Population Explorer User Guide

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CRISP

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1 Introduction and Overview

The Population Explorer is a module of the HIE Portal that enables near-real time encounter notifications from CSS Insights, as well as functionality to filter, view details, and export notifications of interest. This document serves as a general user guide to assist in navigating the Population Explorer and associated functionality.

1.1 Accessing the Population Explorer

Access to the Population Explorer module is granted by your HIE Admin from the CSS Salesforce HIE Admin Tool. Once you have been granted access, it will natively appear in the HIE Portal Landing page as a new widget on the right-hand side of the screen. If you do not have access to the Population Explorer and believe that you should, please contact your organizational HIE Admin or CRISP Support at support@crisphealth.org to request access.

Once you have access to the Population Explorer itself, access to patient notifications is managed via your Panel Subscriptions. For more information on creating and managing panels, contact your account manager.

2 Population Explorer – Basic Functionality

After logging into the HIE Portal once Population Explorer access has been granted, you will see a new widget pane appear on the right-hand side of the screen, as shown below.

2.1 Panel Selection & Notification Display

To select a panel, use the drop-down menu at the top of the pane with the label 'View Panel.' All of your currently available panels will be available here. The pane will populate with encounter notifications for that panel.

Notification updates are fetched every twenty minutes, and by default new notifications will appear automatically at the top of this pane. Twenty-five notifications are loaded at a time; to see additional notifications, simple scroll down and additional notifications will load twenty-five at a time.

If no notifications are available for the currently selected panel, a message 'No data to display' will appear until a notification is received. If new notifications are available for a panel you are not currently viewing, a small notification icon will appear in the upper-right corner to notify you.

To download the currently displayed list of notifications, click the 'Download' button immediately beneath the panel selection dropdown menu.

2.2 Population Explorer Options

Clicking the gear icon in the upper left corner of the Population Explorer pane will bring up the settings for the module. This allows you to set your preferred defaults, including the default view on load for the Population Explorer, default panel to select on opening, and default number of records included in downloaded extracts.

2.3 Expanded View

To expand the Population Explorer and access additional functionality, click the blue expansion bar on the left hand side of the pane. Clicking the expansion bar again will collapse, then hide the pane entirely. Clicking again will restore the pane to its default view.

The Expanded View shows the current notification list, Detail View, and Quick Filter interfaces all in one location, as shown below. Each of these is described in greater detail in the sections that follow.

2.4 Detail View

To view the details for a notification, click on the notification you want to review. This will bring up a Notification Detail View that contains additional information on the notification, as shown below.

Along with the encounter details for the selected notification, the Detail View will contain all other notifications for the selected patient, loading history for the past 6 months by default. Clicking on any one of these past notifications will switch to the detail view for that notification. If you scroll down in the Detail View window, you will also see an expanded list of all diagnosis codes associated with that event.

To export the current Detail View, click on the Export button to export it in your preferred format. Additional information on the export functionality is available in Section 2.7 below.

2.5 Launch with Context

To launch another CSS application with context for the patient from a notification, right-click on the notification anywhere it appears - in the collapsed widget, left hand list in the Detail View, or a row in the Table View described below - and select the desired application, as shown at right.

2.6 Table View

You can switch between Detail View and Table View in the expanded pane using the tabs in the upper left corner of the screen. Switching to Table View presents you with a list of notifications that can be customized and sorted by clicking on the column headers.

2.7 Creating and Managing Filters

You can create, manage, save, and apply filters to the notification list using the 'Quick Filter' bar on the right-hand side of the screen.

To add a new filter, click "type to select" then begin typing the data element you would like to filter on, select the desired filter criteria, and then click the 'Apply' button to apply that filter. Different selection interfaces will appear depending on the selected data element; for example, a date picker will appear allowing you to set desired date ranges for data elements that represent datetimes.

The current list of notifications will then be automatically filtered according to the created criteria. You can apply as many filters as you like; in the quick filter view, all filters are applied as 'AND' criteria. Appendix A provides a list of all the data elements available for filtering, along with the criteria that can be applied.

To remove a previously applied filter criteria, navigate to the list of current filters then click the Delete icon next to the filter you would like to remove.

To clear all current filters, click the 'Clear Filters' button in the bottom left corner of the Quick Filter pane. This will remove all current filters but will not change or delete any previously saved filters.

To save the current set of filters so that it can be reused later, click the 'Save Current Filter' button in the bottom right corner of the Quick Filter pane.

To apply a previously saved filter, select it from the 'Saved Filters' dropdown, then click the 'Load' button. The criteria from the save filter will then appear in the 'Current Filters' list. Note that this will override any filters in place at the time the saved filter was applied.

2.8 Managing Notification Status

This functionality allows you to track the follow-up status of a notification within the Population Explorer interface.

To enable or disable this functionality in the UI, simply click the gear icon in the upper left corner of the Population Explorer pane, and check or uncheck the 'Manage Notification Status.' Note that this will not change or remove any statuses that have been set; it simply determines whether the functionality displays in the UI so that users who do not need this functionality can hide it to keep their interface clean. By default, this is enabled.

If enabled, a Status drop-down menu will be available for each encounter in both the Detail View (as shown above above) and Table view (below), along with Last Edited information. The available status values are Not Started, In Progress, and Complete, and a set status will be shared with all users who have access to the specific panel and notification you are currently viewing. The last user to make a change to the status will be displayed next to the current status, along with the time of the change. Status values are persisted for a given notification until a user changes the value and are for informational purposes only. CSS does not edit or otherwise maintain these statuses – they are entirely user-driven.

The status for patients can be included as a data element in exported extracts along with other information, as described in the next section.

2.9 Exporting Data

Data can be exported from most views of the Population Explorer simply by hitting the 'Export' button. This will allow you to create Excel or PDF versions of the data you are currently viewing, as appropriate.

Prior to exporting, you must read and acknowledge the terms for exporting protected health information. All exports must be handled in accordance with HIPAA and appropriate security safeguards for this type of information.

After agreeing, you will be presented with the Export Interface. This interface allows you to select which fields you would like to include in the created extract by selecting from the available fields. 'Select All' and 'Select None' buttons are made available to quickly change the selection status for all fields. Additionally, you can 'Save Selected Fields As My Default' after making your choices so that the selected fields will auto-select for all future exports that you create. You can always modify the included fields and your defaults at the time of subsequent exports as desired.

Some fields are required to generate the extract; these will be displayed on the left-hand side of the interface, but cannot be changed.

After you are done customizing the data fields for the export, simply select the desired export type, PDF or Excel, and the extract will be generated and you will be allowed to save the file locally according to the settings of the internet browser you are using. Some export options (such as the table view) will only allow export via Excel, given the amount of data to be included.

3 Appendix A: Filter Data Elements & Criteria

Below is the list of data elements currently available in the Quick Filter, as well as the criteria that can be applied to each data element type.

3.1 Table 1: Filter Data Elements

Note that data elements will only filter if they are present in the underlying encounter data; not all data elements made available in the Population Explorer are fully populated in the originating data feed.

Name	Type	Value Set	Notes
Admit Date / Time	Datetime		
Admit Source	Free Text		
Care Manager	Free Text		
Care Manager Email	Free Text		
Care Program	Free Text		
Death Indicator	Boolean		
Diagnosis Codes	Code	Valid ICD-10 diagnosis codes	
Diagnosis Description	Free Text	Valid ICD-10 diagnosis code descriptions	
Discharge Date / Time	Datetime		
Discharge Disposition	Free Text		
Discharge To Location	Free Text		
Encounter Date	Datetime		
Encounter Type	Free Text		
Facility Type	Free Text		
Insurance Type	Free Text		
MRN	Free Text		Local Source MRN
Patient Class	Fixed Value Set	E, I, O, Obs	
Patient Complaint	Free Text		
Patient Name	Free Text		
Point of Care	Free Text		
Primary Diagnosis Code	Code	Valid ICD-10 diagnosis codes	
Primary Diagnosis Code Description	Free Text	Valid ICD-10 diagnosis code descriptions	
Provider	Free Text		
Follow-Up Status	List	Not Started, In Progress, Complete	User-provided

3.2 Table 2: Data Type Filter Criteria

Data Element Type	Available Criteria
Boolean	Is, Is Not
Date / Time	Before, After, Exact Date, Range
Code	Equals, Does Not Equal, In, Not In
Fixed Value Set	Equals, Does Not Equal, In, Not In
Free Text	Starts With, Ends With, Contains, Does Not Contain, Equals, Does Not Equal