Social Needs Data
User Guide

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CRISP

Social Needs Data User Guide

Table of Contents

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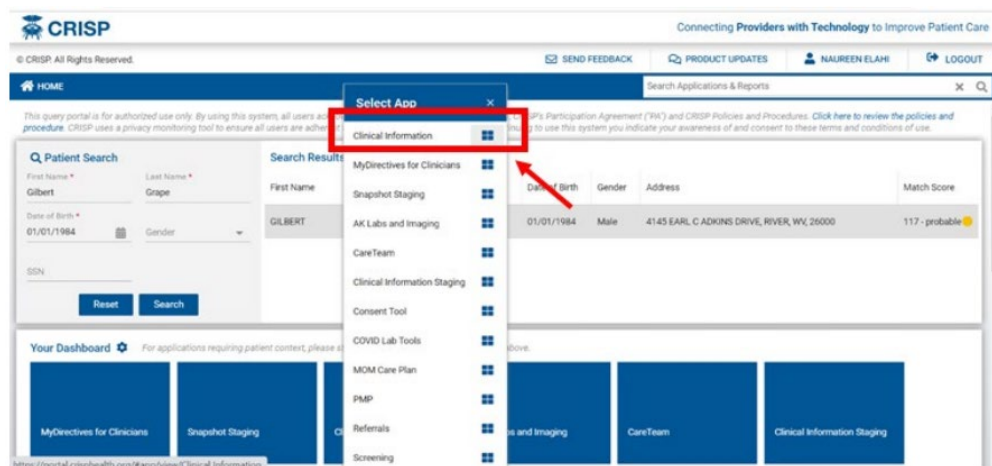
You can access the SDOH suite of tools via the CRISP Portal or through InContext.

Accessing Assessments and Z-Codes

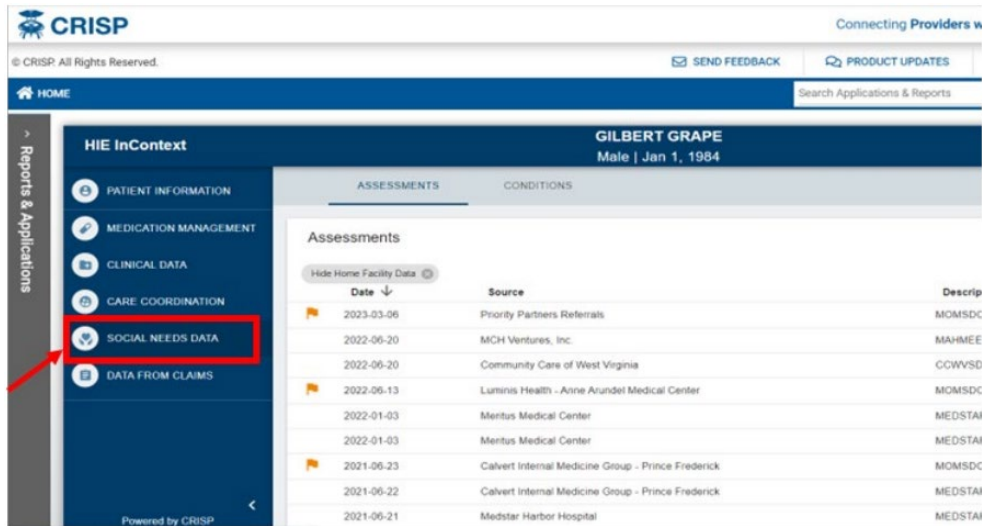Below are the steps for how to access the social needs data tab in the CRISP Portal.

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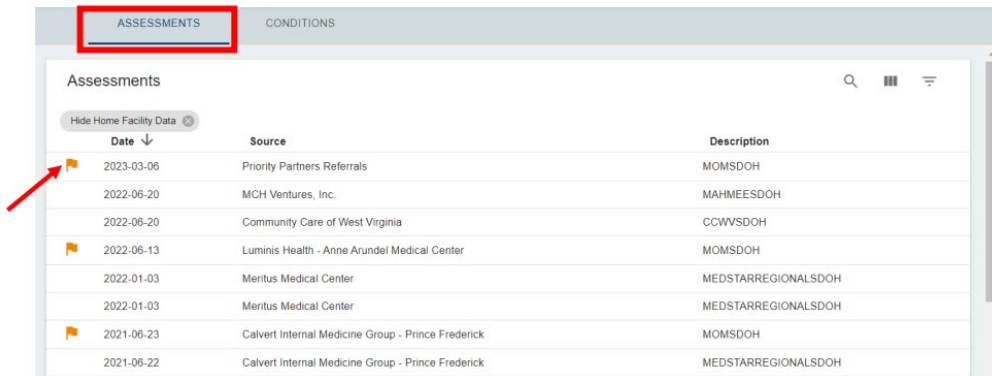
CRISP

Step 2: Select the Social Needs Data tab.

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

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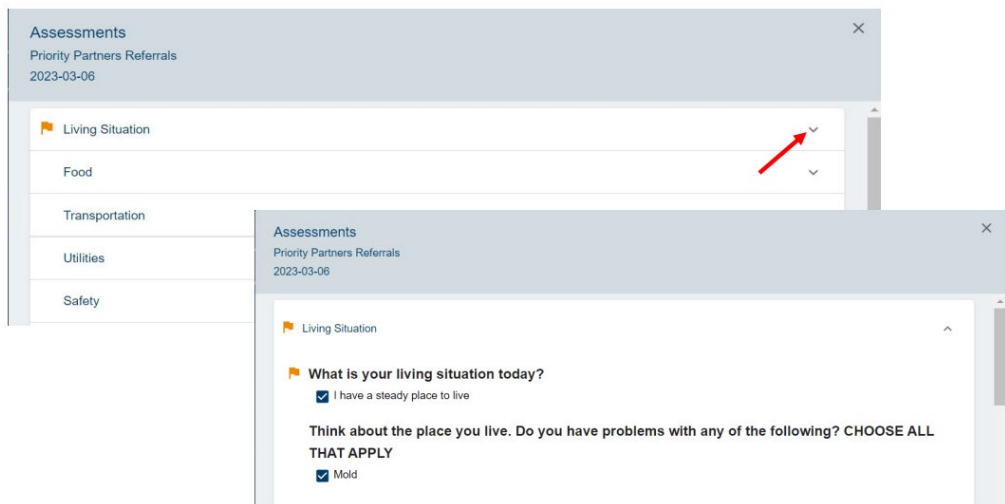
Viewing Z-Codes: Under the Social Needs Data Tab and next to Assessments at the top, click on "Conditions," where Z-codes providers have assigned will be visible. The source, Z-code and description of the Z-code with be displayed.


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.*

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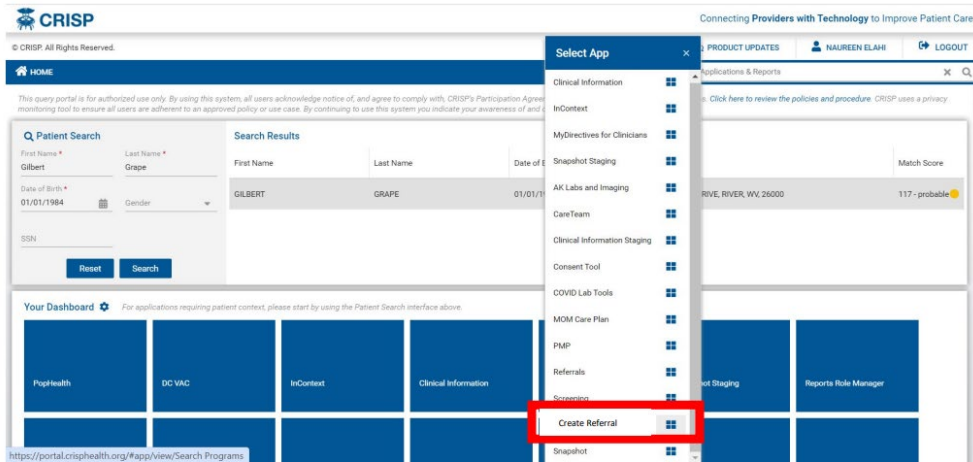
Step 2: You can find a program you would like to refer your patient to by the following 2 options:

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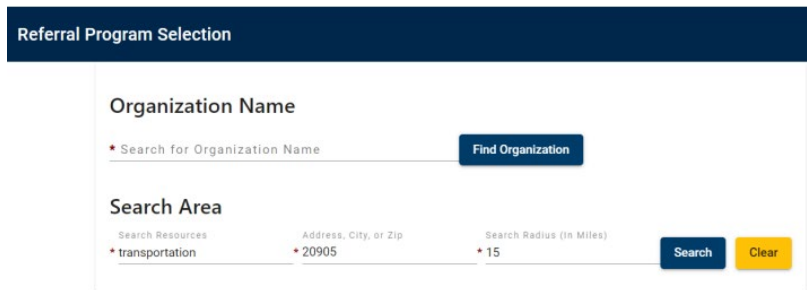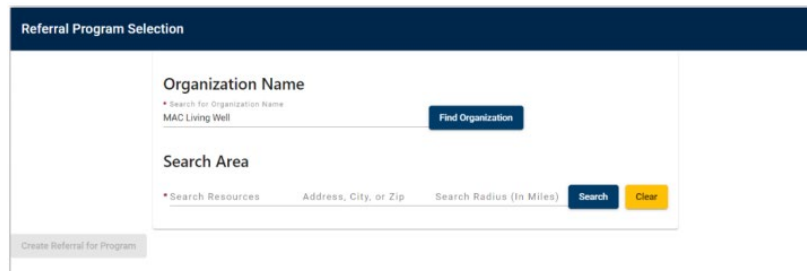
Step 3: Scroll down to view the search results. The organization's name, program name, contact number, and program description will populate under the search results. Click on the drop-down arrow under "Program Description" to see more details of each program.

![CRISP logo]

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.

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.

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

Choose Files | 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 *

Clear   Submit   ☐ 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:

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.

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.

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.
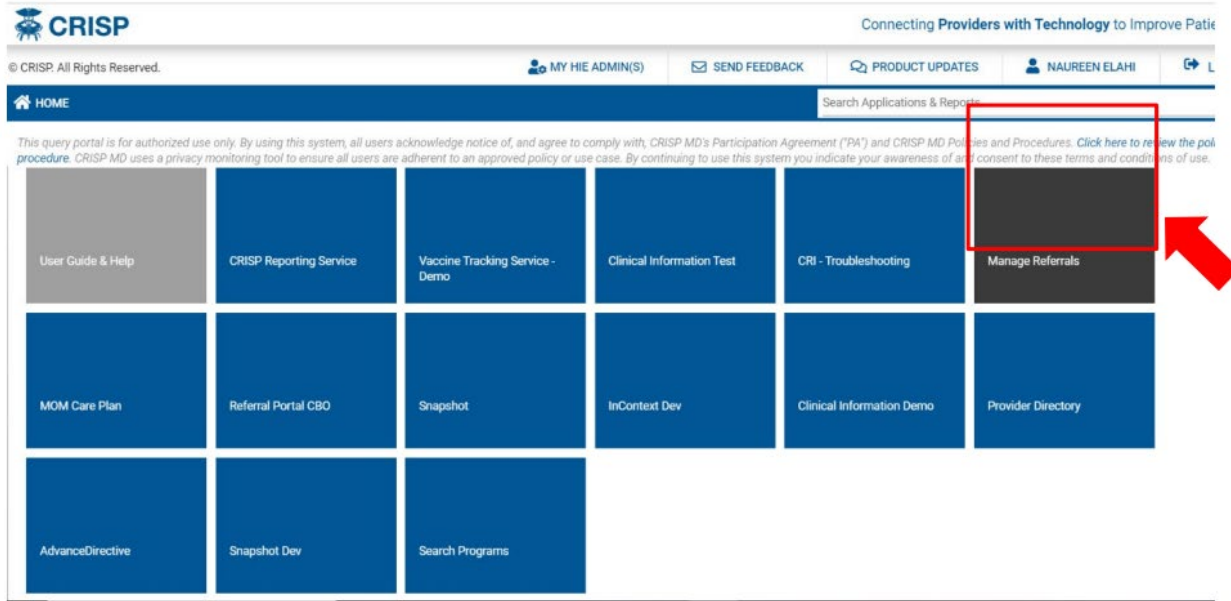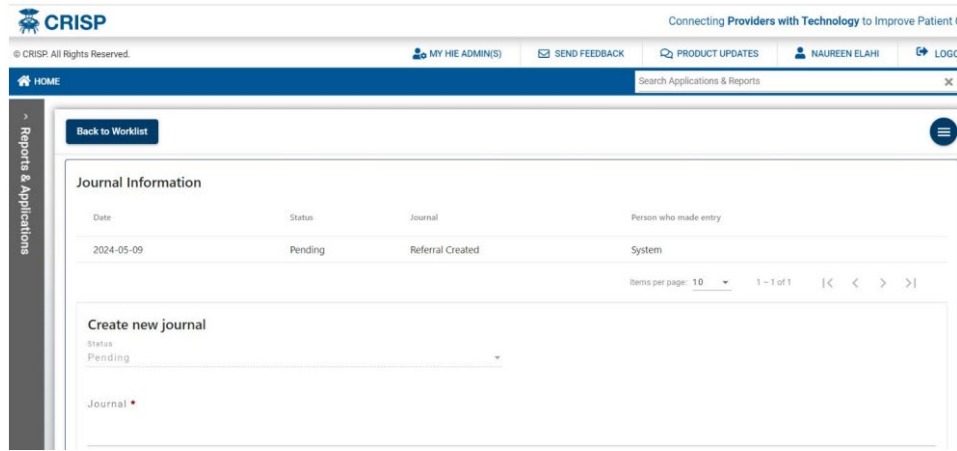

Step 2: You will be led to the "CBO Worklist" where you can view a list of all the referrals that have been sent to your programs. Click on the patient's name to be led to the referral details.

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.


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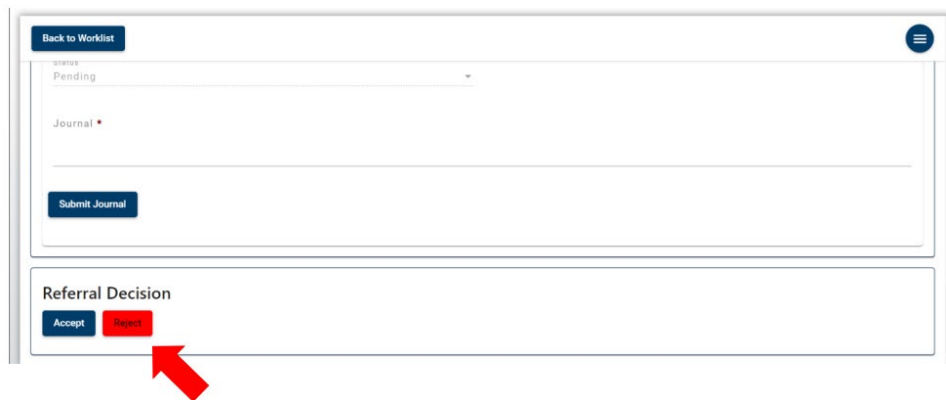
Reject Referral: If you need to reject the referral, a window will pop up asking to provide more information on why the referral was rejected. Complete fields accordingly.

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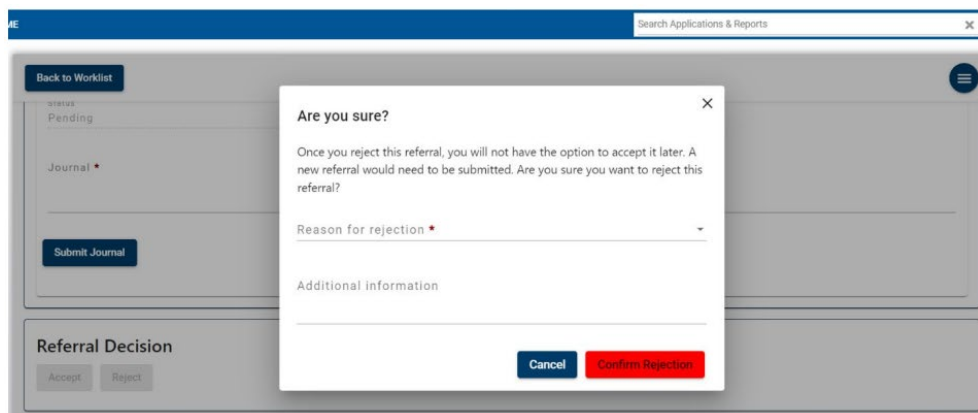
Reset Status: The Journal Information section will populate immediately with the rejected status and note. To revert the referral back to Pending state, you may click on the blue icon in the top right-hand corner and select "Reset to Pending"

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.

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.

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.