

Population Explorer User Guide

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1 Introduction and Overview



» What is Population Explorer?

Population Explorer is a module of the HIE Portal that enables near-real time encounter, logic-based, and preventive services notifications from CSS, as well as functionality to filter, view details, track notification status, and export notifications of interest. This document serves as a general user guide to assist in navigating Population Explorer and using its functionality to full effect.

1.1 Accessing the Population Explorer

» Access to the Population Explorer module is granted by your HIE Admin from the CSS HIE Admin Tool. Once you have been granted access, it will natively appear in the HIE Portal Landing page as a new widget on the right-hand side of the screen. If you do not have access to Population Explorer and believe that you should, please contact your organization's HIE Admin.

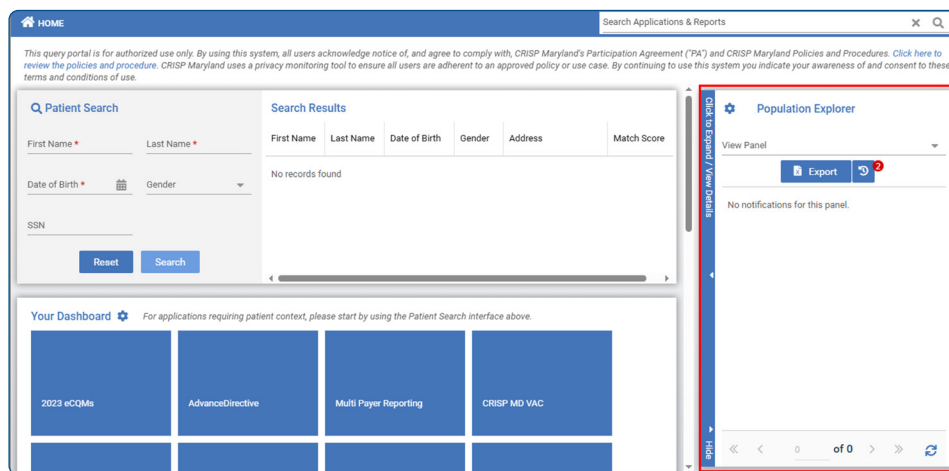
Once you have access to Population Explorer itself, access to patient notifications is managed via your Panel Subscriptions. For more information on creating and managing panels, contact your account manager.

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Population Explorer – Functionality



» After logging into the HIE Portal once Population Explorer access has been granted, you will see a new widget pane appear on the right-hand side of the screen, as shown below.



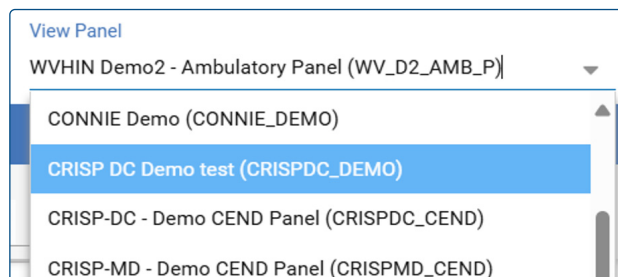


2.1 Panel Selection & Notification Display

» Choosing a Panel

Use the “[View Panel](#)” dropdown at the top of the screen.

- Choose from:**
1. Your assigned panels
 2. Advanced filters (list icon) you have created or have been shared with you by someone else with access to that panel
 3. Global filters (globe icon) made available in your region by CSS



Types of Notifications

Population Explorer displays three notification types for your selected panel:

Type	Color Indicator	Description
Encounters	White	Includes near-real-time EMS + ADTs
Logic-Based Alerts	Yellow	Based on custom clinical logic
Preventive Services	Green	Based on preventive care criteria

Notification Refresh Timing

- Notifications **sync every 20 minutes** but do **not auto-load**.
- A **bell icon** appears in the top right corner when new notifications are available.
- Click the bell to load the latest 25 notifications.
- Scroll down to load more, 25 at a time.

Panel Updates & Patient Data

- Panels and patient identifiers sync every **20 minutes**.
- New patients may take a few hours to appear due to backend processing.
- If no data is available for the selected panel or filter, a “**No data to display**” message will show.

Downloading Notifications

To export the visible list:

- Click the “**Export**” button.





2.2 Population Explorer Settings

» Clicking the gear icon in the upper left corner of the Population Explorer pane will bring up the user preference settings for the module. This allows you to set your preferred defaults, including the default view on load for the Population Explorer, default panel to select on opening, default filter to select on opening, and default number of records included in downloaded extracts. You can also set whether you would like to hide notification status management and enable advanced filters here. Notification auto-load is currently disabled and cannot be turned on.

Population Explorer Settings

Default panel

Default filter

Default widget view
Normal View

Download size
5000

Default data load period
All ☒ Apply for encounter history

Hide notification status management features: ☐

Enable notification auto load: ☐

Enable advanced filter builder: ☒

RESET ALL DISCARD CHANGES SAVE CHANGES CLOSE

If you do not need to view all available data and only wish to pull more recent events, you can set the '[Default Data Load Period](#)' for anywhere from one day up to one year in place of the default '[All](#).' This selection will apply to all areas of Population Explorer. To have this limit also apply to the Encounter Detail '[Encounter History](#)' section, simply check the 'Apply for encounter history' box next to the dropdown.



2.3 Expanded View

» To expand the Population Explorer widget and access additional functionality, click the blue expansion bar on the left-hand side of the pane. Clicking the expansion bar again will collapse, then hide the pane entirely. Clicking again will restore the pane to its default view.

The Expanded View shows the current notification list, Detail View, and Quick Filter interfaces all in one location, as shown below. Each of these is described in greater detail in the sections that follow. You can also toggle between viewing encounters, logic-based notifications, preventive services, or any combination thereof, using the **'Display Type'** selector in the upper left-hand corner of the window. As mentioned previously, see Section 3 for more information on logic-based notifications.

2.4 Detail View

» To view the details for a notification, click on the notification you want to review. This will bring up a Notification Detail View that contains additional information on the notification, as shown below. The information available in Detail View will depend on the notification type (encounter, logic-based, or preventive services) and elements available in the underlying data source. Sections that do not apply to the selected notification will be auto-collapsed.

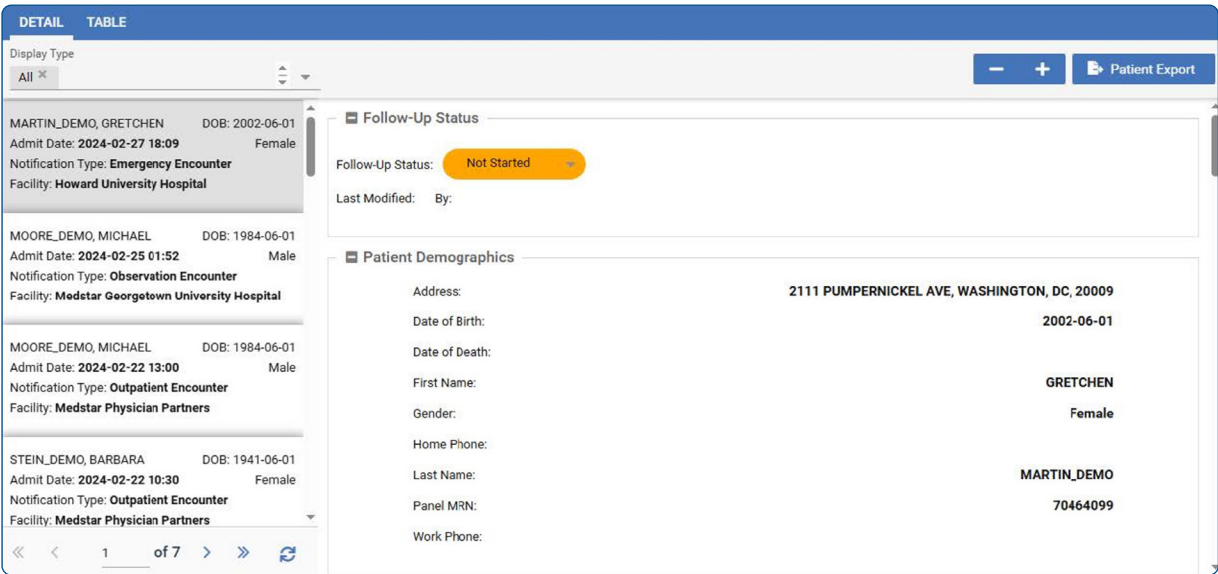
Along with the encounter details for the selected notification, the Detail View will contain all other notifications for the selected patient, loading history for the past 6 months by default. Clicking on any one of these past notifications will switch to the Detail View for that notification.

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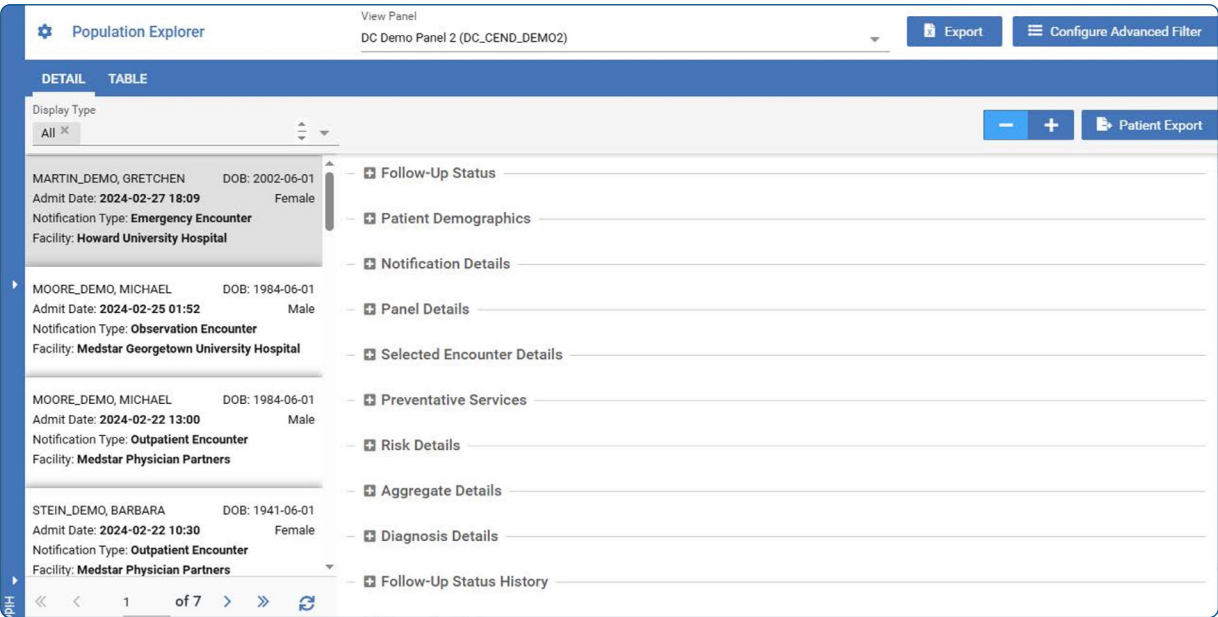
Population Explorer – Functionality



If you scroll down in the Detail View window, you will also see an expanded list of all diagnosis codes associated with that event, if available.



You can expand or collapse all sections of the Detail View panel using the plus and minus buttons at the top of the screen, respectively, or collapse individual sections using the icons at each section header, as shown below.



To export the current Detail View, click on the Patient Export button to export it in your preferred format. Additional information on the export functionality is [available in Section 2.9 and 2.11](#) below.



2.5 Launch with Context

- » To launch another CSS application with context for the patient from a notification, right-click on the notification anywhere it appears - in the collapsed widget, left hand list in the Detail View, or a row in the Table View described below - and select the desired application, as shown at right.

2.6 Table View

- » You can switch between Detail View and Table View in the expanded pane using the tabs in the upper left corner of the screen. Switching to Table View presents you with a list of notifications that can be customized and sorted by clicking on the column headers. Note that the entire currently requested dataset will sort when this is done.

Name	Age	Gender	State	Facility	Facility Type	Notification Type	Encounter Type	Follow-Up Status
MARTIN_DEMO, GRETCHEN	22	F	DC	Howard University Hospital	Hospital	Emergency Encounter	Emergency	Not Started
MOORE_DEMO, MICHAEL	40	M	MD	Medstar Georgetown Univer...	Hospital	Observation Encounter	Observation	Complete
MOORE_DEMO, MICHAEL	40	M	MD	Medstar Physician Partners	Ambulatory Medical	Outpatient Encounter	Outpatient	Not Started
STEIN_DEMO, BARBARA	83	F	VA	Medstar Physician Partners	Ambulatory Medical	Outpatient Encounter	Outpatient	Not Started
STEIN_DEMO, BARBARA	83	F	VA	Medstar Washington Hospit...	Hospital	Outpatient Encounter	Outpatient	Not Started
MOORE_DEMO, MICHAEL	40	M	MD	Medstar Georgetown Univer...	Hospital	Outpatient Encounter	Outpatient	Not Started
JONES_DEMO, OLIVIA	0	F	DC	Children's National Medical ...	Ambulatory Medical	Outpatient Encounter	Outpatient	Not Started
STEIN_DEMO, BARBARA	83	F	VA	Medstar Physician Partners	Ambulatory Medical	Outpatient Encounter	Outpatient	Not Started

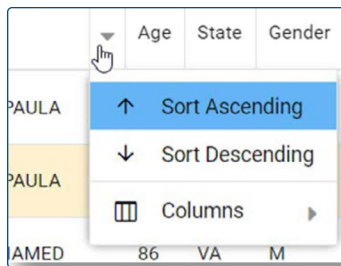
You can also click the panel expander to add or cut certain data criteria and filters, as well as sort the data.



2.7 Creating and Managing Quick Filters

» You can create, manage, save, and apply quick filters to the notification list using the **'Quick Filter'** bar on the right-hand side of the screen.

To add a new filter, click **"type to select"** then begin typing the data element you would like to filter on, select the desired filter criteria, and then click the **'Apply'** button to apply that filter. Different selection interfaces will appear depending on the selected data element; for example, a date picker will appear allowing you to set desired date ranges for data elements that represent datetimes. If the text for a filter criteria is longer than the visible area, simply hover over it to view the full description.



Note that extremely broad search criteria (for example, a diagnosis code string containing 'O' without any other criteria) can create extremely large result sets and may time out. If this happens, simply apply stricter criteria and search again.

Null Search: Fields that allow for a NULL / NOT NULL search option will include true nulls values as well as empty strings when returning null values, by design.

Range Lookups: Some fields may allow for range-based lookups using the UI shown on the right. In such cases, the range is inclusive of the values entered. If no From value is provided, the entry is treated as a 'Less Than' filter; if no To value is provide, the entry is treated as a 'Greater Than' filter.

The current list of notifications will then be automatically filtered according to the criteria created. You can apply up to 20 filters at a time; in the quick filter view, all filters are applied as 'AND' criteria.

Appendix A provides a list of all the data elements available for filtering, along with the criteria that can be applied.

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Population Explorer – Functionality



» To remove a previously applied filter criteria, navigate to the list of current filters then click the Delete icon next to the filter you would like to remove.

To clear all current filters, click the '[Clear Filters](#)' button in the bottom left corner of the Quick Filter pane. This will remove all current filters but will not change or delete any previously saved filters.

To clear all current filters, click the '[Clear Filters](#)' button in the bottom left corner of the Quick Filter pane. This will remove all current filters but will not change or delete any previously saved filters.

To save the current set of filters so that it can be reused later, click the '[Save Current Filter](#)' button in the bottom right corner of the Quick Filter pane. Once saved, you will be able to access the filter under "[Saved Filters](#)". Commonly used filters available to all users are called "[Global Filters](#)". Global Filters will also appear in this list underneath your personal filters, with a globe icon next to the name indicating that they are global filters.

To apply a previously saved filter, select it from the '[Saved Filters](#)' dropdown, then click the '[Load](#)' button. The criteria from the save filter will then appear in the '[Current Filters](#)' list. Note that this will override any filters in place at the time the saved filter was applied.



2.8 Managing Notification Status

» This functionality allows you to track the follow-up status of a notification within the Population Explorer interface.

The screenshot shows the Population Explorer interface. At the top, there's a header with 'Population Explorer' and a 'View Panel' dropdown set to 'DC Demo Panel 2 (DC_CEND_DEMO2)'. There are buttons for 'Export' and 'Configure Advanced Filter'. Below the header, there's a 'DETAIL' tab selected. A 'Display Type' dropdown is set to 'All'. The main content area shows two patient records. The first record is for MARTIN_DEMO, GRETCHEN, DOB: 2002-06-01, Admit Date: 2024-02-27 18:09, Female, Notification Type: Emergency Encounter, Facility: Howard University Hospital. The second record is for MOORE_DEMO, MICHAEL, DOB: 1984-06-01, Admit Date: 2024-02-25 01:52, Male, Notification Type: Observation Encounter, Facility: Medstar Georgetown University Hospital. A red box highlights the 'Follow-Up Status' section for the first patient, which shows 'Follow-Up Status: Complete' and 'Last Modified: 2025-03-28T03:15:36.660414 By: anishpk+admin@hmetrix.com'. Below this, the 'Patient Demographics' section shows 'Address: 6868 PAXTON LN, UPPERMARLBORO, MD, 20772' and 'Date of Birth: 1984-06-01'.

This functionality is automatically activated in the UI. To opt-out of notification status, simply click the gear icon in the upper left corner of the Population Explorer pane and check the '**Hide Notification Status Management features**,' as shown below. Note that this will not change or remove any statuses that have been set; it simply determines whether the functionality displays in the UI so that users who do not need this functionality can hide it to keep their interface clean. By default, this is enabled.

The screenshot shows the 'Population Explorer Settings' dialog box. It has a close button (X) in the top right corner. The settings include: 'Default panel' (dropdown), 'Default filter' (dropdown), 'Default widget view' (dropdown set to 'Normal View'), 'Download size' (dropdown set to '5000'), 'Default data load period' (dropdown set to 'All'), and a checkbox 'Apply for encounter history' which is checked. A red box highlights the 'Hide notification status management features:' checkbox, which is currently unchecked. Below this are two more checkboxes: 'Enable notification auto load:' (unchecked) and 'Enable advanced filter builder:' (checked). At the bottom, there are four buttons: 'RESET ALL', 'DISCARD CHANGES', 'SAVE CHANGES', and 'CLOSE'.

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Population Explorer – Functionality



- » If enabled, a Status drop-down menu will be available for each encounter in both the Detail View (as shown above) and Table view along with Last Edited information. The available status values are **'Not Started'**, **'In Progress'**, **'No Planned Follow Up'**, and **'Complete'**, and a set status will be shared with all users who have access to the specific panel and notification you are currently viewing.

The screenshot shows the 'Population Explorer' interface. At the top, there's a 'View Panel' dropdown set to 'DC Demo Panel 2 (DC_CEND_DEMO2)', an 'Export' button, and a 'Configure Advanced Filter' button. Below this is a tabbed interface with 'DETAIL' and 'TABLE' tabs. Under the 'TABLE' tab, there are filters for 'Display Type' (Notifications, Encounters, Preventative Services) and a 'Patient Export' button. The main table has columns: Name, Age, Gender, State, Facility, Facility Type, Notification Type, Encounter Type, and Follow-Up Status. The 'Follow-Up Status' column contains dropdown menus with values like 'Not Started' (orange) and 'Complete' (green). The bottom of the table shows 'Page 1 of 7' and 'Displaying 1 - 25 of 163'.

Name	Age	Gender	State	Facility	Facility Type	Notification Type	Encounter Type	Follow-Up Status
MARTIN_DEMO, GRETCHEN	22	F	DC	Howard University Hospital	Hospital	Emergency Encounter	Emergency	Not Started
MOORE_DEMO, MICHAEL	40	M	MD	Medstar Georgetown Univer...	Hospital	Observation Encounter	Observation	Complete
MOORE_DEMO, MICHAEL	40	M	MD	Medstar Physician Partners	Ambulatory Medical	Outpatient Encounter	Outpatient	Not Started
STEIN_DEMO, BARBARA	83	F	VA	Medstar Physician Partners	Ambulatory Medical	Outpatient Encounter	Outpatient	Not Started
STEIN_DEMO, BARBARA	83	F	VA	Medstar Washington Hospit...	Hospital	Outpatient Encounter	Outpatient	Not Started
MOORE_DEMO, MICHAEL	40	M	MD	Medstar Georgetown Univer...	Hospital	Outpatient Encounter	Outpatient	Not Started
JONES_DEMO, OLIVIA	0	F	DC	Children s National Medical ...	Ambulatory Medical	Outpatient Encounter	Outpatient	Not Started
STEIN_DEMO, BARBARA	83	F	VA	Medstar Physician Partners	Ambulatory Medical	Outpatient Encounter	Outpatient	Not Started

The last user to make a change to the status will be displayed next to the current status, along with the time of the change. Status values will persist for a given notification until a user changes the value and are for informational purposes only. CSS does not edit or otherwise maintain these statuses – they are entirely user-driven. The status for patients can be included as a data element in exported extracts along with other information, as described in the next section.

2.9 Exporting Data

- » Data can be exported from most views of Population Explorer simply by hitting the **'Export'** button. The max download size for exports is 10K. This will allow you to create Excel or PDF versions of the data you are currently viewing, as appropriate.

Notice and Acknowledgement: Exporting PHI

You are about to download a file containing privileged, confidential, and/or protected health information (PHI) that may be subject to protection under the law, including the Health Insurance Portability and Accountability Act of 1996, as amended (HIPAA).

By clicking the 'Download' button, you are stating that you are authorized to view the information in this file. An audit record will be saved with the information below.

Note: If you are a systems administrator, remember that downloading this file to your personal device is not allowed. You must use an approved device to download this file.

☐ I have read and understood the terms of downloading protected patient information.

ACCEPT AND CONTINUE

CANCEL

2

Population Explorer – Functionality



» Prior to exporting, you must read and acknowledge the terms for exporting protected health information. All exports must be handled in accordance with HIPAA and appropriate security safeguards for this type of information. After agreeing, you will be presented with the Export Interface, shown below.

Population Explorer - Export Interface

Select the data elements below that you would like to include in the exported extract. Some fields are required for successful export and may not be deselected.

Required Fields	Optional Fields		
☒ First Name	☐ ACO	☐ Address	☐ Admit Date / Time
☒ Gender	☐ Admit Source	☐ Care Manager	☐ Care Manager Email
☒ Last Name	☐ Care Program	☐ Cell Phone	☐ Date of Birth
	☐ Date of Death	☐ Death Indicator	☐ Diabetes-Related Codes
	☐ Diabetes-Related Description	☐ Discharge Date / Time	☐ Discharge Disposition
	☐ Discharge To Location	☐ Encounter Type	☐ ER Last 180 Days
	☐ ER Last 30 Days	☐ ER Last 365 Days	☐ ER Last 60 Days
	☐ ER Last 90 Days	☐ Facility	☐ Facility Type
	☐ Follow up Status	☐ Follow up Status Updated By	☐ Follow Up Status Updated Date
	☐ Group	☐ Hemoglobin A1C Lab Date	☐ Hemoglobin A1C Results Value
	☐ Home Phone	☐ Inpatient Last 180 Days	☐ Inpatient Last 30 Days
	☐ Inpatient Last 365 Days	☐ Inpatient Last 60 Days	☐ Inpatient Last 90 Days
	☐ Insurance From ADT	☐ Insurance Type	☐ Location
	☐ Location from ADT	☐ Middle Name	☐ MRN

An approved device must be used to download this file. In downloading this data, you agree to CSS's terms for downloading protected patient information (PHI).

This interface allows you to select which fields you would like to include in the created extract by selecting from the available fields. **'Select All'** and **'Select None'** buttons are made available to quickly change the selection status for all fields. Some fields are required to generate the extract; these will be displayed on the left-hand side of the interface but cannot be changed.

Additionally, you can **'Configure & Save Selected Fields As My Default'** by clicking the button on the left-hand side of the screen. This will open a new window (as shown on the right) that will allow you to re-order the columns in the export as desired and add or remove columns from inclusion. Simply drag and drop individual fields from the left into the Export List at the right in the desired order (columns will arrange in the export left to right based on top to bottom order in this UI). To move multiple columns at once, check the box next to that column before dragging them to the export list. Use the check box at the top next to **'Available Fields'** to select all available columns at once.

Configure Your Export

Select the checkboxes for the data elements you want to export. Drag those fields from 'Available Fields' to 'Export List' and arrange them in your preferred order. First Name, Last Name, and Gender are mandatory and cannot be deselected.

Available Fields	Export List
☐ Middle Name	☐ First Name
☐ Address	☐ Last Name
☐ Home Phone	☐ Gender
☐ Work Phone	
☐ ACO	
☐ Admit Date / Time	
☐ Admit Source	
☐ Care Manager	
☐ Care Manager Email	
☐ Care Program	

2

Population Explorer – Functionality



This can be done before or after making your choices on the main export screen, so that the selected fields will auto-select for all future exports that you create. You can always modify the included fields and your defaults at the time of subsequent exports as desired.

After you are done customizing the data fields for the export, simply select the desired export type, the extract will be generated, and you will be allowed to save the file locally according to the settings of the internet browser you are using. Some export options (such as the table view) will only allow export via Excel, given the amount of data to be included, while PDF-friendly interfaces like Patient Detail View will also present a PDF export option.

» Compliance Reminder

Before exporting:

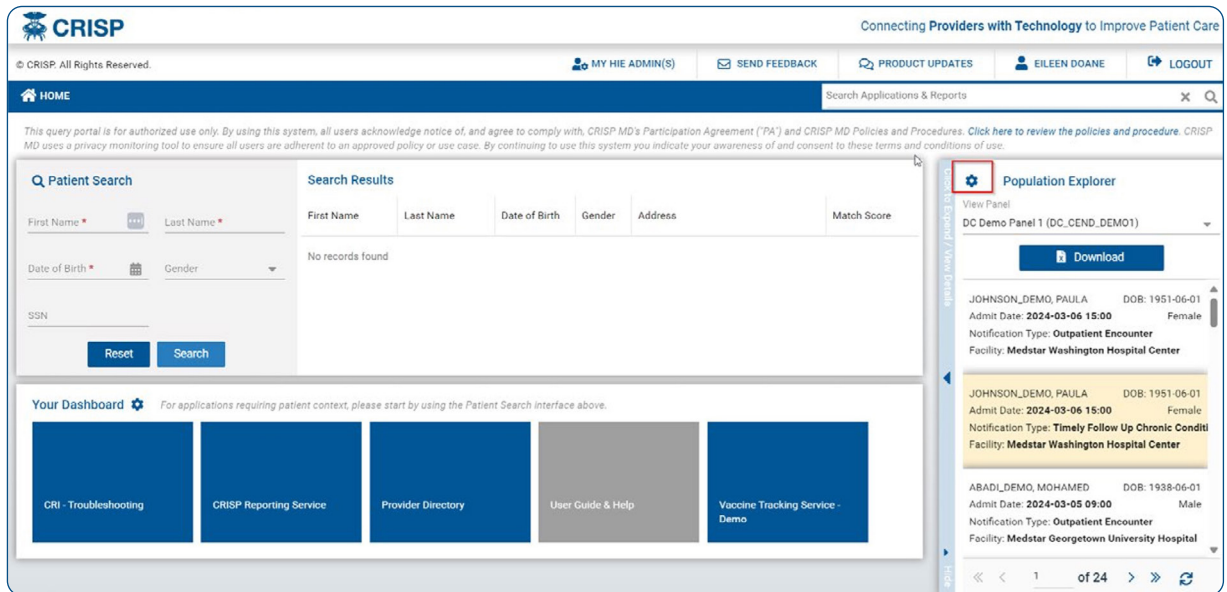
- You must **acknowledge terms related to Protected Health Information (PHI)**.
- All exports must comply with **HIPAA** and relevant security policies.



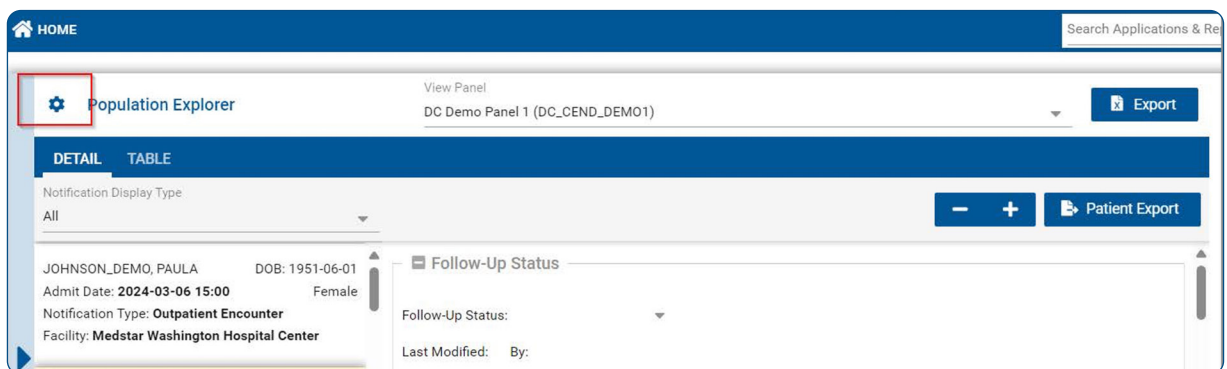
2.10 Advanced Filter Builder

» The Advanced Filter Builder (AFB) allows users to flexibly create much more complex criteria definitions for filtering patient populations by combining panels and applying Boolean logic operators to any of the data elements available in Population Explorer. This filter builder is primarily useful in situations where the Quick Filter functionality does not offer sufficient granularity for targeting a desired set of beneficiaries or events. The Advanced Filter Builder must be enabled before first use.

To do this, first navigate to settings menu using the gear icon from the right-hand panel:



OR in Expanded View



2

Population Explorer – Functionality

» Select “**Enable Advanced Filter Builder**” and save changes. As with other settings, you will not need to enable Advanced Filter Builder every time you access Population Explorer. This will now be your new default setting.

Population Explorer Settings

Default panel

Default filter

Default widget view

Normal View

Download size

500

Default data load period

All

☒ Apply for encounter history

Hide notification status management features:

☐

Enable advanced filter builder:

☐

RESET ALL

DISCARD CHANGES

SAVE CHANGES

CLOSE

Now that you have enabled the Advanced Filter Builder, click the ‘Configure Advanced Filters’ button in the upper right corner of the Detail View pane to access it.

Population Explorer

View Panel

DC Demo Panel 2 (DC_CEND_DEMO2)

Export

Configure Advanced Filter

DETAIL

TABLE

Display Type

All

MARTIN_DEMO, GRETCHEN

DOB: 2002-06-01

Female

Admit Date: 2024-02-27 18:09

Notification Type: Emergency Encounter

Facility: Howard University Hospital

MOORE_DEMO, MICHAEL

DOB: 1984-06-01

Male

Admit Date: 2024-02-25 01:52

Notification Type: Observation Encounter

Facility: Medstar Georgetown University Hospital

Follow-Up Status

Follow-Up Status: Complete

Last Modified: 2025-03-28T03:15:36.660414 By: anishpk+admin@hmetrix.com

Patient Demographics

Address: 6868 PAXTON LN, UPPERMARLBORO, MD, 20772

Date of Birth: 1984-06-01

After opening the Advanced Filter Builder, you will be presented with a new AFB template, as shown below. To edit an existing advanced filter, select from the ‘View Advanced Filters’ dropdown at the top of the screen. Otherwise, enter the name for your advanced filter and hit ‘**Save Changes**’ to create a new advanced filter. You can then add criteria as described below.

Population Explorer - Advanced Filter Builder

View Advanced Filters

Create New

Save Changes

Discard Chang

Close

Click to add criteria:

IN

AND

OR

NOT

GROUP

Panel

Criteria

Name

Status

Inactive

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

DELETE

Selected Criteria

2

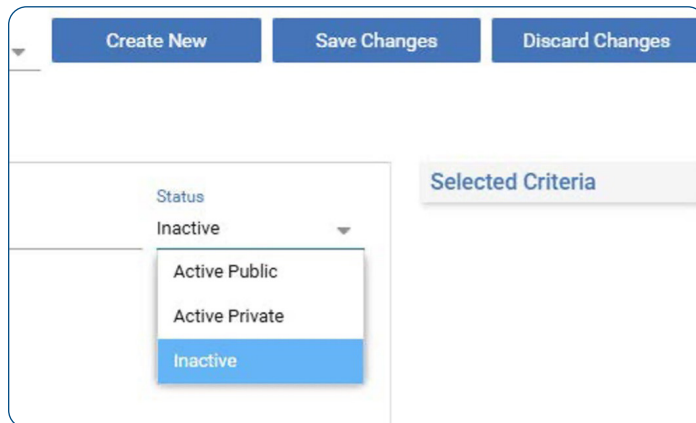
Population Explorer – Functionality



» To discard any unsaved changes on the currently selected panel, hit the '[Discard Changes](#)' button. To create a new advanced filter and open a blank AFB template after editing or creating an advanced filter, simply click the '[Create New](#)' button.

You can set the status of an advanced filter using the Status dropdown to the right of the name field. There are 3 status options to set your filter to: [Active Public](#), [Active Private](#), [Inactive](#).

- **Active Public** – Setting the status to '[Active Public](#)' will enable any user with access to all of the included panels to use that advanced filter. **It is important you ONLY set a filter to "Active Public" if it should be shared with others.** This is useful for sharing common advanced filters with others in your organization, so they do not have to individually re-create them.
- **Active Private** – Setting the status to '[Active Private](#)' will enable the user who created the filter to see it throughout the interface. **No other user will be able to see this filter.**
- **Inactive** – Setting the status to '[Inactive](#)' means that you will be able to see your previously saved filter in the Advanced Filter Builder – **but NOT throughout the rest of the interface.**



The buttons along the left-hand side of the interface allow you to add panels, criteria, and logical operators to the Advanced Filter. Click the 'Panel' button first to add a selection interface that allows you to choose one or more panels as the basis for the advanced filter. Any beneficiaries included on any of the selected panels will be evaluated for inclusion in the advanced filter.

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Population Explorer – Functionality



» To add a filter criteria, just click the Criteria button. This will bring up an additional interface, shown at right, that allows you to select the data element that will define the criteria, as well as the list of values to be considered. You can manually click on the right-hand side Definition List to add, edit, or remove values, or '**Clear**' the list by clicking the corresponding button.

If a data element has a defined set of values, these will pre-populate in the right-hand side of the dialogue box; simply click the trash can icon to remove values which are not wanted. For data elements that include a long criteria list (such as diagnosis codes), you can download a template, populate the values in Excel, and then upload the populated template to generate the criteria list rather than entering them one by one.

You may add up to 20 criteria as needed to define the advanced filter. Use the logical operators above (**IN, AND, OR, NOT**) between criteria to join them. If a set of criteria needs to be considered together (for example, "A AND (B OR C)"), use the Group operator to create containing parentheses sets.

Any criteria or operators can be dragged and dropped vertically in the UI to re-order them after they have been placed, and clicking the trash can icon or Delete button on the right-hand side of the screen will remove the selected element.

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Population Explorer – Functionality



- » A definition list for any criteria can be viewed by simply clicking the **'Definition List'** button after it has been created, and likewise, existing definition lists can be edited by clicking the pencil icon next to the Definition List button.

After you are done creating or editing the advanced filter, simply click the **'Close'** button in the upper left corner to return to the Detail View of Population Explorer.

Please see Appendix B for step-by-step example of how to create your own filter in Advanced Filter Builder.

2.11 Asynchronous Exports

- » The Population Explorer serves a large number of clinical and administrative end users and ensuring system stability and responsiveness is a key priority for CSS. Some large export requests may require significant system resources to generate, particularly during times of the workday when many users are exporting data. To ensure that these exports can be delivered in a timely fashion without disrupting other users' experience, CSS has implemented an asynchronous export queue to manage large requests, and requests when system loads are particularly heavy.

If you make an export request that will need some time to process, you will see a notification informing you that your request has been accepted for processing. Your export request queue and history can be viewed by clicking the export history icon in the top navigation bar:

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Population Explorer – Functionality



» Depending on the size of your exported dataset and number of other queued requests, these requests can take up to 72 hours to process (most will take much less than this – in some case as little as 10 minutes).

When an export request is ready for download, a red icon will appear (as shown in the screenshot above), indicating that you have downloads available. The number in the icon indicates the number of exports ready for download. Clicking on the export history icon will bring up a dialogue showing you your currently requested extracts in the queue, those ready for download, as well as a history of all previous export requests. Clicking the '**Download**' icon on the right-hand side will download the indicated file.

Download Notifications ×			
File	Status	Requested On	
CONNIE_CEND (CONNIE_CEND)-natenonadminhmetrixcom-202506240...	Downloaded	2025-06-24 00:09	
DC Demo Panel 2 (DC_CEND_DEMO2)-natenonadminhmetrixcom-20250...	Downloaded	2025-06-24 00:08	
CONNIE_CEND-natenonadminhmetrixcom-202506100222.xlsx	Generated	2025-06-10 14:22	
AK_CEND_DEMO2-natenonadminhmetrixcom-202506100223.xlsx	Downloaded	2025-06-10 14:23	
CONNIE_CEND-natenonadminhmetrixcom-202506101133.xlsx	Generated	2025-06-10 11:33	
AK_CEND_DEMO2-natenonadminhmetrixcom-202506101133.xlsx	Downloaded	2025-06-10 11:33	
« < Page <u>1</u> of 1 > » ↺ Displaying 1 - 6 of 6			

Downloads will remain available for 72 hours, or until you successfully download the requested file. Due to security needs, all extracts will be permanently deleted from the system after this time.

Downloads will use the filename convention

[panel / filter name]-[username]-[request datetime].xlsx

Note that if your request can be processed immediately, it will be, and you will be presented to save the exported file at the time of request.

3

Additional Display Types

3.1 Notification Display Types

» As described earlier, notifications come in three varieties: encounters, logic-based notifications, and preventive services. Encounter and preventive services data are available for all users; logic-based notifications will only be available for display for current subscribers. These can be added as a feature later for affiliates and regions that do not currently have them.

Users can filter the display type by selecting from among the different types using the drop-down in the upper left hand corner of the screen. The notifications can then be further filtered by the logic used to generate the alert by selecting the appropriate filter criteria within the Quick Filter box, selecting Notification Type or Preventive Services Category as appropriate for the search desired, as shown below.

DETAILTABLE

Display Type

Preventive Services

All

Encounters

Notifications

Preventive Services

DOB: 1963-01-01

24 00:00

Female

ectal Screening

Johnson_DEMO, Amanda

DOB: 1972-01-01

Service Date: 2022-01-15 00:00

Female

Notification Type: Colorectal Screening

Facility: Yale New Haven Health System

Follow-Up Status

Follow-Up Status:

Last Modified: By:

Patient Demographics

Address:

Date of Birth:

Quick Filter

Notification Type

Type to select

Diagnosis Rule

Timely Follow Up

Chronic Conditions

Primary or Secondary

Diagnosis

Readmission Inpatient

Rule

APPLY

Some data elements may have additional information available when displayed; CSS is continuing to add new functionality over time. For such elements, additional information will display when hovering over that element in Detail View; for example, currently the Preventive Services Data Source field will provide additional tooltip information when hovering over this field.

Additional technical documentation on the underlying data sources and logic used in creating logic-based and preventive services alerts is available from CSS upon request.

Quick Filter

Preventive Services Category

Type to select

Colorectal screening

APPLY



3.2 Preventive Services Detail Section

» The Preventive Services Section provides information about the notification and where a user can find the corresponding source document in the Clinical Information Section of HIE Portal/InContext. For notifications with Data Source of CCD, users should look in the Structured Documents Tab (using the Document Evidence Date). For notifications with Data Source of Diagnostic Reports, users should look in the Health Records Tab (using the Event Date).

Hovering over a field in the UI will provide additional information on the particular data element in this section of the interface.

Preventive Services Field	Description
Category	Type of preventive service
Code	Procedure/diagnosis code if available
Description	Description associated with code
Results	Indicates whether results are available – currently blank for all records
Test Name	Additional test name available or title associated with diagnostic report
Data Source	Type of data source – CCD, ADT, Diagnostic Reports. Hover over this field for more information about where to find the corresponding document
Document Evidence Date	Date of the corresponding CCD (if applicable)
Event Date	Date of the preventive service
Facility Name	Facility reporting the preventive service

Population Explorer View Panel
CONNIE_CEND (CONNIE_CEND) Export Configure Advanced Filter

DETAIL TABLE

Display Type
Preventive Services

Boyd_DEMO, Kelly DOB: 1963-01-01
Service Date: 2025-01-24 00:00 Female
Notification Type: Colorectal Screening
Facility: Griffin Health

Johnson_DEMO, Amanda DOB: 1972-01-01
Service Date: 2022-01-15 00:00 Female
Notification Type: Colorectal Screening
Facility: Yale New Haven Health System

Reyes_DEMO, James DOB: 1962-01-01
Service Date: 2022-01-04 00:00 Male
Notification Type: Colorectal Screening
Facility: Hartford Healthcare

Cox_DEMO, Heidi DOB: 1975-01-01
Service Date: 2022-01-01 00:00 Female
Notification Type: Colorectal Screening

Preventive Services

Category: Colorectal screening

Details:

Code: 73761001

Description: HX GASTROENTEROLOGY COLONOSCOPY-SCAN

Results:

Test Name:

Data Source: CCD

Document Evidence Date: 2022-01-22

Event Date: 2022-01-04

Facility Name: Hartford Healthcare

1 of 1

Risk Details

4

Appendix A: Filter Data Elements & Criteria



» Below is the list of data elements currently available in the Quick Filter, as well as the criteria that can be applied to each data element type.

4.1 Table 1: Filter Data Elements

» Note that data elements will only filter if they are present in the underlying encounter data; not all data elements made available in the Population Explorer are fully populated in the originating data feed.

Preventive Services Field	Data Source	Data Type
ACO	Panel	Text
Admit Date/Time	ADT	Date
Admit Source	ADT	Text
Care Manager	Panel	Text
Care Manager Email	Panel	Text
Care Program	Panel	Text
Date of Birth	Panel	Date
Date of Death	ADT	Date
Death Indicator	ADT	Text
Diagnosis Codes	ADT	Alpha-numeric
Diagnosis Descriptions	ADT	Text
Discharge Date/Time	ADT	Date
Discharge Deposition	ADT	Text
Discharge to Location	ADT	Text
Encounter Date	ADT	Date
Encounter Type	Derived field	Picklist
Facility	ADT	Text
ER Last 30 Days	Calculated field - does not include current visit	Numeric
ER Last 60 Days	Calculated field - does not include current visit	Numeric
ER Last 90 Days	Calculated field - does not include current visit	Numeric
ER Last 180 Days	Calculated field - does not include current visit	Numeric
ER Last 365 Days	Calculated field - does not include current visit	Numeric

4

Appendix A: Filter Data Elements & Criteria



Preventive Services Field	Data Source	Data Type
Facility	ADT	Text
Facility Type	Mapped from Facility Source Code	Text
Follow Up Status	User defined field	Picklist
Inpatient Last 30 Days	Calculated field - does not include current visit	Numeric
Inpatient Last 60 Days	Calculated field - does not include current visit	Numeric
Inpatient Last 90 Days	Calculated field - does not include current visit	Numeric
Inpatient Last 180 Days	Calculated field - does not include current visit	Numeric
Inpatient Last 365 Days	Calculated field - does not include current visit	Numeric
Insurance From ADT	ADT	Text
Insurance Type	Panel	Text
Location	Panel	Text
Medical Record Number (MRN)	ADT	Alpha-numeric
National Provider Identifier (NPI)	Panel	Numeric
Notification Type	Predefined Alert Type	Picklist
OBS (Observation) Last 30 Days	ADT	Numeric
OBS (Observation) Last 60 Days	Derived field	Numeric
OBS (Observation) Last 90 Days	ADT	Numeric
OBS (Observation) Last 180 Days	Calculated field - does not include current visit	Numeric
OBS (Observation) Last 365 Days	Calculated field - does not include current visit	Numeric
Outpatient Last 30 Days	Calculated field - does not include current visit	Numeric
Outpatient Last 60 Days	Calculated field - does not include current visit	Numeric
Outpatient Last 90 Days	Calculated field - does not include current visit	Numeric
Outpatient Last 180 Days	Calculated field - does not include current visit	Numeric
Outpatient Last 365 Days	Calculated field - does not include current visit	Numeric
Panel MRN	Panel	Alpha-numeric
Patient Class	ADT	Text
Patient Complaint	ADT	Text
Patient Name	Panel	Text
Practice	Panel	Text
Preventive Services Category	Preventive Services Feed (CCD or Diagnostic Report)	Picklist

4

Appendix A: Filter Data Elements & Criteria



Preventive Services Field	Data Source	Data Type
Preventive Services Code	Preventive Services Feed (CCD or Diagnostic Report)	Text
Preventive Services Data Source	Preventive Services Feed (CCD or Diagnostic Report)	Text
Preventive Services Description	Preventive Services Feed (CCD or Diagnostic Report)	Text
Preventive Services Document Evidence Date	Preventive Services Feed (CCD or Diagnostic Report)	Date
Preventive Services Event Date	Preventive Services Feed (CCD or Diagnostic Report)	Date
Preventive Services Facility Name	Preventive Services Feed (CCD or Diagnostic Report)	Text
Preventive Services Results	Preventive Services Feed (CCD or Diagnostic Report)	Text
Inpatient Last 365 Days	Preventive Services Feed (CCD or Diagnostic Report)	Text
Primary Care Provider	Panel	Text
Primary Diagnosis Codes	ADT	Text
Primary Diagnosis Description	ADT	Alpha-numeric
Provider	ADT	Text
Risk Methodology 1	Panel	Text
Risk Methodology 2	Panel	Text
Risk Score 1	Panel	Numeric
Risk Score 2	Panel	Numeric

4.2 Table 2: Data Type Filter Criteria

Data Element Type	Available Criteria
Boolean	Is, Is Not
Code	Equals, Does Not Equal, In, Not In
Date / Time	Before, After, Exact Date, Range
Fixed Value Set	Equals, Does Not Equal, In, Not In
Free Text	Starts With, Ends With, Contains, Does Not Contain, Equals, Does Not Equal
Numeric Range	From, To



4.3 Table 3: Notification Type Filter Criteria

Notification Type	Type
Abnormal A1C Test Result - All	Alert Flag (Static Value)
Abnormal A1C Test Result - Diabetes	Alert Flag (Static Value)
Abnormal A1C Test Result - Prediabetes	Alert Flag (Static Value)
Death Indicator Global	Alert Flag (Static Value)
High Risk Pregnancy Rule	Alert Flag (Static Value)
Lane Incoming Diagnosis Rule	Alert Flag (Static Value)
Maternal Health - Labor & Delivery	Alert Flag (Static Value)
Non Fatal Overdose Hospital Alert Rule	Alert Flag (Static Value)
Potential Pre Diabetes Smart Alert Rule	Alert Flag (Static Value)
Readmission Emergency Rule	Alert Flag (Static Value)
Readmission Inpatient Rule	Alert Flag (Static Value)
Specialty Visit	Alert Flag (Static Value)
Timely Follow Up Chronic Conditions Primary Discharge Diagnosis Only	Alert Flag (Static Value)
Timely Follow Up Chronic Conditions Primary Or Secondary Diagnosis	Alert Flag (Static Value)

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Appendix B: Advanced Filter Builder



» Below is a step-by-step example of how to build a filter in the Advanced Filter Builder. Advanced Filter Builder is to be utilized by a small subset of users whose needs may not be met through the other filter options. You can apply any combination of filters to criteria contained in encounters or notifications and customize what is displayed. This tool can be used to include or exclude lists of criteria (i.e. diagnosis codes) or select multiple values to be evaluated and viewed at one time (i.e. discharges OR admits in the last X number of days).

Start with panel selection:

1. Click **IN** on the left-hand menu
2. Click **PANEL** on the left-hand menu
3. Click the **drop-down** arrow and select the panel(s) you want as your starting patient population.
4. Set your status. When building a new filter, it is recommended to set your status to “**inactive**” for testing purposes. Once tested, it is recommended to move to “**Active Public**” or “**Active Private**” defined below.

Inactive: Setting the status to ‘Inactive’ means that you will be able to see your previously saved filter in the Advanced Filter Builder – but NOT throughout the rest of the interface.

Active Public: Setting the status to ‘Active Public’ will enable any user with access to all of the included panels to use that advanced filter. It is important you **ONLY** set a filter to “Active Public” if it should be shared with others. This is useful for sharing common advanced filters with others in your organization, so they do not have to individually re-create them.

Active Private: Setting the status to ‘Active Private’ will enable the user who created the filter to see it throughout the interface. No other user will be able to see this filter.



» **Step 2:** Select any additional filter criteria you would like to place on your patient population. Sample filters are at the end of the guide.

1. Click operator (AND, OR)
2. If you would like to use multiple criteria, use the GROUP button and begin a parenthesis prior to criteria selection
3. Click **CRITERIA** on the left-hand menu and select which field you would like to filter on
4. Click the drop-down arrow under “**Select Criteria**” and scroll down to the criteria you want to select

Once you select which criteria you want to add, if the selection is a list, you will be presented with a list of choices, depending on the data type and options for that criteria:

1. Make your selection from the drop-down menu.
2. Click “**Add New**”.
3. Type your entry (NOT case sensitive).
4. If you want to add additional entries, click “**Add New**” and type additional entries.
5. Repeat as many times as necessary.
6. If the criteria selection is not a predefined picklist, you will enter the definition list (what you would like to filter on – see screenshot at right).

7. If you have a long list of criteria, you may also Click “**Download Submission Template**”, enter your multiple criteria (one per row), Save and then use the “**Drag and Drop**” or “**BROWSE FILE**” to upload your file. The Definition List will populate with the contents of your file. This feature is especially helpful if you have a list of diagnosis codes.

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Appendix B: Advanced Filter Builder Example



- » 1. Make your selection from the drop-down menu.
2. Click "**Add New**".
3. Type your entry (NOT case sensitive).
4. If you want to add additional entries, click "**Add New**" and type additional entries.
5. Repeat as many times as necessary.
6. If the criteria selection is not a predefined picklist, you will enter the definition list (what you would like to filter on – see screenshot at right).
7. If you have a long list of criteria, you may also Click "**Download Submission Template**", enter your multiple criteria (one per row), Save and then use the "**Drag and Drop**" or "**BROWSE FILE**" to upload your file. The Definition List will populate with the contents of your file. This feature is especially helpful if you have a list of diagnosis codes.

Once you click "**SAVE CHANGES**", you will be brought back to the Advanced Filter Builder module.

- The default filter will be "**IN**" which means you want to look for an exact match on your criteria list.
- If you want to do "**Contains**" rather than an exact match, change the "**IN**" to "**LIKE**"

- To view the definitions, you have specified for your criteria, click "**DEFINITION LIST**" and the definitions will population on the right-hand side of the screen.
- To Exclude values contained in the definition list, click "**NOT**" before you select your criteria.
- Criteria and operators can be rearranged by dragging and dropping them into the correct spot.



Advanced Filter Builder Scenario #1

» Below is an example of an Advanced Filter Builder with the following criteria:

- Applied to 2 Demo Panels
- Encounter Type of Emergency
- Exclude a specified Facility

Here is how to build this:

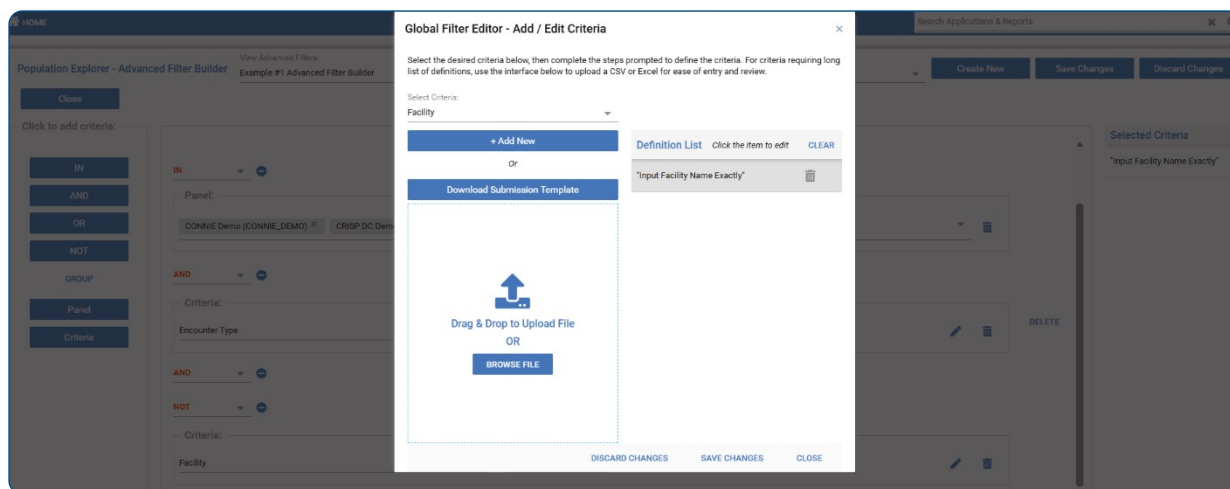
1. Build the list of panel(s) (IN button, then PANEL button, Select desired panel(s))
2. Build the Encounter Type Criteria (AND button, the CRITERIA button, ENCOUNTER TYPE, then delete the Encounter Types you do not want). In this example, we have removed EMS, Inpatient, Observation and Outpatient from the definition list – leaving just Emergency as the criteria. Save Changes.

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Appendix B: Advanced Filter Builder Example



3. Build the excluded facility criteria (AND button, NOT button, CRITERIA button, Add New, then type out the Facility Name exactly. Save Changes.



4. Save the filter with status "Inactive" - then change the status to "Active Private" so you can complete your testing.



Advanced Filter Builder Scenario #2

» Below is an example of an Advanced Filter Builder with the following criteria:

- Applied to 1 Demo Panel
- Has encountered the ER 3 or more times in the last 90 days
- Exclude Outpatient patient class

1. Build the list of panel (IN button, then PANEL button)
2. Build the ER Last 90 days Criteria (AND button, the CRITERIA button, ER Last 90 Days, ADD NEW, input your specified number). The specified number in this example is 3.
3. Save Changes.

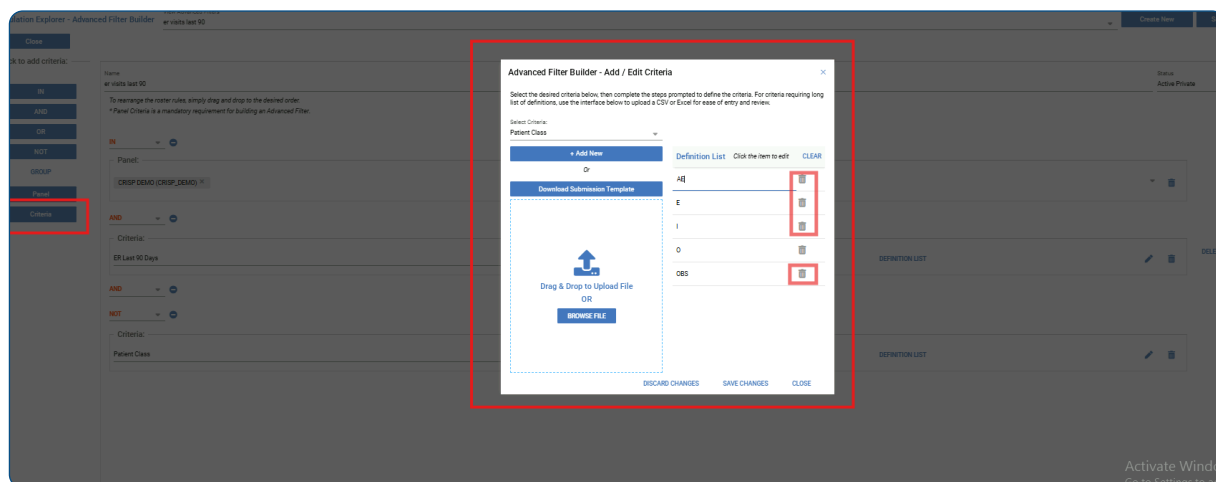
3. Select $\geq$ in the drop down menu to the right of ER Last 90 days. This ensures that the criteria is set for ER 3 or more times in the last 90 days.

5

Appendix B: Advanced Filter Builder Example



4. Build the excluded facility criteria (AND button, NOT button, CRITERIA button, PATIENT CLASS in drop down, then remove AE, E, I, OBS. This ensures the criteria is not looking for O – “Outpatient”. Save Changes.



5. Save the filter with status “Inactive” - then change the status to “Active Private” so you can complete your testing.



Advanced Filter Builder Scenario #3

» Below is an example of an Advanced Filter Builder with the following criteria:

- Applied to 1 Demo Panel
- Encounter type of Emergency, Inpatient, Observation or Outpatient
- Self-Specified list of Diagnoses codes relating to pregnancy

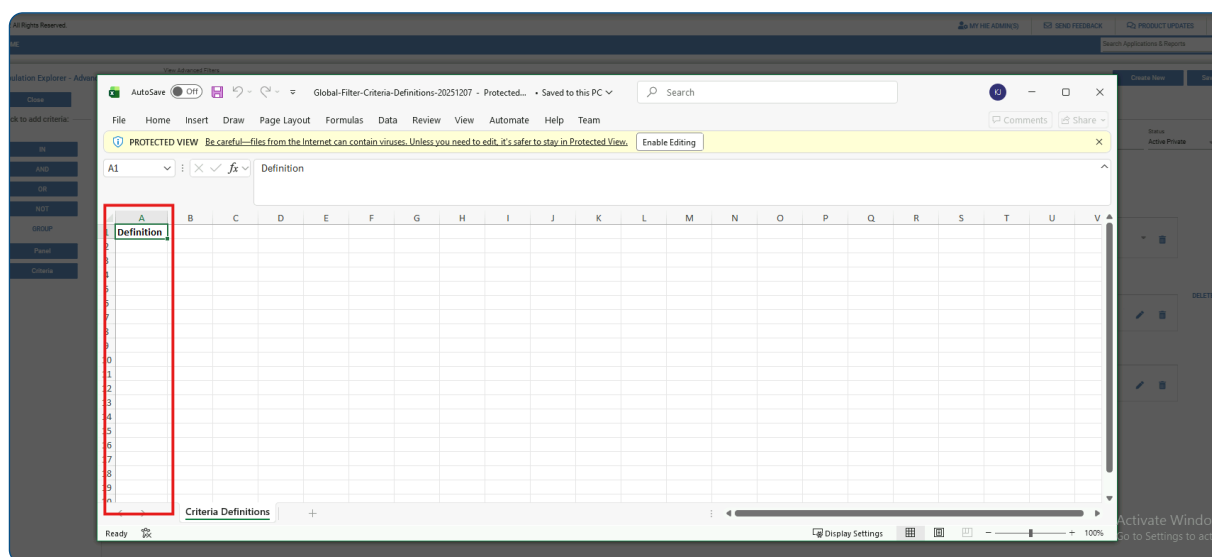
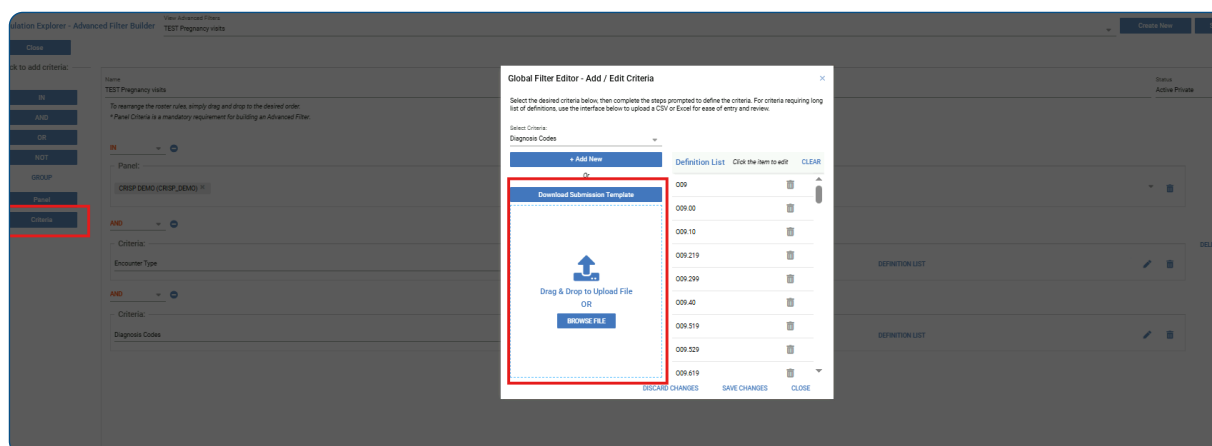
Here is how to build this:

1. Build the panel selection (IN button, then PANEL button, select desired panel)
2. Build the Encounter type criteria (AND button, the CRITERIA button, select ENCOUNTER TYPE in drop down, delete any encounter type you do not want). In this example “EMS” was removed. Save Changes

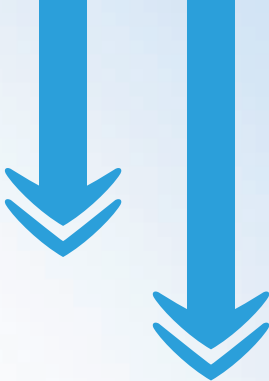
3. Build the diagnoses code criteria (AND button, CRITERIA button, DIAGNOSIS CODES in drop down, ADD NEW to input diagnoses codes directly under “Definition list” or use the Submission Template to upload a list of diagnoses codes). Save Changes.

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Appendix B: Advanced Filter Builder Example



4. Save the filter with status “Inactive” - then change the status to “Active Private” so you can complete your testing.



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Revision History		
Version Number	Date	Summary of Change
1.0	December 2025	Initial Version
1.1	July 2026	H1 2026 functionality updates, formatting cleanup