



# CRISP

Chesapeake Regional Information  
System for our Patients

# Social Needs Data User Guide

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**2024**

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# Social Needs Data User Guide

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## 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).

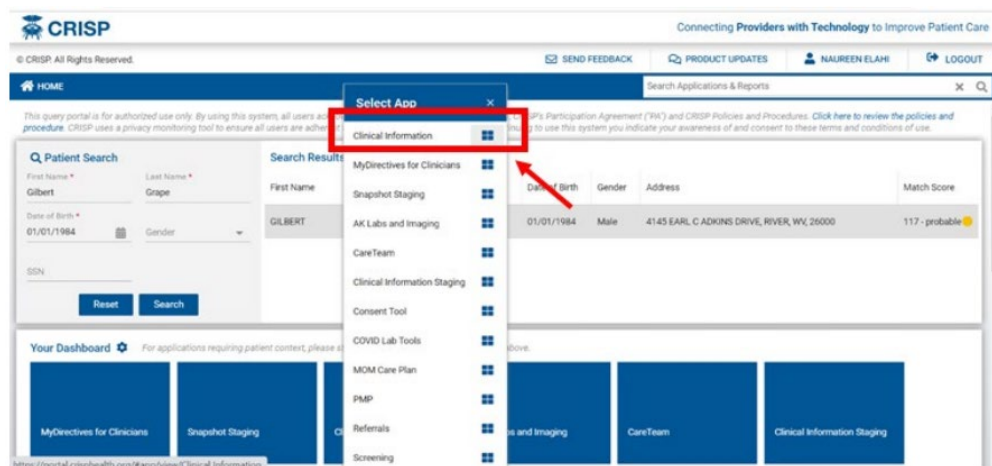
You can access the SDOH suite of tools via the CRISP Portal or through InContext.

## Accessing Assessments and Z-Codes

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

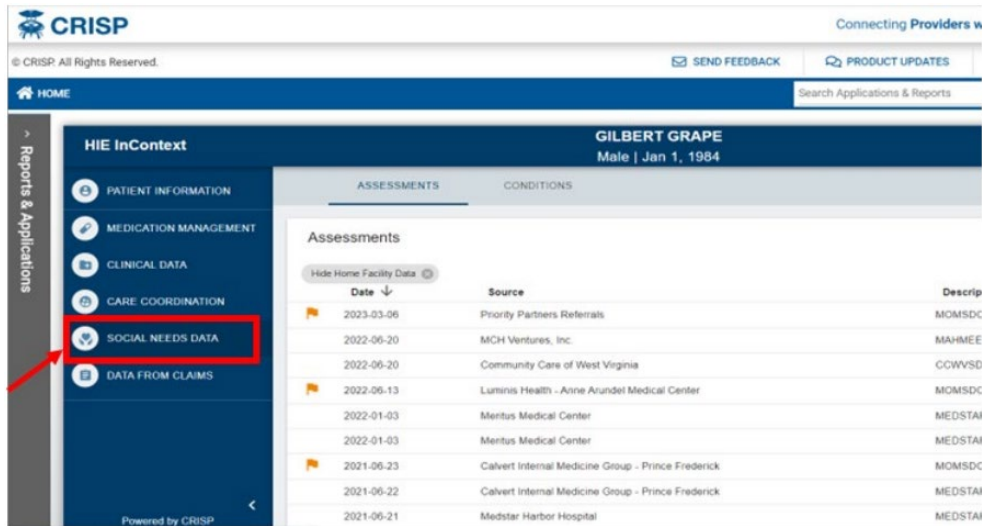
### Step 1:

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

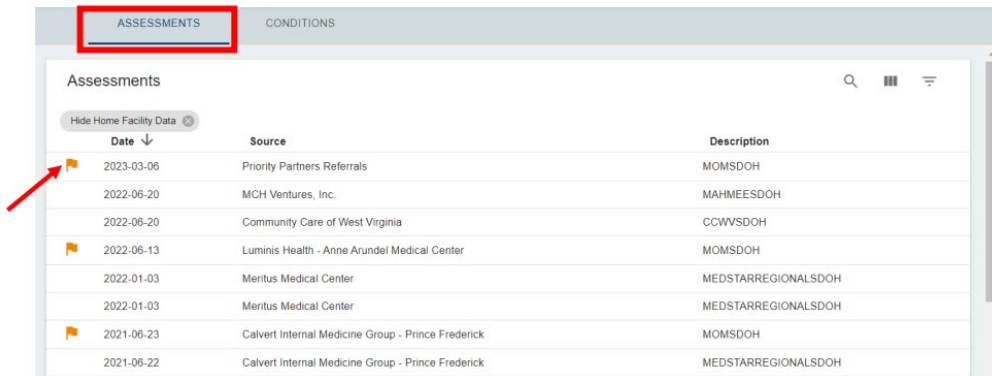




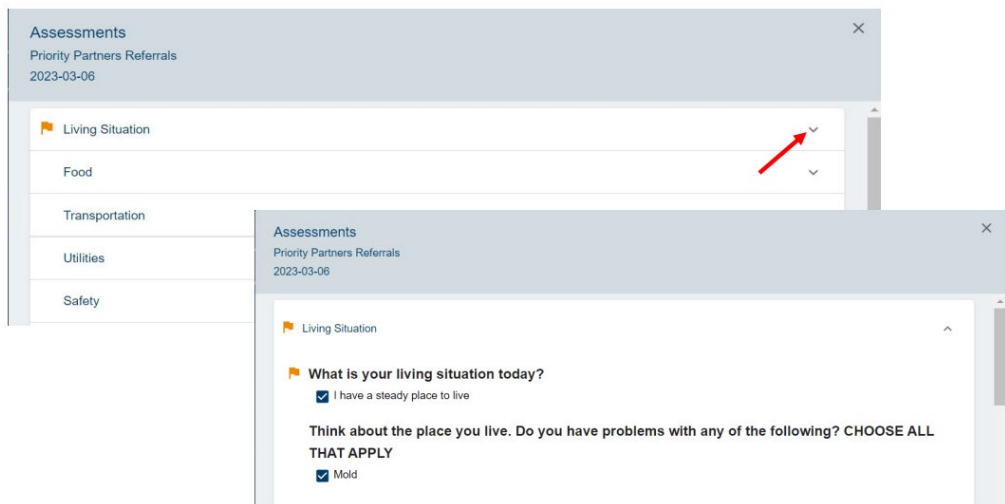
**Step 2:** Select the Social Needs Data tab.



**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 will be displayed.

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

## Submit Referral via CRISP Portal

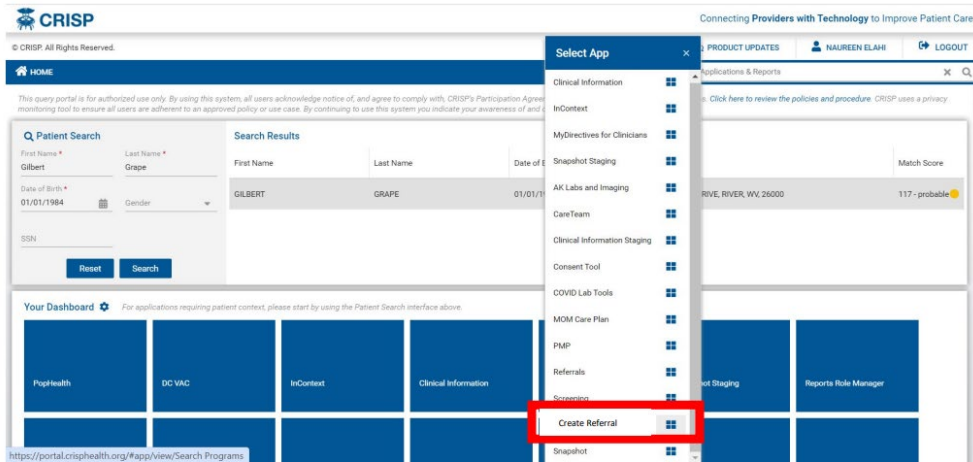
To submit a referral via CRISP, please reference the steps below. Both web-based and InContext users may submit a referral directly in CRISP.

**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.

Date ↓	Source	Title	Type	Size (KB)
2022-06-22	University of Maryland Medical System-REL UMMS	Summary of Care	Summarization of Episode Note	—
2022-02-08	HUFPP Internal Medicine Suite 5000	Summary of Care	SUMMARIZATION OF EPISODE NOTE	—
2022-02-08	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	—

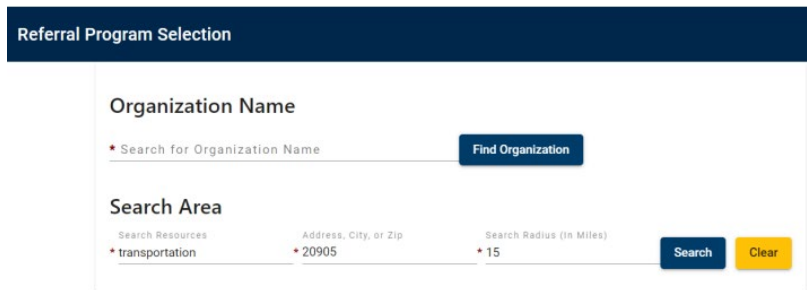
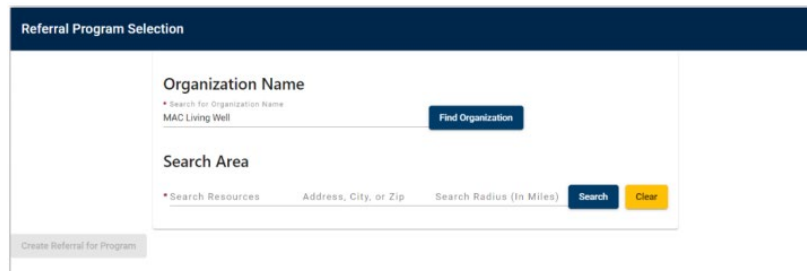


**Step 1:** For web-based users, search for patient, click on the patient's row, and then click on the "Create Referral" tile in the list of applications.



**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 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	^
<p>Description: 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.</p>					
<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

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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 \*

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 * 9999994340	Phone Number Type * Mobile
All Phone Number	All 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 \* 
 Last Name \* 
 Organization \*  NPI \* 
 Phone Number \*

[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.

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	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

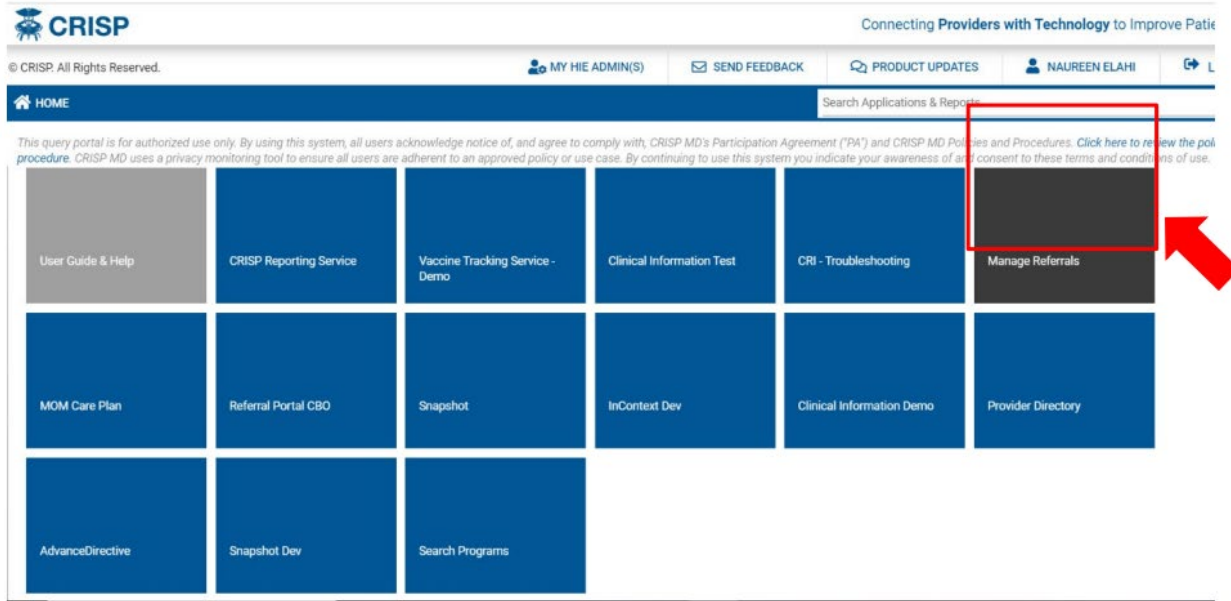
- Referral Sender
- Referral Recipient
- Journal Entries





# Managing the Referral (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.



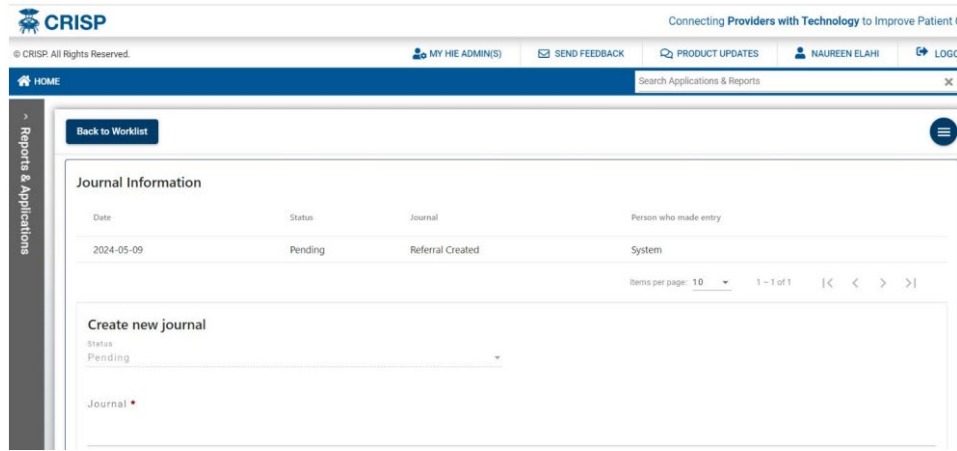
**Step 2:** You will be led to the “CBO Worklist” where you can view a list of all the referrals that have been sent to your programs. Click on the patient’s name to be led to the referral details.

The screenshot shows the "CBO Worklist" interface. At the top right, there is a "Download CSV" button. Below it is a table with the following columns: Name, Gender, Date of Birth, Referring Provider, Referral Date (with a downward arrow), Referral Status, Last Updated, Organization, and Program Name. The table contains two rows of data for Gilbert Grape. At the bottom, there is a pagination control showing "Items per page: 25" and "1 - 2 of 2" with navigation arrows.

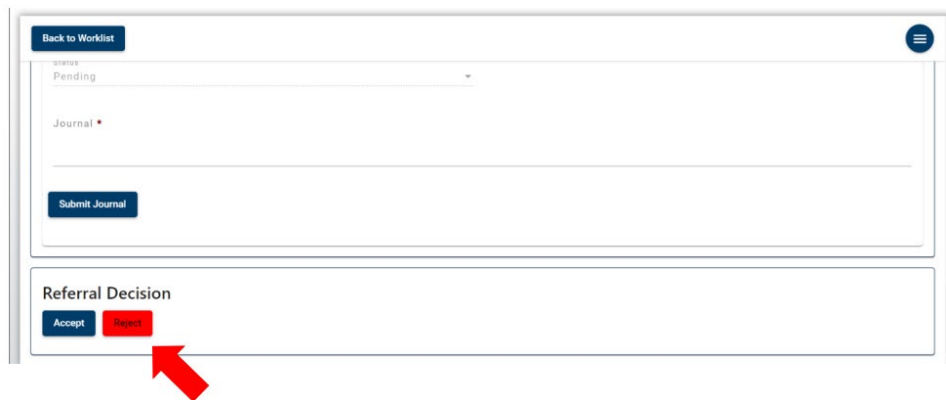
Name	Gender	Date of Birth	Referring Provider	Referral Date ↓	Referral Status	Last Updated	Organization	Program Name
Gilbert Grape	M	1984-01-01	Janelle Thomas	2024-05-09 01:30:04 PM	Pending	2024-05-09 01:30:04 PM	Crisp Referrals Test-DC	Weight Loss Program
Gilbert Grape	M	1984-01-01	Janelle Thomas	2024-02-26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



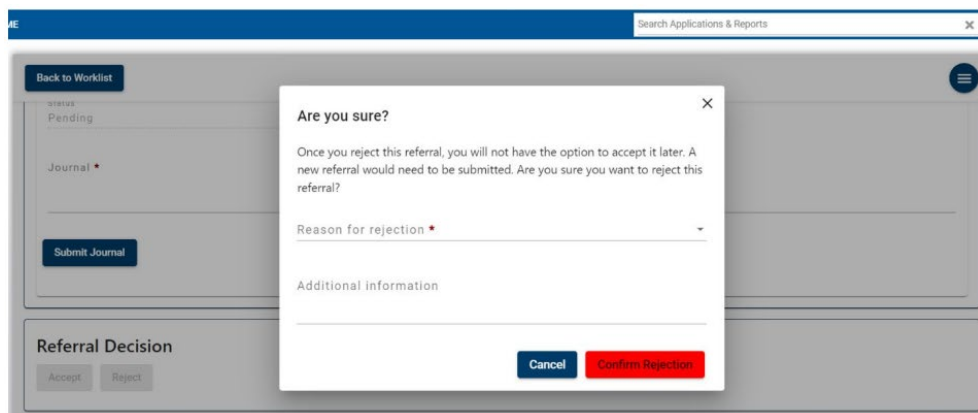
**Step 3:** Scroll down to the bottom of the page to view the “Journal Information” section. This is where you may document any updates and status changes for the referral at any time.



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.





**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”

The top screenshot shows the 'Provider Information' section with fields for First Name (Janelle), Last Name (Thomas), Organization (CRISP-MD Internal), NPI (2889291), and Phone Number (999999999). Below it is the 'Journal Information' table:

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

The bottom screenshot shows a confirmation dialog box: "Are you sure? Please confirm resetting the referral status to Pending." with "Cancel" and "Confirm" buttons.

**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 top screenshot shows the 'Referral Decision' section with 'Accept' and 'Reject' buttons. The bottom screenshot shows the 'Create new journal' form with a 'Submit Journal' button.



**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.

The top screenshot shows a 'Create new journal' form with a 'Submit Journal' button highlighted by a red arrow. The bottom screenshot shows a 'Journal Information' table with a red arrow pointing to the 'Enrolled 5/24/24' entry.

### 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).