



Training Guide:

Population Explorer

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In this guide:

The purpose and benefits of Population Explorer

How to access and configure Population Explorer

How to navigate Population Explorer

How to use filters to manage follow-up work

How to manage follow-up using downloads or status tracking

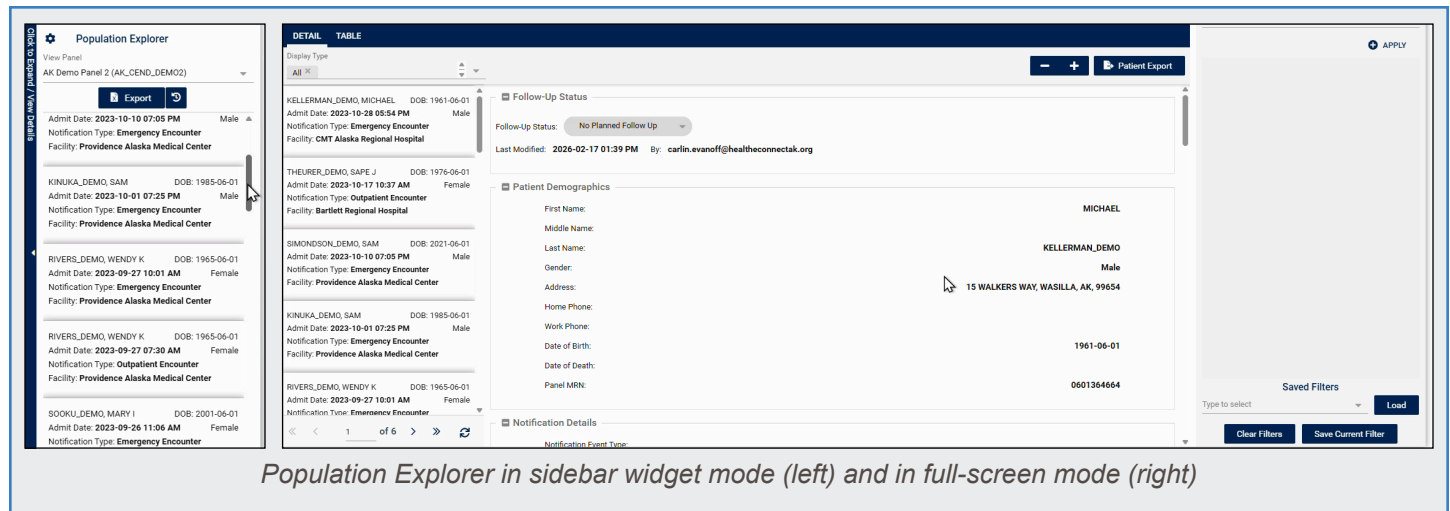
Contents

- The purpose and benefits of Population Explorer 3**
- How to access and configure Population Explorer 3**
 - Accessing Population Explorer..... 3
 - Selecting your patient panel..... 4
 - User Settings..... 4
- How to navigate Population Explorer 5**
 - Sidebar widget navigation 5
 - Main Views 6
 - Detail View 6
 - Navigation Tips..... 7
 - Accessing patient charts..... 7
- How to use filters to manage follow-up work 8**
 - Benefits of filters..... 8
 - Common use cases..... 8
 - Applying Filters 8
 - Saving Filters 9
 - Clearing Filters..... 9
- Managing follow-up using downloads or built-in tracking 10**
 - Downloading Data 10
 - Patient-Level Downloads 11
 - Status Tracking 12
 - Status History..... 12
 - Table View features 13

The purpose and benefits of Population Explorer

Population Explorer is a real-time encounter notification tool within the HIE Portal that helps users monitor patient activity across participating facilities.

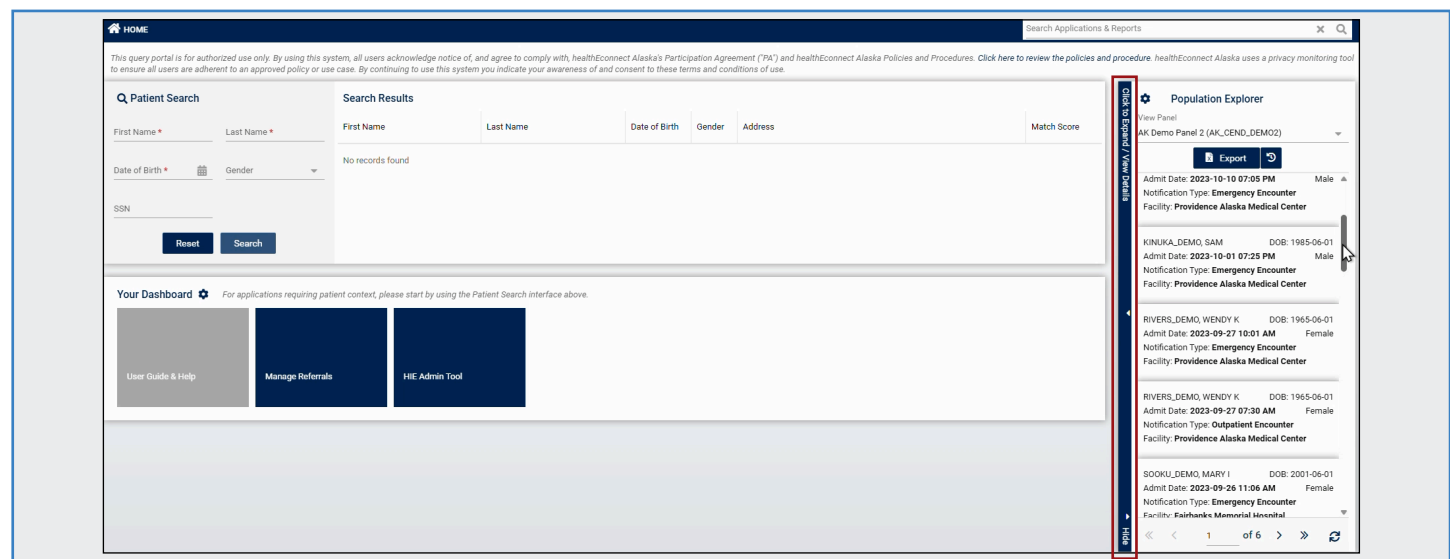
- It shows when patients in your panel have visits, admissions, discharges, or transfers.
- It provides detailed information about each encounter.
- It consolidates related events into a single record, giving a complete picture of each patient encounter
- It includes built-in status tracking features that support follow-up workflows and care coordination across your team.



How to access and configure Population Explorer

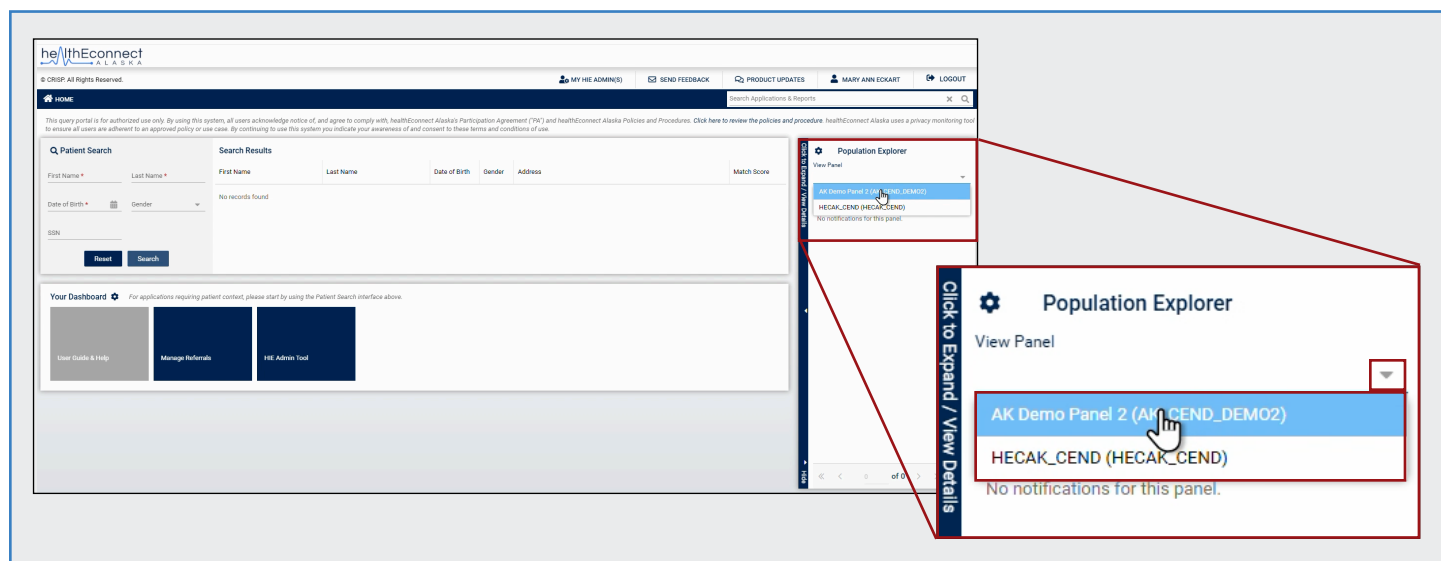
Accessing Population Explorer

- Population Explorer is accessed directly within the HIE Portal.
- By default, it appears as a sidebar widget on the right side of the screen.
- Click the vertical blue bar to open or hide the tool.



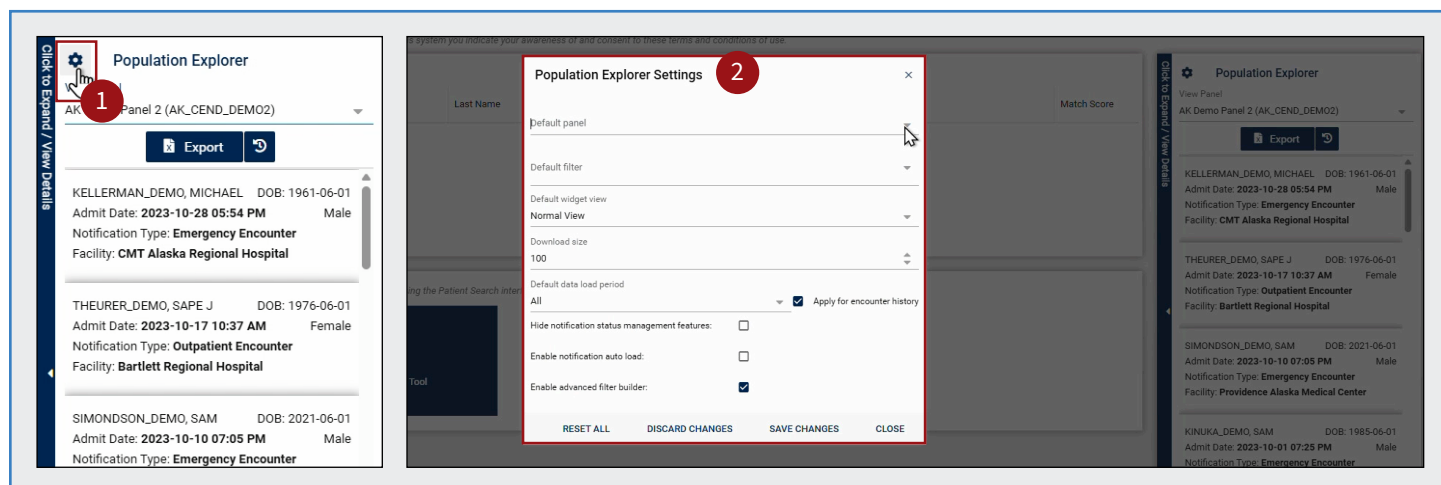
Selecting your patient panel

- Select your patient panel from the dropdown menu to begin viewing notifications.
- Most users will have one panel available.
- Users in larger organizations may have multiple panels to choose from.



User Settings

- Click the gear icon (1) to access settings.
- In the settings window that opens (2), you can configure settings such as:
 - Default patient panel
 - Default filter
 - Default widget view (window size)
 - Download preferences
 - Feature visibility (such as status tracking or advanced filters)

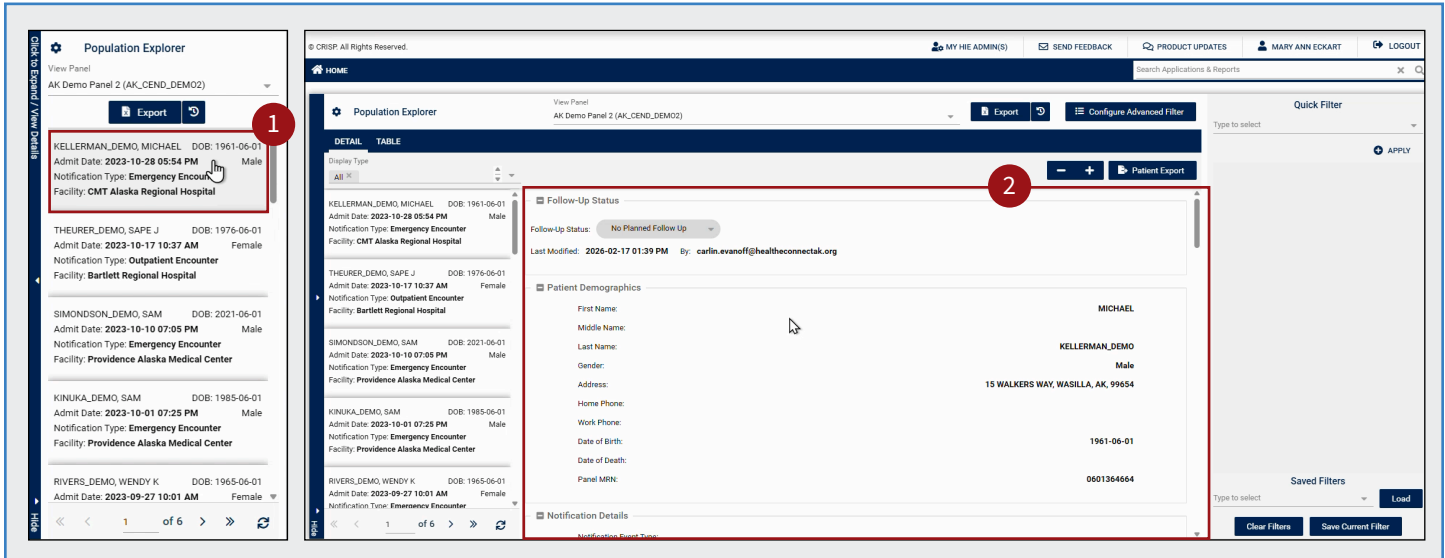


Note: We recommend saving your default panel to avoid selecting it each time you access the tool.

How to navigate Population Explorer

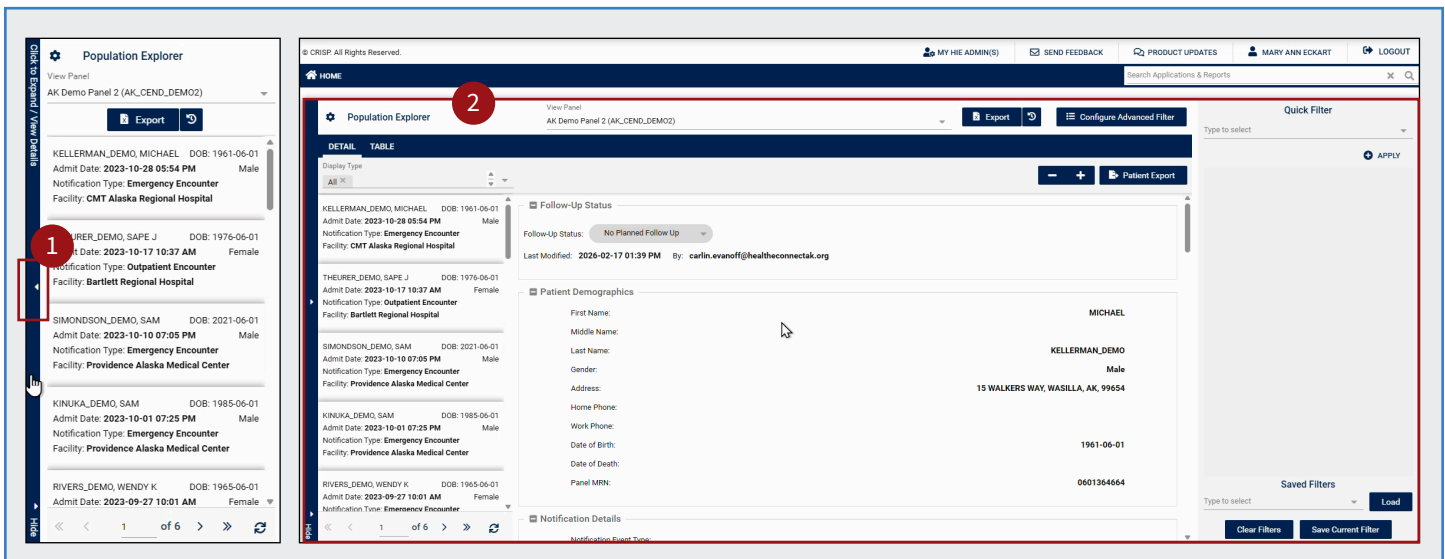
Sidebar widget navigation

- Scroll through encounter notifications in the sidebar.
- The list displays 25 items at a time.
- Notifications refresh approximately every 20 minutes.
- Click any encounter (1) to open it in the full-screen view (2).



Expanding Population Explorer to full screen

- You can also click the arrow icon (1) in the sidebar widget view to expand Population Explorer to full screen (2).
- This view provides access to all available features.



Your preferred default window size can be set in Settings.

Main Views

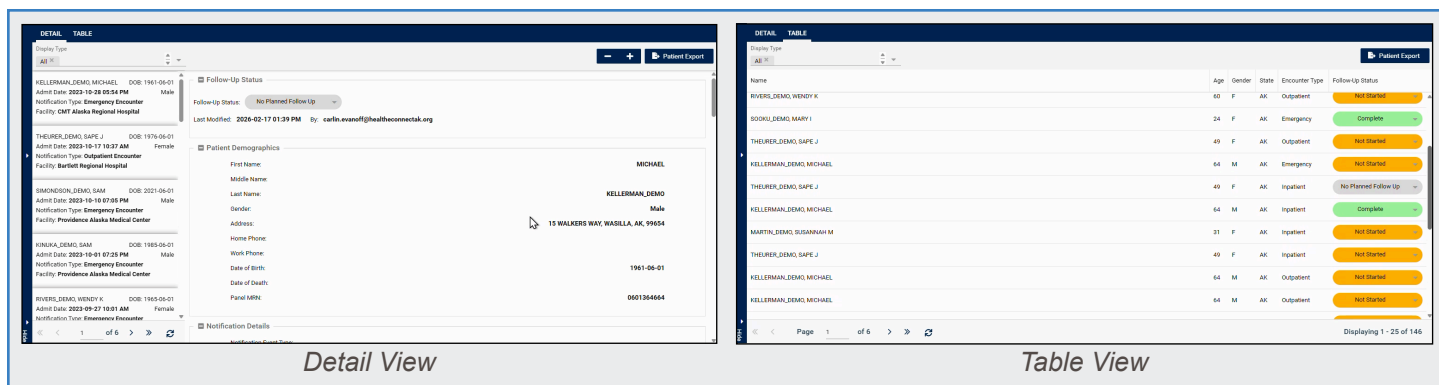
Population Explorer includes two primary views:

Detail View

- Focuses on individual patient encounters
- Displays detailed information for a selected encounter

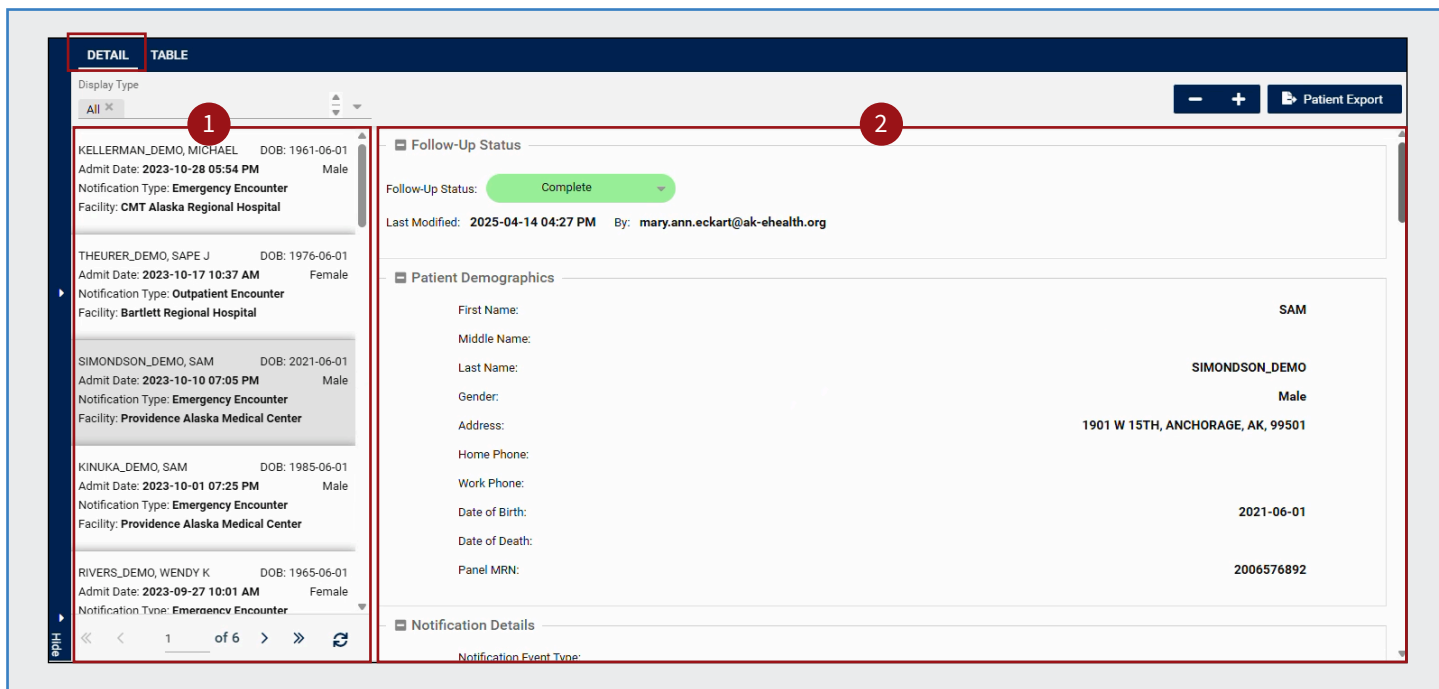
Table View

- Displays an at-a-glance list across multiple encounters
- Supports tracking / managing follow-up activity



Detail View

- **Left side (1):** chronological list of encounters (most recent at the top)
- **Right side (2):** detailed information for the selected encounter

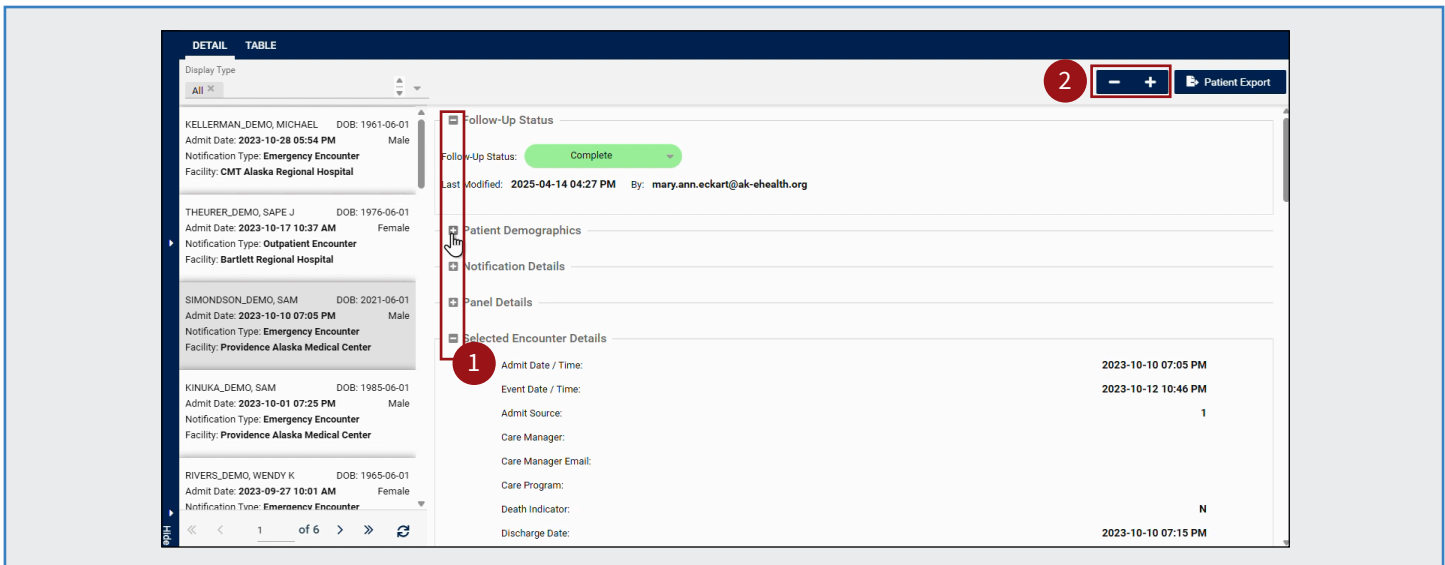


The detailed section includes items such as:

- Patient demographics
- Encounter-specific details
- Encounter history
- Aggregated visit data (30, 60, 90, and 180 days)
- Encounter types (inpatient, outpatient, emergency)

Navigation Tips

- Use the plus (+) and minus (-) icons to expand or collapse sections (1).
- Use the controls at the top to expand or collapse all sections (2).

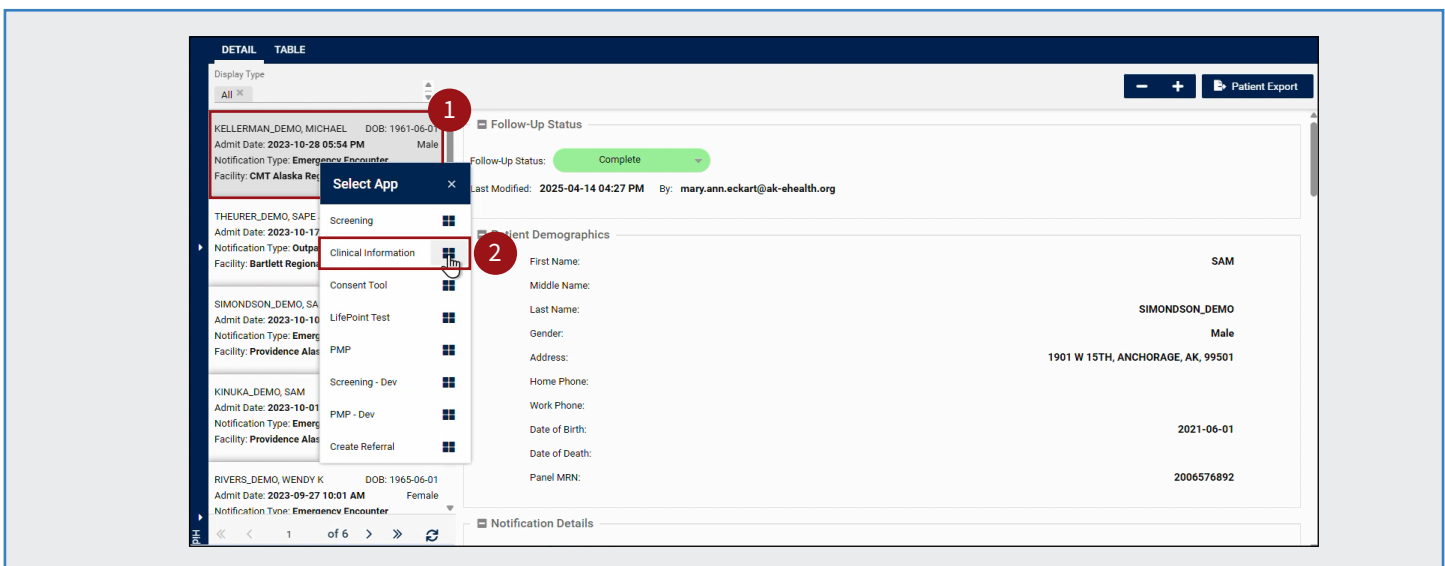


Default section behavior can be configured in Settings.

Accessing patient charts

- Right-click on an encounter notification (1).
- Select the *Clinical Information* application (2).

This opens the patient's chart without returning to the home screen and having to search for the patient.



Opening the patient chart will navigate away from Population Explorer.

How to use filters to manage follow-up work

Benefits of filters

Filters allow you to narrow the encounter list based on specific criteria. They help:

- Prioritize follow-up work
- Focus on specific patient populations
- Support targeted care coordination

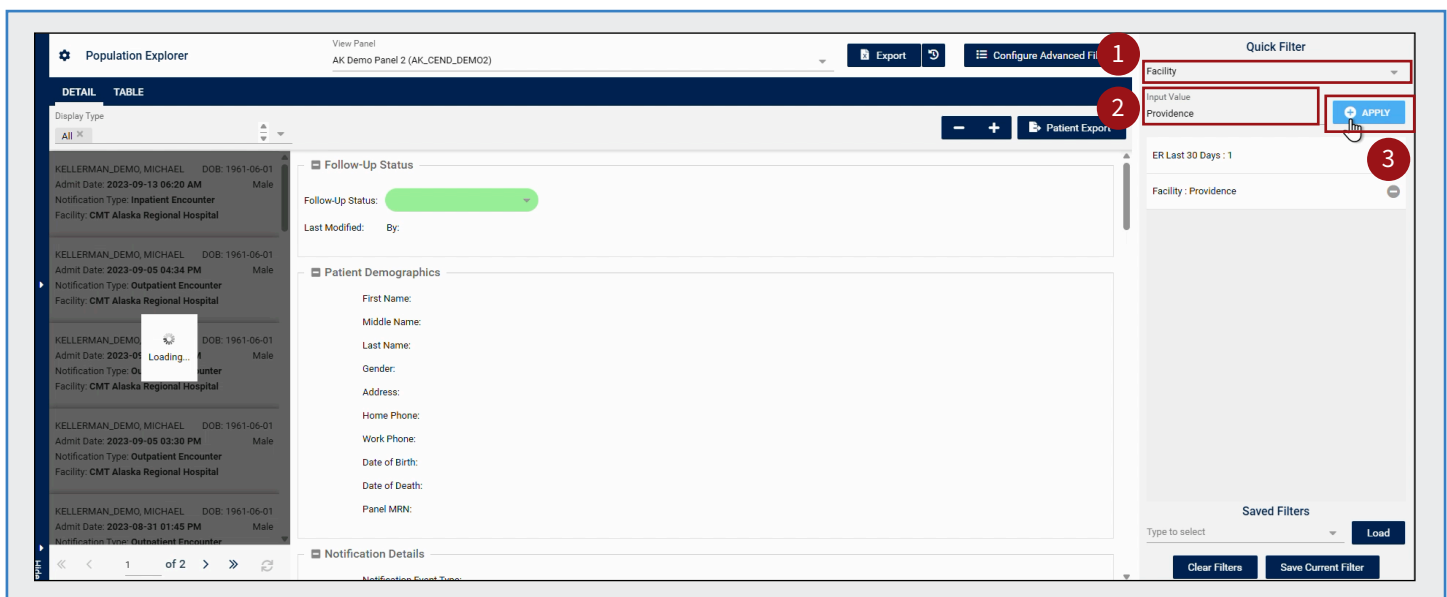
Common use cases

- Tracking hospitalizations or ER visits
- Coordinating transitions of care
- Identifying high-risk patients
- Addressing social care needs through targeted outreach

Applying Filters

- Select a filter type (1) (such as encounter type, date range, diagnosis, or facility).
- Enter your criteria (2).
- Click **Apply** (3).
- You can apply multiple filters to further refine results.

Results update immediately in both the *Encounter Detail* and *Table* views.



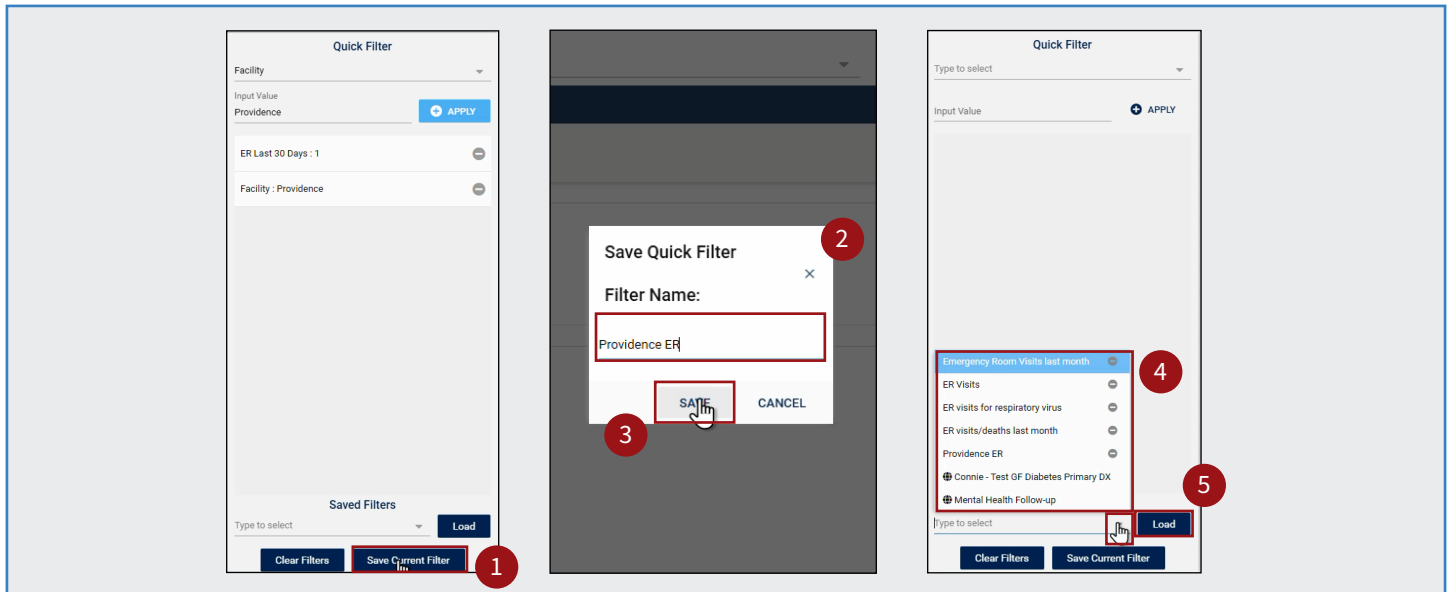
Saving Filters

To create a new saved filter:

- Click **Save Current Filter** (1)
- In the pop-up window, enter a name (2)
- Click **Save** (3)

To use a saved filter:

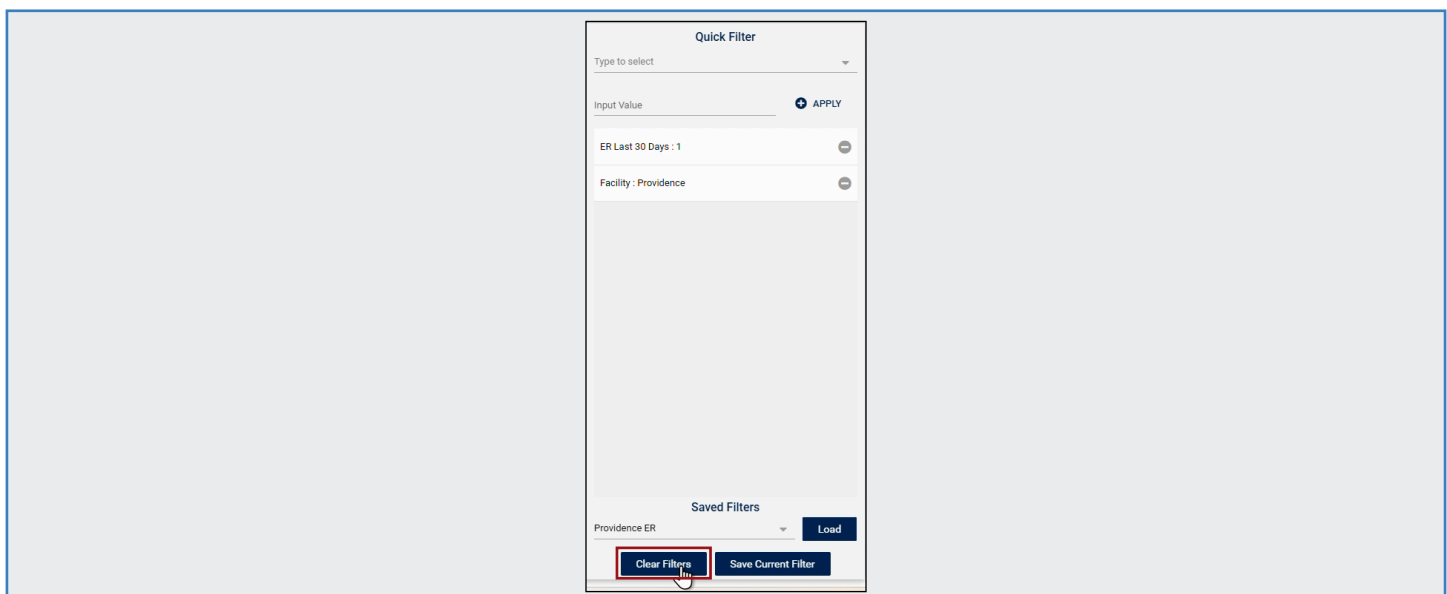
- Select the filter from the list (4)
- Click **Load** (5)



Saved filters do not apply automatically. You must click Load.

Clearing Filters

Click **Clear Filters** to return to the full encounter list



Saving filters is especially helpful when navigating away to view patient charts. It prevents the need to rebuild filters when you return.

Managing follow-up using downloads or built-in tracking

Downloading Data

- Click the **Export** button from either the widget view (1) or the full-screen view(2).
- In the pop-up window, acknowledge access to protected health information (3).
- Select which fields to include in the downloaded report (4).
- Click the **Excel** button (5) to download as a spreadsheet.

The image illustrates the process of downloading patient data from the Population Explorer interface. It consists of four numbered steps:

- Step 1:** A widget view showing a list of patients. The 'Export' button is circled in red.
- Step 2:** A full-screen view of the same data. The 'Export' button is circled in red.
- Step 3:** A 'Notice and Acknowledgement: Exporting PHI' dialog box. The 'ACCEPT AND CONTINUE' button is circled in red.
- Step 4:** The 'Population Explorer - Export Interface' dialog box. The 'Excel' button is circled in red.

Patient-Level Downloads

Individual patient encounter details can be downloaded as a PDF or Excel file.

- Select **Patient Export** within the encounter detail section (1).
- In the pop-up window, acknowledge access to protected health information (2).
- Select which fields to include in the report (3).
- Choose your desired file type (PDF or Excel) (4).

The image illustrates the process of downloading patient encounter details in four steps:

- Step 1:** In the **Population Explorer** interface, the **Patient Export** button is highlighted in the top right corner.
- Step 2:** A **Notice and Acknowledgement: Exporting PHI** dialog box is displayed. The user must acknowledge access to protected health information (PHI) by checking the box and clicking **ACCEPT AND CONTINUE**.
- Step 3:** The **Population Explorer - Export Interface** dialog box is shown. The user selects the fields to include in the report. Under **Required Fields**, **First Name**, **Last Name**, and **Gender** are selected. Under **Optional Fields**, **Facility**, **Follow up Status**, and **Location** are selected.
- Step 4:** The user chooses the desired file type (PDF or Excel) at the bottom of the export interface.

Status Tracking

- Population Explorer includes a built-in follow-up status feature.
- Status can be updated in both the *Detail* (1) and *Table* (2) views.
- Status options include:
 - Not Started
 - In Progress
 - Complete
 - No Planned Follow-Up

Status is only visible within your organization.

Status options should be defined by your facility based on workflow needs.

Status History

- A history of status changes is available at the bottom of the detail view
- This allows your team to track progress across users and over time.

Table View features

- Table View provides an at-a-glance list of encounter data across your panel or a filtered list.
- Displays key encounter fields and follow-up status in columns.
- Table view features include:
 - Sorting by any column (1)
 - Customizing column visibility (2)
 - Updating follow-up status directly within the table (3)

The image consists of two side-by-side screenshots of a web application's Table View, illustrating three key features: sorting, column customization, and status updates.

Left Screenshot:

- Feature 1 (Sorting):** A red box highlights the 'Follow-Up Status' column header. A dropdown menu is open, showing options: 'Sort Ascending' (with an upward arrow), 'Sort Descending' (with a downward arrow), and 'Columns' (with a grid icon).
- Feature 3 (Status Update):** A red box highlights a 'Not Started' status button in the 'Follow-Up Status' column for a row. A dropdown menu is open, showing options: 'Not Started' (highlighted), 'In Progress', 'Complete', 'No Planned Follow Up', and another 'Not Started' option at the bottom.

Right Screenshot:

- Feature 2 (Column Customization):** A red box highlights the 'Columns' dropdown menu. A side panel is open, showing a list of columns with checkboxes for visibility: Name, Age, Gender, Panel MRN, MRN, State, Facility, Location From ADT, Facility Type, Primary Care Provider, Notification Type, Encounter Type, Admit/Service Date, Discharge Date, DOB, Provider, and Follow-Up Status. The 'Encounter Type' and 'Follow-Up Status' checkboxes are checked.