ULP® Starter Guide

Unified Landing Page is the single-login access point to all WVHIN services and provides a streamlined method of accessing all applications while requiring only one username and password.

The ULP features:

- A universal patient search with capabilities such as "fuzzy search" to show potential matches and an option to combine patient records into the same view for some applications.

- The ability to switch between applications while viewing the same patient. Seamlessly access to new applications while still maintaining a single username and password.

WEST VIRGINIA HEALTH INFORMATION NETWORK

ULP® STARTER GUIDE

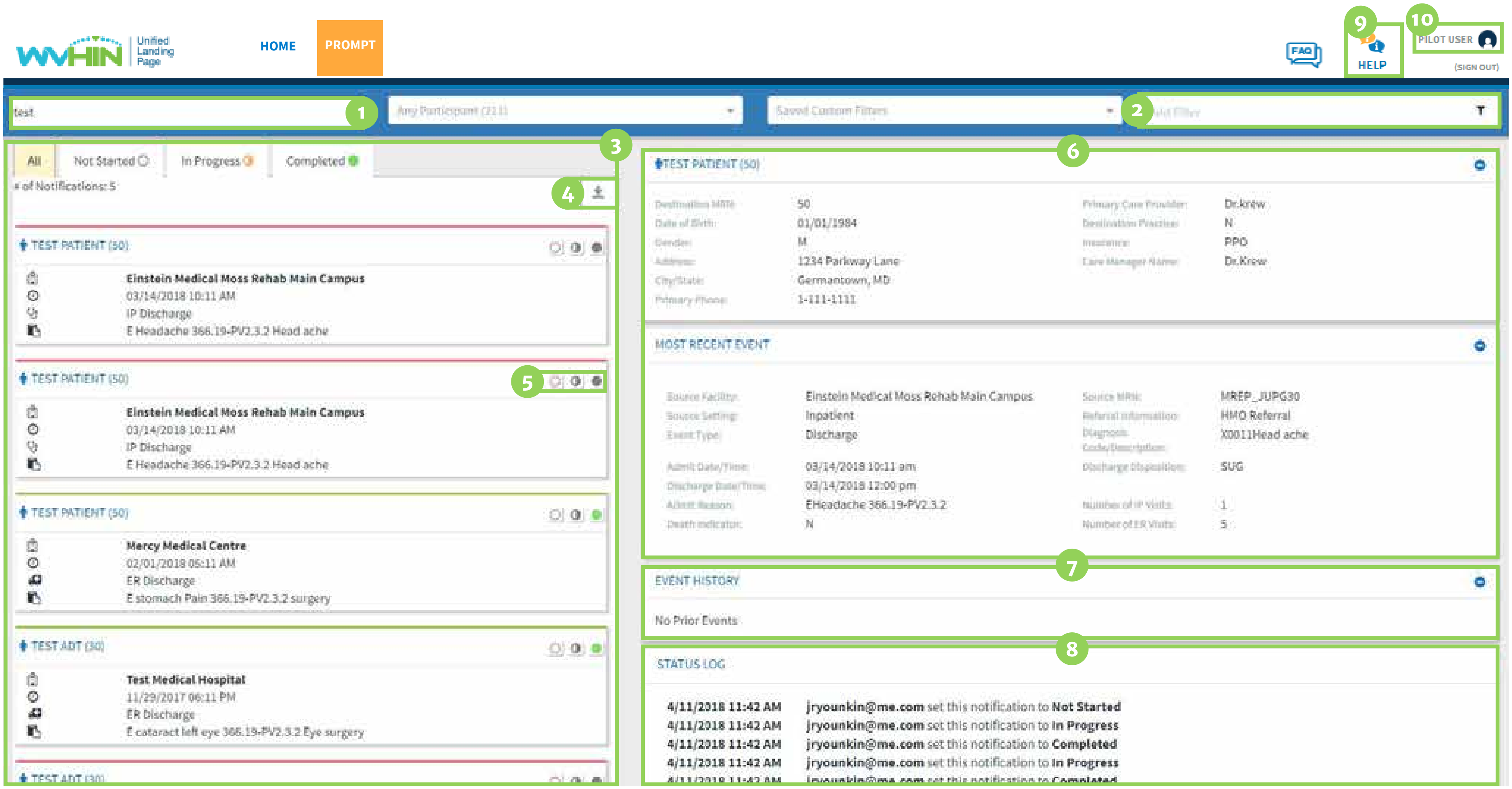
PROMPT

Proactive Management of Patient Transitions, PROMPT, was developed to provide an easy to use interface for clinicians to access notifications and other capabilities of the Encounter Notification Service® (ENS®).

ULP® STARTER GUIDE

PROMPT

Please email support@crisphealth.org for any issues, suggestions or defects.



Here's what you can do in PROMPT:

1. **Conduct a Search**
2. **Apply a Filter**
3. **View a List of Notifications**
4. **Download the Notifications Summary**
5. **Mark Work-flow Status**
6. **Access the Full Notification**
7. **View Prior Events**
8. **View the Status Log**
9. **Get Help**
10. **Activate Account Settings**

PROMPT

Please email support@crisphealth.org for any issues, suggestions or defects.

If you want to:

Use this approach:

1 Conduct a Search

A user can use the search box to filter results by patient name or MRN (Patient ID). The Patient ID or MRN is pulled from the patient panel submitted by the Participant. If a user prefers to search for the MRN of the source facility (i.e., where the event took place), he/she can use the Add Filters drop-down and apply a filter for Source MRN.

2 Apply a Filter

There are a variety of filters that can be used in PROMPT to improve the view of notifications. First, if a user has access to more than one participant (i.e., if he/she has submitted more than one patient panel), he/she can click the Participant drop-down to see notifications from a single Participant or all (Any Participants). Additionally, a user can filter by specific data elements in the notification using the Add Filters drop-down (e.g., number of ER visits, Diagnosis, Chief Complaint, PCP, Event Type). This feature allows the user to apply specific search criteria to the notifications view. For example, a user could search for frequent ED utilizers with filters for Patient Class = Emergency (E), Event Type = Discharge (A03), and Number of ER visits > 3.

3 View a List of Notifications

The notifications preview provides a quick summary of the following items:

- Gender
- Name
- MRN/Unique identifier assigned by you (the Participant)
- The date and time of the encounter/event
- The notification event type
- The Patient Complaint followed by the Diagnosis if provided

4 Download the Notifications Summary

One of the buttons in the upper right corner of the notifications preview section is the download button. This allows you to download all notifications or a list of notifications that have been selectively filtered (up to a maximum of 500 notifications). The downloaded notifications are saved as a comma separated file (.csv), which will open in Microsoft Excel. This feature allows the user to download notifications at any time based on his/her selected criteria and share data with outside users or care teams, add additional data to the spreadsheet, and more.

5 View Work-flow Status

PROMPT was created to be lightweight and intuitive. Three basic work-flow statuses were created (Not Started, In Progress, and Completed) to allow users to track actions taken during care coordination. Each status corresponds to the respective tab in the notifications preview screen and will also be recorded in the Status Log section of the full notification view.

Please email support@crisphealth.org for any issues, suggestions or defects.

If you want to:	Use this approach:
6 **Access the Full Notification**	When a notification is selected from the list, a more detailed information view will display on the right with information from both the ADT message and the patient panel submitted by the participant. This includes key demographic and event information including, but not limited to: • Name • Patient ID or MRN • Phone Number • Date of Birth • Address • Number of IP and ER Visits (last 6 months) • Recorded Event Date and Time • Patient Class (e.g., ER, IP, OP) • Event Type (e.g., Admit, Discharge) • Event Location • Patient Diagnosis • Discharge Disposition • Discharge to Location • Patient Complaint • Admit Source
7 **View Prior Events**	At the bottom of the detailed notification view, ENS also displays a list of historical events for the patient. The Event History begins when the participant went live on PROMPT (when the first patient panel/roster was submitted). Each prior event is populated by information from the ADT that was received.
8 **View the Status Log**	A Status Log section is displayed below the Most Recent Event and/or Additional Information sections of the detailed notification view. This section provides a history of actions taken by users when changing the status of a notification during their work-flow. Each entry will record the user name, date and time, and which work-flow status was set for the notification.
9 **Get Help**	Clicking the question mark in the upper right hand corner will allow you to directly email the ticketing system to keep track of any questions, issues or suggestions. (PHI is permitted within the feedback portal)
10 **Activate Account Settings**	Your name is displayed in the upper right hand corner. Upon clicking it, two options will be listed: change password and logout.
Change Your Password	Clicking change password will go to the screen where a user can change the password by entering the old password and requested new password.
Logout	The logout function allows the user to remove the authentication of the user. Closing the window for ULP will automatically log the user off as well.

WEST VIRGINIA HEALTH INFORMATION NETWORK

ULP® STARTER GUIDE

Panel Loader

Learn how to upload patient panels from your system to receive Encounter Notification Service (ENS) alerts.

Navigate the Panel Loader homepage by following this step-by-step process:

1 View the Status

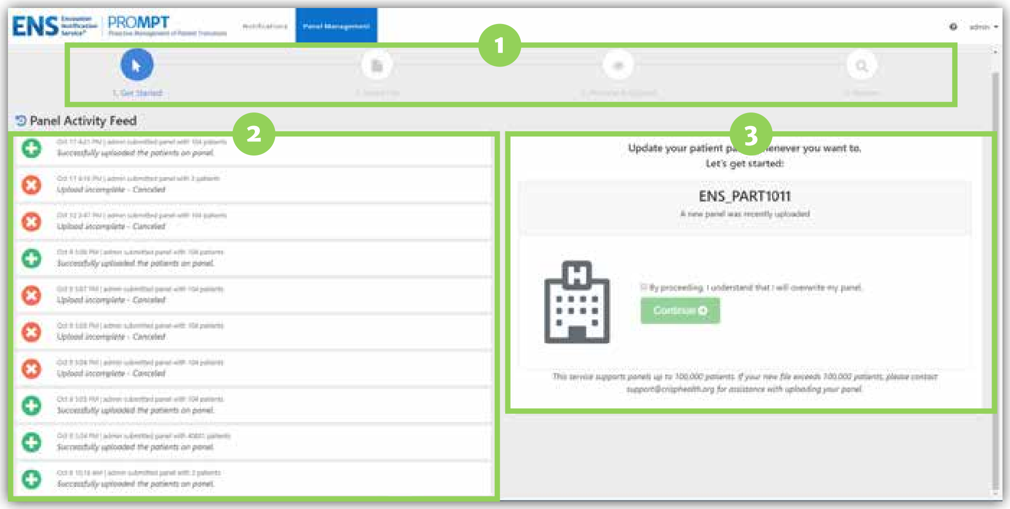
The status bar displays the various phases of the panel upload process and changes as you progress through each phase.

2 View the Panel Activity

The feed on the left shows a history of previous user activity loading

panels. You can click on each entry to view a "Completed Task Report," which shows the breakdown of rows/patients in the following statuses after an attempted upload:

- **Total** – Number of patients on the patient panel template during upload.
- **Not Processed** – Number of patients on the panel that were rejected due to an MPI error threshold limit being met or exceeded. If the template reaches the 5% threshold for MPI or Overlaid rows, the entire panel will be rejected.
- **Mapping Error** – Number of patients/rows with data from a required field omitted or entered in the wrong format.
- **MPI Error** – Number of patients rejected from the Master Patient Index.



- **Invalid** – Number of patients that failed the validation rule(s) and the user chose 'Reject Rows' instead of 'Use Anyway'.
- **Overlaid** – Number of patients with a conflict in the MPI where the same MRN / Patient ID is provided for different demographics.
- **Published** – Number of patients from the panel that have been successfully uploaded to the system.

3 Upload Patient Panel

This box displays the number of patients on the current patient panel and allows you to upload a new panel to overwrite existing patients (click the check box and click Continue). Please ensure you are using the correct panel template (downloaded through the site or CRISP website) and follow the formatting guidelines.

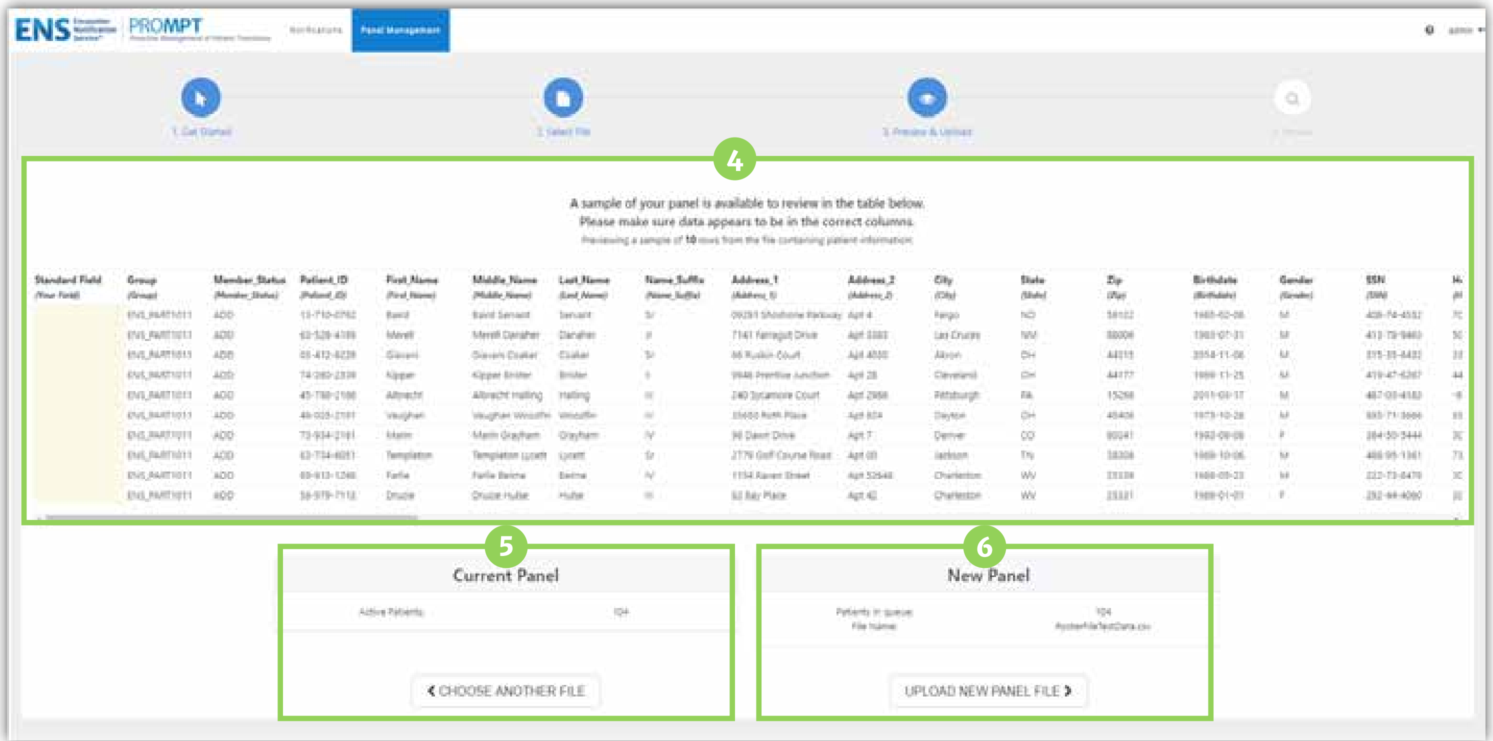
Continue by previewing your panel and uploading:

4 File Preview

Displays a random sample of 10 rows/patients from the panel to give the user the opportunity to check formatting and data quality (i.e., ensure the headers match the data below). Mapping errors (blank data or incorrect formatting in required fields, e.g., address, Birth date) will display here for the previewed rows.

5 Current Panel

Displays the number of active patients on the current panel. Users can click Choose Another File if their data is displaying incorrectly and need to start over.



6 Current Panel

Displays the number of active patients on the current panel. Users can click Choose Another File if their data is displaying incorrectly and need to start over.

Panel Loader

Please email support@crisphealth.org for any issues, suggestions or defects.

7 Progress Bar

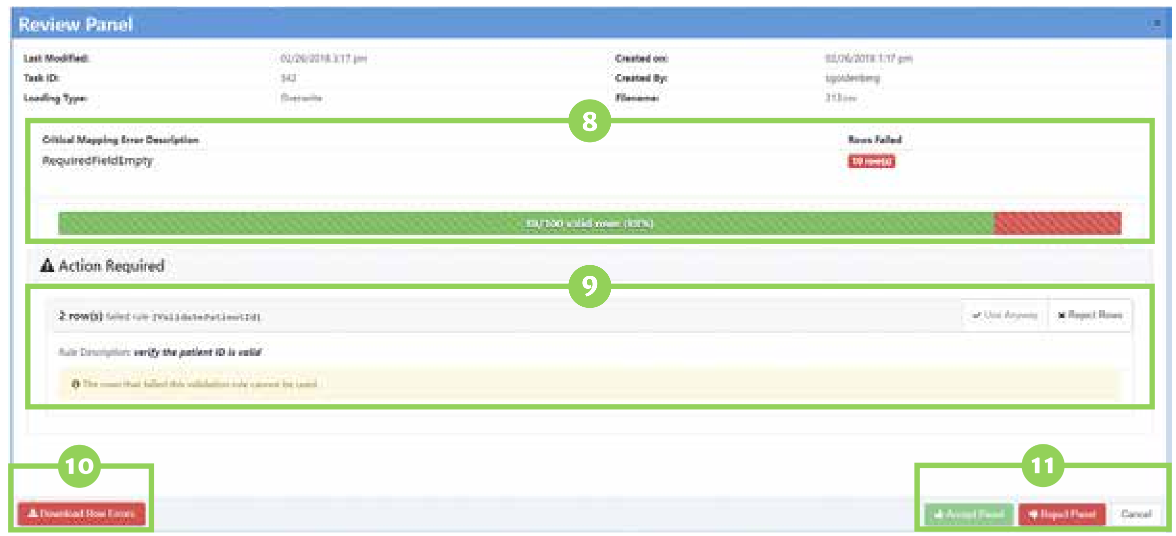
Displays after the user clicks Upload Panel on the previous screen and the panel details are ready for review. This may take several hours depending on the user's connection and panel size, but users can close the browser and return later. Click Review Panel to proceed.

8 Mapping Errors

If mapping errors are present, a description of the mapping error and number of rows affected will be displayed here. This section will not display if there are no mapping errors.

9 Validation Results

If validation errors are present during upload, information will be displayed here and prompt the user to click Use Anyway or Reject Rows from the panel. This section will not display if there are no validation errors.



10 Validation Results

Allows the user to download rows that have mapping and/or validation errors (row number and error reason will display) for troubleshooting.

11 Complete Upload

After reviewing any mapping or validation errors (if applicable), the user can click Accept Panel, Reject Panel, or Cancel. Accepting or rejecting the panel will complete the upload process and return the user to the home screen. Any MPI or Overlaid errors will display after upload when the user returns to the home screen to click entry in the Panel Activity Feed to view the Completed Task Report.

WEST VIRGINIA HEALTH INFORMATION NETWORK

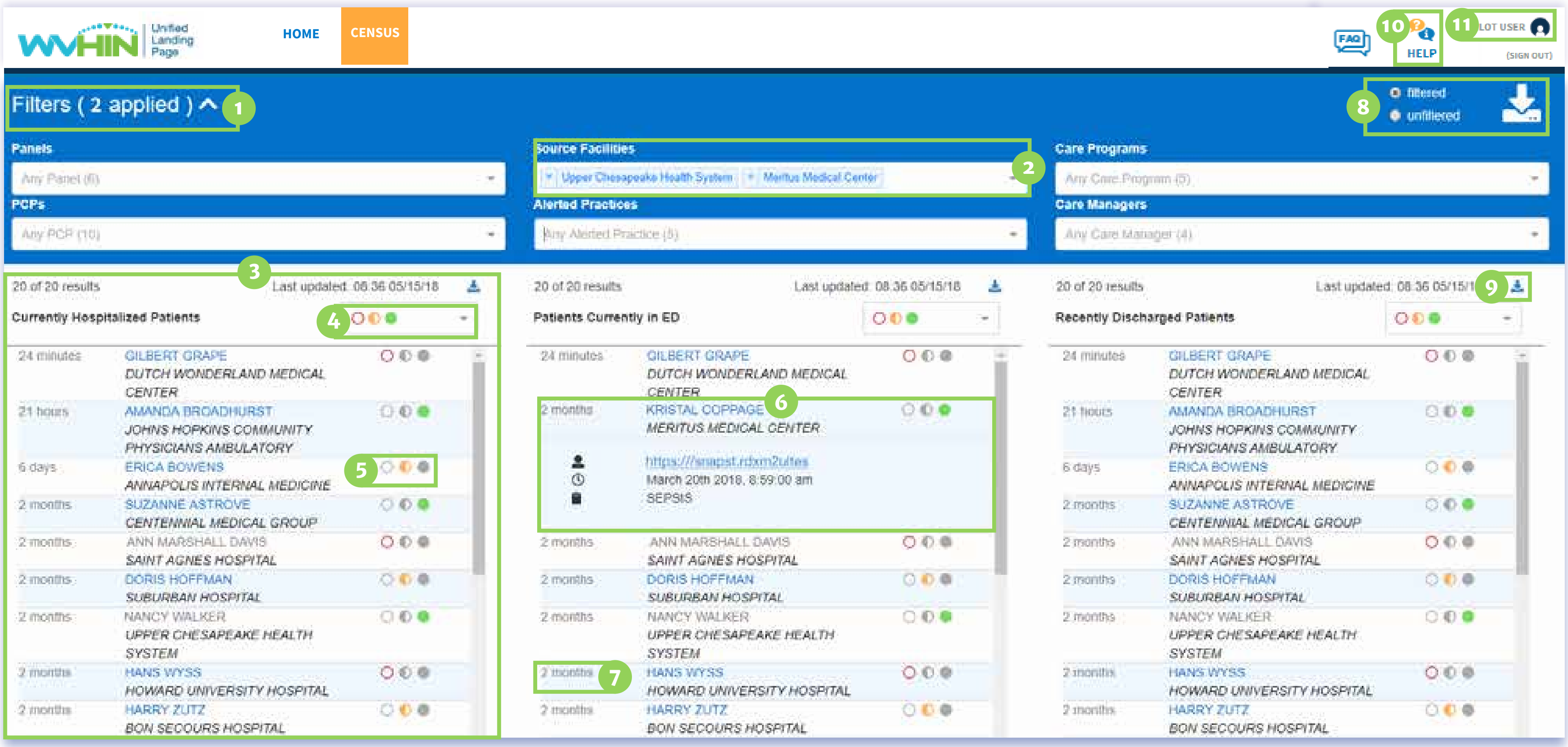
ULP® STARTER GUIDE

Census View

CENSUS View was developed to provide an easy-to-use tool for clinicians and care coordinators to access notifications, patient status, and other capabilities of the Encounter Notification Service® (ENS®) all in a single in-depth view.

Census View

Please email support@crisphealth.org for any issues, suggestions or defects.



Here's what you can do in Census View:

1. Display the Filter Summary
2. Apply a Filter
3. Visit Panels
4. Apply the Work-flow Filter
5. View the Work-flow Status
6. Access Patient Information
7. View Length of Stay
8. Download All Visit Panels
9. Download an Individual Panel
10. Get Help
11. Activate Account Settings

Census View

Please email support@crisphealth.org for any issues, suggestions or defects.

If you want to:	Use this approach:
1 **Display the Filter Summary**	The "Filters" button in the upper left-hand corner displays the filters currently applied to the user's patient panels. To view/hide applied filters, click the drop-down arrow.
2 **Apply a Filter**	There are six filters that can be used in Census to organize the patient panels. Users can apply filters from the following categories: Panel, Source Facility, Care Program, PCP, Alerted Practices, and Care Managers. The information used to generate the filters is pulled from the patient panel submitted by the Participant. To add a filter, a user can manually enter search criteria into the appropriate field or click the drop-down arrow to select one of the options provided. To remove a specific filter, click the "X" to the left of the filter. To remove all filters within a category, select the "X" to the right of that category.
3 **Visit Panels**	The visit panels allow a user to view the location of his/her patients. Currently, Census displays three panels: "Currently Hospitalized Patients", "Patients Currently in the ED", and "Recently Discharged Patients". Over time, additional panels may be included.
4 **Apply the Work-flow Filter**	The work-flow filter function allows a user to sort a panel based on the patient's care coordination status ("Not Started", "In Progress", "Completed").
5 **View the Work-flow Status**	The work-flow status icons allow a user to track a patient's care coordination status throughout their encounter. The red outlined circle indicates a patient's care coordination status as "Not Started", the orange partially-filled circle indicates a status as "In Progress", and the green solid circle indicates a status as "Completed".

Census View

Please email support@crisphealth.org for any issues, suggestions or defects.

If you want to:	Use this approach:
6 **View Patient Information**	Click on the patient's name to view more information including a link to the Patient Care Snapshot (providing an in-depth patient view), the exact time and date of event, and the patient's diagnosis.
7 **View Length of Stay**	The column to the left of the patient's name display his/ her length of stay.
8 **Download All Notification Panels**	The white download icon in the upper right-hand corner allows the user to download all notification panels ("Currently Hospitalized Patients", "Patients Currently in ED", and "Recently Discharged Patients") simultaneously. Click the "filtered" button to download all visit panels with your selected filters applied; click the "unfiltered" button to download all notification panels without any filters.
9 **Download an Individual Panel**	The blue download icon in the upper right-hand corner of each visit panel allows the user to download that visit panel individually. The panel will [automatically] download with the filters selected by the user once clicked. To download the panel without filters, manually clear filters from the appropriate categories(s) at the top of the page.
10 **Get Help**	Clicking the question mark in the upper right hand corner will allow you to directly email the ticketing system to keep track of any questions, issues or suggestions. (PHI is permitted within the feedback portal)
11 **Activate Account Settings**	Your name is displayed in the upper right hand corner. Upon clicking it, two options will be listed: change password and logout.
Change Your Password	Clicking change password will go to the screen where a user can change the password by entering the old password and requested new password.
Logout	The logout function allows the user to remove the authentication of the user. Closing the window for ULP will automatically log the user off as well.

WEST VIRGINIA HEALTH INFORMATION NETWORK

ULP® STARTER GUIDE

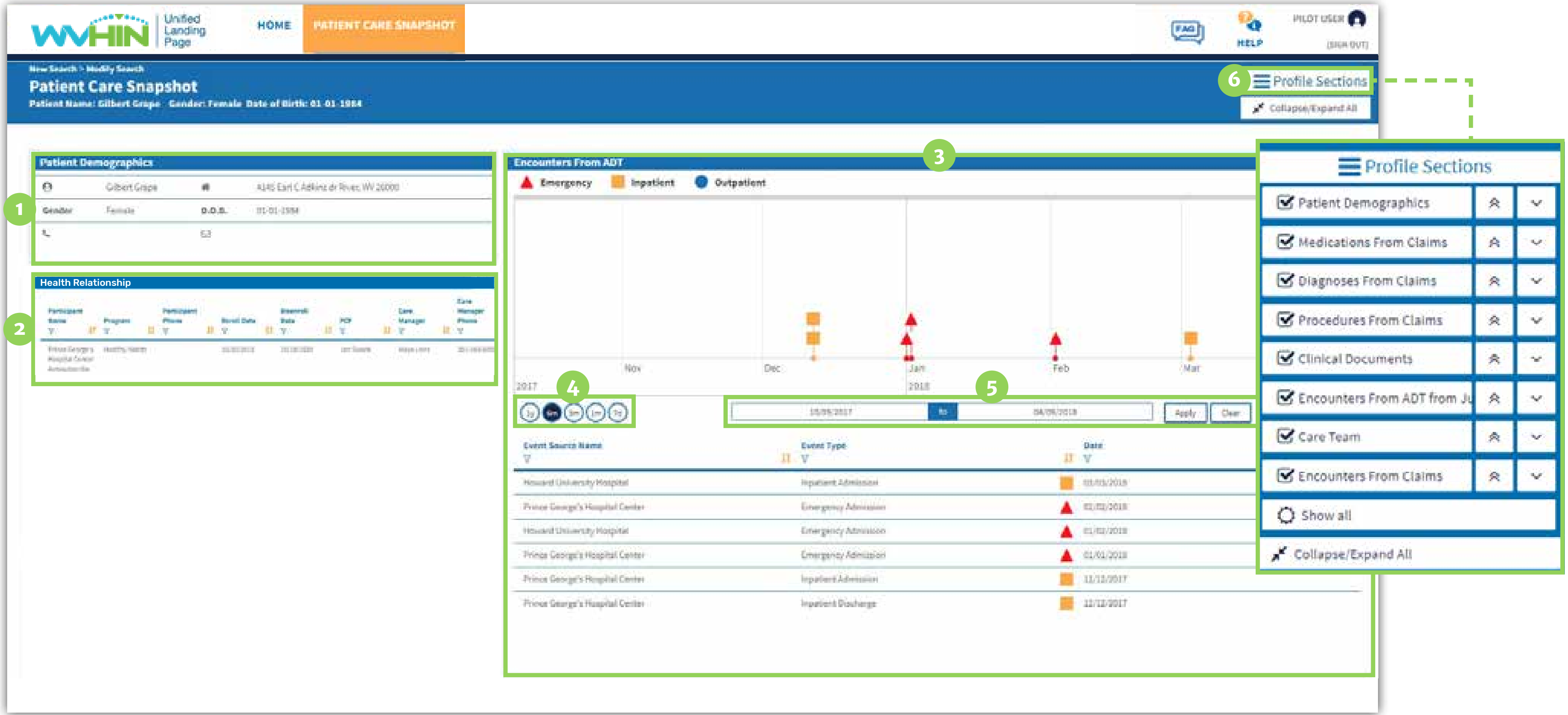
Patient Care Snapshot

The Patient Care Snapshot is an aggregation of both clinical and non-clinical data for a selected patient.

The Patient Care Snapshot combines critical information relevant to your role in the patient's care. It displays data from a variety of sources to provide an at-a-glance view of the patient's clinical history. Information is presented from a compilation of care management data alongside real-time hospital encounter feeds, up-to-date demographic information, patient to care provider attribution, and clinical summaries of care from our real-time interfaces with providers across the region.

Patient Care Snapshot

Please email support@crisphealth.org for any issues, suggestions or defects.



Here's what you can do in the Patient Care Snapshot:

1. **View Patient Demographics**
2. **View who Receives Alerts**
3. **View Recent Encounter Activity**
4. **Adjust Timeline Range**
5. **Filter Results by Date**
6. **Modify Profile Sections**

Patient Care Snapshot

Please email support@crisphealth.org for any issues, suggestions or defects.

If you want to:	Use this approach:
1 **View Patient Demographics**	The “Patient Demographics” widget displays the patient’s information including name, address, gender, date of birth, and contact information.
2 **View who Receives Alerts**	The “Health Relationships” widget displays information about the various provider organizations who will receive encounter alerts for that patient. This information can be sorted to suit your viewing needs by clicking the yellow arrows next to the field of interest.
3 **View Recent Encounter Activity**	The “Encounters from ADTs” widget displays information on patient encounters including the source (facility where the encounter took place), the event type, and the date. This information can be sorted to suit your viewing needs by clicking the yellow arrows next to the field of interest. Use the circular buttons to view encounters for a specific time frame. For a more detailed view, place your cursor over the graph to zoom in or out.
4 **Adjust Timeline Range**	Select from the options provided to view patient data within the desired time frame, ranging from one week to a year.
5 **Filter Results by Date**	Enter the dates within the fields provided to search a specific timeframe then click “apply”. This will give you a more granular view of patient data presented.
6 **Modify Profile Sections**	The Patient Care Snapshot dashboard can be customized to fit your viewing needs. Click the “Profile Sections” button to enable or disable various widgets. You can also drag and drop widgets to adjust the order in which they are viewed on your screen.

WEST VIRGINIA HEALTH INFORMATION NETWORK

ULP® STARTER GUIDE

Health Records

The Health Records application is designed to make clinical data easily accessible and provides an improved overall user experience.

This new application provides an updated layout, search capabilities, and improves usability with fewer clicks to access patient information.

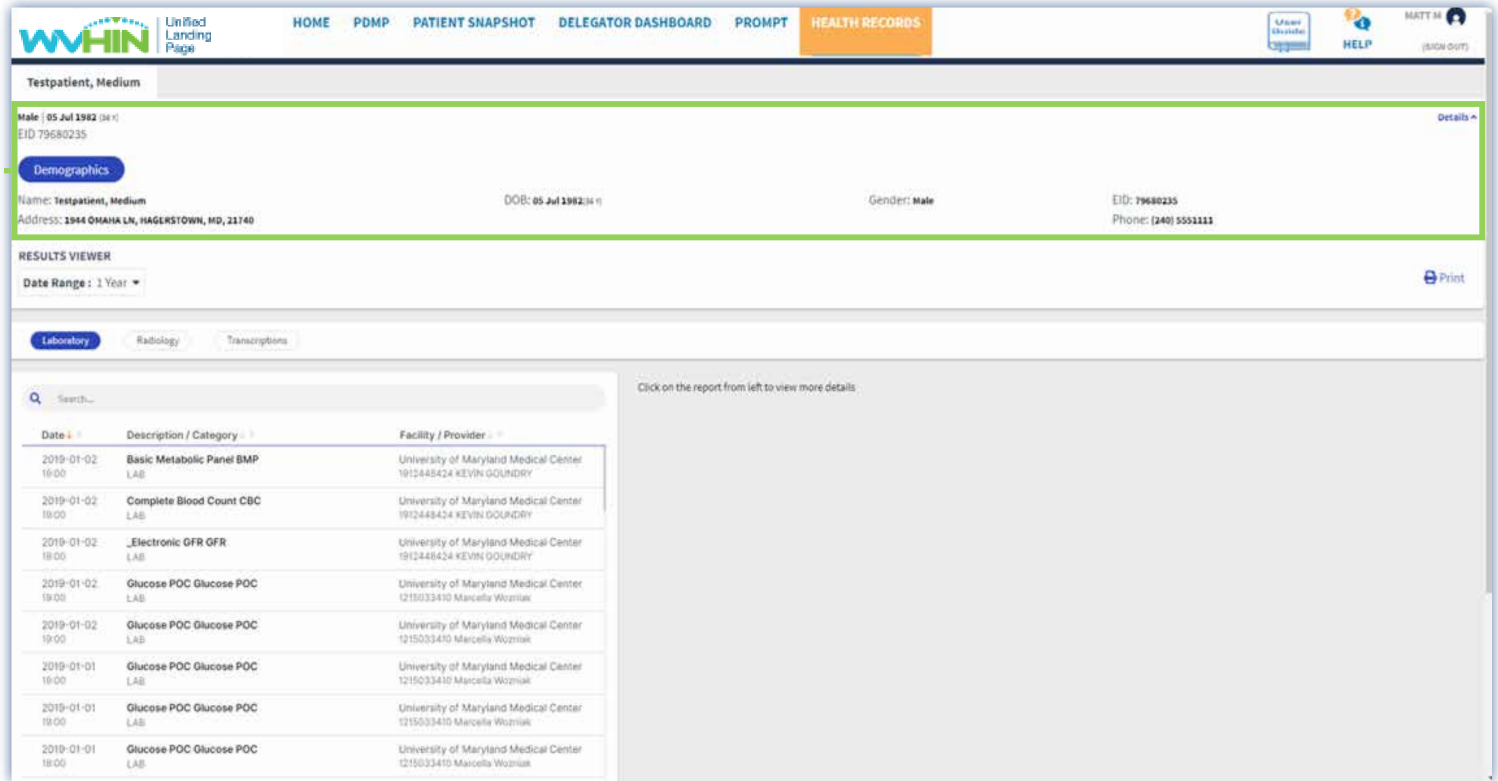
Health Records

Please email support@crisphealth.org for any issues, suggestions or defects.

Navigate the Health Records Application by following this step-by-step process:

1 Additional Patient Demographic Information

To view additional patient demographic data click the “details” button to expand the section and show patient information such as address, telephone number and EID.

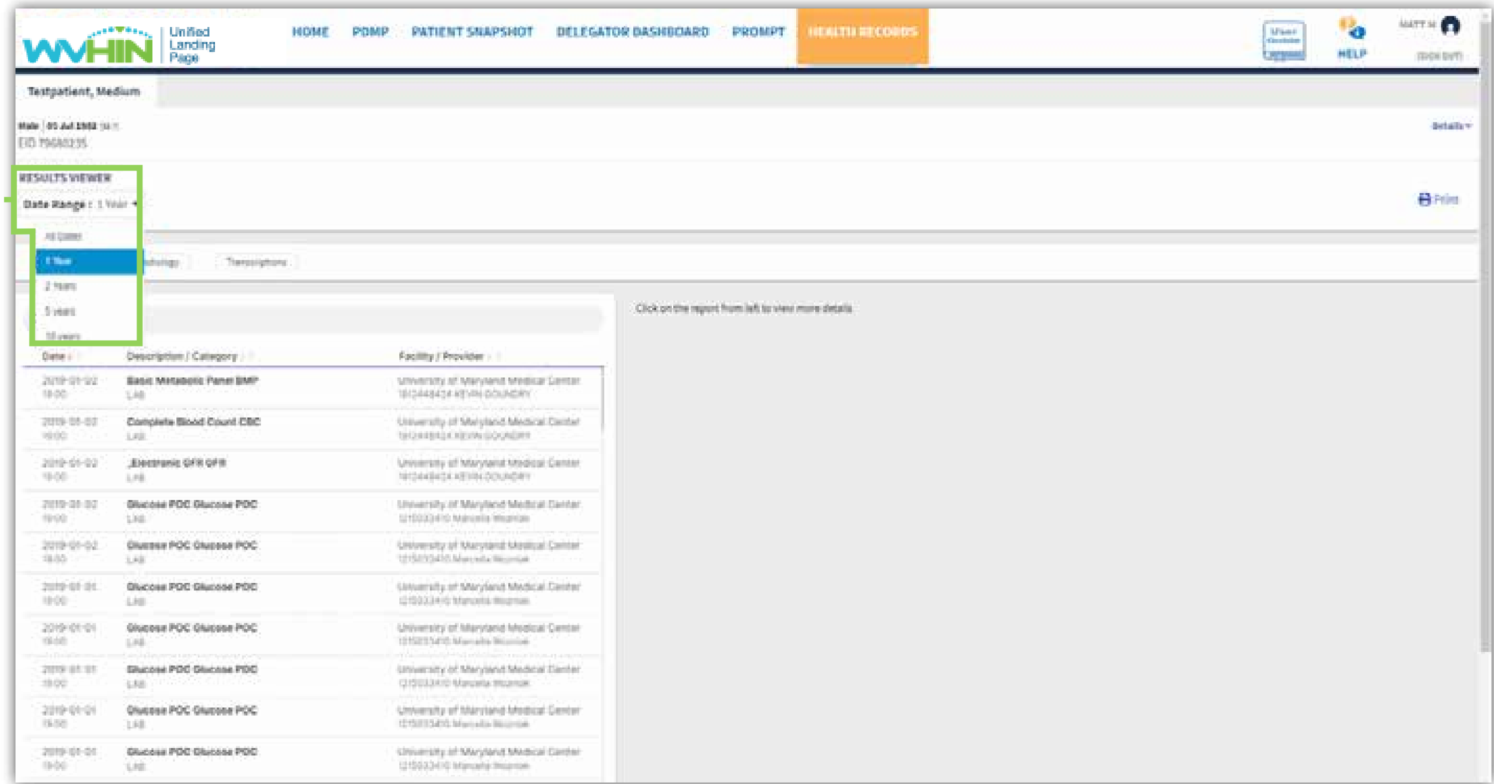


Health Records

Please email support@crisphealth.org for any issues, suggestions or defects.

2 Select the Date Range Dropdown

The “Date Range” dropdown provides options ranging from one to 10 years. To view patient data within a desired time frame, click the dropdown menu to select the date range for which you’d like to view patient data.

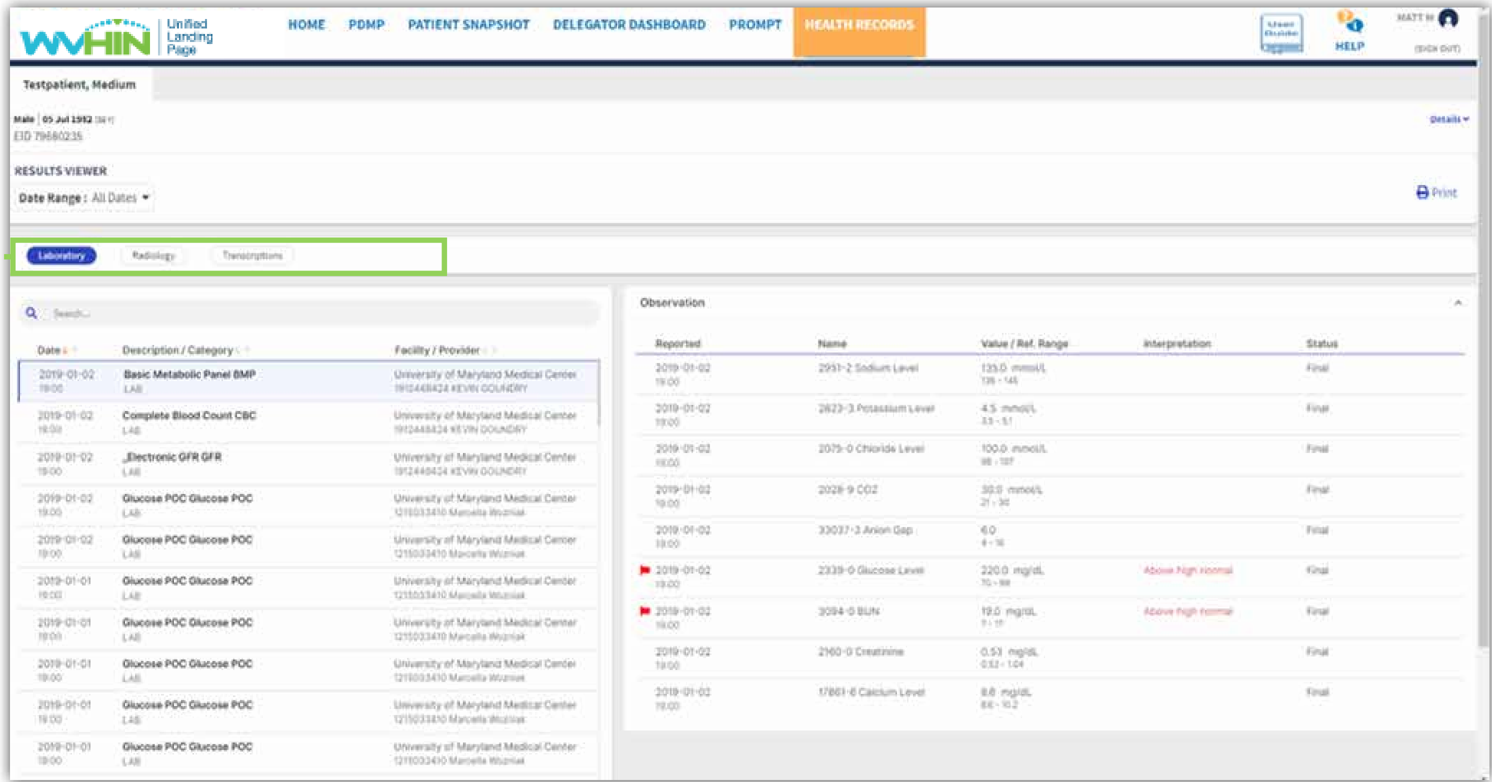


Health Records

Please email support@crisphealth.org for any issues, suggestions or defects.

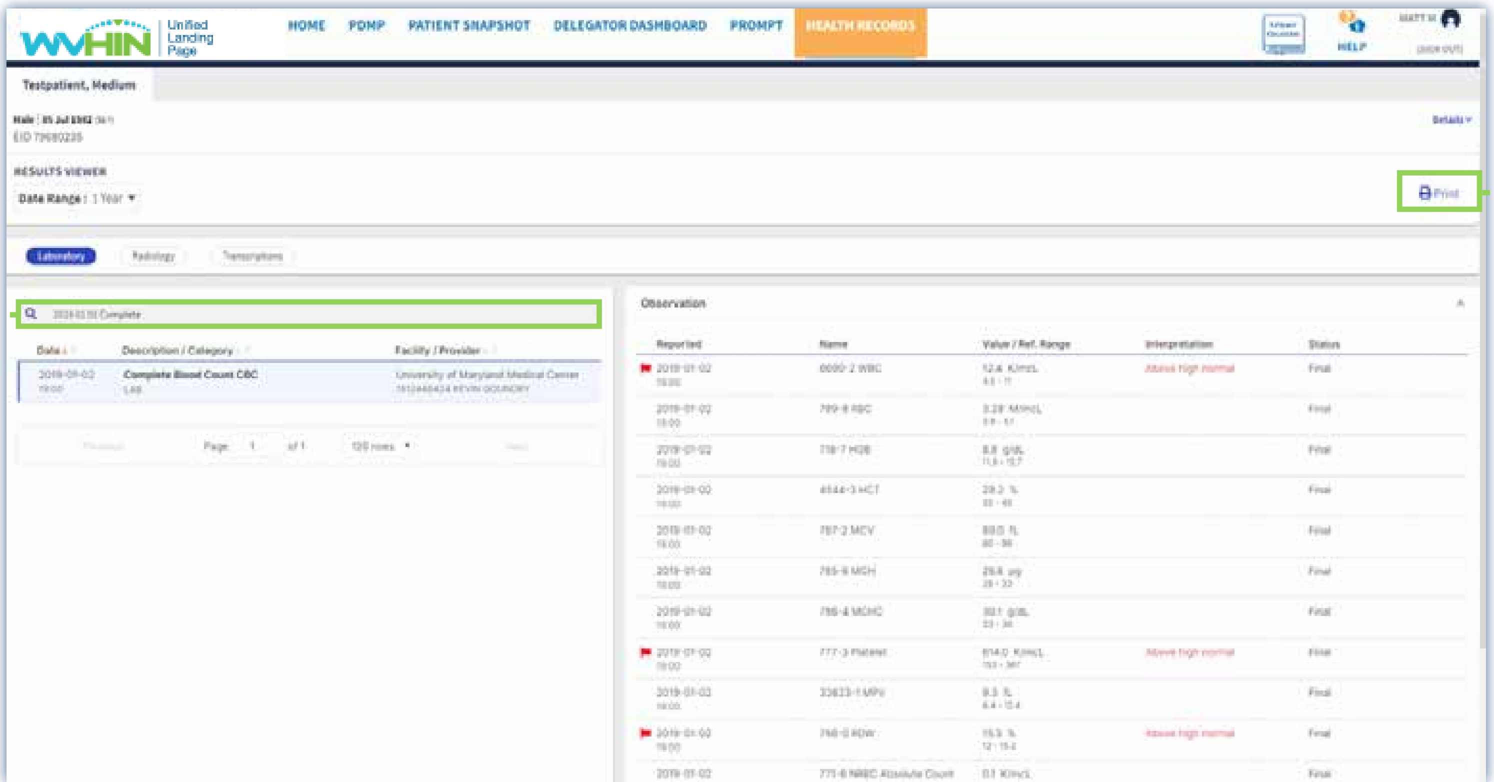
3 Select a Report Type

Once within your patient's health records use the buttons to view labs, radiology, transcription, or imaging reports. Each button displayed is based on the type of reports available for each patient. Click the laboratory button to view the patient's most recent lab results. Within the window click the report you wish to view to instantaneously load the patient's results on the right-hand side of the screen. Follow these same steps to view additional reports within the other buttons.



4 Search Clinical Data

To locate a specific report, enter the date, report description, provider, and/or facility name within the search field provided. Review the results then select the desired report.



5 Printing Reports (Step 1)

Each report can be converted to a .pdf document then printed. Select the report you wish to download then click the print button. Please note, this feature only allows for one report to download at a time.

6 **Printing Reports** (Step 2)

Preview of PDF printed record.