

Navigating Cancer Screening Data in CRISP DC

A Step-by-Step HIE-Tool Specific Reference Guide

Clinical Information App | Population Explorer | Population Health (PopHealth)



Prepared by the eHealthDC team in collaboration with DC Health and the DC Department of Health Care Finance (DHCF)

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Introduction

Cancer screening results often live outside a patient's primary chart — completed at an outside facility, never returned electronically, and easy to lose track of during a busy visit. This creates delays, duplicate outreach, and missed opportunities to catch abnormal results early.

CRISP DC, the District's health information exchange (HIE), closes this gap by bringing screening information from across the community into one place. Care teams can see completed screenings, open the underlying reports, and focus their outreach on the patients who still need to be screened.

Purpose of This Guide

This reference guide walks through the four primary ways to find and use cancer screening data in CRISP DC:

- The Clinical Information App is used to identify individual patient's screening results, including in-workflow access from your EHR.
- Image Exchange allows you to view diagnostic-quality radiology and cardiology images, including mammograms and other screening images, via the Web Portal or InContext.
- Population Explorer grants you the ability to build filters and rosters that flag patients who have or have not completed a screening.
- Population Health (PopHealth) includes a dashboard-level reporting on screening rates across a panel of patients.

Who Should Use This Guide

Medical assistants, care coordinators, quality/population health staff, and any care team member responsible for confirming screening completion, closing care gaps, or reporting on breast, cervical, and colorectal cancer screening.

Learning Objectives

By the end of this guide, you will be able to:

- Navigate CRISP DC's Population Explorer, PopHealth, Image Exchange, and Clinical Information App (InContext) to locate preventive screening data and images.
- Use the Preventive Screening feature to identify patients screened for breast, cervical, and colorectal cancer.
- Generate and export Preventive Screening reports.
- Export and upload cancer screening reports into your EHR.

Section 1: Accessing Cancer Screening Results in the Clinical Information App

The Clinical Information App gives providers and staff a real-time view of a patient's clinical history from across the HIE — encounters, lab results, discharge summaries, and CCD documents — either directly inside the EHR or through the CRISP DC web portal.

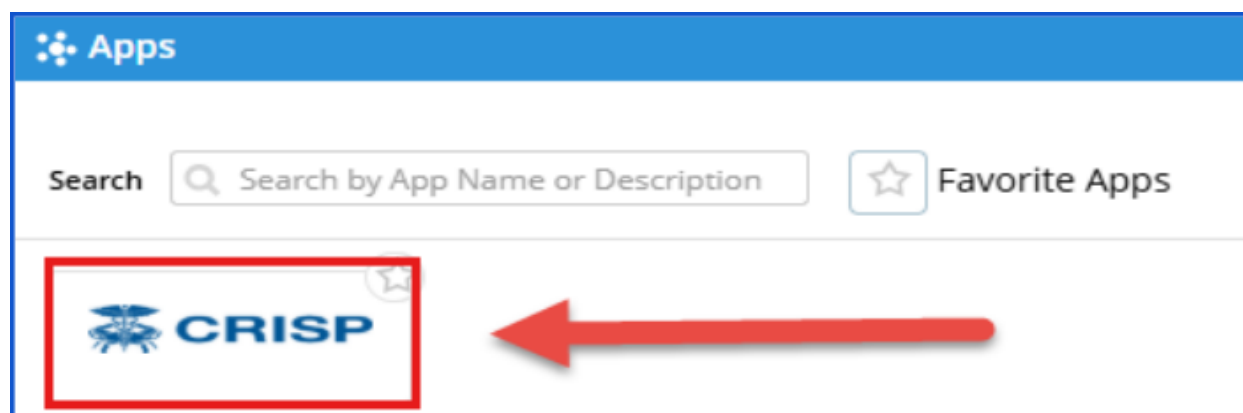
1.1 What the Clinical Information App Provides

Feature	Description
In-Workflow Access	Providers view a patient's clinical and pharmacological history directly within their EHR.
Real-Time HIE Data	Displays live encounters, lab results, discharge summaries, and CCD documents.
Cross-Provider Visibility	Expands insight into a patient's care history across multiple providers.
Data Completeness	Highlights gaps or missing elements so providers can address them in their own systems.
Integrated HIE Tools	Enables access to MyDirectives for Advance Care Planning and LinkU.

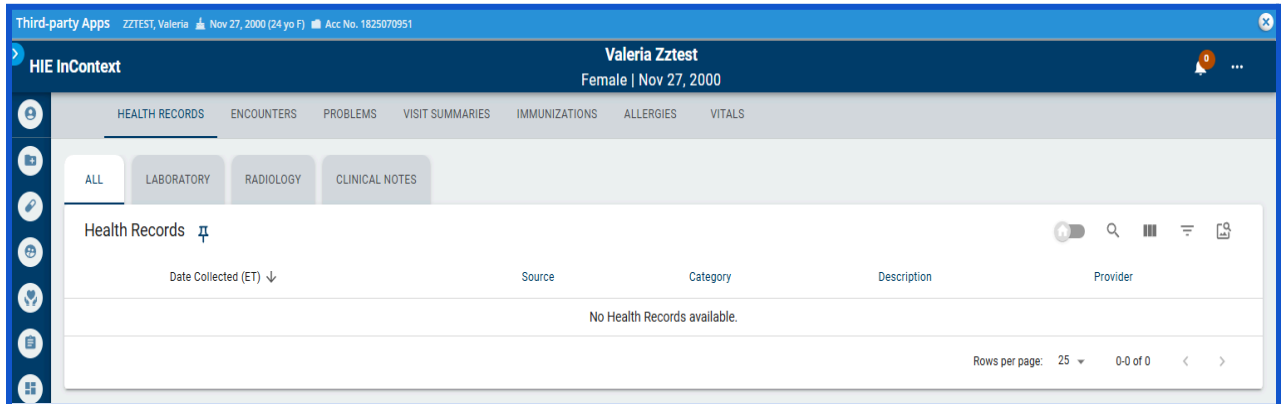
1.2 Option 1 — Open the Record via InContext (from the EHR)

Use this option when you already have the patient's chart open in your EHR.

Step 1: From the patient's record in the EHR, click the **Apps** icon and select **CRISP DC**.



Step 2: CRISP DC opens to the **Home** page, automatically showing available HIE data for the patient open in the EHR.



1.3 Option 2 — Find the Patient in the Web Portal

Use this option when accessing CRISP DC directly, outside of the EHR.

Step 1: Access the **CRISP DC** portal at (<https://idp.crisphealth.org/#login>) using your login credentials.

Step 2: Enter the **patient's first name, last name, and date of birth**, then click **Search** to locate them in the system.

The screenshot shows the CRISP DC Patient Search web portal. The header includes a 'HOME' button and a 'Search Applications &' search bar. A disclaimer text is present: 'This query portal is for authorized use only. By using this system, all users acknowledge notice of, and agree to comply with, CRISP-DC's Participation Agreement ("PA") and CRISP-DC Policies and Procedures. Click here to review tool to ensure all users are adherent to an approved policy or use case. By continuing to use this system you indicate your awareness of and consent to these terms and conditions of use.' The main content area is divided into two sections: 'Patient Search' and 'Search Results'. The 'Patient Search' section contains input fields for 'First Name *', 'Last Name *', 'Date of Birth *', 'Gender', and 'SSN'. There are 'Reset' and 'Search' buttons at the bottom of this section. The 'Search Results' section displays a table with columns: 'First Name', 'Last Name', 'Date of Birth', 'Gender', 'Address', and 'Match Score'. Below the table, it states 'No records found'.

Step 3: Select the **patient** from the search results, then click the **Clinical Information tab** from the Select App menu.

The screenshot shows the 'Patient Search' interface. On the left, there are input fields for First Name (Jane), Last Name (Doe), Date of Birth (08/31/1963), Gender, and SSN. Below these are 'Reset' and 'Search' buttons. On the right, the 'Search Results' table lists the patient: Jane Doe, 08/31/1963, Female. A red box highlights the text 'Click here to access clinical information in the patient's record' with an arrow pointing to the 'Clinical Information' option in the 'Select App' dropdown menu. Other options in the menu include 'Referral Portal', 'Screening', and 'Snapshot'.

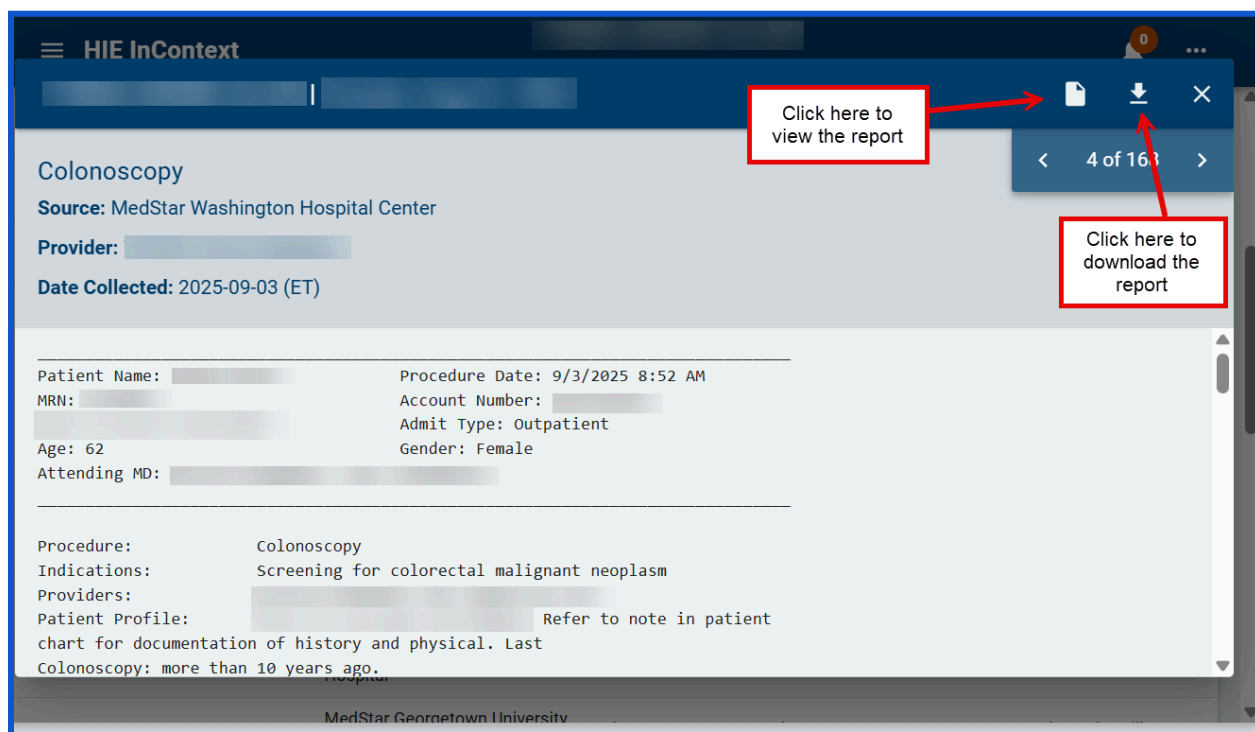
1.4 Locating and Viewing Screening Results

Step 4: Scan the Health Records list for the relevant screening (e.g., a colonoscopy or mammogram) and select the document to open the report.

The screenshot shows the 'HIE InContext' interface. The top navigation bar includes 'HEALTH RECORDS', 'ENCOUNTERS', 'PROBLEMS', 'VISIT SUMMARIES', 'IMMUNIZATIONS', and 'ALLERGIES'. Below this, there are tabs for 'ALL', 'LABORATORY', 'RADIOLOGY', and 'CLINICAL NOTES'. The 'Health Records' section displays a table with the following columns: Date Collected (ET), Source, Category, Description, and Provider. The table contains several entries, with the 'Colonoscopy' entry highlighted in yellow. A red arrow points to this entry.

Date Collected (ET)	Source	Category	Description	Provider
2025-09-03	MedStar Washington Hospital Center	Laboratory	Pathology First Specimen	
2025-09-03	MedStar Washington Hospital Center	Laboratory	POC Gem VBG	
2025-09-03	MedStar Washington Hospital Center	Clinical Notes	History and Physical	
2025-09-03	MedStar Washington Hospital Center	Clinical Notes	Colonoscopy	
2025-08-20	MedStar Washington Hospital	Clinical Notes	History and Physical	

Step 5: Click the desired icon to either **view** or **download** the report.



Outcome: The report can now be saved to the patient's chart. Repeat Steps 4–5 for any additional screenings (for example, a mammogram after reviewing a colonoscopy).

1.5 Closing the Loop

Completing a screening is not the same as closing the loop. The loop only closes once results are in the record, reviewed, and documented.

Milestone	Where You See It in CRISP DC
Mammogram completed	Screening report arrives; the patient's row turns green in Population Explorer.
Colonoscopy completed	Result appears under Data Source (CCD / diagnostic report).
Review the results	Open the report via the Clinical Information view or InContext.
Abnormal result?	Route the patient to diagnostic follow-up — the loop is not closed until then.
Document	Export the report for your organization's records.
Finish	Mark the patient's Follow-Up Status Complete.

Section 2: Locating Cancer Screening Images in Image Exchange

Image Exchange lets users view a patient's diagnostic-quality images — including mammograms, CT scans, and other radiology studies — through the CRISP DC Web Portal or the InContext app within your EHR. Organizations that participate in Image Exchange contribute images to the HIE and share the corresponding radiology reports; images are then made accessible to authorized users who already have access to the patient's record. Image Exchange is powered in partnership with eHealth Technologies (eHT).

2.1 What Image Exchange Provides

Feature	Description
Report-Level View	View an image and its corresponding Radiology or Cardiology report.
Imaging Worklist	Compare images from every organization that contributes images to CRISP DC. The worklist holds up to 20 years of prior images from participating sites.
Transfer to PACS	Download external images from the Imaging Worklist into your facility's local PACS. Access is restricted to users approved by their facility's PACS administrator.

2.2 Option 1 — Access via the Web Portal

Use this option when accessing CRISP DC directly, outside of the EHR.

Image Exchange is accessed through the Clinical Information App, so the entry steps are the same as in Section 1. Follow Section 1.3, Option 2 — Find the Patient in the Web Portal (log in, search for the patient, and select Clinical Information from the Select App menu), then continue with Section 2.4 below.

2.3 Option 2 — Access via InContext (from the EHR)

Use this option when you already have the patient's chart open in your EHR.

Follow Section 1.2, Option 1 — Open the Record via InContext (from the EHR) to open the patient's record from your EHR, then continue with Section 2.4 below.

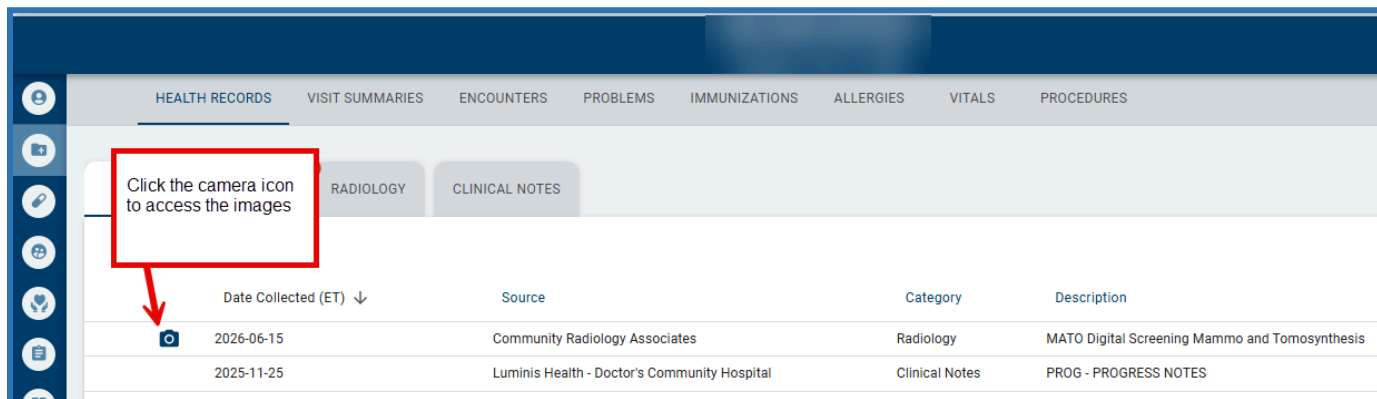
2.4 Locating and Opening Radiology Images (All Users)

Once you're in the Clinical Information view — whether you arrived via the Web Portal or InContext — the remaining steps are the same.

Step 4: On the Clinical Information tab, navigate to the **Radiology** sub-tab within Health Records.

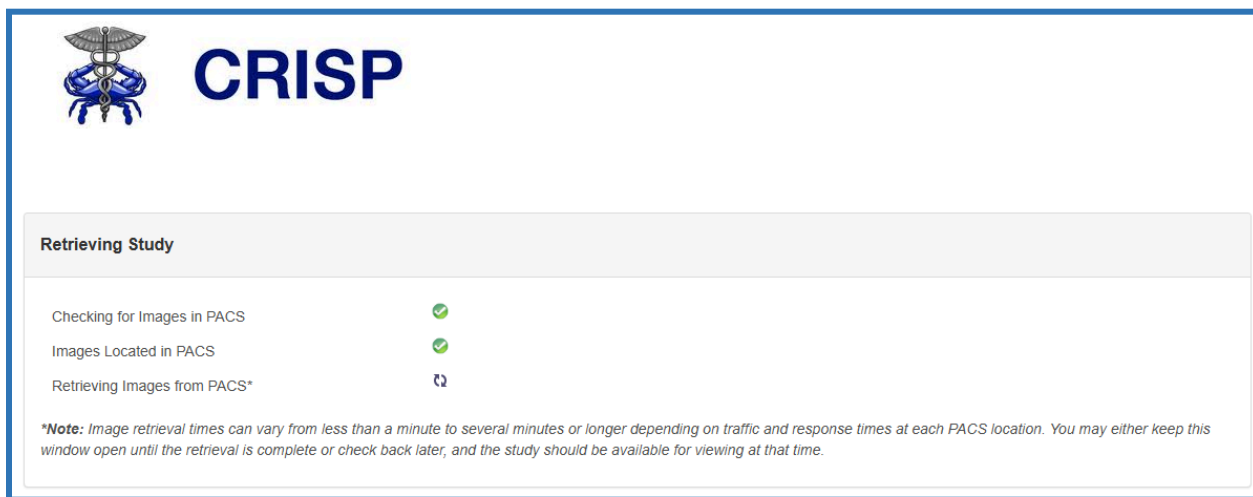
Step 5: To open the report, click the row containing the report.

Step 6: To open the image, click the **camera icon** next to the study.

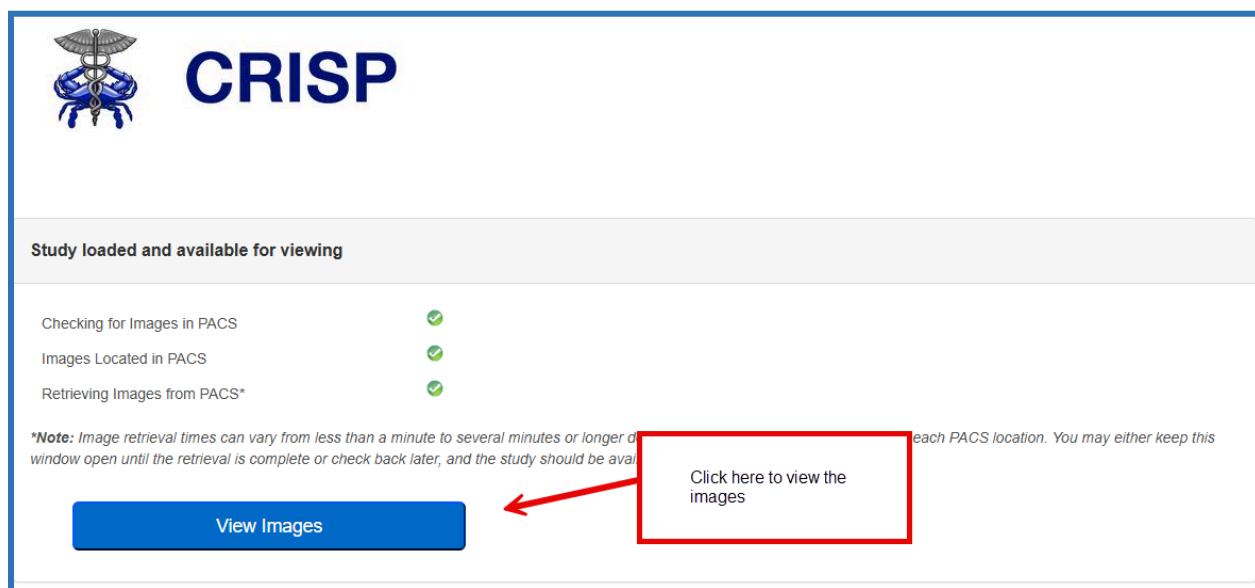


Outcome: Clicking the camera icon opens the image in a new window using eHealthViewer, CRISP DC's built-in image viewer. Images display in full diagnostic quality, are FDA 510(k) Class II certified for clinical use, and no PHI is stored on the local device.

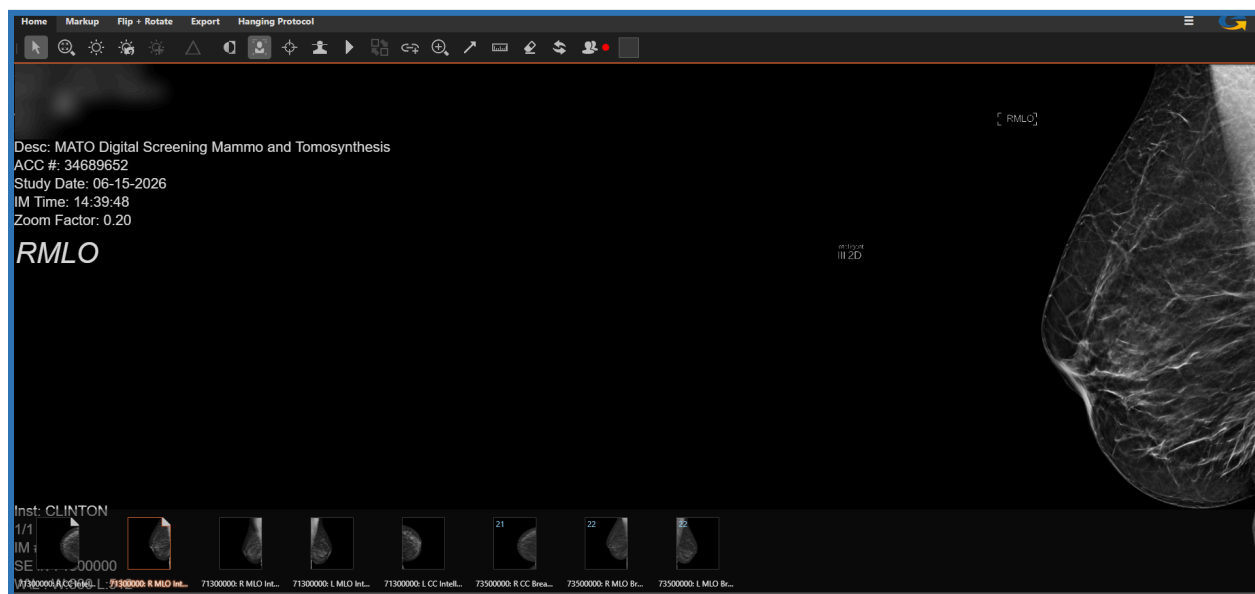
Step 7: The retrieving study screen will open and provide insight into the status of the PACS system retrieving the images.



Step 8: Once the images are available, you will be prompted to click the view images button.



Step 8: The images will appear.

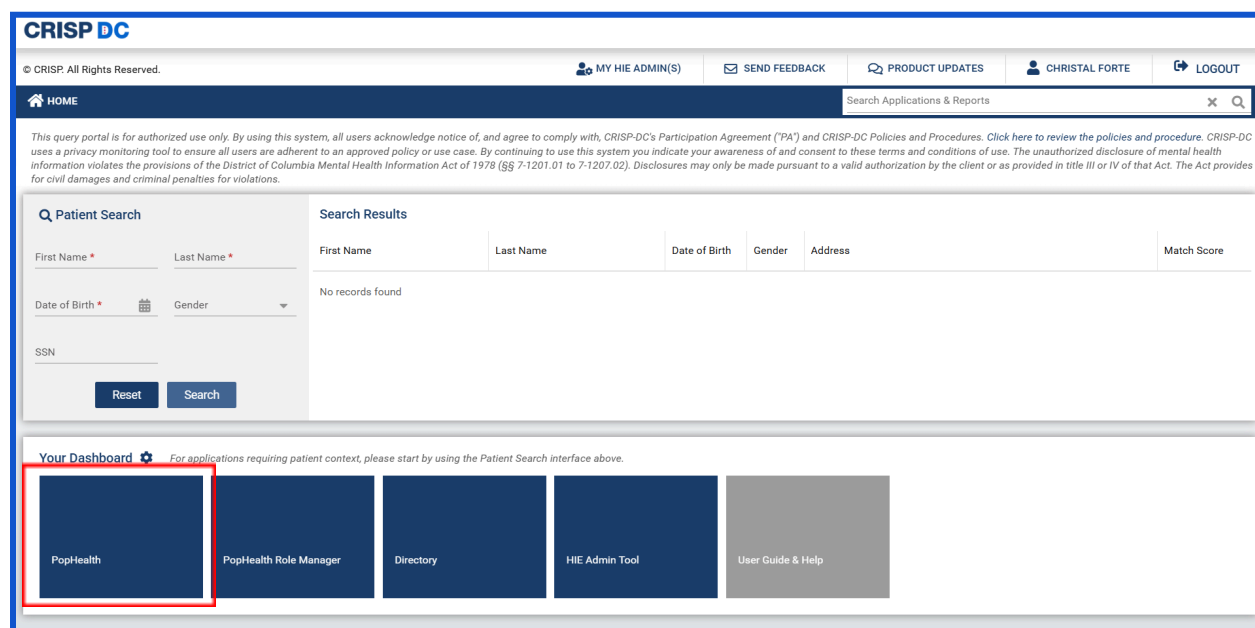


Section 3: Understanding the Population Health (PopHealth) Tool

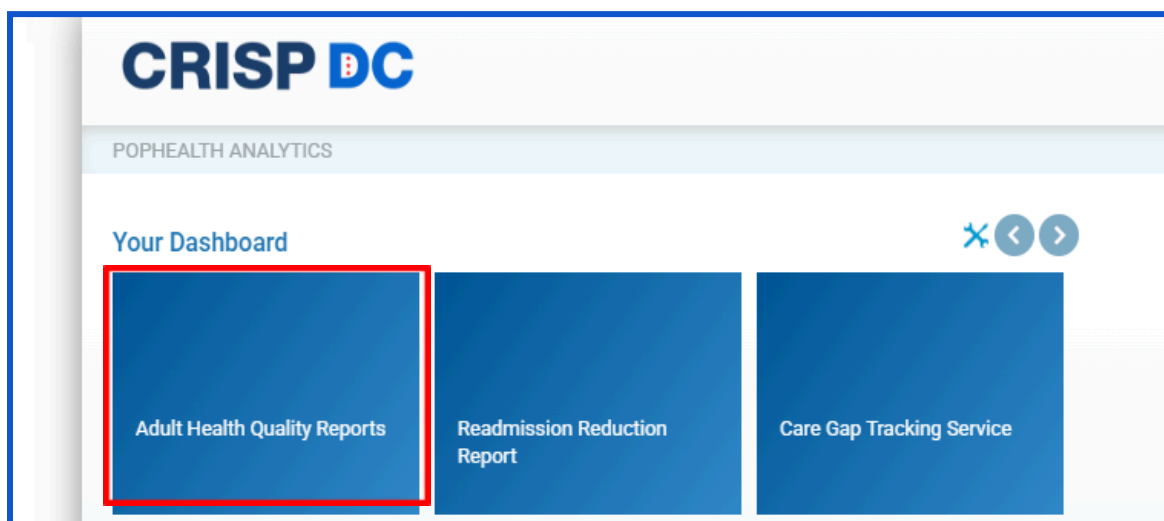
PopHealth provides dashboard-level analytics for tracking screening compliance across an entire patient panel, rather than one patient at a time. Use it to identify how many patients are due for a screening, monitor performance over time, and export lists for outreach.

3.1 Navigating to the Breast Cancer Screening Dashboard

Step 1: From the CRISP DC Home page, **select PopHealth** from your dashboard.



Step 2: Open the **Adult Health Quality Reports** tile.

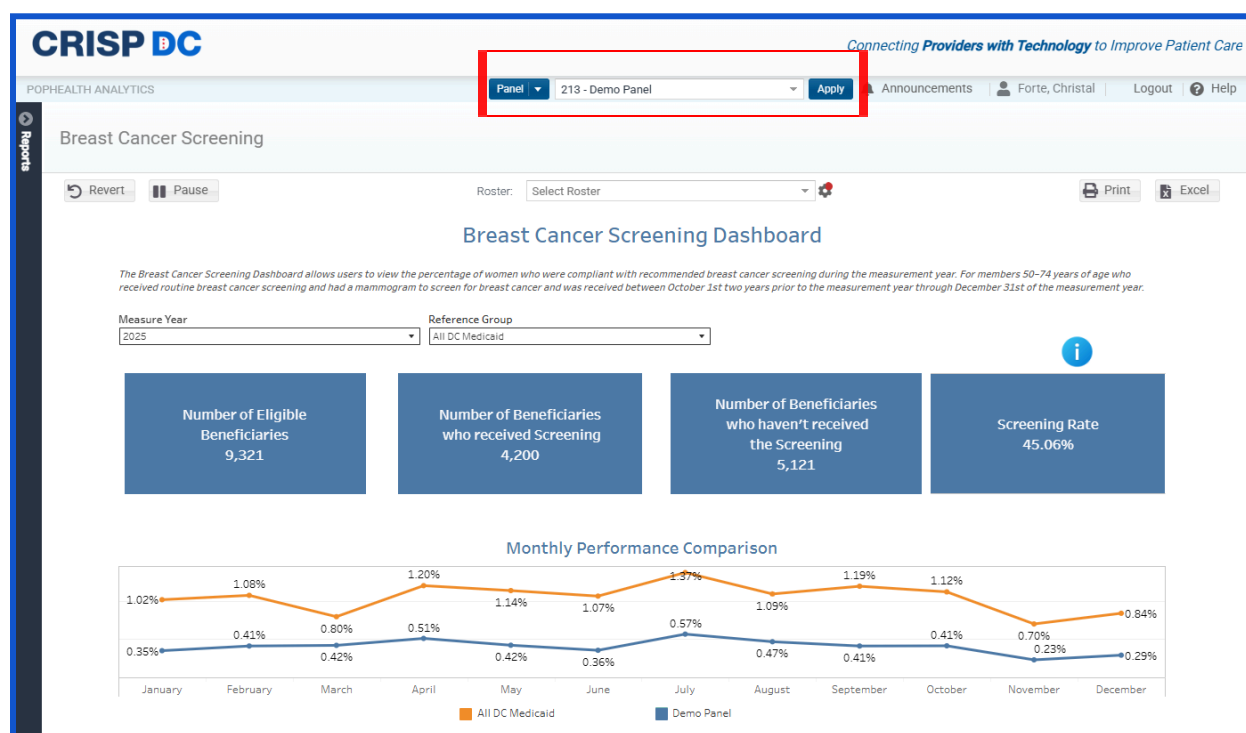


Step 3: Expand Cancer Screening Reports and **select Breast Cancer Screening** (Cervical Cancer Screening and Colorectal Cancer Screening are available the same way).

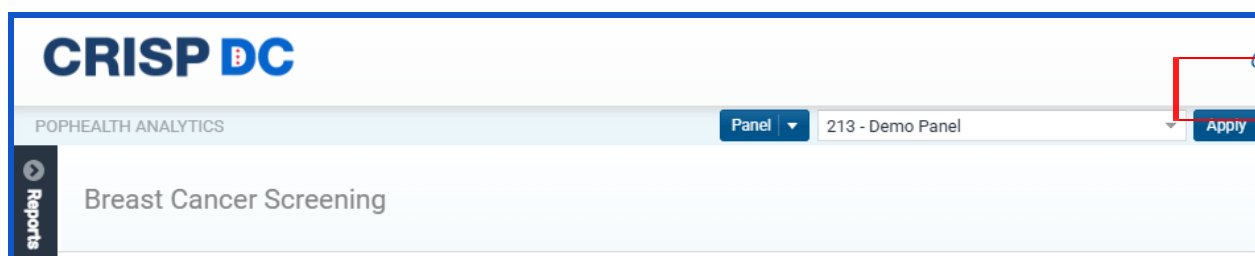


3.2 Loading Panel Data

Step 4: On the dashboard, **select your Panel** from the Panel dropdown.



Step 5: Click **Apply** to load the data for that panel.

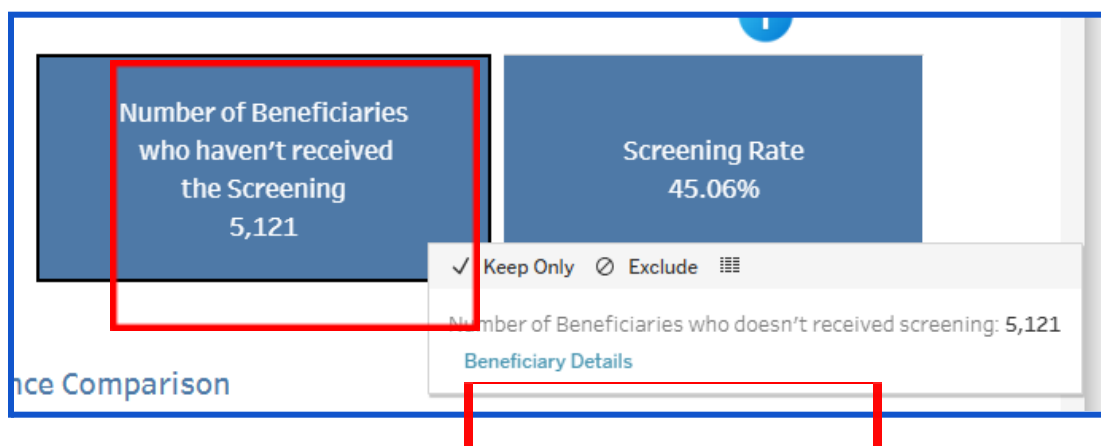


Note: The dashboard displays Number of Eligible Beneficiaries, Number of Beneficiaries Who Received Screening, Number of Beneficiaries Who Haven't Received the Screening, and the overall Screening Rate, along with a Monthly Performance Comparison chart.

3.3 Drilling Down to a Patient List

Step 6: Select the **Number of Beneficiaries Who Haven't Received the Screening** tile to review that population.

Step 7: Click **Beneficiary Details** to apply the drill-down feature.



Step 8: Review the resulting beneficiary list, then **click Excel** to export it.

Member Original ID	Beneficiary Name	Gender	DOB	Age	ZIP	Case Manager	DHCF Plan (Current)	Claim Count	Total Amount Paid	Ethnicity	Race
10152908	Kelly Boyd_DEMO	F	1/1/1963	50	6123	Null	AMERIHEALTH DISTRICT OF COLUMBIA	1	\$172	NOT HISPANIC(78.26%) UNKNOWN(21.74%)	BLACK OR AFRICAN AMERICAN(72.22%) BLACK OR AFRICAN AMERICAN(21.74%)
10381490	Amanda Johnson_DEMO	F	1/1/1972	52	6161	Null	AMERIHEALTH DISTRICT OF COLUMBIA	1	\$172	NOT HISPANIC(88.46%) UNKNOWN(11.54%)	BLACK OR AFRICAN AMERICAN(43.48%) BLACK OR AFRICAN AMERICAN(11.54%)
10416936	Huriya Furchert	F	8/1/1979	46	01298	Null	FEE-FOR-SERVICE	1	\$179	HISPANIC(60.00%) UNKNOWN(40.00%)	UNKNOWN(100.0%) WHITE(100.0%)
10460572	Justin Hawkins_DEMO	F	1/1/1945	74	6131	Null	FEE-FOR-SERVICE	1	\$	NOT HISPANIC(66.67%) UNKNOWN(33.33%)	UNKNOWN(100.0%) OTHER(40.00%)
10581677	Kuntumie Kuaday	F	7/1/1974	51	32831	Null	AMERIHEALTH DISTRICT OF COLUMBIA	1	\$172	NOT HISPANIC(47.37%) UNKNOWN(52.63%)	BLACK OR AFRICAN AMERICAN(47.37%) BLACK OR AFRICAN AMERICAN(52.63%)

3.4 Coordinating Outreach

After exporting the list, coordinate with your team to:

- Review patients who have not received a breast cancer screening.
- Coordinate outreach efforts with case managers to improve the screening rate.
- Identify care gaps contributing to patients not being screened.

Section 4: Building Screening Filters in Population Explorer

Population Explorer lets you build reusable, saved filters — either simple Quick Filters or more advanced roster-based filters — so you can quickly surface patients who need (or have completed) a cancer screening every time you log in.

4.1 Preventive Services Data Fields

The Preventive Services feature helps organizations identify patients who are up to date on recommended preventive screenings and services for breast and colorectal cancer.

Field	Description
Category	Type of preventive service.
Code	Procedure/diagnosis code (if available).
Description	Description associated with the code.
Results	Indicates whether results are available.
Test Name	Additional test name or title associated with the diagnostic report.
Data Source	CCD, ADT, or Diagnostic report.
Event Date	Date of the preventive service.
Facility Name	Facility reporting the preventive service.

4.2 Building an Advanced Filter (Roster-Based)

Use the Advanced Filter Builder when you need to track a specific list of patients (for example, all patients due for screening in a given measurement year) across one or more panels.

Step 1: Open the **Advanced Filter Builder** section of Population Explorer.

Population Explorer - Advanced Filter Builder

View Advanced Filters

Create New Save Changes Discard Changes

Close

Click to add criteria:

IN AND OR NOT GROUP Panel Criteria

Name: 2025 Non-Screened Breast Cancer

Status: Inactive

To rearrange the roster rules, simply drag and drop to the desired order.

IN

Panel:

CONNIE_CEND (CONNIE_CEND) CRISPOC_CEND (CRISPOC_CEND) DC Demo Panel 2 (DC_CEND_DEMO2)

DELETE

AND

Step 2: Name the filter (e.g., "2025 Non-Screened Breast Cancer").

Population Explorer - Advanced Filter Builder

View Advanced Filters

Create New Save Changes Discard Changes

Close

Click to add criteria:

IN AND OR NOT GROUP Panel Criteria

Name: 2025 Non-Screened Breast Cancer

Status: Inactive

To rearrange the roster rules, simply drag and drop to the desired order.

IN

Panel:

CONNIE_CEND (CONNIE_CEND) CRISPOC_CEND (CRISPOC_CEND) DC Demo Panel 2 (DC_CEND_DEMO2)

DELETE

AND

Step 3: Choose the "In" operator, then select "Panel."

Population Explorer - Advanced Filter Builder

View Advanced Filters

Create New Save Changes Discard Changes

Close

Click to add criteria:

IN AND OR NOT GROUP Panel Criteria

Name: 2025 Non-Screened Breast Cancer

Status: Inactive

To rearrange the roster rules, simply drag and drop to the desired order.

IN

Panel:

CONNIE_CEND (CONNIE_CEND) CRISPOC_CEND (CRISPOC_CEND) DC Demo Panel 2 (DC_CEND_DEMO2)

DELETE

AND

Step 4: Select the panel(s) to apply.

Population Explorer - Advanced Filter Builder

View Advanced Filters

Create New Save Changes Discard Changes

Close

Click to add criteria:

IN AND OR NOT GROUP Panel Criteria

Name: 2025 Non-Screened Breast Cancer

Status: Inactive

To rearrange the roster rules, simply drag and drop to the desired order.

IN

Panel:

CONNIE_CEND (CONNIE_CEND) CRISPOC_CEND (CRISPOC_CEND) DC Demo Panel 2 (DC_CEND_DEMO2)

DELETE

AND

Step 5: Select the "AND" operator, then "Criteria."

Close

Click to add criteria:

IN

AND

OR

NOT

GROUP

Panel

Criteria

Name

2025 Non-Screened Breast Cancer

To rearrange the roster rules, simply drag and drop to the desired order.

IN

Panel:

CONNIE_CEND (CONNIE_CEND) X CRISPDC_CEND (CRISPDC_CEND) X DC Demo Panel 2 (DC_CEND_DEMO2) X

AND

Step 6: In the pop-up dialog box, click **Download Submission Template**.

Advanced Filter Builder - Add / Edit Criteria

Select the desired criteria below, then complete the steps prompted to define the criteria. For criteria requiring long list of definitions, use the interface below to upload a CSV or Excel for ease of entry and review.

Select Criteria:

+ Add New

Definition List Click the item to edit CLEAR

Or

Download Submission Template

Drag & Drop to Upload File

OR

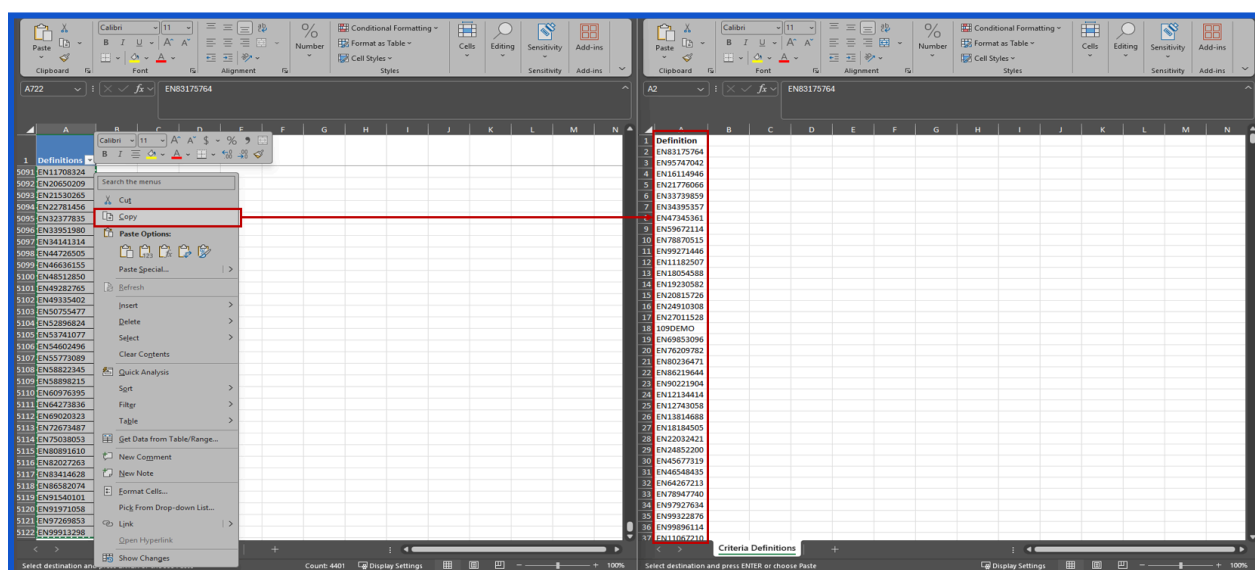
BROWSE FILE

DISCARD CHANGES SAVE CHANGES CLOSE

Step 7: Open the exported beneficiary file and **click the SMRN List tab**.

1	Member Original ID	Beneficiary Name	Source/MRN	Gender	DOB	Age	ZIP	CASE MANAGEMENT AGENCY	DHCF Plan (Current)	Ethnicity	Race	Claim Count	Total Amount Paid
4631	6663155	Ronnie Jerschard	EN46631555	F	12/1/1985	40	62438	AMERHEALTH DISTRICT OF COLUMBIA	UNKNOWN(1.27%)		BLACK OR AFRICAN AMERICAN(100.0%)	0	
4632	48512850	Memhat Matta-jara	EN48512850	F	12/1/1985	40	77677	MEOSTAR FAMILY CHOICE, INC.	NOT HISPANIC(60.78%)		UNKNOWN(39.21%)	0	
4633	48512850	Memhat Matta-jara	EN48512850	F	12/1/1985	40	77677	MEOSTAR FAMILY CHOICE, INC.	NOT HISPANIC(60.78%)		BLACK OR AFRICAN AMERICAN(39.21%)	0	
4634	48512850	Memhat Matta-jara	EN48512850	F	12/1/1985	40	77677	MEOSTAR FAMILY CHOICE, INC.	UNKNOWN(39.22%)		UNKNOWN(75.00%)	0	
4635	48512850	Memhat Matta-jara	EN48512850	F	12/1/1985	40	77677	MEOSTAR FAMILY CHOICE, INC.	UNKNOWN(39.22%)		TWO OR MORE RACES(5.00%)	0	
4636	48512850	Memhat Matta-jara	EN48512850	F	12/1/1985	40	77677	MEOSTAR FAMILY CHOICE, INC.	UNKNOWN(39.22%)		BLACK OR AFRICAN AMERICAN(20.00%)	0	
4637	49282765	Amberly F Barberian Olant	EN49282765	F	12/1/1985	40	62626	MEOSTAR FAMILY CHOICE, INC.	HISPANIC(4.350%)		UNKNOWN(100.0%)	0	
4638	49282765	Amberly F Barberian Olant	EN49282765	F	12/1/1985	40	62626	MEOSTAR FAMILY CHOICE, INC.	UNKNOWN(95.65%)		WHITE(4.550%)	0	
4639	49282765	Amberly F Barberian Olant	EN49282765	F	12/1/1985	40	62626	MEOSTAR FAMILY CHOICE, INC.	UNKNOWN(95.65%)		UNKNOWN(5.82%)	0	
4640	49282765	Amberly F Barberian Olant	EN49282765	F	12/1/1985	40	62626	MEOSTAR FAMILY CHOICE, INC.	UNKNOWN(95.65%)		OTHER(13.64%)	0	
4641	49335402	Fuel-Hsun Yaya Mukete Epse Nijmpe	EN49335402	F	12/1/1985	40	62310	WELLPOINT DISTRICT OF COLUMBIA, INC.	NOT HISPANIC(41.03%)		BLACK OR AFRICAN AMERICAN(100.0%)	0	
4642	49335402	Fuel-Hsun Yaya Mukete Epse Nijmpe	EN49335402	F	12/1/1985	40	62310	WELLPOINT DISTRICT OF COLUMBIA, INC.	UNKNOWN(58.97%)		UNKNOWN(78.36%)	0	
4643	49335402	Fuel-Hsun Yaya Mukete Epse Nijmpe	EN49335402	F	12/1/1985	40	62310	WELLPOINT DISTRICT OF COLUMBIA, INC.	UNKNOWN(58.97%)		BLACK OR AFRICAN AMERICAN(21.74%)	0	
4644	60755477	Tanna Green Gill	EN05754777	F	12/1/1985	40	63054	AMERHEALTH DISTRICT OF COLUMBIA	NOT HISPANIC(100.0%)		BLACK OR AFRICAN AMERICAN(100.0%)	0	
4645	62896824	Stacey A Mulner	EN02896824	F	12/1/1985	40	61901	WELLPOINT DISTRICT OF COLUMBIA, INC.	DECLINED TO ANSWER(66.87%)		UNKNOWN(100.0%)	0	
4646	62896824	Stacey A Mulner	EN02896824	F	12/1/1985	40	61901	WELLPOINT DISTRICT OF COLUMBIA, INC.	UNKNOWN(33.33%)		UNKNOWN(100.0%)	0	
4647	63741077	Geridena Adjei	EN05741077	F	12/1/1985	40	61626	AMERHEALTH DISTRICT OF COLUMBIA	NOT HISPANIC(100.0%)		BLACK OR AFRICAN AMERICAN(100.0%)	0	
4648	64602496	Mag-grace Coughlan, Molly	EN06460249	F	12/1/1985	40	67559	AMERHEALTH DISTRICT OF COLUMBIA	NOT HISPANIC(100.0%)		BLACK OR AFRICAN AMERICAN(100.0%)	0	
4649	65773089	Sydle Holzem	EN05773089	F	12/1/1985	40	60075	AMERHEALTH DISTRICT OF COLUMBIA	NOT HISPANIC(60.00%)		WHITE(100.0%)	0	
4650	65773089	Sydle Holzem	EN05773089	F	12/1/1985	40	60075	AMERHEALTH DISTRICT OF COLUMBIA	UNKNOWN(40.00%)		UNKNOWN(100.0%)	0	
4651	68822345	Philomina Adibogos	EN08822345	F	12/1/1985	40	60920	MEOSTAR FAMILY CHOICE, INC.	HISPANIC(56.25%)		UNKNOWN(66.67%)	0	
4652	68822345	Philomina Adibogos	EN08822345	F	12/1/1985	40	60920	MEOSTAR FAMILY CHOICE, INC.	HISPANIC(56.25%)		UNKNOWN(100.0%)	0	
4653	68822345	Philomina Adibogos	EN08822345	F	12/1/1985	40	60920	MEOSTAR FAMILY CHOICE, INC.	NOT HISPANIC(12.50%)		WHITE(100.0%)	0	
4654	68822345	Philomina Adibogos	EN08822345	F	12/1/1985	40	60920	MEOSTAR FAMILY CHOICE, INC.	UNKNOWN(31.25%)		WHITE(20.00%)	0	
4655	68822345	Philomina Adibogos	EN08822345	F	12/1/1985	40	60920	MEOSTAR FAMILY CHOICE, INC.	UNKNOWN(31.25%)		UNKNOWN(60.00%)	0	
4656	68822345	Philomina Adibogos	EN08822345	F	12/1/1985	40	60920	MEOSTAR FAMILY CHOICE, INC.	UNKNOWN(31.25%)		OTHER(20.00%)	0	
4657	6888215	Leslie Gallaway Holmes	EN08882155	F	12/1/1985	40	66827	NOT HISPANIC(100.0%)			BLACK OR AFRICAN AMERICAN(100.0%)	0	
4658	6076395	Alissa Gill Columbia	EN06763955	F	12/1/1985	40	69602	NOT HISPANIC(100.0%)			BLACK OR AFRICAN AMERICAN(100.0%)	0	
4659	64273836	Deannika Rungfarsangroon	EN47383636	F	12/1/1985	40	67452	NOT HISPANIC(100.0%)			UNKNOWN(100.0%)	0	
4660	64273836	Deannika Rungfarsangroon	EN47383636	F	12/1/1985	40	67452	UNKNOWN(50.00%)			BLACK OR AFRICAN AMERICAN(100.0%)	0	
4661	69020323	Dhreen Quanyar	EN69020323	F	12/1/1985	40	63149	AMERHEALTH DISTRICT OF COLUMBIA	UNKNOWN(40.00%)		UNKNOWN(100.0%)	0	
4662	69020323	Dhreen Quanyar	EN69020323	F	12/1/1985	40	63149	AMERHEALTH DISTRICT OF COLUMBIA	NOT HISPANIC(83.33%)		BLACK OR AFRICAN AMERICAN(80.00%)	0	
4663	69020323	Dhreen Quanyar	EN69020323	F	12/1/1985	40	63149	AMERHEALTH DISTRICT OF COLUMBIA	UNKNOWN(16.67%)		UNKNOWN(100.0%)	0	
4664	62673487	Rhaneica Cobos Jr	EN76273487	F	12/1/1985	40	65455	MEOSTAR FAMILY CHOICE, INC.	HISPANIC(75.00%)		UNKNOWN(100.0%)	0	
4665	62673487	Rhaneica Cobos Jr	EN76273487	F	12/1/1985	40	65455	MEOSTAR FAMILY CHOICE, INC.	NOT HISPANIC(25.00%)		UNKNOWN(100.0%)	0	
4666	6508053	Satony Kunkle	EN78080533	F	12/1/1985	40	64263	WELLPOINT DISTRICT OF COLUMBIA, INC.	NOT HISPANIC(100.0%)		BLACK OR AFRICAN AMERICAN(100.0%)	0	
4667	60892410	Momrip Kimery	EN08892410	F	12/1/1985	40	65476	MEOSTAR FAMILY CHOICE, INC.	NOT HISPANIC(84.74%)		BLACK OR AFRICAN AMERICAN(100.0%)	0	
4668	60892410	Momrip Kimery	EN08892410	F	12/1/1985	40	65476	MEOSTAR FAMILY CHOICE, INC.	UNKNOWN(15.26%)		BLACK OR AFRICAN AMERICAN(100.0%)	0	
4669	69022763	Saina Pichoo II	EN09022763	F	12/1/1985	40	65367	AMERHEALTH DISTRICT OF COLUMBIA	NOT HISPANIC(100.0%)		BLACK OR AFRICAN AMERICAN(100.0%)	0	

Step 8: Copy the MRNs from the SMRN List tab and paste them into the submission template you downloaded.



Step 9: Save and rename the updated submission template in a folder on your computer.

Image needed?

Step 10: Navigate back to Population Explorer and select Panel MRN from the Select Criteria dropdown.

Advanced Filter Builder - Add / Edit Criteria ×

Select the desired criteria below, then complete the steps prompted to define the criteria. For criteria requiring long list of definitions, use the interface below to upload a CSV or Excel for ease of entry and review.

Select Criteria:
Panel MRN

+ Add New

Or

Download Submission Template

Drag & Drop to Upload File
OR
BROWSE FILE

Definition List Click the item to edit CLEAR

DISCARD CHANGES SAVE CHANGES CLOSE

Step 11: Click Browse File and select the submission template you saved.

Advanced Filter Builder - Add / Edit Criteria ×

Select the desired criteria below, then complete the steps prompted to define the criteria. For criteria requiring long list of definitions, use the interface below to upload a CSV or Excel for ease of entry and review.

Select Criteria:
Panel MRN

+ Add New

Or

Download Submission Template

Drag & Drop to Upload File
OR
BROWSE FILE

Definition List Click the item to edit CLEAR

DISCARD CHANGES SAVE CHANGES CLOSE

Step 12: Set the status to Active Public and click Save Changes.

Population Explorer - Advanced Filter Builder

View Advanced Filters

Create New Save Changes Discard Changes

Close

Click to add criteria:

IN AND OR NOT GROUP Panel Criteria

Name: 2023 Non-Screened Breast Cancer Status: Active Public Selected Criteria

To rearrange the roster rules, simply drag and drop to the desired order.

IN Panel: CONNIE_CEND (CONNIE_CEND) CRISPOC_CEND (CRISPOC_CEND) DC Demo Panel 2 (DC_CEND_DEMO2) DELETE

AND Criteria: Panel: MIN IN DEFINITION LIST

Outcome: A confirmation notification appears at the top of the page indicating the filter was created successfully.

Step 13: Navigate back to Population Explorer and select the saved filter under “View Panel”. A list of matching patient encounters populates.

CRISP DC

Advanced Filter

2023 Non-Screened Breast Cancer is created successfully.

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Population Explorer - Advanced Filter Builder

View Advanced Filters

Create New Save Changes Discard Changes

Close

Click to add criteria:

IN AND OR NOT GROUP Panel Criteria

Name: 2023 Non-Screened Breast Cancer Status: Active Public Selected Criteria

To rearrange the roster rules, simply drag and drop to the desired order.

IN Panel: CONNIE_CEND (CONNIE_CEND) CRISPOC_CEND (CRISPOC_CEND) DC Demo Panel 2 (DC_CEND_DEMO2) DELETE

AND Criteria: Panel: MIN IN DEFINITION LIST

Step 14: In Quick Filter, select **Preventive Services Category**, choose the relevant screening type (e.g., Breast Cancer Screening), then click the **+** icon to apply the filter.

The screenshot shows the 'Population Explorer' interface. At the top, there's a search bar and a 'View Panel' dropdown set to '2025 Non-Screened Breast Cancer'. Below this, there's a 'DETAIL' tab and a 'TABLE' tab. The 'TABLE' tab shows a list of patients with columns for Name, DOB, Admit Date, Notification Type, and Facility. The 'DETAIL' tab shows a detailed view of a patient's information, including Follow-Up Status, Patient Demographics, and Notification Details. A red box highlights the '2025 Non-Screened Breast Cancer' panel name.

Note: Patients highlighted in green in the results list indicate a preventive screening document report is available in the HIE.

Step 15: Click the “+” icon to apply the filter.

The screenshot shows the 'Population Explorer' interface. At the top, there's a search bar and a 'View Panel' dropdown set to '2025 Non-Screened Breast Cancer'. Below this, there's a 'DETAIL' tab and a 'TABLE' tab. The 'TABLE' tab shows a list of patients with columns for Panel MRN, Name, Facility, Gender, Encounter Type, Admit/Service Date, Discharge Date, Location, Practice, and Follow-Up Status. The 'DETAIL' tab shows a detailed view of a patient's information, including Follow-Up Status, Patient Demographics, and Notification Details. A red box highlights the '2025 Non-Screened Breast Cancer' panel name. Another red box highlights the 'Quick Filter' section on the right, which contains a dropdown menu for 'Preventive Services Category' and a '+ ADD' button.

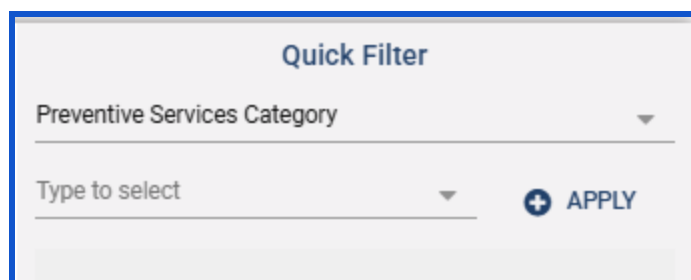
4.3 Building a Quick Filter (Fast, Reusable Search)

Use Quick Filters for a faster, panel-wide search by screening category and recency — ideal for day-to-day monitoring.

Step 1: Open the Quick Filter section of Population Explorer.

The screenshot shows the 'Quick Filter' section of the Population Explorer interface. It features a search bar with the placeholder text 'Type to select'. Below the search bar, there's a red box containing the text 'Click here to select your first filter option'. To the right of the search bar, there's a '+ APPLY' button. A red arrow points from the red box to the '+ APPLY' button.

Step 2: Select Preventive Services Category.



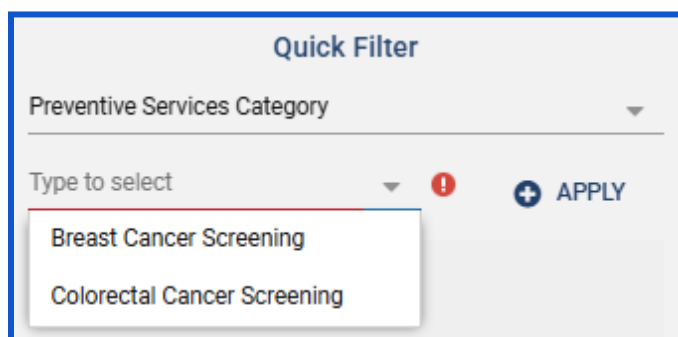
Quick Filter

Preventive Services Category

Type to select

+ APPLY

Step 3: Select the cancer screening type(s) to track (Breast Cancer Screening or Colorectal Cancer Screening).



Quick Filter

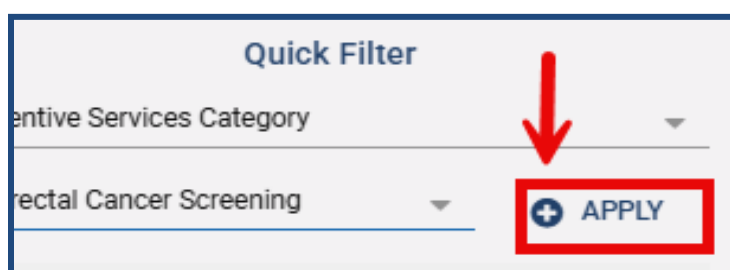
Preventive Services Category

Type to select

- Breast Cancer Screening
- Colorectal Cancer Screening

+ APPLY

Step 4: Click Apply to add it to the filter.



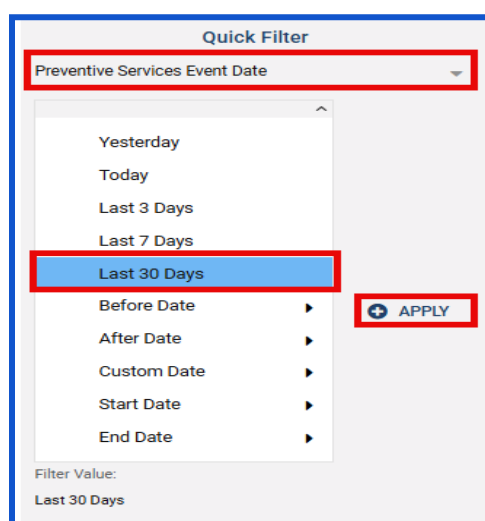
Quick Filter

Preventive Services Category

Colorectal Cancer Screening

+ APPLY

Step 5: Switch the filter category to Preventive Services Event Date.



Quick Filter

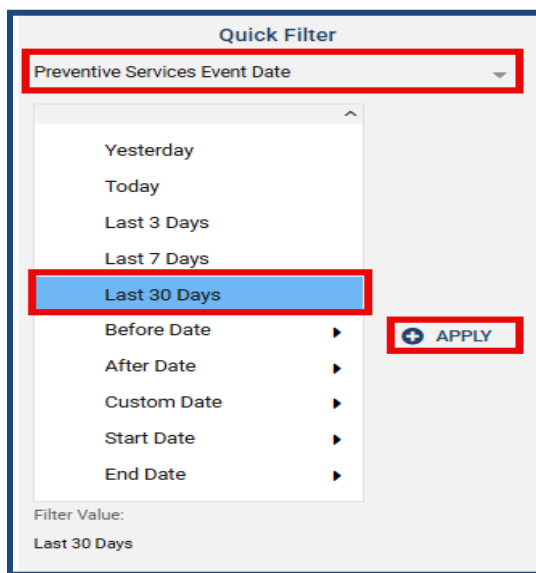
Preventive Services Event Date

- Yesterday
- Today
- Last 3 Days
- Last 7 Days
- Last 30 Days
- Before Date
- After Date
- Custom Date
- Start Date
- End Date

+ APPLY

Filter Value:
Last 30 Days

Step 6: Select a recent range (e.g., Last 30 Days), then click Apply.



Quick Filter

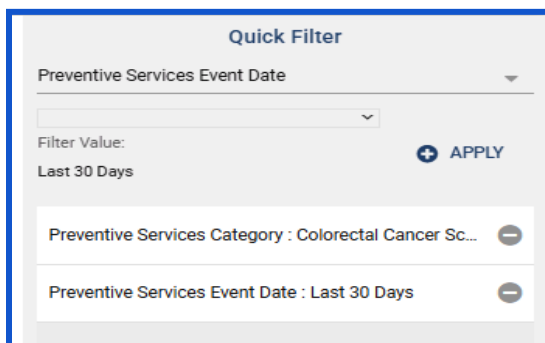
Preventive Services Event Date

- Yesterday
- Today
- Last 3 Days
- Last 7 Days
- Last 30 Days**
- Before Date
- After Date
- Custom Date
- Start Date
- End Date

Filter Value:
Last 30 Days

+ APPLY

Step 7: Click Save Current Filter to keep the selections.



Quick Filter

Preventive Services Event Date

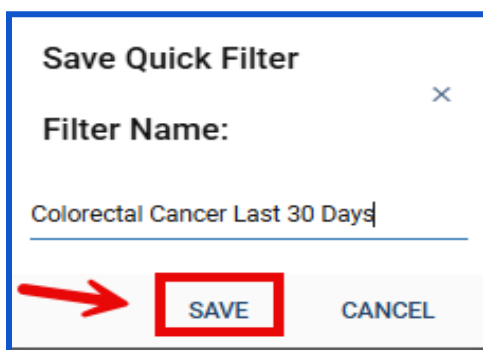
Filter Value:
Last 30 Days

+ APPLY

Preventive Services Category : Colorectal Cancer Sc...

Preventive Services Event Date : Last 30 Days

Step 8: Name the filter so it can be reused at every login, then click Save.



Save Quick Filter

Filter Name:

Colorectal Cancer Last 30 Days

→ SAVE CANCEL

4.4 Identifying Patients and Reviewing Records

Step 9: Apply the saved filter and confirm the correct panel is selected under View Panel.

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HOME Search Applications & Reports

Population Explorer

View Panel: Ensure your panel is selected here

Export

Quick Filter

Type to select

APPLY

DETAIL TABLE

Display Type

Preventive Services

Service Date: 2025-09-03 12:00 AM Female
Notification Type: Colorectal Cancer Screening
Facility: Medstar Washington Hospital Center

Service Date: 2025-09-03 12:00 AM Female
Notification Type: Colorectal Cancer Screening
Facility: Medstar Washington Hospital Center

Service Date: 2025-09-03 12:00 AM Female
Notification Type: Colorectal Cancer Screening
Facility: Medstar Washington Hospital Center

Service Date: 2025-09-03 12:00 AM Female
Notification Type: Colorectal Cancer Screening
Facility: Medstar Washington Hospital Center

Service Date: 2025-09-03 12:00 AM Female
Notification Type: Colorectal Cancer Screening
Facility: Medstar Washington Hospital Center

Service Date: 2025-09-03 12:00 AM Female
Notification Type: Colorectal Cancer Screening
Facility: Medstar Washington Hospital Center

Follow-Up Status

Follow-Up Status:

Last Modified: By:

Patient Demographics

First Name:

Middle Name:

Last Name:

Gender:

Address:

Home Phone:

Work Phone:

Date of Birth:

Date of Death:

Panel MRN:

Notification Details

1 of 2998

Saved Filters

Type to select

Load

Clear Filters Save Current Filter

Step 10: Select Preventive Services in the Display Type to view patients with recent screenings.

CRISP DC

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HOME Search Applications & Reports

Population Explorer

View Panel: Ensure your panel is selected here

Export

Quick Filter

Type to select

APPLY

DETAIL TABLE

Display Type

Preventive Services

Service Date: 2025-09-03 12:00 AM Female
Notification Type: Colorectal Cancer Screening
Facility: Medstar Washington Hospital Center

Service Date: 2025-09-03 12:00 AM Female
Notification Type: Colorectal Cancer Screening
Facility: Medstar Washington Hospital Center

Service Date: 2025-09-03 12:00 AM Female
Notification Type: Colorectal Cancer Screening
Facility: Medstar Washington Hospital Center

Service Date: 2025-09-03 12:00 AM Female
Notification Type: Colorectal Cancer Screening
Facility: Medstar Washington Hospital Center

Service Date: 2025-09-03 12:00 AM Female
Notification Type: Colorectal Cancer Screening
Facility: Medstar Washington Hospital Center

Service Date: 2025-09-03 12:00 AM Female
Notification Type: Colorectal Cancer Screening
Facility: Medstar Washington Hospital Center

Follow-Up Status

Follow-Up Status:

Last Modified: By:

Patient Demographics

First Name:

Middle Name:

Last Name:

Gender:

Address:

Home Phone:

Work Phone:

Date of Birth:

Date of Death:

Panel MRN:

Notification Details

1 of 2998

Saved Filters

Type to select

Load

Clear Filters Save Current Filter

Note: Patients highlighted in green indicate there is a preventive screening document report in the HIE. Click the patient to access the details.

Step 11: Select the patient's name to review their screening results.

HOME Search Applications

Population Explorer View Panel

DETAIL TABLE

Display Type Preventive Services

Service Date: 2024-06-14 12:00 AM Female
Notification Type: Breast Cancer Screening
Facility: George Washington University

Service Date: 2024-06-14 12:00 AM Female
Notification Type: Breast Cancer Screening
Facility: ECW Capital Clinical

Service Date: 2024-06-14 12:00 AM Female

Preventive Services

Category: Breast Cancer Screening

Details:

Code:

Description:

Results:

Test Name: MG Mammo Screen Digital Bil w 3D Tomo

Data Source: Diagnostic Reports

Document Evidence Date: N/A

Event Date: 2024-06-14

600 of 2998

Note: The Preventive Services panel shows the location of the screening report within the patient's HIE account, specifically under the Data Source field.

Step 12: Right-click the patient's name, then right-click the four-square Apps icon next to Clinical Information.

Population Explorer View Panel

DETAIL TABLE

Display Type Preventive Services

Service Date: 2025-09-06 12:00 AM Female
Notification Type: Breast Cancer Screening
Facility: Kaiser Permanente

Service Date: 2025-09-06 12:00 AM
Notification Type: Breast Cancer Screening
Facility: Kaiser Permanente

Service Date: 2025-09-05 12:00 AM
Notification Type: Colorectal Cancer Screening
Facility: Medstar Washington Hospital Center

Follow-Up Status

Follow-Up Status: Not Started

Select App

Clinical Information

Referral Portal

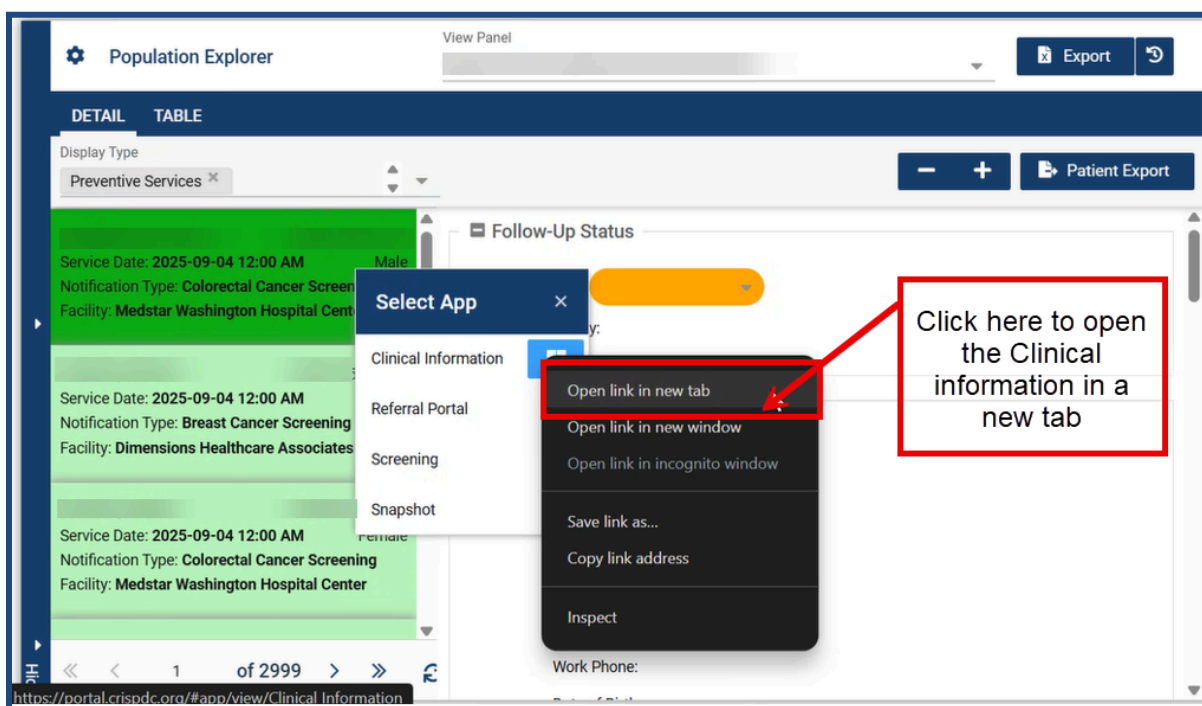
Screening

Snapshot

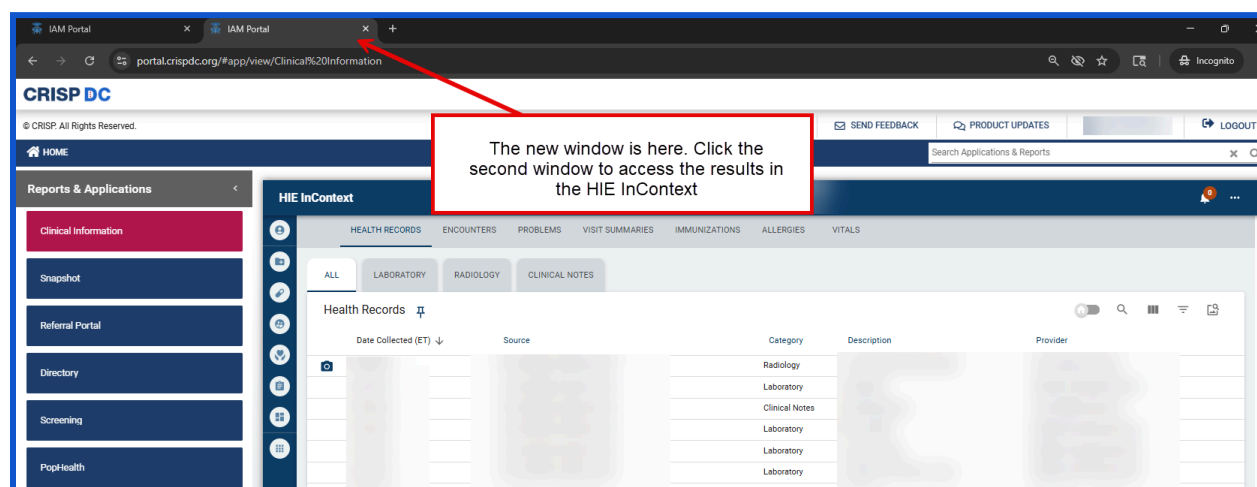
Right click here

1 of 3000

Step 13: Select the drop-down option to Open link in a new tab to access the full test results.



Step 14: Click the new browser tab that appears to access the results in the HIE InContext view.



4.5 Exporting Results and Tracking Follow-Up

With the filtered patient list on screen:

Step 15: Click Patient Export to download the filtered screening list.

The screenshot shows the 'Population Explorer' application. At the top, there is a 'HOME' button and a 'Search Applications' field. Below this, the 'Population Explorer' header includes a 'View Panel' dropdown, an 'Export' button, and a refresh icon. The main content area has tabs for 'DETAIL' and 'TABLE'. Under the 'DETAIL' tab, there is a 'Display Type' dropdown set to 'Preventive Services'. A list of services is shown on the left, with the first entry selected. The details for this entry are shown on the right:

- Category:** Colorectal Cancer Screening
- Details:**
 - Code:** 45385
 - Description:**
 - Results:**
 - Test Name:**
- Data Source:** ADT
- Document Evidence Date:** N/A

At the bottom of the interface, there is a pagination bar showing '600 of 2998' records, with navigation arrows and a search icon.

Step 16: Save or upload the report into the EHR so the care team can act on it.

Outcome: *The screening results are documented and ready for follow-up and reporting.*

As the list is worked, use Follow-Up Status to:

- Track the progress of each patient's record related to preventive screenings.
- Streamline reporting by flagging what still needs to be completed.
- See progress across patient lists with transparency for the care team.
- Keep data current by updating follow-up status (Not Started, In Progress, Complete) directly in the tool.

Quick Reference Summary

Which Tool Should I Use?

I need to...	Use this tool
Check one patient's screening history during a visit	Clinical Information App (InContext or Web Portal)
View or download a mammogram, CT, or other radiology image	Image Exchange (InContext or Web Portal)
See panel-wide screening compliance rates and trends	Population Health (PopHealth) Dashboard
Build a reusable list of patients needing/completing screening	Population Explorer (Quick Filter or Advanced Filter)
Export a patient list for outreach or upload to my EHR	Population Health or Population Explorer — Export/Patient Export
Track follow-up progress on a screening list	Population Explorer — Follow-Up Status

Key Terms

Term	Definition
InContext	The view of CRISP DC that opens automatically within the EHR for the patient currently in context.
CCD	Continuity of Care Document — a standardized clinical summary shared between providers.
Panel	A defined group of patients (e.g., by practice or clinic) used to scope reports and filters.
Quick Filter	A fast, reusable Population Explorer filter based on category and date criteria.
Advanced Filter Builder	A Population Explorer tool for building roster-based filters using panels and uploaded MRN lists.
Follow-Up Status	A field (Not Started / In Progress / Complete) used to track progress on a patient's screening record.

Term	Definition
Imaging Worklist	The Image Exchange feature that lists a patient's prior imaging studies from every contributing organization, for side-by-side comparison.
eHealthViewer	The built-in image viewer that opens when a radiology or cardiology image is selected in Image Exchange.