



Panel Processor

Quick Guide

Users can manually submit their organization's patient panel through the **Panel Processor** application within the CRISP DC Portal. The patient panel must be submitted at least every 90 days to maintain access to real-time encounter notifications on clients. Organizations with frequent patient changes can choose to submit panels more frequently to include monthly, bi-weekly, or even daily.

Panel Processor

1

Select the **Panel Processor** application from **Your Dashboard** on the landing page of the CRISP DC Portal.

CRISP DC

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MY HIE ADMIN(S)

SEND FEEDBACK

PRODUCT UPDATES

ASHLEY BRASWELL

LOGOUT

HOME

Search Applications & Reports

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The screenshot displays the CRISP DC Portal dashboard. At the top, there is a navigation bar with the CRISP DC logo, copyright information, and user options: MY HIE ADMIN(S), SEND FEEDBACK, PRODUCT UPDATES, ASHLEY BRASWELL, and LOGOUT. Below this is a dark blue header with a HOME icon and a search bar for Applications & Reports. A disclaimer text is visible below the header. The main content area is titled 'Your Dashboard' and contains a grid of application tiles: PopHealth, HIE Admin Tool, Panel Processor (highlighted with a red box and a red circle with the number 1), Referral Portal, User Guide & Help, and Directory. To the right, a 'Population Explorer' sidebar is visible, featuring a 'View Panel' dropdown, a 'Download' button, and a notification area stating 'No notifications for this panel.' At the bottom of the sidebar, there are navigation arrows and a '0 of 0' indicator.

<https://portal.crisphealth.org/#app/view/Panel Processor>

Panel Processor

2

Under **Template Selection** within the Panel Processor, select **CSS Patient Panel**. CSS refers to CRISP Shared Services, the governing body that CRISP DC falls under. Always choose the **CSS Patient Panel** template.

The screenshot displays the 'Panel Processor' interface. At the top, there is a navigation bar with a 'HOME' icon and a search bar labeled 'Search Applications & Reports'. Below this, a sidebar on the left is labeled 'Reports & Applications'. The main content area is titled 'Panel Processor' and features two tabs: 'Upload File' (active) and 'Upload History'. A progress indicator shows three steps: '1 Select Template', '2 Upload File', and '3 Processing File'. The '1 Select Template' step is expanded to show a 'Template Selection' dialog. This dialog has a dropdown menu labeled 'Select Template File' with a red circle '2' next to it. The dropdown is open, showing two options: 'CSS Patient Panel' and 'CONNIEPatientPanel'. The 'CSS Patient Panel' option is highlighted with a red rectangular box. Below the dropdown, there is a 'Next' button.

Panel Processor

3

- a) Under **Panel Selection**, choose the panel that you would like to update for your organization. Most organizations will have only one attributed panel. Larger organizations or orgs monitoring different patient populations may have two or more. Once selected, click **Next** in the bottom left corner.

✓ Template Selection

Select Template File
CSS Patient Panel

Selected Template: CSS Patient Panel

Download Template

2 Panel Selection

Please select the panel you would like to update

3a

Please select panel code
CRISP DC Demo test (CRI... ✓

CRISP DC Demo test (CRISPDC_DEMO) ✓

Note: File Naming Convention: [subscribercode]-1-z-MM-dd-yyyy
For Example: CRISPDC_DEMO-1-z-MM-dd-yyyy

Next

Panel Processor

3

- b) If you are unable to select a panel within **Panel Selection** and instead receive the error message below, your organization's panel may not be configured for your Panel Processor. Please reach out to your CRISP DC account manager for assistance.

The screenshot displays a three-step process flow:

- 1 Select Template**: Includes a 'Template Selection' step.
- 2 Upload File**: Includes a 'Panel Selection' step.
- 3 Processing File**: The current step, which is highlighted with a red circle and a red box containing an error message.

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

4

- a) Once the correct template has been selected, move forward to Step 2, **Upload File**.
- b) Upload the completed file by dragging and dropping the file into the grey box. You can also click into the grey box to access your computer's files and select the patient panel.

4a

2

3

Select Template

Upload File

Processing File

Upload File

Selected Template: CSS Patient Panel

Selected Panel Source Code: CRISPDC_DEMO

4b

Click Here Or Drop File

File Naming Convention: `[subscribercode]-1-z-MM-dd-yyyy`

For Example: `CRISPDC_DEMO-1-z-MM-dd-yyyy`

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. File type must be csv. Successful confirmation of file type will advance you to Step 3, the **Processing File** tab.

Upload File Upload History

1 Select Template 2 Upload File 3 Processing File

Upload File

Selected Template: CSS Patient Panel

Selected Panel Source Code: CRISPDC_DEMO

Files

 CRISPDC_DEMO-1-z-02-28-2025.csv

[Reset](#)

5a

[Remove](#) [Submit](#)

Panel Processor

5

- b) Incorrect file types (including .xlsx) will cause a failure message to display on the screen. Select **Reset** to upload a new file with the corrected .csv file type.

Panel Processor

Upload File

Upload History



Select Template

2

Upload File

3

Processing File

Upload File

Selected Template: CSS Patient Panel

Selected Panel Source Code: CRISPCD_DEMO

5b

[Reset](#)

File Upload Failed.

File content type is not supported.

Panel Processor

6

File upload verification will begin in step 3, **Processing File**. The processing steps are:

- a) Processing Panel – validating file type and file size
 - b) Scanning for Viruses – checking for any viruses in the file.
 - c) Validating File – confirming data within the file are correct and align with the template specifications.
- 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.

Upload File

Upload History



Select Template



Upload File

3

Processing File

6a



Processing panel

6b



Scanning For Viruses

6c



Validating File

File failed primary validation. Check the Upload History tab for more details.

Panel Processor

File upload verification will begin in 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.

