



eReferral Tool

User Guide

Referral Submission Process

1

DC Portal Log In & Patient Search

- a) Log into the DC Portal at portal.crispdc.org.
- b) Search the desired patient (First Name, Last Name, and Date of Birth are required).
- c) Once the patient list loads, any potential matches that meet the criteria will appear. The results will show the likelihood of a patient match by match scores indicated by probable, etc. Select the most appropriate patient, then access the “Referrals Portal” application tab.

1a

Log in to CRISP-DC Identity

CRISP DC

Email

Next

[Reset your password?](#)

Warning: CRISP-DC policy prohibits username and password sharing.
Violation could result in account termination.

Questions or Concerns? Please contact the CRISP-DC Customer Care Team
at support@crisphealth.org or (833) 580-4646.

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1b

Patient Search

First Name * Last Name *

Date of Birth * Gender

SSN

Reset Search

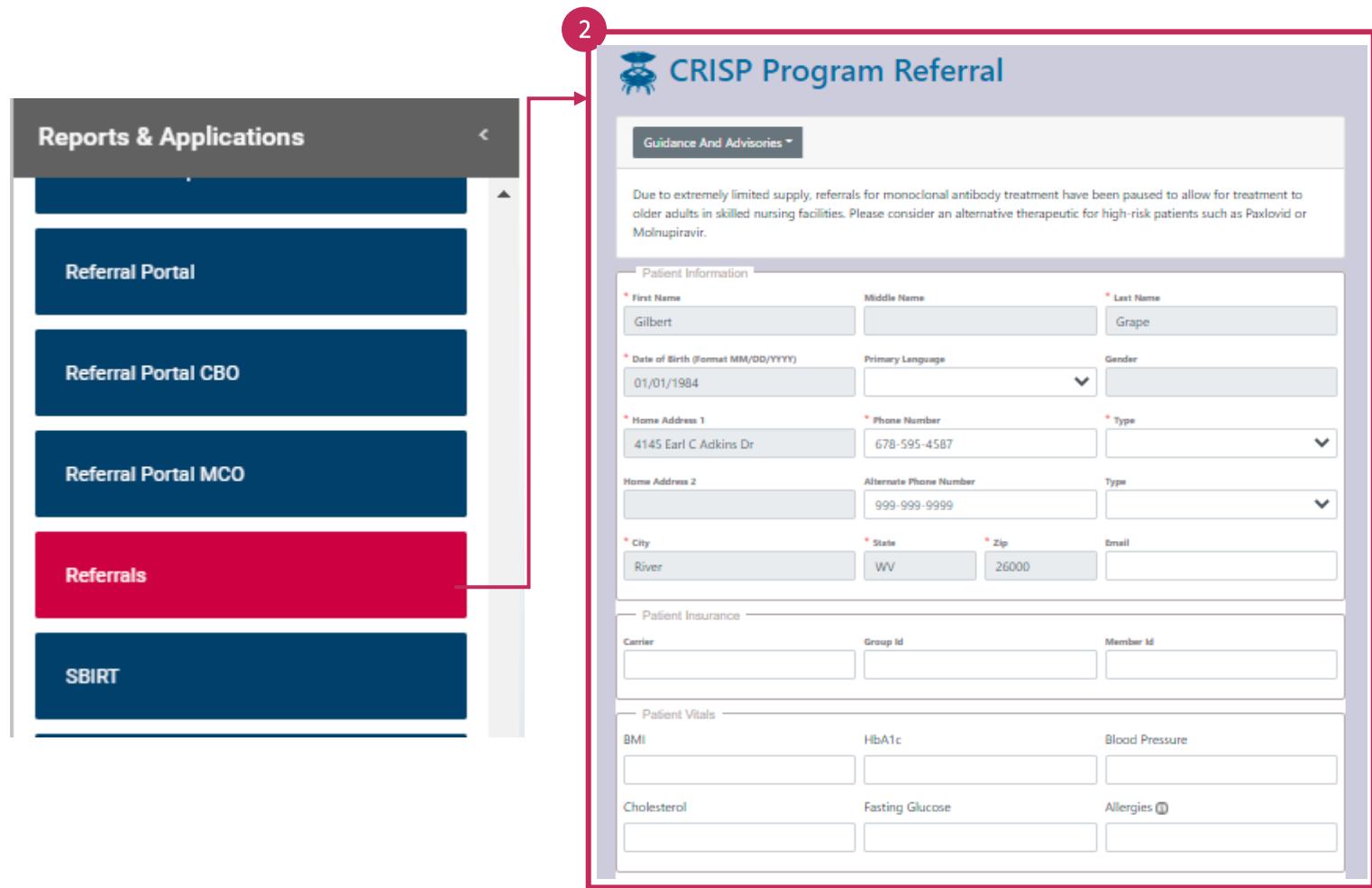
| Results | | | | | |
|------------------|-----------|---------------|--------|---------|-------------|
| First Name | Last Name | Date of Birth | Gender | Address | Match Score |
| No records found | | | | | |

1c

2

Referrals Tab: Web Form

Once in the “Referrals” tab, the form will prepopulate with patient demographic information (First and Last Name, Date of Birth, Home Address, Phone Number). Patient Insurance, The Patient Vitals, Alternate Phone Number, Primary Language and Email section must be completed manually.



2

CRISP Program Referral

Guidance And Advisories

Due to extremely limited supply, referrals for monoclonal antibody treatment have been paused to allow for treatment to older adults in skilled nursing facilities. Please consider an alternative therapeutic for high-risk patients such as Paxlovid or Molnupiravir.

Patient Information

| | | |
|---|--|----------------------|
| * First Name Gilbert | Middle Name | * Last Name Grape |
| * Date of Birth (Format MM/DD/YYYY) 01/01/1984 | Primary Language | Gender |
| * Home Address 1 4145 Earl C Adkins Dr | * Phone Number 678-595-4587 | * Type |
| Home Address 2 | Alternate Phone Number 999-999-9999 | Type |
| * City River | * State WV | * Zip 26000 |
| Email | | |

Patient Insurance

| | | |
|---------|----------|-----------|
| Carrier | Group Id | Member Id |
|---------|----------|-----------|

Patient Vitals

| | | |
|-------------|-----------------|----------------|
| BMI | HbA1c | Blood Pressure |
| Cholesterol | Fasting Glucose | Allergies ⓘ |

3

Organization and Program Selection

- a) Select a CBO from the “Organization” drop-down
- b) Select a “Program”
- c) Hover over the programs to see a program description. The CBO submits a brief description for each program upon onboarding.

Referral Program

Organization: Sorogi

Programs

Diabetes Prevention Program
Diabetes Self-Management Education and Support (DSMES) Program

CDC recognized program designed to delay or prevent type 2 diabetes. 25 weekly group classes facilitated by DPP certified lifestyle coaches. Coaches lead discussion on lifestyle changes that can alter behavior and results in improve health. Participants have access to a structured physical activity program, a registered dietitian and peer support group. Program is offered at no cost to DC residents.

Please enter all relevant information that you would like relayed

Example: Luke Skywalker is a 44 y.o. male who presented to ABC Family recent encounter on 4/1/19; BMI is 32, HbA1c level is 6.2. No previous changes including healthy eating habits and fitness regimens.

Choose Files No file chosen

Referring Physician

I am referring this patient myself I am refer

4

Submitting the Form

The comment box is a required field provided for sharing pertinent patient notes with the CBO. If you do not have any notes to include, please type N/A. Once the form is completed, check the “Patient Consent” box then click “Submit” to send the referral. Upon referral submission, the user has the option to download a PDF of the referral and save for their own record keeping.

Referral Program

* Organization: The YMCA of Metro Washington

* Programs: Blood Pressure Self-Monitoring, Cooking and Nutrition classes, Diabetes Prevention Program, Medical Nutrition Therapy

4 * Please enter all relevant information that you would like relayed to the accepting provider below:

Example: Luke Skywalker is a 44 y.o. male who presented to ABC Family Practice and qualifies for enrollment into a DPP. Per most recent encounter on 4/1/19, BMI is 32, HbA1c level is 6.2. No previous diagnosis of DM1 or DM2. Counseled patient on lifestyle changes including healthy eating habits and fitness regimens.

Choose Files No file chosen

Referring Physician

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

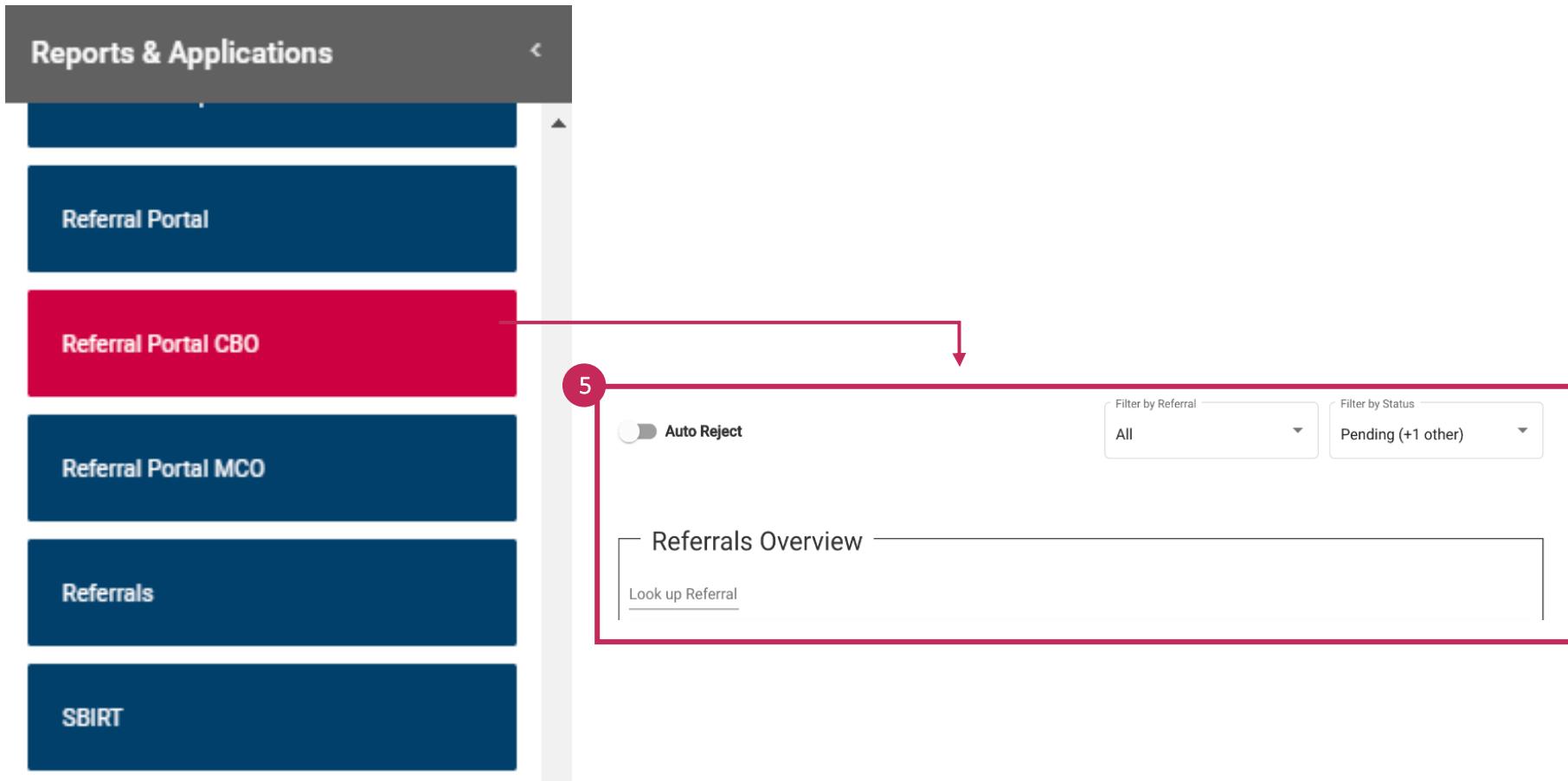
Submit Clear Patient Agreement ?

Community Based Organization (CBO) Workflow

5

Referral Portal CBO Tab

Log into the DC Portal at portal.crispdc.org, and then click the “Referral Portal CBO” tab at the top of the screen.



6

Referrals Overview Page

The Referrals Overview page provides a comprehensive list of all patients referred to the CBO through the CRISP Referral tool along with a host of other identifiers such as the patient's referral status and the referring provider.

6

Auto Reject

Filter by Referral: All

Filter by Status: Pending (+3 others)

Referrals Overview

Look up Referral

| Name (last, first) | Gender | DOB | Doctor | Health Org. | Ref. Date | Referral Status | Accepted Date | Programs |
|----------------------|--------|--------------|-------------|------------------------------------|--------------|-----------------|---------------|-----------|
| GRAPE, GILBERT | | Jan 1, 1984 | Samit Desai | Saint Agnes Hospital | Apr 14, 2022 | Pending | | 0 / 0 / 1 |
| Grape, Gilbert | | Jan 1, 1984 | | | Apr 11, 2022 | Pending | | 0 / 0 / 1 |
| Grape, Gilbert | | Jan 1, 1984 | | CRISP Internal Users - Break Glass | Apr 11, 2022 | Pending | | 0 / 0 / 1 |
| Integrations, Patone | M | Jan 1, 2001 | Samit Desai | Saint Agnes Hospital | Apr 11, 2022 | Accepted | Apr 11, 2022 | 0 / 1 / 1 |
| Cadence, Anna | F | Nov 16, 1981 | | | Apr 11, 2022 | Accepted | Apr 11, 2022 | 0 / 1 / 1 |
| Patone, Integrations | M | Jan 1, 2001 | Samit Desai | Saint Agnes Hospital | Apr 8, 2022 | Accepted | Apr 8, 2022 | 0 / 1 / 1 |
| | | | | CRISP | | | | |

7

Referrals Overview Page: Auto Rejection

If the CBO can no longer accommodate new referrals, toggle the “Auto Reject” button to enable the auto rejection functionality. Auto rejection will automatically communicate to the referring person that the submitted referral has been rejected.

7

Auto Reject

Filter by Referral: All

Filter by Status: Pending (+3 others)

Referrals Overview

| Name (last, first) | Gender | DOB | Doctor | Health Org. | Ref. Date | Referral Status | Accepted Date | Programs |
|----------------------|--------|--------------|-------------|------------------------------------|--------------|-----------------|---------------|-----------|
| GRAPE, GILBERT | | Jan 1, 1984 | Samit Desai | Saint Agnes Hospital | Apr 14, 2022 | Pending | | 0 / 0 / 1 |
| Grape, Gilbert | | Jan 1, 1984 | | | Apr 11, 2022 | Pending | | 0 / 0 / 1 |
| Grape, Gilbert | | Jan 1, 1984 | | CRISP Internal Users - Break Glass | Apr 11, 2022 | Pending | | 0 / 0 / 1 |
| Integrations, Patone | M | Jan 1, 2001 | Samit Desai | Saint Agnes Hospital | Apr 11, 2022 | Accepted | Apr 11, 2022 | 0 / 1 / 1 |
| Cadence, Anna | F | Nov 16, 1981 | | | Apr 11, 2022 | Accepted | Apr 11, 2022 | 0 / 1 / 1 |
| Patone, Integrations | M | Jan 1, 2001 | Samit Desai | Saint Agnes Hospital | Apr 8, 2022 | Accepted | Apr 8, 2022 | 0 / 1 / 1 |
| | | | | CRISP | | | | |

8

Referrals Overview Page: Filtering & Status Updates

- a) Each column can be filtered for optimized viewing. Navigate to the top right corner of the screen to select desired filtering form the filters button provided.
- b) The patient's referral status will be filtered by the selected status indicator.

Auto Reject

Filter by Referral

All

8a

Filter by Status

Pending

Accepted

Rejected

Completed

8b

Referrals Overview

Look up Referral

| Name (last, first) | Gender | DOB | Doctor | Health Org. | Ref. Date | Referral Status | Accepted Date | Programs |
|--------------------|--------|--------------|----------------------|------------------------------------|--------------|-----------------|---------------|-----------|
| Cadence, Anna | F | Nov 16, 1981 | Sheena Patel | CRISP Internal Users - Break Glass | Apr 21, 2022 | Accepted | Apr 21, 2022 | 0 / 1 / 1 |
| GRAPE, GILBERT | M | Jan 1, 1984 | Sheena Patel | CRISP Internal Users - Break Glass | Apr 21, 2022 | Accepted | Apr 21, 2022 | 0 / 1 / 1 |
| GRAPE, GILBERT | | Jan 1, 1984 | Shreyash Shrivastava | CRISP Internal Users - Break Glass | Apr 21, 2022 | Pending | | 0 / 0 / 1 |
| GRAPE, GILBERT | | Jan 1, 1984 | Shreyash Shrivastava | CRISP Internal Users - Break Glass | Apr 20, 2022 | Pending | | 0 / 0 / 1 |

9

Referrals Overview

Page: Advanced Search

To search for a specific referral (patient, provider, etc.) navigate to the “Look up Referral” field in the top left corner of the screen to begin search. Please note, when searching dates the following format is required: MM/DD/YYYY.

9

Referrals Overview

Look up Referral

patel

| Name (last, first) | Gender | DOB | Doctor | Health Org. | Ref. Date | Referral Status | Accepted Date | Programs |
|--------------------|--------|--------------|--------------|---|--------------|-----------------|---------------|-----------|
| Cadence, Anna | F | Nov 16, 1981 | Sheena Patel | CRISP Internal Users - Break Glass | Apr 21, 2022 | Accepted | Apr 21, 2022 | 0 / 1 / 1 |
| GRAPE, GILBERT | M | Jan 1, 1984 | Sheena Patel | CRISP Internal Users - Break Glass | Apr 21, 2022 | Accepted | Apr 21, 2022 | 0 / 1 / 1 |
| Grape, Gilbert | M | Jan 1, 1984 | Sheena Patel | CRISP Internal Users - Break Glass | Apr 6, 2022 | Accepted | Apr 6, 2022 | 0 / 1 / 1 |
| Grape, Gilbert | | Jan 1, 1984 | Sheena Patel | CRISP Internal Users - Break Glass | Apr 5, 2022 | Pending | | 0 / 0 / 1 |

10

Export to Excel

To download a report of referred patients and additional datasets, click the green “Export to Excel” button at the bottom of the Referrals Overview page.

10

| Glass | | | | | | | | | | | |
|------------------------|-------------|--------------|--------------|---------|-----------|--|--|--|--|--|--|
| CRISP | | | | | | | | | | | |
| Internal Users - Break | | | | | | | | | | | |
| Glass | | | | | | | | | | | |
| CRISP | | | | | | | | | | | |
| Internal Users - Break | | | | | | | | | | | |
| Glass | | | | | | | | | | | |
| Grape, Gilbert | Jan 1, 1984 | Sheena Patel | Aug 16, 2021 | Pending | 0 / 0 / 1 | | | | | | |
| GRAPE, GILBERT | Jan 1, 1984 | Sheena Patel | Jan 25, 2021 | Pending | 0 / 0 / 1 | | | | | | |

Export to Excel Upload Data

1 – 7 of 7 < < > >|

Items per page: 25

Reports

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V |
|---|--------------|-----------|------------|----------|-------------|-------------|-----------|--------------|---------------|------------|-------------|-------|---------|-------|-----|-------|--------------|-------------|-------------|---------------|------------------------|---|
| 1 | confirmation | firstName | middleName | lastName | dateOfBirth | phoneNum | phoneNumb | alternatePho | homeAddres | homeAddres | city | state | country | zip | bmi | hbaic | bloodPressur | cholesterol | fastingGluc | referringPhys | npn | |
| 2 | b2f0d97-aa | Anna | Cadence | | 11/16/1981 | 410-888-999 | Home | | 1021 Main S | | Columbia | MD | | 21045 | 25 | | | | | | Sheena Patel 12341234; | |
| 3 | 5de3d65d-55 | GILBERT | GRAPE | | 01/01/1984 | 678-595-458 | Home | | 4145 Earl C A | | River | WV | | 26000 | 25 | 7.1 | | | | | Sheena Patel 12341234; | |
| 4 | 93746d00-cd | Gilbert | Grape | | 01/01/1984 | 678-595-458 | Home | | 4145 Earl C A | | River | WV | | 26000 | 25 | | | | | | Sheena Patel 12341234; | |
| 5 | 4f949b35-4e | Gilbert | Grape | | 01/01/1984 | 678-595-458 | Home | | 4145 Earl C A | | River | WV | | 26000 | | | | | | | Sheena Patel 12341234; | |
| 6 | c678bab-c0 | Gilbert | Grape | | 01/01/1984 | 678-595-458 | Mobile | | 4145 Earl C A | | River | WV | | 26000 | 25 | | | | | | 00000 | |
| 7 | a917101e-bf | Gilbert | Grape | | 01/01/1984 | 951-123-456 | Home | | 4145 Earl C A | | River | WV | | 26000 | | | | | | | Sheena Patel 12341234; | |
| 8 | 03e8beb-d8 | GILBERT | GRAPE | | 01/01/1984 | 999-999-777 | Home | | 4145 EARLC | | BIRCH RIVER | WV | | 26000 | | | | | | | Sheena Patel 12341234; | |

11

Program(s) Referred To Section

- a) The “Program Referred To” section will show each program within the CBO to which a patient was referred. Click the arrow to open program details.
- b) The Opt-Out Button should be utilized when one of the following two choices are made:
 - i. If the patient chooses to participate but does not wish to have their information shared with CRISP
 - ii. If the patient chooses to not receive the treatment AND does not wish to share that information with CRISP

Program(s) Referred To

TEST for Referrals

11a



Program(s) Referred To

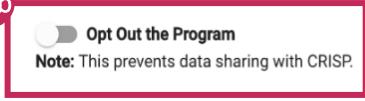
TEST for Referrals

^

Program Referred

TEST for Referrals

11b



Opt Out the Program

Note: This prevents data sharing with CRISP.

*Enrollment Status

Enrollment Date

Appointment Date

Enrolled

4/18/2022

4/20/2022

*Appointment Status

Appointment Made

CRISP DC eReferral Tool – Community Based Organization (CBO) Workflow

11

Program(s) Referred To Section

c) To view a report on the number of referred patients who have been accepted, rejected, enrolled, completed, or disenrolled from your programs, click the green “Reports” button at the bottom of the Referrals Overview page. This report is available for the purpose of tracking the outcomes for referrals made through CRISP.

11c

Export to Excel | Upload Data | Reports

Reports

Back to Referrals

Enrollment Outcome: Pending, Enrolled, Completed, Rejected | Calendar Year: 01/01/2022 to 12/31/2022 | Submit

Pending | Enrolled | Completed | Rejected

Pending | Enrolled | Completed | Rejected

Pending

Pending | Enrolled | Completed | Rejected

| Id | Full Name | Referrer | CBO Notes | Created | Referral Program ID | Enrollment Status | Reject Reason | Program Name | Outcome Achieved | Response Time (Days) |
|------|---------------|----------|-----------|------------|---------------------|-------------------|---------------|--------------|------------------|----------------------|
| 4015 | Gilbert Grape | | TEST. | 2022-02-25 | 8773 | Completed | | PIMR | X | 0 |
| 4016 | Gilbert Grape | | TEST. | 2022-02-25 | 8775 | Completed | | PIMR | X | 0 |

12

Program(s) Referred To: Enrolled View

Patient enrollment status can be changed here. Once “Enrolled” has been selected, an enrollment date will populate.

Please note, if the referral status was changed to “Accepted” on the Referrals Overview page, the enrollment date will auto-populate in this field.

Program Referred

TEST for Referrals

Opt Out the Program

Note: This prevents data sharing with CRISP.

12

Pending

Enrolled

Rejected

Completed

Disenrolled

Enrollment Date

4/18/2022



Appointment Date

4/20/2022



13

Program(s) Referred To: Rejected View

- a) To reject a referral, click on the “Rejected” option in the status drop-down. Once rejected, a pop-up box will appear where the user can specify why the referral was rejected. The “Rejected Date” field will auto-populate once the “Rejected” option is chosen.
- b) If you choose “Others” as the reason for rejection, another pop-up box will appear where the user can enter a reason.

13a

Reason for Rejection

Select a Reason for Rejection *

- Incomplete Referral/More Information Needed
- Patient Ineligible Based on Screening
- Patient Declined
- Patient Unreachable
- No Capacity/Funding
- Others

13b

Reason for Rejection

Select a Reason for Rejection *

Others

Enter a Reason *

Confirm Cancel

14

Patient Information

Certain fields must be completed by a CBO in order to successfully complete the Web Form. A patient ID and the patient's gender must be entered into the "Patient Information" section in order to save this document.

14

Patient Information

| | |
|--------------------|-------------------------|
| *Patient ID | First Name |
| ABCDE | GILBERT |
| Middle Name | Last Name |
| | GRAPE |
| Name Suffix | Date of Birth |
| | Jan 1, 1984 |
| *Gender | Primary Language |
| Male | |
| SSN | |
| ####-##-#### | |

15

Patient Contact Details

If the end user has the patient's home phone number, work number, and/or cell phone, it can be entered in the "Patient Contact Details" section. The blue boxed sections/fields, Phone, Email, and Alternate Phone will be pre-populated (and not editable) if the referring person completes fields within the referral Web Form.

15

Patient Contact Details

Home Phone

###-###-####

Work Phone

###-###-####

Cell Phone

###-###-####

Phone (From Referral)

678-595-4587 Home

Alternate Phone (From Referral)

Email (From Referral)

someone@hostname.com

Referral OutReach Attempted

16

Clinical Fields

The Patient Clinical Fields will be pre-populate (and not editable) with data from the referral Web Form.

16

Patient Clinical Fields

BMI

25

HbA1c

7.1

Blood Pressure

Cholesterol

Allergies

Fasting Glucose

NKDA

17

Referring Physician Information

The “Referring Physician Information” section captures the contact information for the referring provider. Additionally, any notes that the referrer added to the Web Form will be shown here. These fields are also not editable.

17

Referring Physician Information

Referring Physician Name

Sheena Patel

NPI

1234123412

Organization

CRISP Internal Users - Break Glass

Referring Person Name

Sheena Patel

Referring Person Email

sheena.patel@crisphealth.org

Referring Provider/Person Notes

Gilbert needs help with nutrition planning and fitness options

Referring Person Workflow

18

DC Portal Log In & Referrals

- a) Log into the DC Portal at portal.crispdc.org.
- b) Click on the Referral Portal Tab

18a

Log in to CRISP-DC Identity

CRISP DC

Email

Next

[Reset your password?](#)

Warning: CRISP-DC policy prohibits username and password sharing.
Violation could result in account termination.

Questions or Concerns? Please contact the CRISP-DC Customer Care Team
at support@crisphealth.org or [\(833\) 580-4646](tel:(833)580-4646).

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18b

Reports & Applications

Referral Portal

Referral Portal CBO

Referral Portal MCO

Referrals Overview

[Look up Referral](#)

Filter by Status
Pending (+1 other) ▾

19

Referrals Overview

Review the Referrals Overview page. Here, you will find a queue of all patients you have referred using the CRISP Referral tool.

19

Referrals Overview

Look up Referral

| Name (last, first) | Gender | DOB | CBO | Ref. Date | Referral Status | Accepted Date | Programs |
|----------------------------------|-------------------|--------------|---------|--------------|-----------------|---------------|-----------|
| Fields_Minie | | Jun 30, 1990 | Min CBO | Jul 17, 1997 | Pending | | 0 / 0 / 2 |
| Fields_Schema | | Jan 1, 2001 | Min CBO | Aug 26, 2020 | Pending | | 0 / 0 / 2 |
| optOut_test | Prefer Not to Say | Jun 30, 1990 | Min CBO | Sep 15, 2020 | Pending | | 0 / 0 / 2 |
| Tester82_Someone | Male | Jan 22, 1972 | CBO 1 | Sep 24, 2020 | Pending | | 0 / 0 / 3 |
| Tester84_Someone | | May 2, 1963 | CBO 1 | Sep 30, 2020 | Pending | | 0 / 0 / 3 |
| Tester83_Someone | Female | May 2, 2000 | CBO 1 | Sep 24, 2020 | Accepted | Sep 24, 2020 | 0 / 2 / 3 |

Export to Excel

Items per page: 25 ▾

1 – 6 of 6

| < < > > |

20

Referrals Overview

Page Description

Each column can be filtered for optimized viewing. Navigate to the top right corner of the screen to select desired filtering from the filters dropdown.

Referrals Overview

Look up Referral

| Name (last, first) | Gender | DOB | CBO | Ref. Date | Referral Status | Accepted |
|----------------------------------|-------------------|--------------|---------|--------------|-----------------|---------------------------|
| Fields_Minie | | Jun 30, 1990 | Min CBO | Jul 17, 1997 | Pending | 0 / 0 / 2 |
| Fields_Schema | | Jan 1, 2001 | Min CBO | Aug 26, 2020 | Pending | 0 / 0 / 2 |
| optOut_test | Prefer Not to Say | Jun 30, 1990 | Min CBO | Sep 15, 2020 | Pending | 0 / 0 / 2 |
| Tester82_Someone | Male | Jan 22, 1972 | CBO 1 | Sep 24, 2020 | Pending | 0 / 0 / 3 |
| Tester84_Someone | | May 2, 1963 | CBO 1 | Sep 30, 2020 | Pending | 0 / 0 / 3 |
| Tester83_Someone | Female | May 2, 2000 | CBO 1 | Sep 24, 2020 | Accepted | Sep 24, 2020 0 / 2 / 3 |

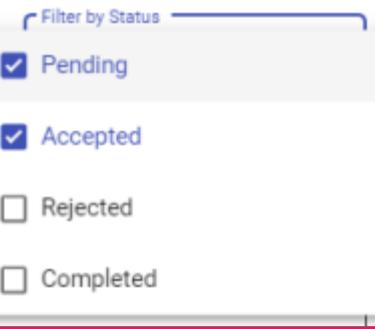
Export to Excel

Items per page: 25

1 – 6 of 6

< < > >>

20



21 Advanced Search

To search a specific referral (patient, provider, etc.) navigate to the “Look up Referral” field in the top left corner of the screen. Please note, when searching dates the following format is required: MM/DD/YYYY.

21

Referrals Overview

Look up Referral
som|

| Name (last, first) | Gender | DOB | CBO | Ref. Date | Referral Status | Accepted Date | Programs |
|-----------------------------------|--------|--------------|-------|--------------|-----------------|---------------|-----------|
| Tester82, Someone | Male | Jan 22, 1972 | CBO 1 | Sep 24, 2020 | Pending | | 0 / 0 / 3 |
| Tester84, Someone | | May 2, 1963 | CBO 1 | Sep 30, 2020 | Pending | | 0 / 0 / 3 |
| Tester83, Someone | Female | May 2, 2000 | CBO 1 | Sep 24, 2020 | Accepted | Sep 24, 2020 | 0 / 2 / 3 |

Export to Excel

Items per page: 25 ▾ 1 – 3 of 3 | < < > > |

CRISP DC eReferral Tool – Referring Person Workflow

22

Export to Excel

To download a report of referred patients and additional datasets, click the green “Export to Excel” button at the bottom of the Referrals Overview page

– Referrals Overview –

Look up Referral

| Name (last, first) | Gender | DOB | CBO | Ref. Date | Referral Status | Accepted Date | Programs |
|---------------------|-------------------|--------------|---------|--------------|-----------------|---------------|-----------|
| Fields_Minte | | Jun 30, 1990 | Min CBO | Jul 17, 1997 | Pending | | 0 / 0 / 2 |
| Fields_Schema | | Jan 1, 2001 | Min CBO | Aug 26, 2020 | Pending | | 0 / 0 / 2 |
| optOut_test | Prefer Not to Say | Jun 30, 1990 | Min CBO | Sep 15, 2020 | Pending | | 0 / 0 / 2 |
| Tester82_Someone | Male | Jan 22, 1972 | CBO 1 | Sep 24, 2020 | Pending | | 0 / 0 / 3 |
| Tester84_Someone | | May 2, 1963 | CBO 1 | Sep 30, 2020 | Pending | | 0 / 0 / 3 |
| 22 Tester83_Someone | Female | May 2, 2000 | CBO 1 | Sep 24, 2020 | Accepted | Sep 24, 2020 | 0 / 2 / 3 |

Export to Excel

| A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U |
|---|-----------|----------|------------|-------------|--------------|--------|----------------|----------|------------------|-------|----------------|--------|---------|-----|------|-------|---------|---------|----------|-----------|
| 1 confirmationNumber | firstName | middleI | lastName | dateOfBirth | phoneNumber | phoneH | alternat | alternat | homeAddress1 | homeA | city | state | country | zip | bmi | hba1c | bloodPr | cholest | fastingC | referrin |
| 2 1d1d216-559b-4251-1f15-afc6723d3b21 | Test7 | | | 04/24/2000 | | | | | | | | | | | | | | | | Dr. Minn |
| 3 1d1d216-559b-4251-1f15-afc6723d3b21 | Test7 | | | 04/24/2000 | | | | | | | | | | | | | | | | Dr. Minn |
| 4 1d4d7776-559b-4251-9f55-afc6723d3b21 | Test4 | | | 04/24/2000 | | | | | | | | | | | | | | | | Dr. Minn |
| 5 1d4d7776-559b-4251-9f55-afc6723d3b21 | Test4 | | | 04/24/2000 | | | | | | | | | | | | | | | | Dr. Minn |
| 6 1032c917-7c3f-48c4-8bcd-7adbe29c7084 | Someone | middleI | Test84 | 05/02/1963 | 301-222-5555 | work | 301-222-2;home | | | | Los Angele CA | 33333 | 20 | | | 100 | normal | | | Dr. Minn |
| 7 1032c917-7c3f-48c4-8bcd-7adbe29c7084 | Someone | middleI | Test84 | 05/02/1963 | 301-222-5555 | work | 301-222-2;home | | | | Los Angele CA | 33333 | 20 | | | 100 | normal | | | Dr. Minn |
| 8 1032c917-7c3f-48c4-8bcd-7adbe29c7084 | Someone | middleI | Test84 | 05/02/1963 | 301-222-5555 | work | 301-222-2;home | | | | Los Angele CA | 33333 | 20 | | | 100 | normal | | | Dr. Minn |
| 9 1d5d7366-559b-4251-9f55-afc6723d3b21 | Test3 | | | 04/24/2000 | | | | | | | | | | | | | | | | Dr. Minn |
| 10 1d5d7366-559b-4251-9f55-afc6723d3b21 | Test3 | | | 04/24/2000 | | | | | | | | | | | | | | | | Dr. Minn |
| 11 1b5b7367-789b-4241-9f94-afc6723d3b21 | Test2 | | | 04/24/2000 | | | | | | | | | | | | | | | | Dr. Minn |
| 12 1b5b7367-789b-4241-9f94-afc6723d3b21 | Test2 | | | 04/24/2000 | | | | | | | | | | | | | | | | Dr. Minn |
| 13 1032c917-7c3f-48c4-8bcd-7adbe29c7083 | Someone | middleI | Test83 | 05/02/2000 | 301-222-5555 | work | 301-222-2;home | | | | Los Angele CA | 33333 | 20 | | | 100 | normal | | | Dr. Minn |
| 14 1032c917-7c3f-48c4-8bcd-7adbe29c7083 | Someone | middleI | Test83 | 05/02/2000 | 301-222-5555 | work | 301-222-2;home | | | | Los Angele CA | 33333 | 20 | | | 100 | normal | | | Dr. Minn |
| 15 1032c917-7c3f-48c4-8bcd-7adbe29c7083 | Someone | middleI | Test83 | 05/02/2000 | 301-222-5555 | work | 301-222-2;home | | | | Los Angele CA | 33333 | 20 | | | 100 | normal | | | Dr. Minn |
| 16 1032c917-7c3f-48c4-8bcd-7adbe29c7082 | Someone | middleI | Test82 | 01/22/1972 | 301-222-5555 | work | 301-222-2;home | | | | Springfield MO | 33333 | 20 | | | 100 | normal | | | Dr. Minn |
| 17 1032c917-7c3f-48c4-8bcd-7adbe29c7082 | Someone | middleI | Test82 | 01/22/1972 | 301-222-5555 | work | 301-222-2;home | | | | Springfield MO | 33333 | 20 | | | 100 | normal | | | Dr. Minn |
| 18 1032c917-7c3f-48c4-8bcd-7adbe29c7082 | Someone | middleI | Test82 | 01/22/1972 | 301-222-5555 | work | 301-222-2;home | | | | Springfield MO | 33333 | 20 | | | 100 | normal | | | Dr. Minn |
| 19 1c4a7384-688a-4221-9f74-afc7723b3c07 | Someone | Tester15 | 01/01/0001 | 9858745445 | | | | | 123 eutaw street | | Baltimore MD | 500058 | 25 | | 2547 | 5478G | | | | Dr. Yello |

23

Patient Details View

Select a patient from the Referrals Overview list to navigate to the Patient Details screen. This screen includes all the details captured by the referring person at the time of referral. Click “Cancel” to return to the previous page. Please note, the information provided in the fields cannot be edited. The “Referrals Overview” is designed to provide a read-only view of information sent to and received from the CBO.

23

Cancel

Referral Detail

Confirmation Number

1c4a7384-688a-4221-9f74-afc7723b3b01

Patient Information

First Name

Minie

Middle Name

jones

Last Name

Fields

Date of Birth

Jun 30, 1990

Patient Address

Home Address 1

Home Address 2

City

State

24

Patient Contact and Clinical Fields

The fields in these sections are populated with information provided in the Web Form.

24

Patient Contact Details

Phone

0

Email

Alternate Phone

0

Patient Clinical Fields

BMI

HbA1c

Blood Pressure

Cholesterol

Fasting Glucose

25

Referring Physician Information

The fields in these sections are populated with information provided in the Web Form.

25

Referring Physician Information

Referring Physician Name

Dr. Minnie Mouse

NPI

1032c917-7c3f-48c4-9999-7adbe29c7964

Organization

Meghan Hospitals

Provider Information (Notes)

Referring Person Name

Rahul

Referring Person Email

rahul@gmail.com

Referral Information

Referral Submitted Date

Jul 17, 1997

Referral Status

Pending

Note: Please click in to the individual programs below to check the status of each separate program.

26

Program Referred to Section

- a) The “Program Referred To” section will show each program within the CBO to which a patient was referred. Click the inverted arrow to open program details
- b) These fields are populated by the CBO. This data is also accessible through DC Portal Snapshot tab.

Program(s) (Limit 5)

Mini One

Mini Two

26b

Program(s) (Limit 5)

Mini One

| Program ID | Program Name | Program Description | Program Care Manager |
|------------|--------------|---------------------|----------------------|
| min1 | Mini One | | |

Program Care Manager Phone #

Program Start Date

Program End Date

Enrollment Status

Pending

Appointment Date

Appointment Status

CBO Notes/Care Alert

26a

Alternative Ways to View Referral Information in the DC Portal

27

Snapshot

Users can view referral information captured in the “Referral Portal CBO” tab within the Snapshot tab in the DC Portal.

- a) Under the Care Alerts widget, every time a patient is enrolled into a referral program, the alert populates here.
- b) The Care Team widget contains information that is populated via the CBO referral portal. Details for this can include information such as the care manager and contact information.

27a

| Alerts | | | |
|-----------------------------|---------------|---|------|
| <input type="text"/> Search | | | |
| Date | Source | Description | Type |
| 04/22/2022 | AAMC | GILBERT GRAPE has been enrolled into the TEST for Referrals at AAMC on 04/18/2022; | CA |
| 01/12/2022 | ENS_AMRGRFRFL | GILBERT GRAPE has been referred to Amerigroup's Diabetes Prevention Program - Healthy Living, Healthy You, on 11/10/2021; | CA |
| 11/18/2021 | ENS_MCHDR | Gilbert Grape has been enrolled into | CA |

27b

| Care Team | | | | | | |
|-----------------------------|--------------------|--------------|-------|-----------|-------------------------------|-------------|
| Organization | Organization Phone | Care Manager | Phone | PCP | Program | Status |
| YMCA of Metro Washington | | | | Dr. Smith | ENSYMCAMWSHAS | Disenrolled |
| Priority Partners Referrals | | | | Dr. Smith | ENSPRIORITY | Disenrolled |
| Aetna Referrals | | | | Dr. Smith | ENSCCICEN4 | ● Enrolled |
| DC Hunger Solutions | | | | Dr. Smith | ENSHNGSOL | ● Enrolled |

Social Needs Data

Users can log into the DC Portal at portal.crispdc.org, after searching for the patient the user will then click Clinical Information tab, followed by the Social Needs Data subtab. The referral history tab within the Social Needs Data subtab displays information on the date of the referral, program name, referral status, and the date the referral was last updated. One you click on a referral, a pop-up box will appear providing additional information on the referring provider and recipient of the referral.

HIE InContext

Gilbert Grape
Female | Jan 1, 1984

28

ASSESSMENTS CONDITIONS REFERRAL HISTORY

Referral History

| Date of Referral | Program Name | Status | Last Updated |
|------------------|------------------------------|-----------|--------------|
| 2021-11-26 | TEST for Referrals | Pending | 2021-11-26 |
| 2021-11-29 | TEST for Referrals | Pending | 2021-11-29 |
| 2021-11-30 | TEST for Referrals | Pending | 2021-11-30 |
| 2021-11-30 | Monoclonal Antibody Infusion | Completed | 2021-11-30 |
| 2021-12-01 | TEST for Referrals | Pending | 2021-12-01 |
| 2021-12-01 | Diabetes Prevention Program | Pending | 2021-12-01 |
| 2021-12-02 | TEST for Referrals | Pending | 2021-12-02 |
| 2021-12-03 | TEST for Referrals | Pending | 2021-12-03 |
| 2021-12-06 | TEST for Referrals | Pending | 2021-12-06 |
| 2021-12-07 | TEST for Referrals | Pending | 2021-12-07 |
| 2021-12-13 | Cancer Screening Program | Rejected | 2021-12-23 |

Referral History

Diabetes Prevention Program
Date Updated: 2021-12-01

Referral Sender

Referring Provider:
Referring Provider Organization: Not Provided
Referring Provider Phone: Not Provided
Referring Person: Mandy Williams
Referring Person Organization: Anne Arundel Medical Group
Referring Person Email: mandy.williams@crisphealth.org

Referral Recipient

Organization: Medicaid DPP – CareFirst Health Plan MCO
Program: Diabetes Prevention Program
Program Description: Referral for CareFirst Health Plan MCO members to be assessed for eligibility for the Diabetes Prevention Program and connected to these services. Please include current BMI and HbA1c or fasting blood sugar results, along with contact information for the patient.
Referral Coordinator: Not Provided
Referral Coordinator Phone: Not Provided
Referral Coordinator Email: Not Provided

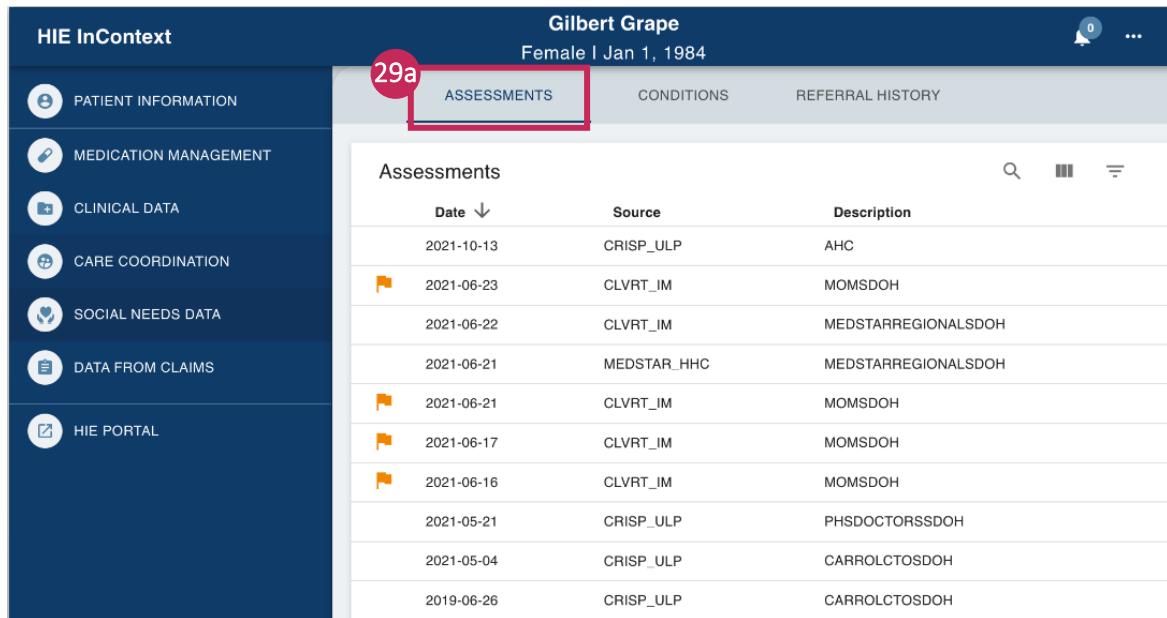
Referral Recipient Updates

Date: 2021-12-01
Note: Test referral for email notification

Social Needs Data

29

The user can also view the conditions subtab to see SDOH z-codes and the assessment subtab, which displays SDOH questionnaires submitted to CRISP and include information under the following SDOH domains: food insecurity, financial insecurity, housing, transportation, employment, etc. The social data displayed in these additional tabs can assist in understanding the social needs of patients and inform subsequent referrals.



29a

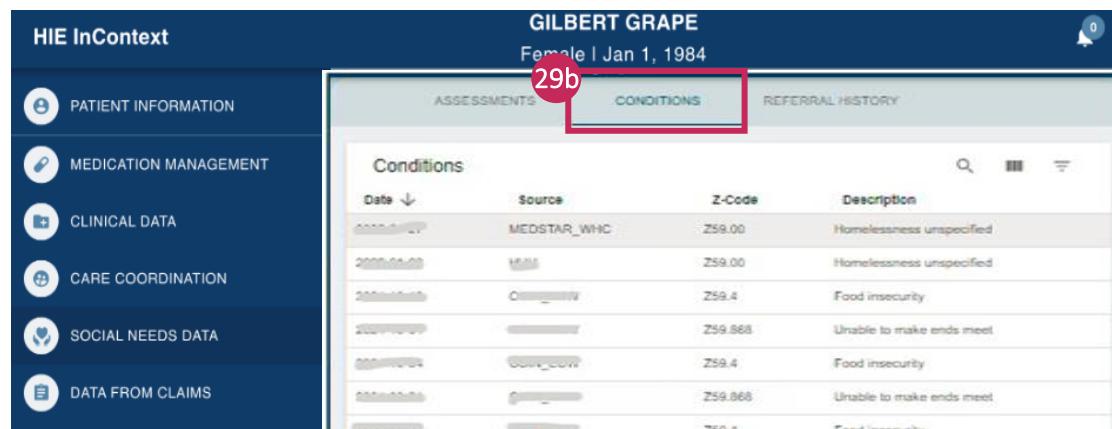
Gilbert Grape
Female | Jan 1, 1984

ASSESSMENTS (highlighted with a red box)

CONDITIONS **REFERRAL HISTORY**

Assessments

| Date | Source | Description |
|------------|-------------|---------------------|
| 2021-10-13 | CRISP_ULP | AHC |
| 2021-06-23 | CLVRT_IM | MOMSDOH |
| 2021-06-22 | CLVRT_IM | MEDSTARREGIONALSDOH |
| 2021-06-21 | MEDSTAR_HHC | MEDSTARREGIONALSDOH |
| 2021-06-21 | CLVRT_IM | MOMSDOH |
| 2021-06-17 | CLVRT_IM | MOMSDOH |
| 2021-06-16 | CLVRT_IM | MOMSDOH |
| 2021-05-21 | CRISP_ULP | PHSDOCTORSSDOH |
| 2021-05-04 | CRISP_ULP | CARROLCTOSDOH |
| 2019-06-26 | CRISP_ULP | CARROLCTOSDOH |



29b

GILBERT GRAPE
Female | Jan 1, 1984

ASSESSMENTS **CONDITIONS** (highlighted with a red box)

REFERRAL HISTORY

Conditions

| Date | Source | Z-Code | Description |
|------------|--------------|---------|--------------------------|
| 2020-06-01 | MEDSTAR_WHIC | Z59.00 | Homelessness unspecified |
| 2020-06-01 | WHIC | Z59.00 | Homelessness unspecified |
| 2020-06-01 | CLVRT_IM | Z59.4 | Food insecurity |
| 2020-06-01 | CLVRT_IM | Z59.868 | Unable to make ends meet |
| 2020-06-01 | CLVRT_IM | Z59.4 | Food insecurity |
| 2020-06-01 | CLVRT_IM | Z59.868 | Unable to make ends meet |
| 2020-06-01 | CLVRT_IM | Z59.868 | Homelessness unspecified |



Any additional questions, comments, or concerns? Please contact outreach at dcoutreach@crisphealth.org.

For support contact support@crisphealth.org or call 833.580.4646.