



WVHIN PANEL PROCESSOR OVERVIEW

MAY 2023

- This session is being recorded.
- The Panel Processor presentation will be emailed to attendees.
- Make up sessions will be scheduled individually by WVHIN Outreach staff for anyone who has not attended these sessions
- Any assistance when uploading panels, contact your WVHIN Outreach staff member or info@wvhin.org

OVERVIEW

The Panel Processor application allows organizations to upload panels to the WVHIN. The application allows users to upload panels for various services, like the Encounter Notification System® (ENS®).

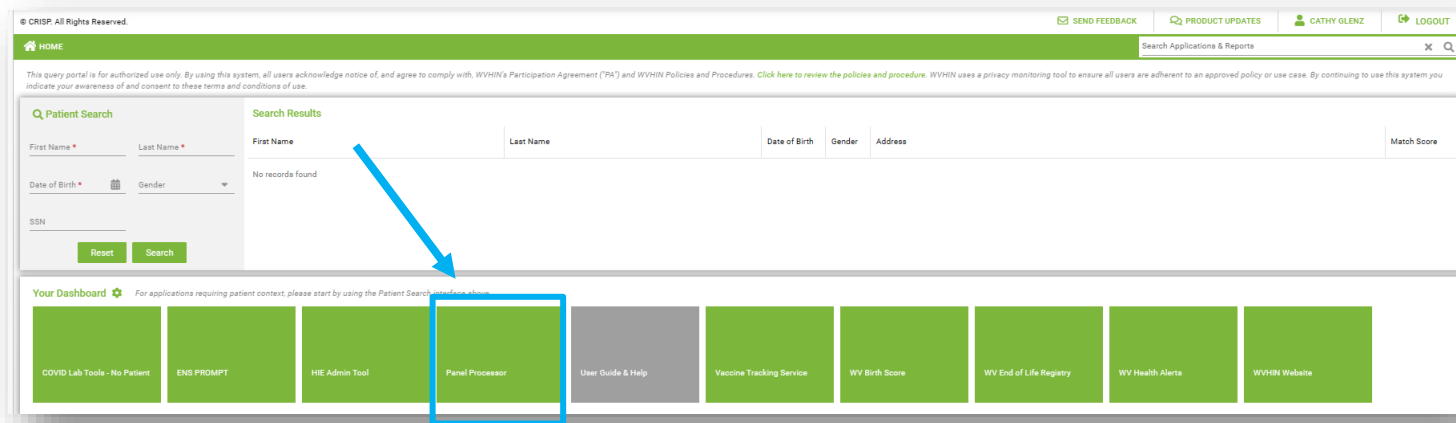
Panels are lists or rosters of patients with whom you or your organization has a treatment relationship.

ENS® is a service that enables subscribers to receive real-time alerts when patients on their panel have a hospital encounter. You can learn more about or sign up for the ENS® service by visiting the WVHIN website.

ACCESSING PANEL PROCESSOR

Users access the Panel Processor application within the WVHIN Portal. To access the Panel Processor, users must:

- Log into the WVHIN Portal with their username, password, and two-factor authentication credentials.
- Click the 'Panel Processor' service tile from your dashboard to launch the application. Your dashboard will consist of all the services you have available to access. Each service displays on a tile.



PANEL PROCESSOR HOME SCREEN

The Panel Processor will display within a frame with the Menu toolbar on the left side and the Portal toolbar at the top of the screen. You can expand the screen by clicking the arrow next to 'Reports & Applications' to collapse the side toolbar.

The screenshot displays the Panel Processor interface within a web application frame. At the top, a green header bar contains the copyright notice '© CRISP. All Rights Reserved.' on the left, and navigation links for 'SEND FEEDBACK', 'PRODUCT UPDATES', 'CATHY GLENZ', and 'LOGOUT' on the right. Below the header is a search bar labeled 'Search Applications & Reports' with a magnifying glass icon. On the left side, a vertical menu titled 'Reports & Applications' is expanded, showing a list of application categories: ENS PROMPT, HIE Admin Tool, COVID Lab Tools - No Patient, WV Birth Score, WV Health Alerts, WVIN Website, Vaccine Tracking Service, Panel Processor (highlighted in blue), and WV End of Life Registry. The main content area is titled 'Panel Processor' and features a progress indicator with three steps: 1. Select Template, 2. Upload File, and 3. Processing File. The 'Select Template' step is currently active, showing a 'Select Template File' dropdown menu. Below the dropdown is a 'Next' button. The 'Upload File' and 'Processing File' steps are currently inactive.

PANEL PROCESSOR HOME SCREEN

- There are two tabs within the Panel Processor Application – ‘Upload File’ and ‘Upload History’. The ‘Upload File’ tab is where users can submit a panel following the process prompts. Users can view the results of Previous successful and unsuccessful upload attempts in the ‘Upload History’ tab.

The screenshot displays the 'Panel Processor' application interface. At the top, there is a dark blue header with the text 'Panel Processor'. Below the header, there are two tabs: 'Upload File' and 'Upload History'. The 'Upload File' tab is currently selected and highlighted with a green border. Below the tabs, a horizontal progress bar shows three steps: 1. Select Template, 2. Upload File, and 3. Processing File. The first step, '1 Template Selection', is highlighted with a green box. Underneath this step, there is a dropdown menu labeled 'Select Template File'. At the bottom of the main content area, there is a 'Next' button.

TEMPLATES

Templates are defined file formats with specific column fields and field data types. Each service using the Panel Processor will have a unique template. Users can download a template with the processor after selecting a template.

The screenshot displays the 'Panel Processor' interface. At the top, there are two tabs: 'Upload File' (active) and 'Upload History'. Below the tabs is a progress bar with three steps: 1. Select Template, 2. Upload File, and 3. Processing File. The 'Select Template' step is currently active. It contains a 'Template Selection' section with a dropdown menu labeled 'Select Template File' showing 'ENS Patient Panel'. Below the dropdown, it says 'Selected Template: ENS Patient Panel'. A green box highlights the 'Download Template' button. At the bottom of the form, there is a 'Next' button.

ENCOUNTER NOTIFICATION SYSTEM® (ENS®)

ENS® is a service that enables subscribers to receive real-time alerts when patients on their panel have a hospital encounter. You can learn more about or sign up for the ENS® service by visiting the WVHIN's website.

The ENS® panel template contains the required and optional fields to submit for processing. The ENS panel template is titled 'ENS Patient Panel' and will download in .xlsx or excel workbook format.

However, each ENS panel submission must be in a .csv file format. The file name of each submission must be in the following format:

[subscriber code]-1-z-MM-dd-yyyy (i.e: Panel_DEMO-1-z-08-05-2022)

ENS PANEL TEMPLATE VALUES

ENS® Panel Template Values

Field Name	Required	Example Value	Notes
Group			
Member_Status		ADD	Values required for delta panels only
Patient_ID	x	999999	
First_Name	x	John	
Middle_Name		K	
Last_Name	x	Doe	
Name_Suffix		Mr.	
Address_1	x	33 main st	
Address_2		apt 45	Provide these values if available
City	x	baltimore	

ENS PANEL TEMPLATE VALUES CONTINUED

ENS® Panel Template Values Continued

Field Name	Required	Example Value	Notes
State	x	MD	
Zip	x	21230	
Birthdate	x	12/31/1900	
Gender	x	M	
SSN		999-99-9999	Provide these values if available
Home_Phone		3025551212	
Work_Phone		3025551212	
Cell_Phone		3025551212	
Practice		Practice A	
Location		555 Healthy Way	
PCP		Dr. Smith	
NPI		1111111111	
TaxID		1111111111	
Insurance		Carefirst BCBS	

ENS PANEL TEMPLATE VALUES CONTINUED

ACO		ACO 1	
Account_Number		8888888	
ENS_Startdate		9/27/2015	
Care_Program		Healthy Care	
Care_Program_StartDt		10/1/2014	
Care_Program_EndDt		9/1/2015	
Care_Manager		John Doe	
Care_Manager_Phone		111-111-1111	
Care_Manager_Email		john.doe@practicea.com	
RiskScore1		20	
RiskMethodology1		HCC	
RiskScore2		24	
RiskMethodology2		Risk Score A	
Region		Montgomery County	
DirectEmail		abc@ainq.direct.org	
DocHaloID		123456	
Follow Up Date		9/20/2015	
Appointment Missed Date		9/5/2015	
Care_Alert		Patient may have experienced a controlled substance event on 9/6/2015 at hospital 4.	Values required for care alert panels
Assigning_Authority_Code		ENS_CODE	Values required for care alert panels

SUBMITTING A PANEL

1. For ENS panel submissions, select the template titled 'ENS Patient Panel'.
The Panel Processor will prompt you to select a panel by name and source code. A source code is a unique set of letters used within the WVHIN to identify a panel.
2. Navigate to the 'Upload File' step by clicking 'Next', 'Upload File', or directly on the number two icon.
3. Upload the completed file by dragging or clicking the grey box on the screen.
4. Click 'Submit' to load the panel to the processor.

The processor will perform an initial check to validate the file type and file size. These checks take only a few seconds. File type must be .csv. File size can be no larger than 100 MB.

A successful file upload will advance the user to the 'Processing File' tab. While a failed upload will display an unsuccessful message on the screen.

SUBMITTING A PANEL CONTINUED

1 Select Template

2 Upload File

3 Processing File

1 Template Selection

2 Panel Selection

i If you do not have any ENS Panel available to update, you will receive this error message.

There are no ENS panels configured for you to update. If you feel this is an error, please contact CRISP Support at 877.952.7477 or support@crisphealth.org

Back to Template Selection

1 Select Template

2 Upload File

3 Processing File

1 Template Selection

2 Panel Selection

i A successful panel selection will display this reminder note.

Please select the ENS panel you would like to update

Please select panel code
UBMC Physicians Prac... ▼

Note: The ENS panel you submit will fully overwrite your existing ENS panel. Please carefully review your file prior to upload.

Back to Template Selection

Next

SUBMITTING A PANEL CONTINUED

Panel Processor

Upload File | Upload History

1 Select Template | 2 Upload File | 3 Processing File

Upload File
Selected Template: CovidPointOfCare

Click Here Or Drop File

Reset

1 Select Template | 2 Upload File | 3 Processing File

Upload File
Selected Template: CovidPointOfCare

Files

EvanTestTemplate.xlsx

Reset Remove Submit

User can reset or remove a selected file by clicking those respective buttons

SUBMITTING A PANEL CONTINUED

The Processing File step does not require any further action from the user. This step displays the real time actions the Panel Processor is performing to further validate and upload the file. The steps the Panel Processor will take are the following:

1. **Processing File** – the processor will check to validate file type and file size
2. **Scanning for Viruses** – the processor will check for any viruses in the file.
3. **Validating File** – the processor will confirm data within the file are correct to the template specifications.
 - a. If a file fails this step, users can view the error details in the ‘Upload History’ tab.
 - b. Even if one row fails out of one hundred rows, the whole file will fail to process.
4. **Uploading for Final Validation** – the processor will send the file to the correct database location within the WVHIN.
5. **Pending Final Validation** – the processor will confirm the file is received by the correct database successfully.

SUBMITTING A PANEL CONTINUED

The screenshot displays a progress bar with five steps: 1. Select Template (checked), 2. Upload File (checked), 3. Processing File (active), 4. Validating File (highlighted with a green box), 5. Uploading for final validation, and 6. Pending final validation. A red arrow points from the text 'Failure Message on Validating File step' to the highlighted step. Below the step, a message box contains the text: 'File failed primary validation. Check the Upload History tab for more details.'

The screenshot displays the 'Panel Processor' interface with two tabs: 'Upload File' and 'Upload History'. The progress bar shows five steps: 1. Select Template (checked), 2. Upload File (checked), 3. Processing File (active), 4. Validating File (checked), 5. Uploading for final validation (checked), and 6. Pending final validation (highlighted with a green box). A green arrow points from the text 'Successful Message will display if the file passes all five steps' to the highlighted step. Below the step, a message box contains the text: 'File has finished uploading to its destination and is pending final validation. You may now view the file details in the Upload History tab.'

UPLOAD HISTORY

The 'Upload History' tab displays all file upload attempts which passed the initial check to validate the file type and size. In other words, the results of any attempt to upload a file where a user could view the 'Processing File' step will appear here.

Users will primarily use the 'Upload History' tab to understand why a panel file failed the 'Validating File' step. However, this tab can also be helpful to view when you last uploaded a panel to a particular source code.

The table on the 'Upload History' tab will contain a row for each file upload attempt. Each row contains the template used, the date and time of the attempted upload, the source code, the file name, the number of rows within the file, and file status.

The file status refers to if the file is ready to be used in the desired service. For example, a 'Succeeded' status message tells the user their ENS service will send alerts based on that panel upload.

UPLOAD HISTORY

Panel Processor						
Upload File	Upload History					
Template	Date/Time Added (UTC)	Source Code	File Name	Total Rows	Status	
CovidPointOfCare	07/14/22 06:13 PM	CRISP_DEMO	Covid_Bulk_Upload_FileC.csv	9	Not Started	
CovidPointOfCare	07/14/22 06:12 PM	CRISP_DEMO	Covid_Bulk_Upload_FileB.csv	9	Not Started	
CovidPointOfCare	07/14/22 06:12 PM	CRISP_DEMO	Covid_Bulk_Upload_File10_rowscomma.csv	9	Not Started	
CovidPointOfCare	07/14/22 06:12 PM	CRISP_DEMO	Covid_Bulk_Upload_FileA.csv	9	Not Started	
CovidPointOfCare	07/14/22 05:20 PM	CRISP_DEMO	Covid_Bulk_Upload_File10_rowscomma.csv	9	Not Started	
CovidPointOfCare	07/14/22 03:14 PM	CRISP_DEMO	2022-07-14T03-13-45-Covid_Bulk_Upload_File10_rowscomma.csv	9	Not Started	

Status	Description
Not Started	ENS has not started processing the file
Processing	Processing of the file is underway
Error	There is an issue with the file. Please contact your account manager for further assistance.
Succeeded	Panel has been successfully submitted

SUCCESSFUL UPLOAD

Summary

Filename: DataTypesOptEnforceTemp.csv

Date Uploaded (UTC): 2022-07-26T18:54:55.8033333

1 Total Rows

0 Successful Rows

0 Failed Rows

ERROR MESSAGE

Summary

Filename: EvanTestTemplate_testsources.csv

Date Uploaded (UTC): 2022-07-28T15:10:19.12

0 Total Rows

0 Successful Rows

0 Failed Rows

Row Number	Error
0	Missing Header from Column: MRN
0	Missing Header from Column: PatientAge
0	Missing Header from Column: PatientBirthWeight
0	Missing Header from Column: CompletedNewbornScreening?

WVHIN SUPPORT INFORMATION

WVHIN Technical User Support :

- wvhinsupport@crisphealth.org
- 1(844) 468-5755

For WVHIN related inquires please contact:
info@wvhin.org