

## KHIE Patient Panels 101: Quick Reference Guide

### Introduction to Patient Panels

A patient panel is a roster of all the patients with whom your organization has an active treatment relationship. Patient panels can be generated as a report from your electronic health record (EHR) system and submitted to KHIE to establish that relationship in the HIE. Submitting patient panels allows your organization to access your patients' information appropriately and securely, without the requirement to "break the glass." This helps to ensure privacy and security of their health information.

Additionally, submitting patient panels ensures that you receive event notifications when your patients visit the ER, or are admitted to or discharged from hospital. Accurate panels also help to improve the quality of data used for care transitions, population health efforts, and performance measures that depend on knowing who your patients are.

### Roles and Responsibilities

Panels are created and submitted either by an organization's KHIE Administrator(s) or designated "Panel Managers."

### Building a Patient Panel

To build your patient panel, the following data elements must be included on a spreadsheet:

- Your internal Patient ID
- Patient first name
- Patient last name
- Street Address
- City
- State
- Zip code
- Date of birth
- Gender

Each of these values represents a column in the spreadsheet that will be uploaded in the Panel Processor tool. A template can be downloaded from Panel Processor showing the exact column names to be used.

- All required values must be populated on your spreadsheet. If any of these elements are missing from the submitted panel, the panel will fail to process.

Once completed, save as a .csv file using the naming format "**subscribercode-1-z-MM-DD-YYYY**" upload into Panel Processor – accessed through the KHIE Portal.

- Alternatively, if your organization has a direct ADT feed to KHIE, you can use auto-subscriptions for panel delivery, removing the need for ongoing manual uploads. To utilize this option, please contact your KHIE Outreach Coordinator or Training Specialist for assistance.

For a detailed overview on how to build and submit a patient panel, please view our [Building a Patient Panel: Detailed User Guide](#).

### **Submitting a Panel**

Patient panels are submitted in the Panel Processor tool, using the “Upload File” tab. Select the panel template you are using – typically this will be the “CEND Patient Panel.” Then select the appropriate panel name and source code.

Under the “Upload File” section you will attach your appropriately named CSV file and click submit. If successful, the screen will advance you to the “Processing File” tab. If unsuccessful, you will receive an error message detailing the issue. Once corrected, restart the process to submit the panel.

A step-by-step guide to building and submitting panels in the Panel Processor can be found in the [Panel Processor User Guide](#).

### **Further Information**

If you have further questions, or difficulty submitting panels, please reach out to your KHIE Outreach Coordinator or Training Specialist. [Find your Outreach Coordinator here](#).