•	
ack to Worklist	rmation			
ack to Worklist	rmation	Journal	Person who made entry	
ack to Worklist ournal Infor		Journal Errolled 5/24/24		
ack to Worklist ournal Infor Date	Status		Person who made entry	
ournal Info Date 2024-05-24	Status Enrolled	Enrolled 5/24/24	Person who made entry Naureen Elahi	
ournal Info Date 2024-05-24 2024-05-24	Status Enrolled Accepted	Enrolled 5/24/24 Called patient's mobile number. Patient would like to enroll in the program and their first appointment is 5/30/24.	Person who made entry Naureen Elahi Naureen Elahi	
ack to Worklist ournal Infor Date 2024-05-24 2024-05-24 2024-05-24	Status Enrolled Accepted Accepted	Errolled 5/24/24 Called patient's mobile number. Patient would like to enroll in the program and their first appointment is 5/30/24. Referral Accepted	Person who made entry Naureen Elahi Naureen Elahi Naureen Elahi	

**Referral Status Key** 

<b>Referral Status</b>	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 <a href="mailto:support@crisphealth.org">support@crisphealth.org</a>.