

FROM NUMBERS TO KNOWLEDGE



Panel Submission User Guide

December 30, 2024

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Background

Immutrack

Immutrack is a program developed in partnership with the **Virginia Center for Health Innovation (VCHI) as part of the Virginia Task Force on Primary Care initiative.** It provides healthcare providers with access to monthly panel-level reports by NPI, focused on Combo 10 vaccination rates for children aged 0-2.

Program participants also gain access to the **Immutrack Vaccine Tracking Service**, a web-based application that enables physicians and payers to track their patients' vaccination status and prioritize outreach to unvaccinated patients. The tool is populated using daily vaccination data and practice lists for each provider's attributed population, offering actionable insights to improve vaccination rates and provide patient-level vaccination data.



Virginia Health Information (VHI) is a nonprofit organization that oversees various health data programs, including Virginia's Health Information Exchange (HIE). Participation in these programs requires signing our Master Services Agreement, Business Associate Agreement, and any applicable program addendums.

To participate, organizations must submit a patient panel with demographic information to establish an active care relationship. This enables access to view patient information within the programs.

Resources

A video tutorial is available on the [VCHI website](#).

VHI Patient Panel

Request assistance from your EHR vendor to create the panel file or follow the steps below.

EHR PATIENT DEMOGRAPHIC REPORT

Step 1. Run a report from your EHR containing the following required fields.

You will want to include patients who have had encounters over the past 12-18 months. Required fields are highlighted in blue on the template and are as follows:

- | | |
|--|--|
| <input type="checkbox"/> Patient ID | <input type="checkbox"/> Patient City |
| <input type="checkbox"/> Patient First Name | <input type="checkbox"/> Patient State |
| <input type="checkbox"/> Patient Last Name | <input type="checkbox"/> Patient Zip Code |
| <input type="checkbox"/> Patient Address 1 (street address) | <input type="checkbox"/> Patient Date of Birth |
| <input type="checkbox"/> Patient Address 2 (apartment number, etc) | <input type="checkbox"/> Patient Gender |

Please leave the below sections blank

- Primary Care Provider
- Care Program or Care Manager

We recommend uploading a new panel each month, but you are welcome to upload as frequently as you feel necessary based on how often you are adding new patients to the roster.

After the first panel, you can opt to send in an Overwrite. The difference is explained here:

- Overwrite – a new panel completely overwrites the old panel. You should always include active patients going back 12-24 months from the date of upload.

Step 2. Export an .xls or .csv file of the patient demographic report from your EHR.

CREATING YOUR VHI PATIENT PANEL FILE

Step 3. Transfer Data to VHI Panel Template.

1. Open the file [VHIPatientPanelTemplate.xls](#). This template will be provided to you by your VHI Account Manager.
2. Delete the examples and instructions in rows 2 – 11. To do this, click on the 2, then press the SHIFT button, then click on the 11. Rows 2 – 11 should now be highlighted and you can press the delete button or right click and choose delete rows.

| | A | B |
|----|-------|-------------|
| 1 | Group | Member_Stat |
| 2 | | ADD |
| 3 | | UPDATE |
| 4 | | DELETE |
| 5 | | |
| 6 | | All panels |
| 7 | | |
| 8 | | Val |
| 9 | | |
| 10 | | |
| 11 | | |
| 12 | | |

Click 2 + SHIFT + 11
Then delete

- Open the file you exported from you EHR and select the first cell of the column you want to copy. For example, select the cell row 2, column A.

| | A | B | C | |
|---|------------|------------|---------------|-----|
| 1 | Patient ID | First Name | Last Name | Add |
| 2 | 123456 | Cookie | Monster | 123 |
| 3 | 789012 | Big | Bird | 456 |
| 4 | 345678 | Oscar | Grouch | 789 |
| 5 | 901234 | Aloysius | Snuffleupagus | 321 |
| 6 | | | | |
| 7 | | | | |

- Hold **SHIFT + CTRL + DOWN ARROW at the same time** on your keyboard. This will select all of the cells containing data in this column. If there are any blank cells in a column, you will need to press the DOWN ARROW again to skip the blank cell and continue highlighting.



- Over the highlighted column, right click on your mouse and select COPY.
- Go to the VHI Patient Panel Template file
- In the VHI Patient Panel Template, in the cell under the appropriate column header, right click on your mouse and select PASTE
- Make sure the data you are pasting into the VHI Patient Panel Template is going into the correct column.

| | A | B | C | D | E | F | G | |
|---|-------|---------------|------------|------------|-------------|---------------|-------------|----|
| 1 | Group | Member_Status | Patient_ID | First_Name | Middle_Name | Last_Name | Name_Suffix | Ad |
| 2 | | | 123456 | Cookie | | Monster | | |
| 3 | | | 789012 | Big | | Bird | | |
| 4 | | | 345678 | Oscar | | Grouch | | |
| 5 | | | 901234 | Aloysius | | Snuffleupagus | | |
| 6 | | | | | | | | |

- Do not delete or rearrange any of the rows or columns in the VHI Patient Panel Template. Check to make sure all of the data in each column has been copied over from your exported EHR report to the VHI Patient Panel Template.

PREPARING YOUR PANEL FOR UPLOAD

Step 4. Saving Your VHI Patient Panel File

- After you have copied and pasted all patient information into the VHI Patient Panel Template, go to FILE>SAVE AS.
- FILE NAME: Your VHI Account Manager will provide you with a Participant Source Code. This is a unique code assigned to your practice/organization. You will include this code in your file name. It is very important to follow this exact naming convention, otherwise your file could be rejected.
Overwrite panel example: SOURCECODE-1-z-MM-DD-YYYY
- FILE TYPE: In the drop-down menu, select CSV (Comma delimited) and click SAVE.

File name: VA_TEST-1-z-12-30-2024

Save as type: CSV (Comma delimited)

Tools Save Cancel

PANEL SUBMISSION TIPS

- Ensure your panel file has the correct name and is saved as a .csv (comma delimited) file type.
- Ensure all column headers are included, named and listed IDENTICALLY to the order on the VHI Patient Panel Template.
- Ensure your patient panel reflects accurate data in ALL required fields (blue).
- Ensure that there is no unnecessary or additional spacing within the cells.

Submitting Your Panel

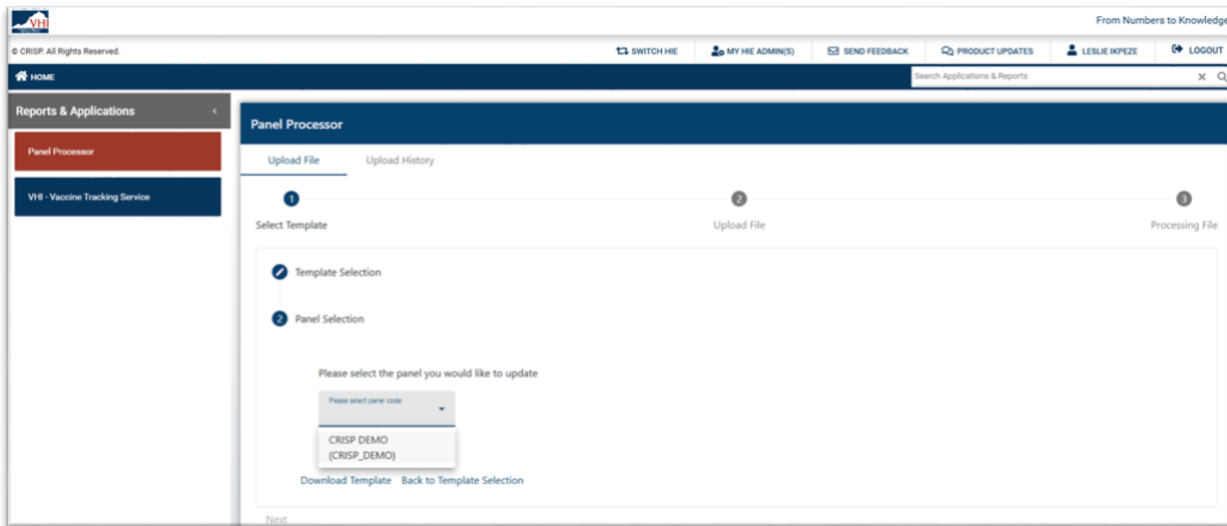
Your patient's information must be submitted to VHI securely.

- Manual upload using the Panel Processor application in the VHI portal

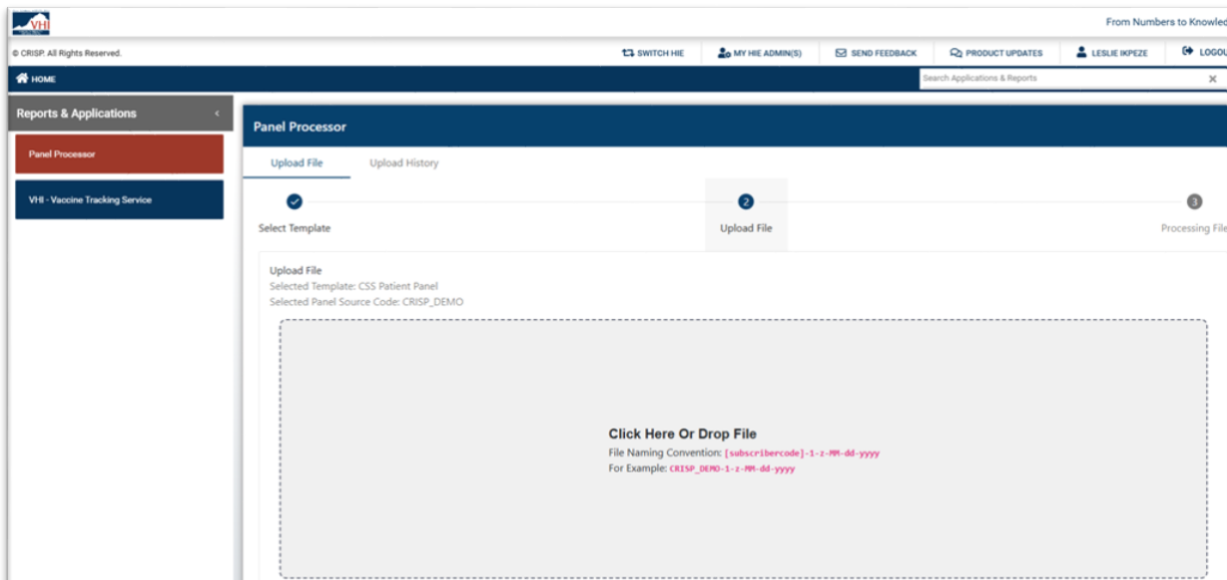
PANEL PROCESSOR

The Panel Processor is an application available in the VHI portal. Log in to the VHI portal, then click on the Panel Processor app and follow the steps below.

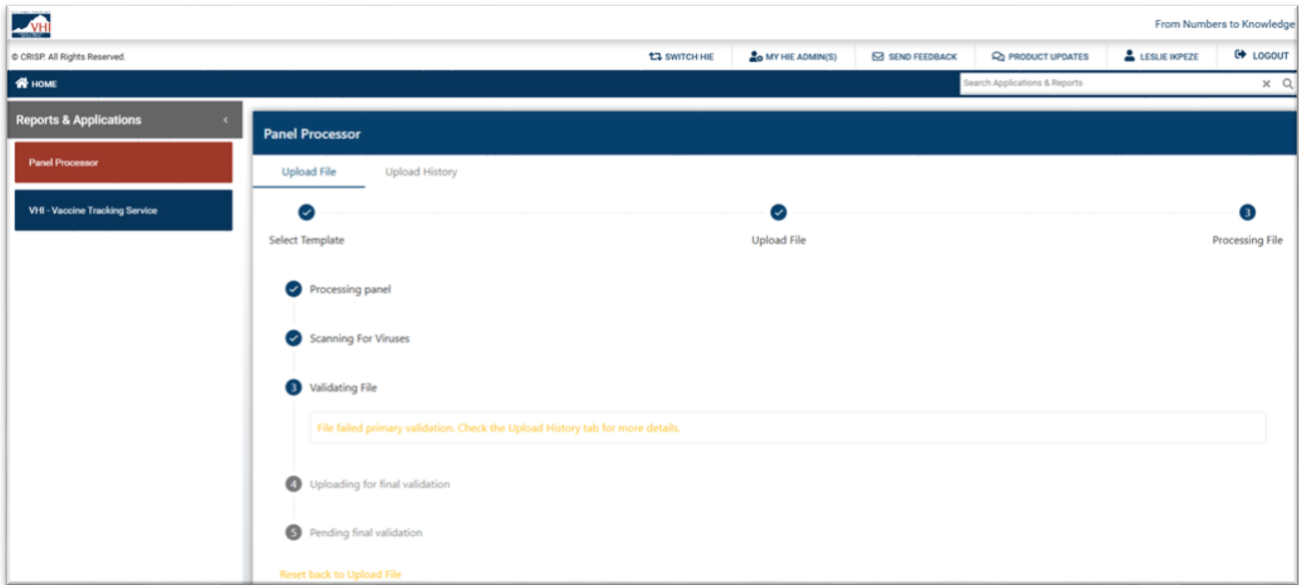
1. Select the Template and Panel you want to upload
 - a. Template = CSS Patient Panel
 - b. Panel Selection = Your panel name / source code



2. Click the box or drag and drop your file to upload, then click Submit



3. File checks and validation



NOTE

If your file fails validation, go to the Upload History tab and click on the file. A pop-up window will indicate why the file failed validation and what needs to be fixed. If you need assistance, please contact your VHI Account Manager.

