



**Panel  
Processor**  
Quick Guide

Providers can manually submit their patient panel through the **Panel Processor** application. The patient panel must be submitted minimally every 90 days. For organizations with frequent patient changes, submitting a panel monthly is recommended.

# Panel Processor

- 1 Select **Panel Processor** from the **Reports & Applications** tab and click on the drop-down arrow.

The screenshot displays the 'Panel Processor' interface. On the left, a 'Reports & Applications' sidebar lists various tools, with 'Panel Processor' highlighted in red and marked with a red circle containing the number '1'. The main content area is titled 'Panel Processor' and features a progress bar with three steps: '1 Select Template', '2 Upload File', and '3 Processing File'. The '1 Select Template' step is currently active, showing a 'Template Selection' section with a 'Select Template File' dropdown menu. Below this, there is a 'Next' button. The top navigation bar includes a 'HOME' link and a search box labeled 'Search Applications & Reports'.

# Panel Processor

- 2 Select the panel you would like to update by **name** and **source code**. Your panel code will include your organization's source code. Choose the most recent patient panel and upload.

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' (which is active) and 'Upload History'. A progress bar is visible, with three steps: '1 Select Template', '2 Upload File', and '3 Processing File'. The '2 Upload File' step is currently active. Below the progress bar, there are two main sections: 'Template Selection' and 'Panel Selection'. The 'Panel Selection' section is highlighted in light gray and contains the instruction 'Please select the ENS panel you would like to update'. Below this instruction is a dropdown menu with the text 'Please select panel code' and a downward arrow. A red box highlights this dropdown menu, and a red circle with the number '2' is placed to its left. At the bottom of the 'Panel Selection' section, there is a link that says 'Back to Template Selection'.

# Panel Processor

- 3 a) Select the Panel Code. Your panel code will include your organization's source code. Choose the most recent patient panel and upload. The patient panel must be in .CSV format and named using the designation (ex: subscribercode-1-z-mm-dd-yyyy).

The screenshot displays a three-step process: 1. Select Template, 2. Upload File, and 3. Processing File. The current step is 'Panel Selection', which includes a 'Template Selection' step. A red circle with '3a' highlights a dropdown menu for 'Please select panel code' with the selected option 'CRISP DC Demo test (...)'. A note below states: 'Note: The ENS panel you submit will fully overwrite your existing ENS panel. Please carefully review your file prior to upload.' A 'Back to Template Selection' link is also visible. A 'Next' button is located at the bottom left of the main content area.

# Panel Processor

- 3 b) If you are unable to select a panel in the dropdown menu and receive this error message, the panel may not be configured for your organization.

The screenshot displays a three-step process flow: 1. Select Template, 2. Upload File, and 3. Processing File. The 'Processing File' step is active, showing a 'Panel Selection' dropdown menu. An error message is displayed below the dropdown, stating: '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'. A 'Back to Template Selection' link is visible below the error message. The 'Next' button is located at the bottom left of the interface.

1 Select Template

2 Upload File

3 Processing File

1 Template Selection

2 Panel Selection

3b 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

Next

# Panel Processor

The highlighted blue values must be included in your patient panel. Verify all cells are complete (not blank) to ensure successful upload.

The screenshot shows a spreadsheet with the following data:

Group	Member_Status	Patient_ID	First_Name	Middle_Name	Last_Name	Name_Suffix	Address_1	Address_2	City	State	Zip	Birthdate	Gender	SSN	Home_Phone	Work_Phone	Cel
	ADD	999999	John	K	Doe		33 main st	apt 45	baltimore	MD	21230	12/31/1900	M	999-99-9999	3025551212	3025551212	302
	UPDATE	1000000	Jane	K	Doe		34 main st	apt 46	baltimore	MD	21230	12/31/1900	F	999-99-9999	3025551212	3025551212	302
	DELETE	1000001	Jim	K	Doe	Jr	35 main st	apt 47	baltimore	MD	21230	12/31/1900	M	999-99-9999	3025551212	3025551212	302

Below the data, a legend explains the highlighting:

- Values always required** (Blue background)
- Values optional** - these fields will appear on your ENS alerts if you include them in the panel (Grey background)
- Values required for delta panels only** (Orange background)
- Provide these values if available** (Green background)
- Values required for care alert panels** (Purple background)

The spreadsheet title is "Sample Patient Panel 08.15.2019". The status bar shows "Ready" and "Accessibility: Investigate".

# Panel Processor

- 4a Select 'Upload File' step by clicking 'Next', 'Upload File', or on the number two icon.
- 4b Upload the completed file by dragging or clicking the grey box on the screen.

The screenshot displays the 'Panel Processor' interface. At the top, a progress bar shows three steps: 'Select Template' (completed), 'Upload File' (current step, highlighted with a red box and labeled '4a'), and 'Processing File' (disabled). Below the progress bar, the 'Upload File' section is visible, containing the text 'Selected Template: ENS Patient Panel' and 'Selected Panel Source Code: CRISPDC\_DEMO'. A large grey dashed box occupies the main area, with the text 'Click Here Or Drop File' centered inside it. This box is highlighted with a red border and labeled '4b'. A 'Reset' button is located at the bottom left of the interface.



# Panel Processor

5

- a) Click 'Submit' to load the panel to the processor. The processor will perform an initial check to validate the file type and file size. File type must be csv, txt, or tsv. File size can be no larger than 100 MB. Successful file upload will advance the user to the 'Processing File' 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' (which is active) and 'Upload History'. The main content area is divided into three steps: 'Select Template' (marked with a checkmark), 'Upload File' (marked with a '2'), and 'Processing File' (marked with a '3'). The 'Upload File' step is currently active and shows the following information: 'Selected Template: ENS Patient Panel' and 'Selected Panel Source Code: CRISPDC\_DEMO'. Under the 'Files' section, a file named 'CRISPDC\_DEMO-1-z-08-01-2022.csv' is listed. At the bottom right of the 'Upload File' section, there are two buttons: a yellow 'Remove' button and a blue 'Submit' button. A red callout box with the number '5a' is positioned over the 'Submit' button. A 'Reset' link is located at the bottom left of the 'Upload File' section.

# Panel Processor

- 5 b) A failed upload will display an unsuccessful message on the screen. The user can select reset to upload a new file.

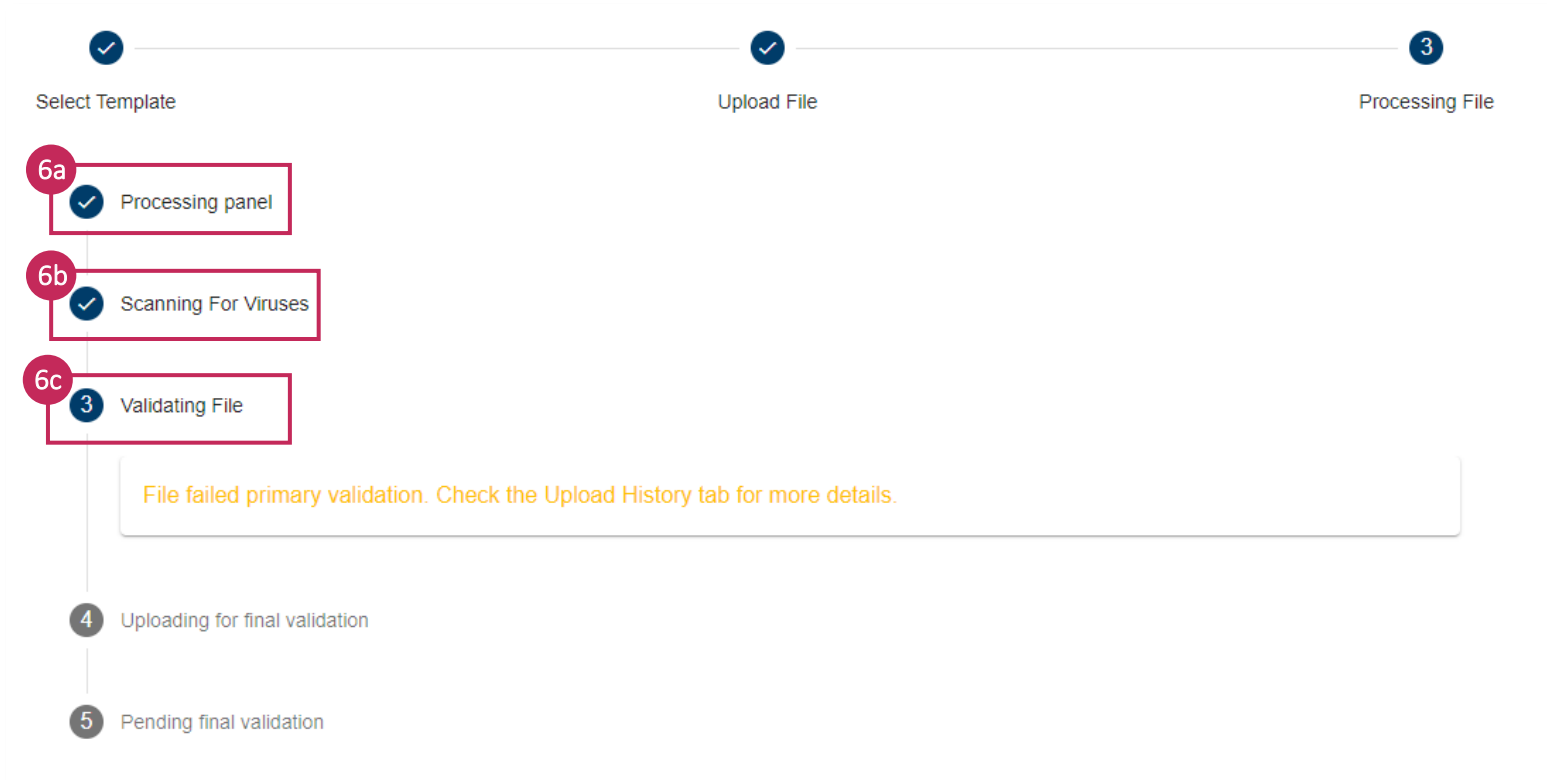
The screenshot displays the 'Panel Processor' interface. At the top, there is a dark blue header with the text 'Panel Processor'. Below the header, there are two tabs: 'Upload File' (which is active) and 'Upload History'. A progress bar is visible with three steps: 'Select Template' (marked with a checkmark), 'Upload File' (marked with a '2'), and 'Processing File' (marked with a '3'). The main content area is titled 'Upload File' and shows 'Selected Template: Alan'. There is a 'Reset' button in orange text. At the bottom left, a red-bordered box contains the message 'File Upload Failed. File content type is not supported.', with a red circle containing '5b' next to it.

# Panel Processor

Successful file upload will begin step 3, **Processing File**. The processing steps are:

6

- a) **Processing File** – the processor will check to validate file type and file size
- b) **Scanning for Viruses** – the processor will check for any viruses in the file.
- c) **Validating File** – the processor will confirm data within the file are correct to the template specifications. Refer to #3 of the guide to review patient panel criteria.
  - If a file fails this step, users can view the error details in the 'Upload History' tab.
  - Even if one row fails out of one hundred rows, the whole file will fail to process.



# Panel Processor

Successful file upload will begin step 3, **Processing File**. The processing steps are:

- 6 d) **Uploading for Final Validation** – the processor will send the file to the correct database location within the HIE.
- e) **Pending Final Validation** – the processor will confirm the file is received by the correct database successfully.

