About CRISP Presentation Guide

This document serves as a guide to the "About CRISP" slide deck, which has been developed to provide a comprehensive overview of CRISP, its onboarding processes, and the key tools and services offered. The slide deck is ready to share with external users as is. However, we recommend tailoring it to address the specific needs or knowledge gaps of your audience. This deck was designed to serve as a single, up-to-date resource for outreach team members, providing slides on all our tools in one place. The presentation is available for access [here].

Background on CRISP HIE

This section includes three slides designed to introduce CRISP's Health Information Exchange (HIE). The primary themes addressed are:

1. **What is CRISP?** (Slide 4)
2. **Why is CRISP important?** (Slide 5)
3. **What does CRISP do?** (Slide 6)

These slides provide foundational information on the CRISP HIE and its role in healthcare coordination.

Onboarding Process

This section includes nine slides aimed at facilitating the CRISP user onboarding process. The first slide outlines the required forms and provides a brief explanation of the necessary panels. Subsequent slides detail the steps for:

- **Setting up Panel Processor to submit patient panels** (Slides 10-12)
- **Designating an HIE Administrator** (Slides 13-14)
- **Configuring the CRISP Portal** (Slides 15-17)

Each of these three topics begins with an overview slide, followed by slides explaining the setup process. Note that these slides do not offer in-depth explanations of the tools themselves (Panel Processor, HIE Admin Tool, or CRISP Portal), but instead focus on the essential steps for ensuring proper user and organizational setup, documentation, and security protocols.

Overview of Key Tools

This section comprises the majority of the slides in the presentation, providing detailed information about CRISP's tools and services, as well as a map illustrating how these components work together. The tools and services covered include:

1. **InContext/Clinical Information** (Slides 21-25)
2. **Population Explorer/CEND** (Slides 26-45)
3. **Consent Tool** (Slides 46-55)
4. **Referral Tool** (Slides 56-59)
5. **CRISP Reporting Services** (Slides 60-64)

Each section begins with an overview of the tool or service, followed by slides that delve into specific functionalities.

InContext/Clinical Information

This section includes five slides dedicated to the InContext Tool and Clinical Information Service. The slides cover:

- **Introduction to InContext and Clinical Information** – What these tools are and how they are related (Slide 21).
- **Accessing InContext and Clinical Information** – The difference between accessing Clinical Information via the portal and InContext via the EHR (Slide 22).
- **Navigating InContext** – An overview of the tabs and subtabs available in the InContext interface (Slide 23).
- **Using the InContext Interface** – A detailed explanation of the user interface and navigation across two slides (Slides 24-25).

Population Explorer & CSS Event Notification Delivery (CEND)

This section provides an overview of CEND and Population Explorer, followed by in-depth coverage of the key functionalities of Population Explorer. The slides include:

1. **Introduction to CEND and Population Explorer** (Slides 26-27).
2. **How to access Population Explorer** (Slide 28).
3. **Detailed walkthroughs of Population Explorer functionalities, including**:
   - Patient Record/Other App Launching (Slide 29)
   - Expanded View and Follow-Up Status (Slides 30-31)
   - Filters (Slides 32-33)
   - Advanced Panel Builder (Slides 34-44)
   - Data Exports (Slide 45)

Given that the Advanced Panel Builder is a new feature of Population Explorer, this section offers an in-depth tutorial, covering the interface and all functionalities with detailed visuals. Slides 34-44 are designed as a comprehensive guide to using the Advanced Panel Builder.

Consent Tool

This section includes ten slides focused on the Consent Tool, explaining both its purpose and its functionality. Topics covered include:

- **Overview of the Consent Tool** and its relation to 42 CFR Part 2 Consent (Slide 46).
- **Patient Consent Registration** – A step-by-step guide to registering patient consent (Slides 47-51).
- **Viewing Consent History** (Slide 52).
- **Printing Consent Registrations** (Slides 53-54).
- **Viewing a Patient's SUD Data** (Slide 55).

Referral Tool

This section consists of four slides that introduce the Referral Tool and explain its functionalities. These slides include:

- **Overview of the Referral Tool** and how to access it (Slide 56).
- **Steps for submitting a referral** through the Referral Tool (Slides 57-59).

CRISP Reporting Services (CRS)

This section contains five slides providing an introduction to CRISP Reporting Services (CRS). The slides include:

- **Overview of CRS** and its capabilities (Slide 60).
- **How to access CRS** through the CRISP Portal, beginning with the Role Manager (Slides 61-63).
- **Available Reports** within CRS, highlighting key functionalities (Slide 64).

CRISP

This document should serve as a valuable resource for navigating the "About CRISP" slide deck and understanding the tools and processes associated with CRISP HIE.