

CurrentCare

Panel Processor User Guide

Overview.....	2
Access the Panel Processor	2
Panel Processor Home Screen	3
Download the Template (if needed)	3
Prepare the Panel File	4
Upload a Panel.....	5
'Processing File' Step	8
Upload History	9

Learn more at CurrentCareRI.org/panel-management.

If you have questions, please contact the CurrentCare Support Team at Support@CurrentCareRI.org or 888.858.4815.

Overview

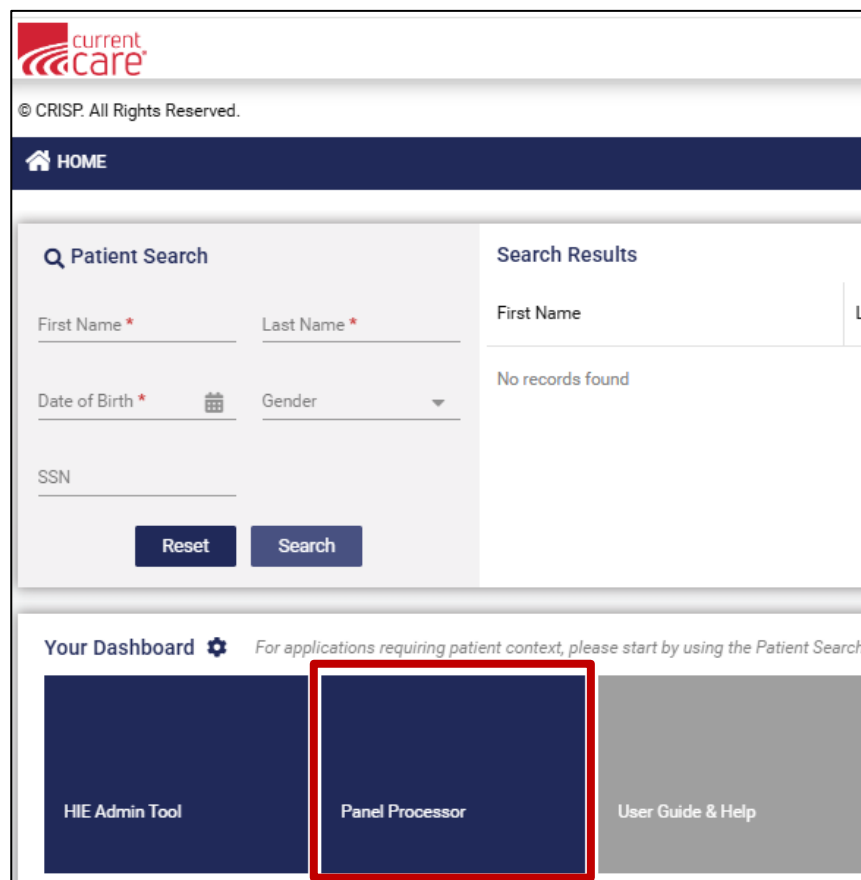
CurrentCare (the Rhode Island Health Information Exchange, HIE) requires each organization to provide a **'panel'** of their active members (patients/clients/etc), and submit regular updates. This is for security purposes, to ensure all access is authorized.

The **Panel Processor** application allows users to upload panels into CurrentCare for various services, such as [CurrentCare Encounter Notifications](#) and [CurrentCare Clinical Data](#). Learn more about panel management at CurrentCareRI.org/panel-management.


Access the Panel Processor

Access the **Panel Processor** application:

- Log into the [CurrentCare Portal](#) with your username, password, and two-factor authentication credentials.
- Click the **'Panel Processor'** service card from your dashboard to launch the application. Your list of services might be different than this example:




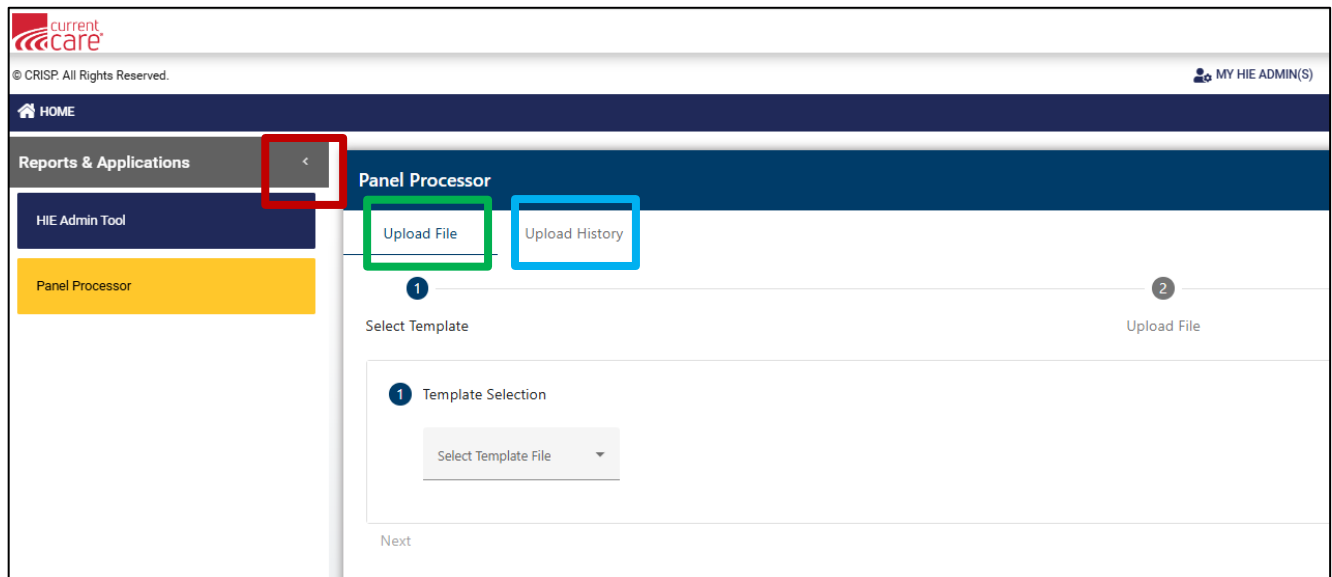
Panel Processor Home Screen

The Panel Processor tool will display. You can collapse the side toolbar by clicking the  next to 'Reports & Applications.'

There are two tabs within the Panel Processor:

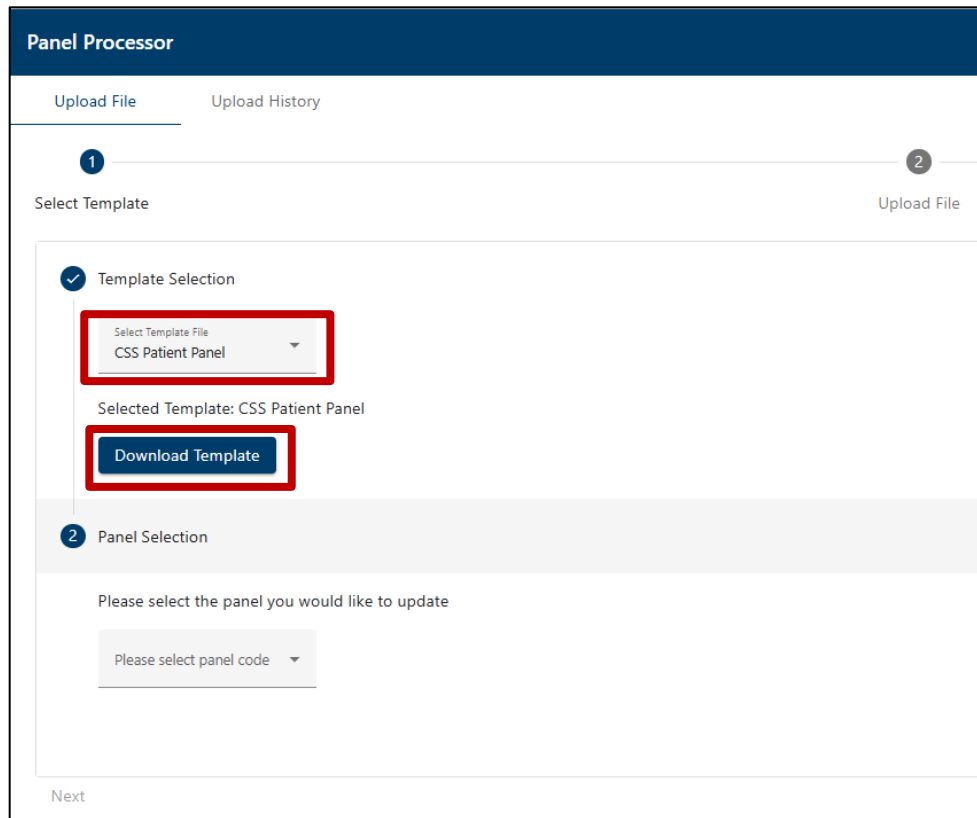
 - **submit a panel** by following the process prompts

 - **view results** of previous successful and unsuccessful upload attempts



Download the Template (if needed)

Before submitting a panel, users must ensure they are using the correct Template (a defined file format with specific column fields and field data types). Each service using the Panel Processor will have a unique template. Click 'Select Template File' > select "CSS Patient Panel" > click 'Download Template.'



The template will download in an Excel format, for example: 'CSSPatientPanel.xlsx.'

Prepare the Panel File

IMPORTANT - Before submitting a panel, users must **ensure that all instructions** are followed exactly as outlined in this "Create a Panel File" Guide. Please pay particular attention to the "Field Descriptions" & "Best Practices" tabs:



← Download file here: CurrentCareRI.org/create-panel

The CurrentCare Team will provide you with a **subscriber code** (or **source code**) for your panel. This is a unique set of characters used within CurrentCare to identify a panel.

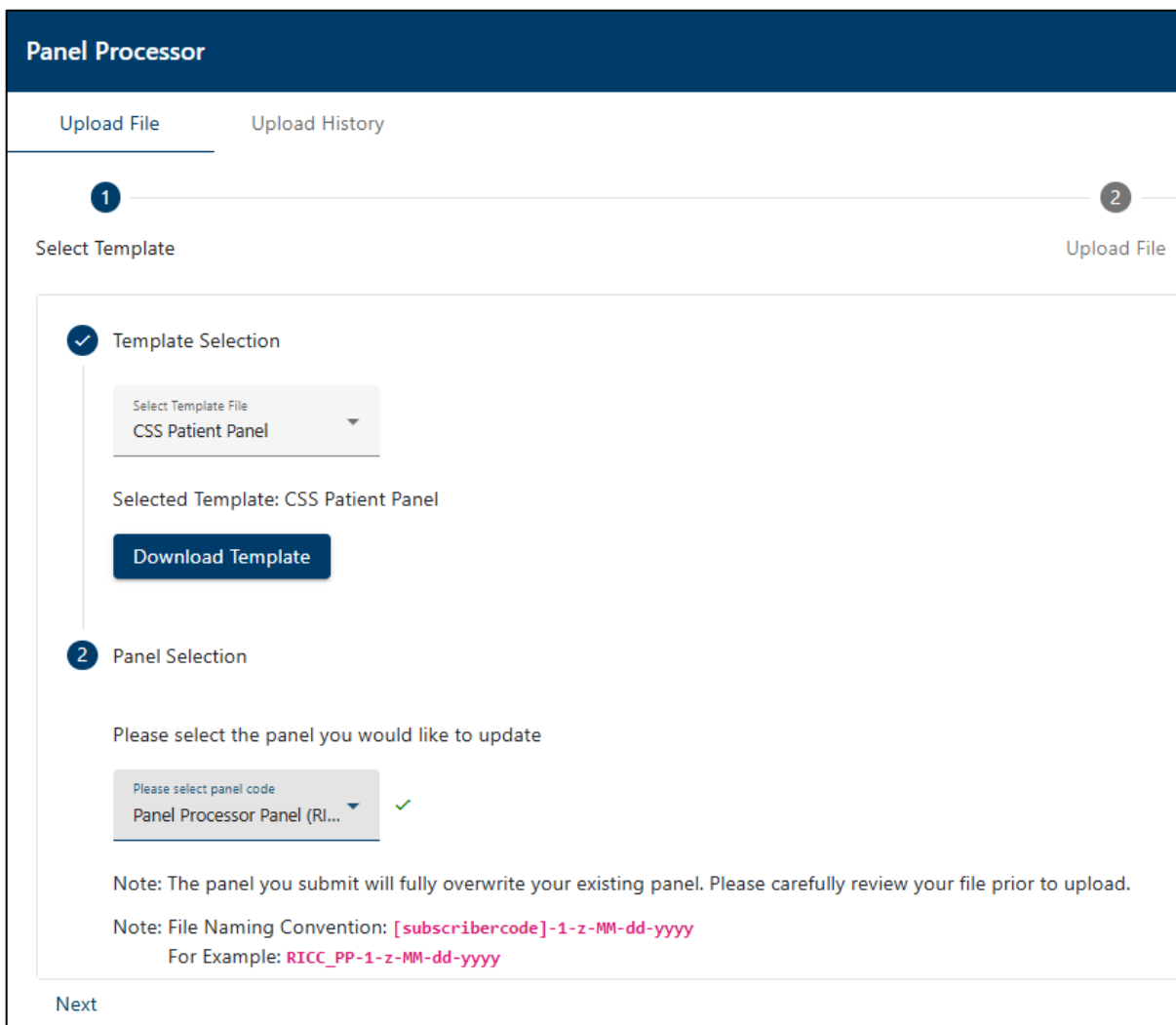
IMPORTANT for each panel file submission:

- Format must be .csv file.
- Filename must be **exactly** in the following format:
 - **[subscriber_code]-1-z-MM-dd-yyyy.csv**
 - For example: RI_DEMO-1-z-04-04-2025.csv

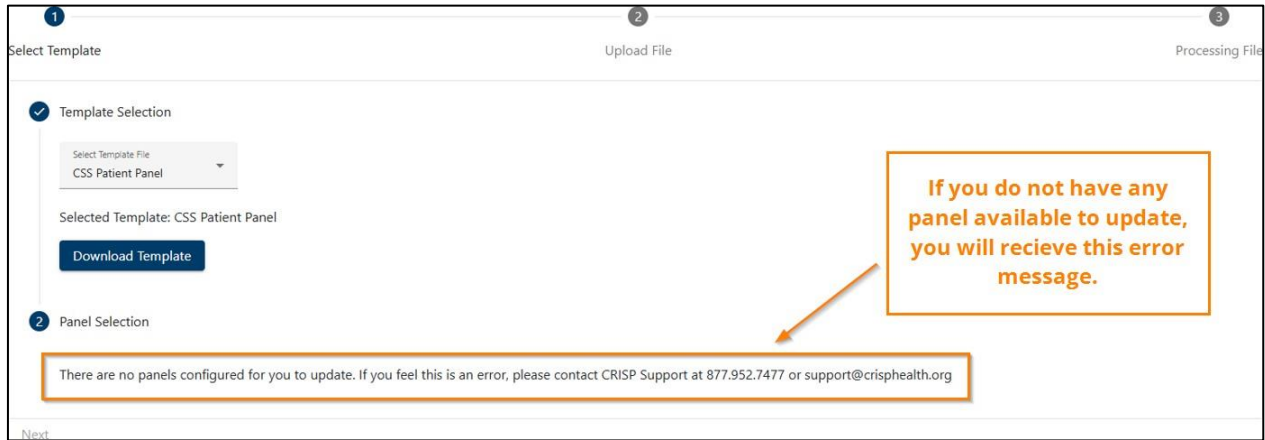
Upload a Panel

To submit a panel through the Panel Processor:

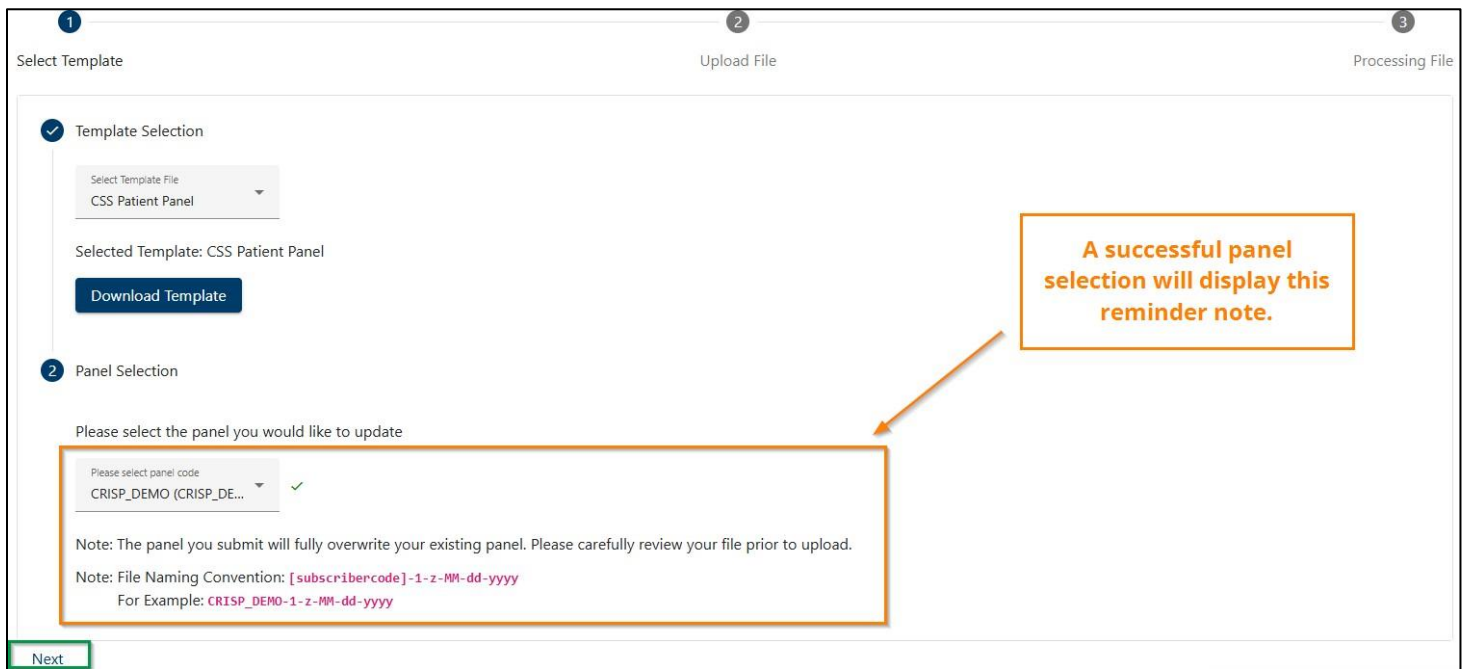
- **Template Selection:** Select the template titled 'CSS Patient Panel'
- **Panel Selection:** Select the panel you want to update. The Panel Processor will prompt you to select a panel by name and subscriber code. A subscriber code (or source code) is a unique set of letters used within the HIE to identify a panel.

A screenshot of the "Panel Processor" web interface. The interface has a dark blue header with the title "Panel Processor". Below the header are two tabs: "Upload File" (active) and "Upload History". The main content area is divided into two steps: Step 1, "Select Template", and Step 2, "Panel Selection". In Step 1, there is a "Select Template File" dropdown menu with "CSS Patient Panel" selected, a "Selected Template: CSS Patient Panel" label, and a "Download Template" button. In Step 2, there is a prompt "Please select the panel you would like to update" and a "Please select panel code" dropdown menu with "Panel Processor Panel (RI..." selected and a green checkmark. Below the dropdown are two notes: "Note: The panel you submit will fully overwrite your existing panel. Please carefully review your file prior to upload." and "Note: File Naming Convention: [subscribercode]-1-z-MM-dd-yyyy For Example: RICC_PP-1-z-MM-dd-yyyy". At the bottom left is a "Next" button.

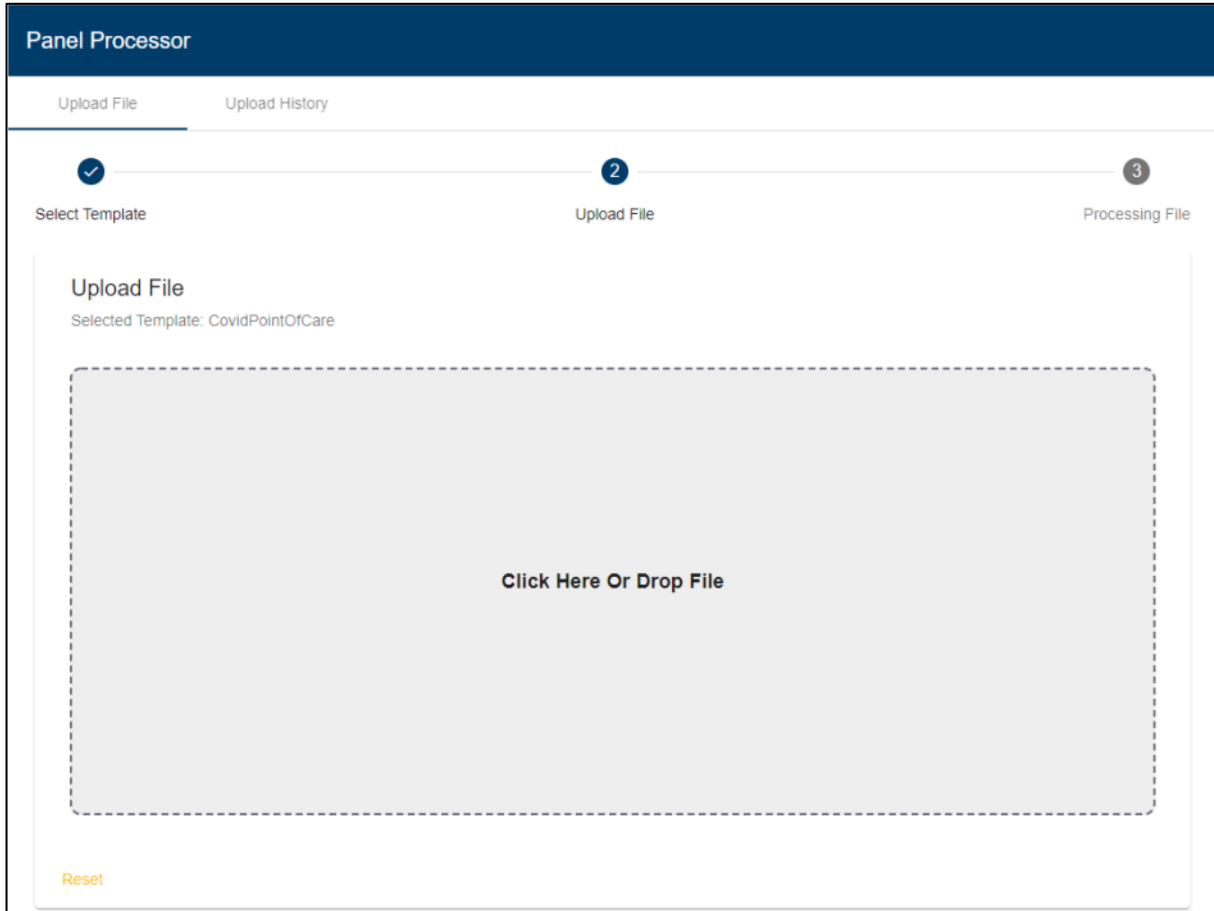
If you receive an error message "There are no panels configured for you to update..." please contact Technical User Support at the contact information provided in error:



Your panel is configured correctly if you receive the following message:

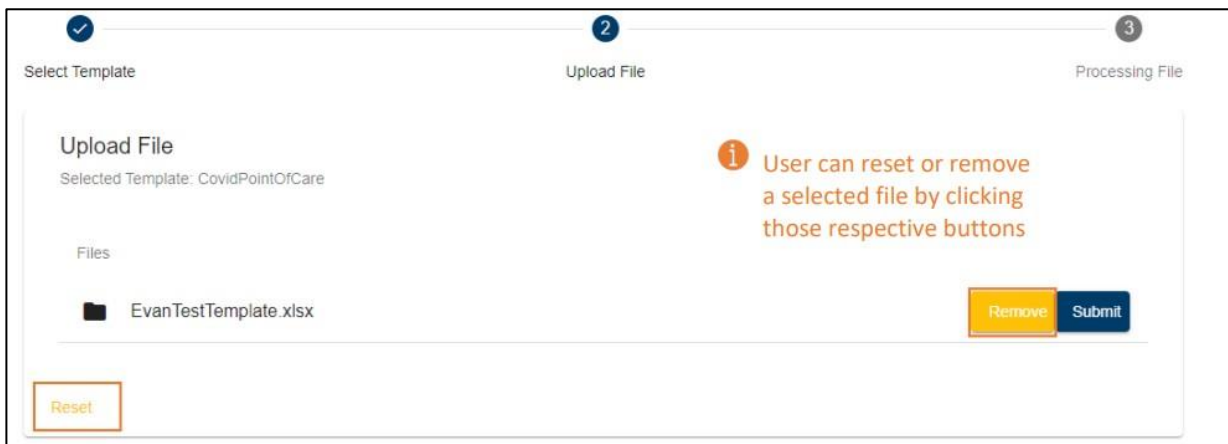


1. Click **Next** at the bottom to navigate to the 'Upload File' step.
2. Upload the completed file by clicking the grey box or dragging and dropping the file there:

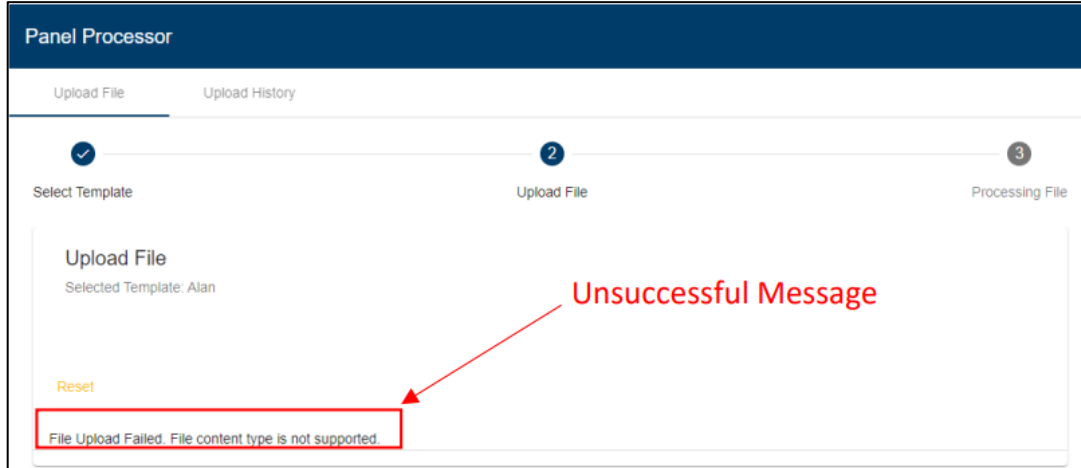


3. Click 'Submit' to load the panel to the processor.

The processor will now perform initial checks to validate the file type and file size, which takes only a few seconds. File type must be .csv & file size must be less than 100 MB.



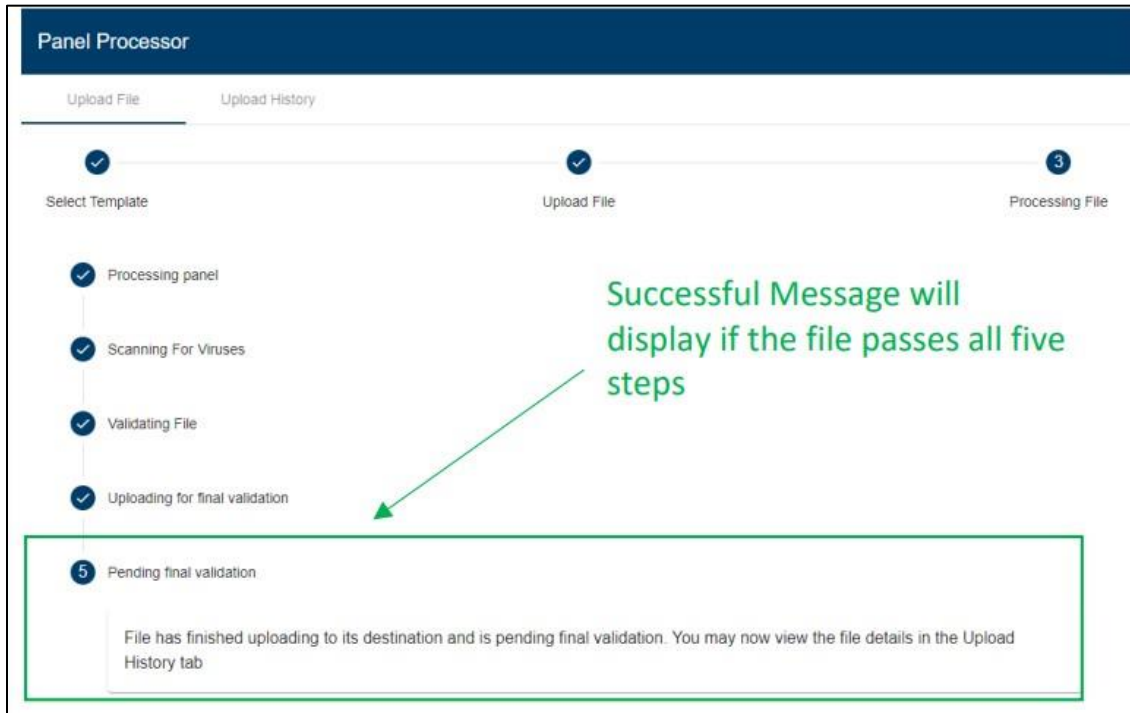
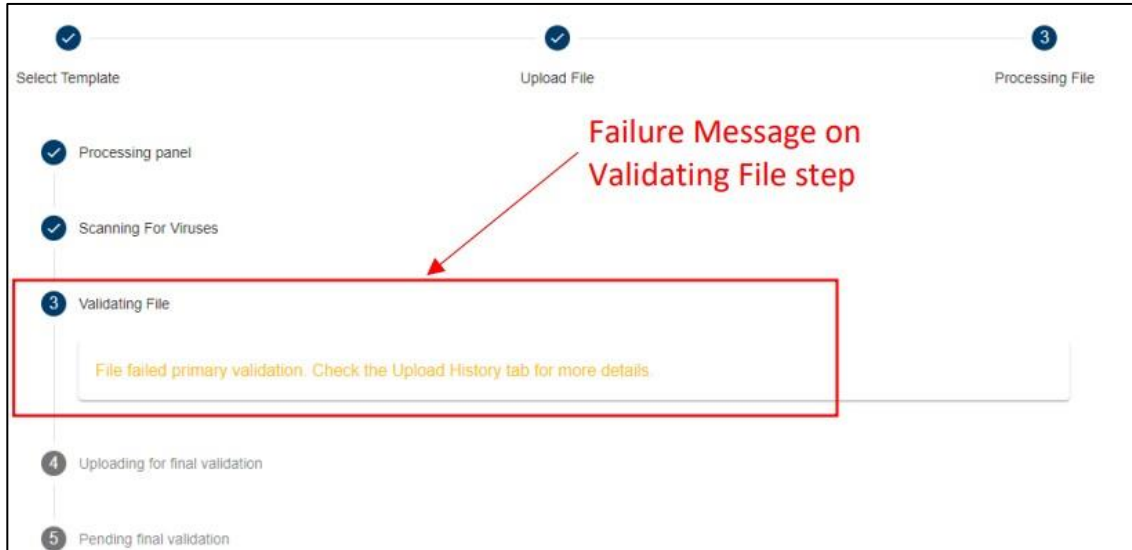
A **failed** upload will display an unsuccessful message:



'Processing File' Step

A **successful** file upload will advance the user to the 'Processing File' tab. This step does not require any further action from the user. It displays the real time actions that the Panel Processor is performing to further validate and upload the file:

1. **Processing File** - check to validate file type and file size
2. **Scanning for Viruses** - check for any viruses in the file.
3. **Validating File** - confirm data within the file are correct to the template specifications.
See the "Prepare the Panel File" section above for how to correctly fill out the panel file.
 - If a file fails this step, users can view the error details in the 'Upload History' tab.
 - Even if one row fails out of one hundred rows, the whole file will fail to process.
4. **Uploading for Final Validation** - send the file to the correct location within CurrentCare.
5. **Pending Final Validation** - confirm the file is successfully received by the correct location within CurrentCare.



Upload History

The 'Upload History' tab displays all file upload attempts which passed the initial check to validate the file type and size. In other words, the results of any attempt to upload a file where a user could view the 'Processing File' step will appear here.



The 'Upload History' tab is used to:

- Monitor panel file status while awaiting final validation
- Understand why a panel file failed the validation step
- View when a panel file was last uploaded to a particular source code

Panel Processor					
Upload File		Upload History			
Template	Date/Time Added ↓	Source Code	File Name	Total Rows	Status
CSSPatientPanel	04/03/25 03:55 PM	RICC_PP	RICC_PP-1-z-04-03-2025.csv	3	Upload completed, awaiting validation
CSSPatientPanel	04/02/25 10:21 AM	RICC_PP	RICC_PP-1-z-04-02-2025.csv	-	Error

The table on the 'Upload History' tab will contain a row for each file upload attempt. Each row contains the template used, the date and time of the attempted upload, the source code, the file name, the number of rows within the file, and file status.

A 'Succeeded' status message tells the user their panel upload is ready within the desired service. The table below displays the possible statuses for panel uploads.

Status	Description
<i>Not Started</i>	Target service has not started processing the file
<i>Upload Complete, Awaiting Validation</i>	Processing of the file is underway
<i>Error</i>	There is an issue with the file. A support team member will reach out to explain and resolve the error.
<i>Succeeded</i>	Panel is now in use in the desired service

Users can click anywhere within a row to view additional details on the upload attempt. A popup box will appear displaying the number of total, successful, and unsuccessful rows. Failed rows will include an error message to assist the user in correcting for future submission attempts.

Successful Message:

Summary

Filename: DataTypesOptEnforceTemp.csv
Date Uploaded (UTC): 2022-07-26T18:54:55.8033333

1 Total Rows
0 Successful Rows
0 Failed Rows

Error Messages:

Summary

Filename: EvanTestTemplate_testsources.csv
Date Uploaded (UTC): 2022-07-26T15:10:19.12

0 Total Rows
0 Successful Rows
0 Failed Rows

Row Number	Error
0	Missing Header from Column: MRN
0	Missing Header from Column: PatientAge
0	Missing Header from Column: PatientBirthWeight
0	Missing Header from Column: CompletedNewbornScreening?

Summary Close [X]

Filename: RICC_PP-1-z-04-02-2025.csv
Date Uploaded: 4/2/25, 10:21 AM

-1 Total Rows
0 Successful Rows
0 Failed Rows

Row Number	Error
0	Missing Header from Column: Assigning_Authority_Code

Items per page: 5 1 – 1 of 1 |< < > >|