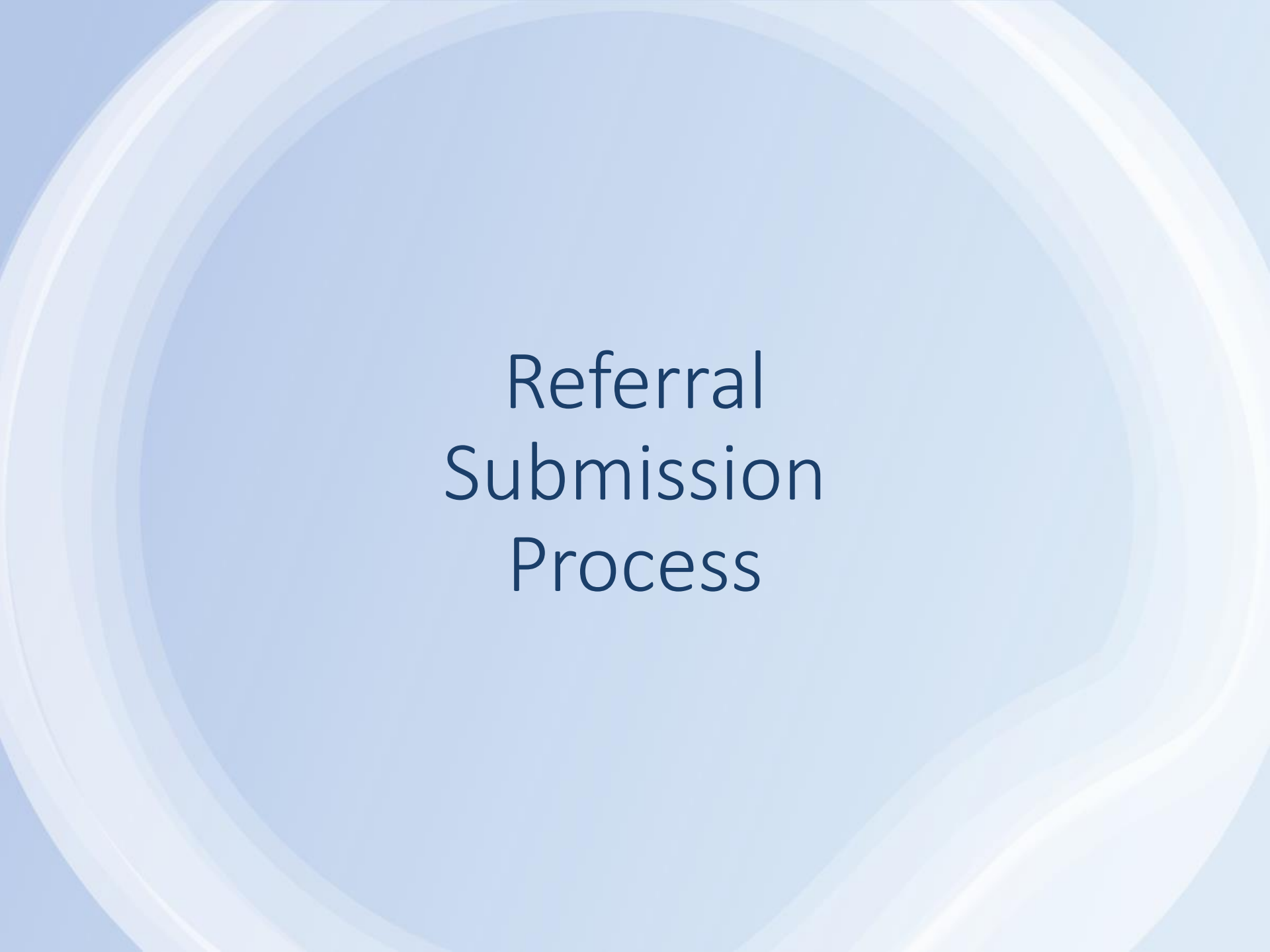




## **eReferral Tool**

User Guide



# Referral Submission Process

# CRISP DC eReferral Tool – 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

Q 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.

Reports & Applications

Referral Portal


Referral Portal CBO

Referral Portal MCO

Referrals

SBIRT

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.

3a

Referral Program

Organization

Sorogil

Please enter all relevant information that you would like relayed

Example: Luke Skywalker is a 44 y.o. male who presented to A&C Fast 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 referring this patient

3b

Programs

Diabetes Prevention Program

Diabetes Self-Management Education and Support (DSMES) Program

3c

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.

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

?

The background of the slide features a series of concentric circles in various shades of blue and light blue, creating a ripple effect that fills the entire frame.

# 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.

Reports & Applications

Referral Portal

Referral Portal CBO

Referral Portal MCO

Referrals

SBIRT

5

Auto Reject

Filter by Referral

Filter by Status

Referrals Overview

Look up Referral

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)

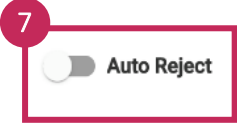
Referrals Overview

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

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.



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				

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

Filter by Status

☒ Pending

☒ Accepted

☐ Rejected

☐ Completed

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.

Grape,  
Gilbert

Jan 1, 1984

Sheena Patel

CRISP  
Internal  
Users - Break  
Glass

Aug 16, 2021 Pending

0 / 0 / 1

GRAPE,  
GILBERT

Jan 1, 1984

Sheena Patel

CRISP  
Internal  
Users - Break  
Glass

Jan 25, 2021 Pending

0 / 0 / 1

10

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	phoneNumbr	phoneNumbr	alternatePho	alternatePho	homeAddress	homeAddress	city	state	country	zip	bmi	hba1c	bloodPressur	cholesterol	fastingGluco	referringPhy	npi
2	b2fa0d97-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	93746db0-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	c678bab0-d0	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	03e8bebd-fb	GILBERT		GRAPE	01/01/1984	999-999-777	Home			4145 EARL C		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

Enrolled

#### Enrollment Date

4/18/2022



#### Appointment Date

4/20/2022



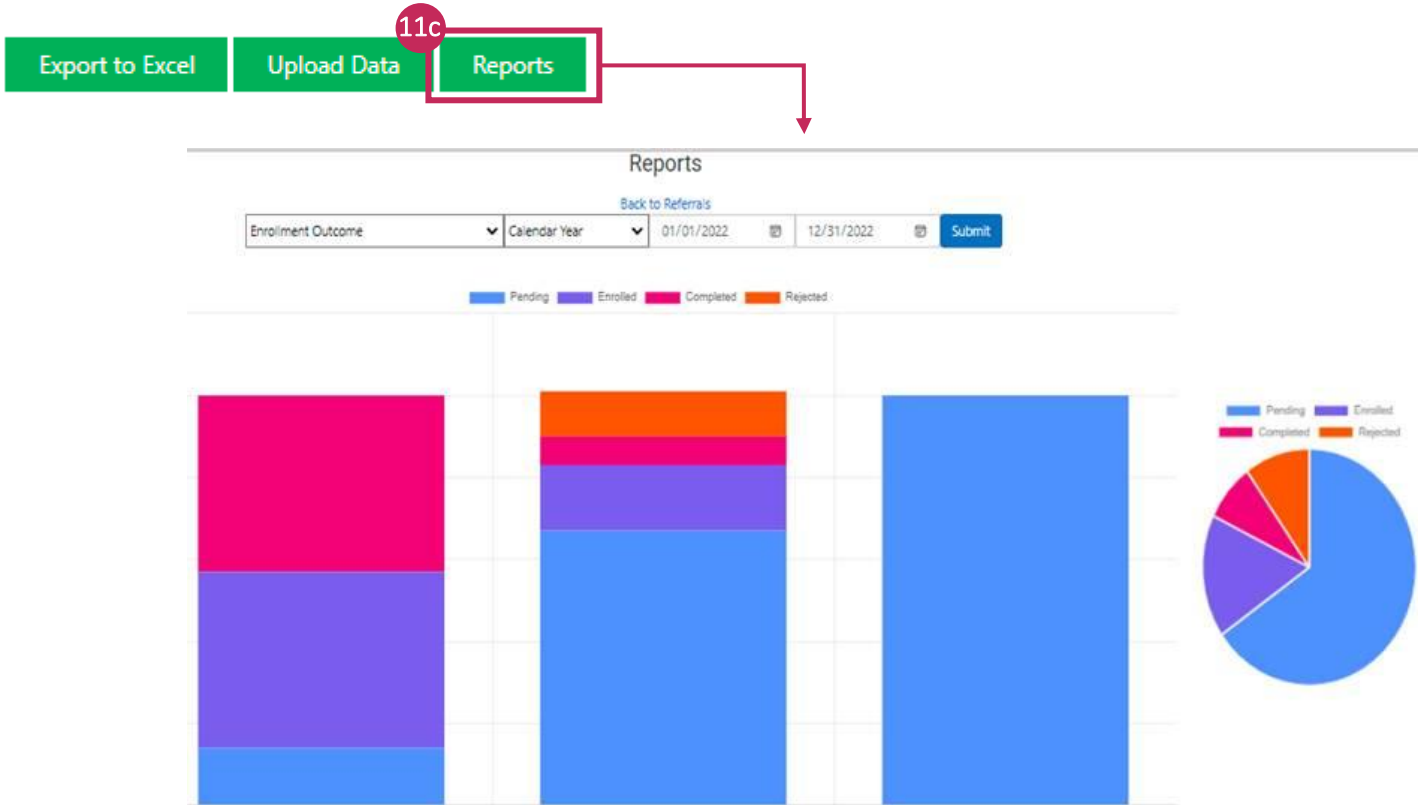
#### \*Appointment Status

Appointment Made

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.



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	✖	0
4016	Gilbert Grape		TEST.	2022-02-25	8775	Completed		PIMR	✖	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

The screenshot shows a modal window titled "Reason for Rejection". At the top, it says "Select a Reason for Rejection \*". Below this is a dropdown menu that is open, displaying a list of reasons: "Incomplete Referral/More Information Needed", "Patient Ineligible Based on Screening", "Patient Declined", "Patient Unreachable", "No Capacity/Funding", and "Others". The "Others" option is at the bottom of the list.

13b

The screenshot shows the same "Reason for Rejection" modal window. The dropdown menu now shows "Others" as the selected option. Below the dropdown, there is a text input field with a red border and a red asterisk, labeled "Enter a Reason \*". At the bottom right of the modal, there are two buttons: a red "Confirm" button and a green "Cancel" button.

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

ABCDE

Middle Name

Name Suffix

\*Gender

Male

SSN

###-##-####

First Name

GILBERT

Last Name

GRAPE

Date of Birth

Jan 1, 1984

Primary Language

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

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

Cell Phone

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

Alternate Phone (From Referral)

☐ Referral OutReach Attempted

Work Phone

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

Phone (From Referral)

678-595-4587 Home

Email (From Referral)

someone@hostname.com

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

<div>BMI</div> <div>25</div>	<div>HbA1c</div> <div>7.1</div>
<div>Blood Pressure</div> <div></div>	<div>Cholesterol</div> <div></div>
<div>Allergies</div> <div>NKDA</div>	<div>Fasting Glucose</div> <div></div>

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

**Organization**

CRISP Internal Users - Break Glass

**Referring Person Email**

sheena.patel@crisphealth.org

**NPI**

1234123412

**Referring Person Name**

Sheena Patel

**Referring Provider/Person Notes**

Gilbert needs help with nutrition planning and fitness options

The background of the slide features a series of concentric circles in various shades of blue and light blue, creating a tunnel-like or ripple effect. The circles are centered around the text.

# 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.

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18b

Reports & Applications

Referral Portal

Referral Portal CBO

Referral Portal MCO

Filter by Status

Pending (+1 other)

Referrals Overview

Look up Referral

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
<a href="#">Fields, Minie</a>		Jun 30, 1990	Min CBO	Jul 17, 1997	Pending		0 / 0 / 2
<a href="#">Fields, Schema</a>		Jan 1, 2001	Min CBO	Aug 26, 2020	Pending		0 / 0 / 2
<a href="#">optOut_test</a>	Prefer Not to Say	Jun 30, 1990	Min CBO	Sep 15, 2020	Pending		0 / 0 / 2
<a href="#">Tester82_Someone</a>	Male	Jan 22, 1972	CBO 1	Sep 24, 2020	Pending		0 / 0 / 3
<a href="#">Tester84_Someone</a>		May 2, 1963	CBO 1	Sep 30, 2020	Pending		0 / 0 / 3
<a href="#">Tester83_Someone</a>	Female	May 2, 2000	CBO 1	Sep 24, 2020	Accepted	Sep 24, 2020	0 / 2 / 3

Export to Excel

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 D
<a href="#">Fields, Minie</a>		Jun 30, 1990	Min CBO	Jul 17, 1997	Pending	0 / 0 / 2
<a href="#">Fields, Schema</a>		Jan 1, 2001	Min CBO	Aug 26, 2020	Pending	0 / 0 / 2
<a href="#">optOut_test</a>	Prefer Not to Say	Jun 30, 1990	Min CBO	Sep 15, 2020	Pending	0 / 0 / 2
<a href="#">Tester82_Someone</a>	Male	Jan 22, 1972	CBO 1	Sep 24, 2020	Pending	0 / 0 / 3
<a href="#">Tester84_Someone</a>		May 2, 1963	CBO 1	Sep 30, 2020	Pending	0 / 0 / 3
<a href="#">Tester83_Someone</a>	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

Filter by Status

☒ Pending

☒ Accepted

☐ Rejected

☐ Completed

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

Export to Excel

Name (last, first)	Gender	DOB	CBO	Ref. Date	Referral Status ↓	Accepted Date	Programs
<a href="#">Tester82, Someone</a>	Male	Jan 22, 1972	CBO 1	Sep 24, 2020	Pending		0 / 0 / 3
<a href="#">Tester84, Someone</a>		May 2, 1963	CBO 1	Sep 30, 2020	Pending		0 / 0 / 3
<a href="#">Tester83, Someone</a>	Female	May 2, 2000	CBO 1	Sep 24, 2020	Accepted	Sep 24, 2020	0 / 2 / 3

Items per page: 25

1 – 3 of 3

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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
<a href="#">Fields, Minie</a>		Jun 30, 1990	Min CBO	Jul 17, 1997	Pending		0 / 0 / 2
<a href="#">Fields, Schema</a>		Jan 1, 2001	Min CBO	Aug 26, 2020	Pending		0 / 0 / 2
<a href="#">optOut_test</a>	Prefer Not to Say	Jun 30, 1990	Min CBO	Sep 15, 2020	Pending		0 / 0 / 2
<a href="#">Tester82_Someone</a>	Male	Jan 22, 1972	CBO 1	Sep 24, 2020	Pending		0 / 0 / 3
<a href="#">Tester84_Someone</a>		May 2, 1963	CBO 1	Sep 30, 2020	Pending		0 / 0 / 3
<a href="#">Tester83_Someone</a>	Female	May 2, 2000	CBO 1	Sep 24, 2020	Accepted	Sep 24, 2020	0 / 2 / 3

22

Export to Excel

Items per page: 25 1 - 6 of 6 |< < > >|

	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	phoneN	alternat	alternat	homeAddress1	homeAd	city	state	country	zip	bmi	hba1c	bloodPi	cholesti	fastingC	referrin
2	1d1d1216-559b-4251-1f15-afc6723d3b21	Test7		AutoReject7	04/24/2000																Dr. Minn
3	1d1d1216-559b-4251-1f15-afc6723d3b21	Test7		AutoReject7	04/24/2000																Dr. Minn
4	1d4d7776-559b-4251-9f55-afc6723d3b21	Test4		AutoReject4	04/24/2000																Dr. Minn
5	1d4d7776-559b-4251-9f55-afc6723d3b21	Test4		AutoReject4	04/24/2000																Dr. Minn
6	1032c917-7c3f-48c4-8bcd-7adbe29c7084	Someone	middletest	Tester84	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	middletest	Tester84	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	middletest	Tester84	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		AutoReject3	04/24/2000																Dr. Minn
10	1d5d7366-559b-4251-9f55-afc6723d3b21	Test3		AutoReject3	04/24/2000																Dr. Minn
11	1b5b7367-789b-4241-9f94-afc6723d3b21	Test2		AutoReject2	04/24/2000																Dr. Minn
12	1b5b7367-789b-4241-9f94-afc6723d3b21	Test2		AutoReject2	04/24/2000																Dr. Minn
13	1032c917-7c3f-48c4-8bcd-7adbe29c7083	Someone	middletest	Tester83	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	middletest	Tester83	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	middletest	Tester83	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	middletest	Tester82	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	middletest	Tester82	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	middletest	Tester82	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

26a

Mini Two

26b

Program(s) (Limit 5)

Mini One

Program ID

min1

Program Name

Mini One

Program Description

Program Care Manager

Program Care Manager Phone #

Program Care Manager Email

Program Start Date

Program End Date

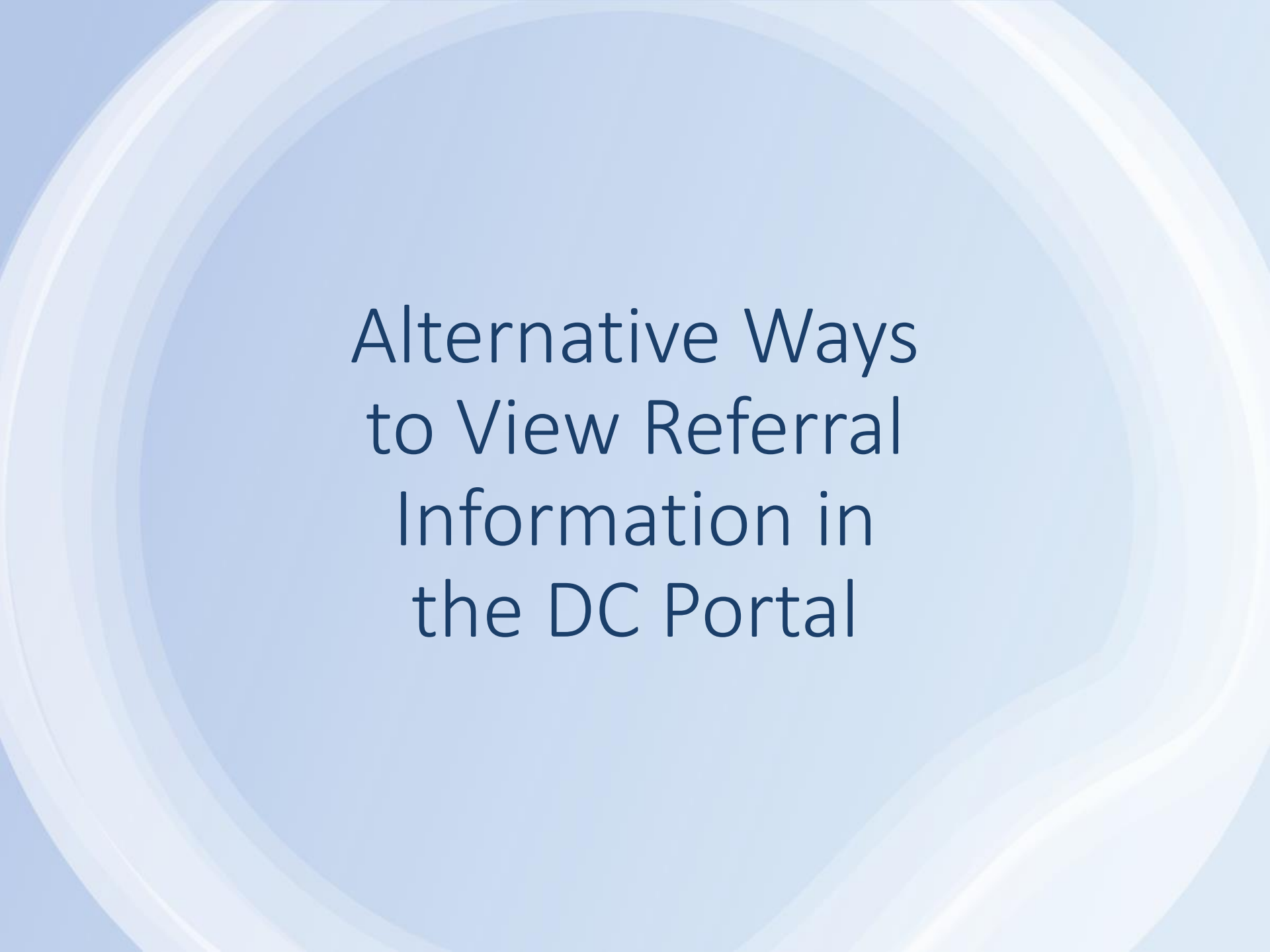
Enrollment Status

Pending

Appointment Date

Appointment Status

CBO Notes/Care Alert



# 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			
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_AMRGRFRL	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	<a href="#">ENSYMCAWASHAS</a>	Disenrolled
Priority Partners Referrals				Dr. Smith	<a href="#">ENSPRIORITY</a>	Disenrolled
Aetna Referrals				Dr. Smith	<a href="#">ENSCCICEN4</a>	Enrolled
DC Hunger Solutions				Dr. Smith	<a href="#">ENSHINGSOL</a>	Enrolled

28

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

0

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PATIENT INFORMATION

MEDICATION MANAGEMENT

CLINICAL DATA

CARE COORDINATION

SOCIAL NEEDS DATA

DATA FROM CLAIMS

HIE PORTAL

ASSESSMENTS

CONDITIONS

REFERRAL HISTORY

Referral History

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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

29

Social Needs Data

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.

HIE InContext

Gilbert Grape

Female | Jan 1, 1984

0

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PATIENT INFORMATION

MEDICATION MANAGEMENT

CLINICAL DATA

CARE COORDINATION

SOCIAL NEEDS DATA

DATA FROM CLAIMS

HIE PORTAL

29a

ASSESSMENTS

CONDITIONS

REFERRAL HISTORY

Assessments

Search

Filter

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

HIE InContext

GILBERT GRAPE

Female | Jan 1, 1984

0

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PATIENT INFORMATION

MEDICATION MANAGEMENT

CLINICAL DATA

CARE COORDINATION

SOCIAL NEEDS DATA

DATA FROM CLAIMS

ASSESSMENTS

29b

CONDITIONS

REFERRAL HISTORY

Conditions

Search

Filter

Date ↓	Source	Z-Code	Description
2021-10-13	MEDSTAR_WHC	Z59.00	Homelessness unspecified
2021-06-23	CLVRT	Z59.00	Homelessness unspecified
2021-06-23	CLVRT	Z59.4	Food insecurity
2021-06-22	CLVRT	Z59.868	Unable to make ends meet
2021-06-21	CLVRT	Z59.4	Food insecurity
2021-06-17	CLVRT	Z59.868	Unable to make ends meet
2021-06-16	CLVRT	Z59.4	Food insecurity



Any additional questions, comments, or concerns? Please contact outreach at [dcoutreach@crisphealth.org](mailto:dcoutreach@crisphealth.org).

For support contact [support@crisphealth.org](mailto:support@crisphealth.org) or call 833.580.4646.

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833.580.4646 | [www.crispdc.org](http://www.crispdc.org)