

ProviderLink

User

Training

Manual

Hospitals



ProviderLink User Training Manual For Hospitals

Your Handbook For ProviderLink
Techniques, Best Practices, Examples, and Tips

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Section I - Introduction to ProviderLink

1. What is ProviderLink?

Unique to the healthcare industry is our interdependence on each other. Rarely can a job be performed without successful external communications. Before you can do your job, you must get an authorization, signature, order, medical record, referral, form, bed availability, etc. from someone else who typically does not report to you or even work for your organization. Herein lies the fundamental healthcare administrative problem. We are interdependent on each other but not necessarily accountable to each other.

ProviderLink is an Internet communications tool that allows you to communicate patient information with other healthcare facilities or professionals. Instead of being tied to a particular fax machine or telephone extension, you can access ProviderLink anywhere you have an Internet connection.

Any document, whether electronic or handwritten, or any other information about a patient can be placed in the patient record and securely sent to recipients. As long as the document can be printed or faxed, it can be loaded into ProviderLink and attached to a patient record.

Whether the organizations you communicate with are online with ProviderLink or not, you can use ProviderLink to track any messages to or from them. For facilities that are online with ProviderLink, every message you send to them appears on their computer screen. If the facility is not yet online, you can still fax them messages and use ProviderLink's fax-back, cover sheet to have any replies automatically routed back to the appropriate patient record. In either case, ProviderLink streamlines all of your communications.

Whenever you are transmitting patient records, you should be concerned about security and HIPAA compliance. ProviderLink helps customers with their HIPAA compliance. Every message sent or received by ProviderLink is logged and is date/time stamped. You can see when a message is sent, when it was read, and who read it. All messages are patient specific, meaning they are logged with and follow the patient record. You will always be able to see the complete patient history in ProviderLink. The data stored in ProviderLink is secure and backed up several times each day.

2. Benefits of Using ProviderLink

Each organization and each department within an organization has different communication needs and ProviderLink has features to address them all.

Here are a few benefits current customers of different types have enjoyed since coming online with ProviderLink:

Hospitals

- a. Utilization Review
 - Less time spent faxing and on the phone
 - Extensive history and audit trail
- b. Discharge Planning
 - Less time spent faxing and on the phone
 - Electronically obtain prior authorizations from participating agencies
 - Broadcast a referral (e.g., SNF, HME/DME, HHA, etc.) with just a few mouse clicks
 - Referral replies are directly attached to the patient records
- c. Business Office

- d. Electronically receive requests for medical records
 - Respond to requests more quickly to shorten the A/R cycle
- e. Outpatient Services
 - Central fax server allows central processing of all physician orders
 - Workflow management for outpatient processes
 - Streamline internal communication processes in one workflow

Skilled Facilities

- a. Receive referrals from hospitals electronically
- b. Pager notification lets you know the moment a referral arrives
- c. Electronically receive and process Medicaid authorizations and prior approval
- d. Broadcast referrals to assisted living, rest homes, and other facilities

HME/DME

- a. Manage physician signature collections for Certificates of Medical Necessity
- b. Electronically obtain Medicaid or private payor approval
- c. Electronically store Medicare DMERC forms
- d. Receive referrals from facilities electronically
- e. Pager notification lets you know the moment a referral arrives

Payors



- a. Less time managing faxes and on the phone
- b. Create online authorizations and schedule upcoming reviews
- c. Copy clinical information into your other systems

3. Conventions Used In This Guide

- When introducing you to a new term, the term will appear in *italics*.
- Using the mouse is key to effectively using ProviderLink. When the instructions say to *click*, it refers to a single click of the left mouse button. This is the main difference of navigating and working in ProviderLink as most commands require a single click.
- There will be times when the instructions will ask you to *double-click* on items. This refers to two rapid clicks of the left mouse button. Double-clicking in ProviderLink is relatively rare.
- The *menu bar* also plays a key role in navigating through ProviderLink. When you are asked to use the menu bar, the instructions will include bold text and arrows like this: **Lookup > Facility**.
- The instructions may call for you to type some text into a field in ProviderLink. The text you will be asked to type will appear in a special font: This is text you need to enter into a field.
- If you need to press a key on your keyboard, the text on the key will appear in a bold special font. For example: press the **Enter** key.
- When you need to click a link or a button on the screen, the link or button name will appear in bold letters: click the **Submit** button.

4. Icons And Notes

The icons and notes used in the margins will lend you insight as to how you may best use the instructions as they are presented.

Icon	How The Icon Is Used
	The target icon points to a useful tip or hint that may help you use ProviderLink more efficiently.
	The Book icon helps to introduce an idea or concept for the first time.

5. How This Guide Is Organized

- **Section 1** – *Introduction To ProviderLink* - This section gives a basic overall introduction to ProviderLink and explains how to use this training guide to get the best results.
- **Section 2** – The *Hands-On Tour of ProviderLink* section outlines the basics of navigating through the ProviderLink system. You will apply the concepts you learn here throughout your day-to-day procedures.
- **Section 3** – The *Using ProviderLink In Your Daily Work* section describes how the features of the ProviderLink system work and how each department's users can get the most benefit from using them.
- **Section 4** – The appendix section describes how to troubleshoot issues encountered while using ProviderLink.

Section II - A Hands-On Tour Of ProviderLink

1. How Do I Access ProviderLink?

ProviderLink is a browser-based web application, meaning it runs completely in an Internet browser requiring no additional hardware or software. You can access ProviderLink from virtually any computer as long as it is connected to the Internet. While ProviderLink may work in other web browsers, Microsoft Internet Explorer Version 6.0 or higher is recommended.

To Access ProviderLink:

1. Using a computer that is connected to the Internet, open a Microsoft Internet Explorer (IE) window.
2. In the IE window *Address* bar, type <https://healthcare.covisint.com> and press the **Enter** key. The *Covisint* login screen will appear.
3. Enter your **User ID** and **Password**.



The Password is case-sensitive and, when you log in, you will need to enter it exactly as you set it up. The system will prompt you to change your Password every 90 days.

4. Click **Login**. The *Covisint Healthcare* home page displays. In the left-hand menu, under *Secured Applications*, click **ProviderLink** to launch the application, which opens in a new window.

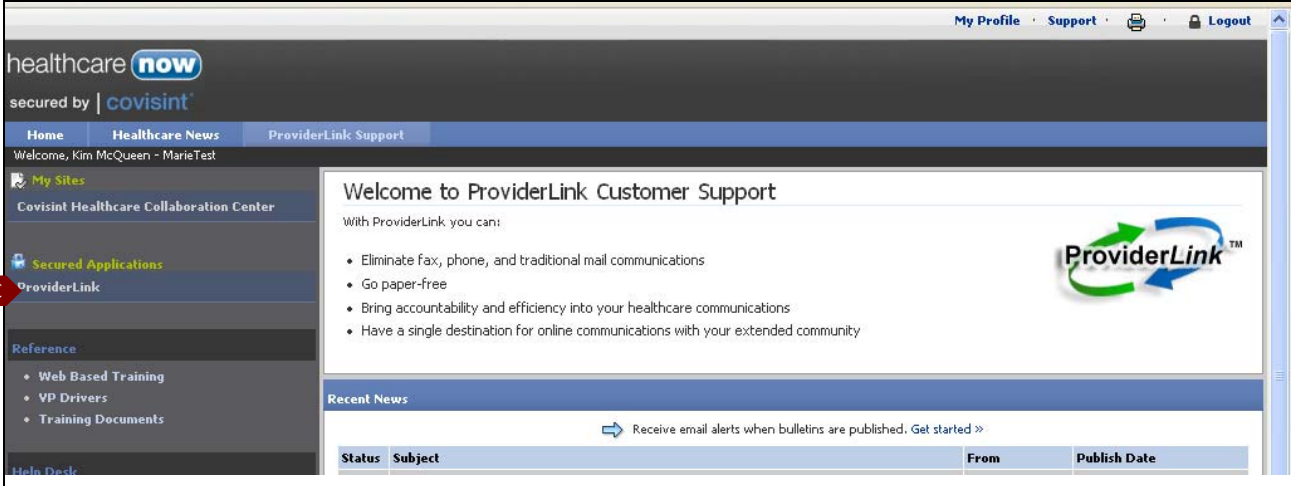
The screenshot shows the healthcare.covisint.com website. The top navigation bar includes 'Home', 'Healthcare News', and 'ProviderLink Support'. A user is logged in as 'Kim McQueen - MarieTest'. The left-hand menu has 'Secured Applications' expanded, with 'ProviderLink' selected. The main content area displays 'Welcome to ProviderLink Customer Support' and lists benefits such as eliminating fax, phone, and mail communications. A 'Recent News' section is visible at the bottom.

2. Logging Into ProviderLink

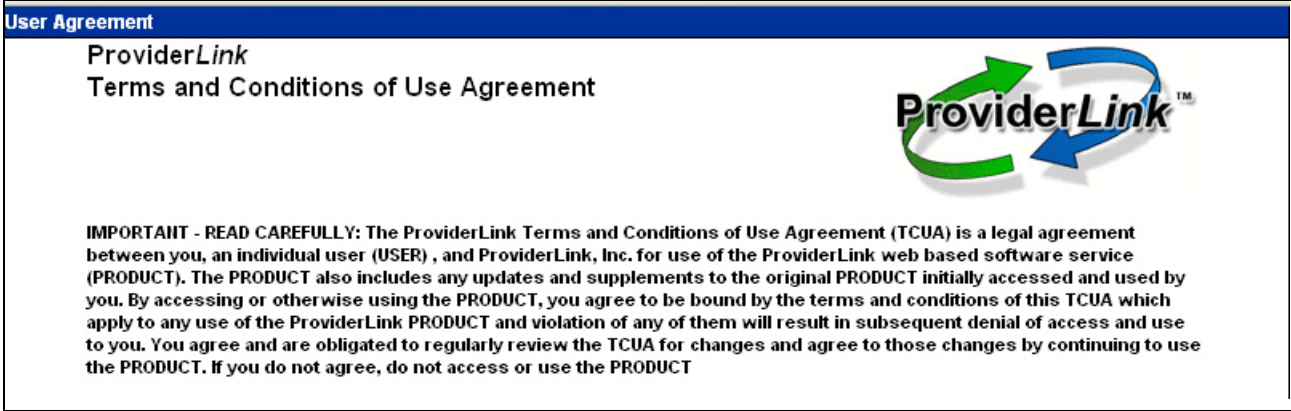
A. The First Time You Log In

After receiving email notification from your Security Administrator that you are registered, you must log in to ProviderLink to complete the registration process.

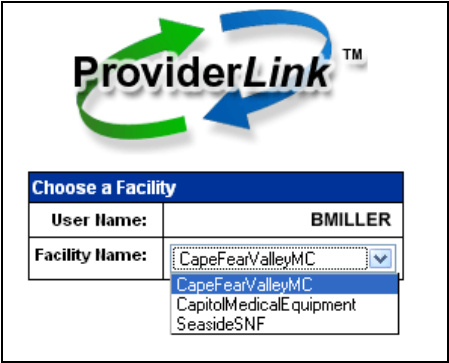
1. Open Internet Explorer.
2. In the URL address bar, enter <https://healthcare.covisint.com>. The *Covisint* login screen displays.
3. Enter your **User ID** and **Password**.
4. Click **Login**. The *Covisint Healthcare* home page displays.



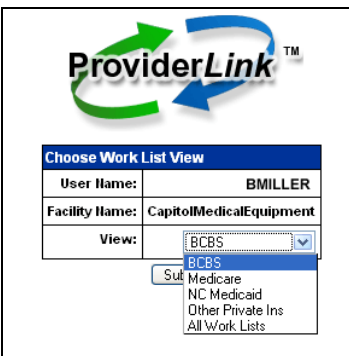
5. In the left-hand menu, under *Secured Applications*, click **ProviderLink** to launch the application. The *ProviderLink Terms and Conditions of User Agreements* screen displays.



- 6. Scroll down to the bottom of the screen and click **Yes** to accept the terms of the agreement. The *ProviderLink News* screen displays.
- 7. Click **Proceed to Application**. You have now completed the registration process.
- 8. When you log in, if you are a multi-facility domain, ProviderLink will ask you to select your facility.



9. Next, you will choose a *Work List View*, which can be thought of as a caseload, or “in basket.” The Work List Views are listed alphabetically. Click the **View** drop-down arrow to select the work list you wish to view and then click the **Submit** button.



Note: “All Work Lists” is a special view that displays all of the patient records in all of the work lists. Generally, it is not used as part of a typical workflow.

10. After selecting a *Work List View*, you will be taken to the *Main Window*, the list of patients in that work list.

B. Failed Login

The ProviderLink system is a secure system and only allows users who provide the right credentials to enter. In other words, you must provide a valid User ID and Password to successfully log into ProviderLink. If you mistype either of these, you will not be allowed to enter, and the system will display the failed login message, “You have entered an invalid password and/or User ID, please try again.”

If you receive this message, check to make sure your User ID is spelled correctly. Then, re-enter your Password, keeping in mind that the Password is case sensitive.

C. User Account Suspended

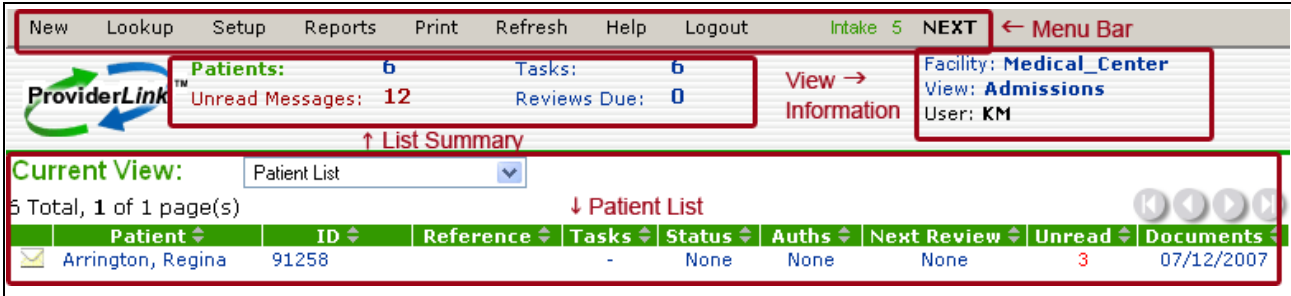
If you enter an incorrect password 5 times within 5 minutes, your Covisint account will be locked due to an excessive number of invalid login attempts. As part of Covisint's comprehensive security design, accounts are automatically locked when it appears someone is trying to guess the password.

In order to unlock your account, simply use your challenge question and answer to reset your password. This will automatically unlock your account.

1. From the <https://healthcare.covisint.com> page, click “**Forgot your password?**.”
 - a. The screen expands displaying a field to enter your **User ID** and then click **Submit**. The *Reset Password* screen displays.
 - b. Enter the **answer** to your challenge question in the *Challenge Answer* field and click **Submit**.
Note: You create your Challenge Question and Answer during the registration process.
 - c. Upon successful submission, the first half of the password displays on the screen, while the second half is sent to email address you submitted during the registration process.
2. Alternatively, you may contact your facility Security Administrator to request that he/she perform the password reset and unlock your account.

3. A Look At The ProviderLink Window

Once you successfully log into ProviderLink, you will see the patient list in the Main Window. You can think of this as the main “control panel” used to navigate throughout ProviderLink. The list of patients displayed on the Main Window can be considered your caseload, or the patients in your “virtual in-basket” that you are currently working with.




- **Menu Bar** – The Menu Bar at the top of the screen is the main navigation method to different parts of the ProviderLink system.
- **List Summary** – This section gives an overview of the patients listed in the Main Window and displays a total of the unread messages, patients, reviews due, and tasks in your work list.
- **View Information** – This section displays information about the current view, including the facility name, work list name, and the current user.
- **Patient List** – This is the list of patients currently assigned to your work list, usually sorted by the patient's last name. You may re-sort the list by clicking on one of the column headers (i.e., ID, Reference, etc.) along the green column header row. Each row represents information about one of the patients in your work list, or a patient record.

Since ProviderLink is a web-based application, everywhere blue or red text appears is a *hyperlink* or *link*. Each link is a shortcut, and clicking on a link will take you to another page or section within ProviderLink. For example, clicking on one of the date links in the *Documents* column will take you to that patient's documents.

A. Understanding The Patient List

The largest portion of the Main Window is the Patient List. The Patient List is divided into rows and columns: the horizontal rows represent a patient record; and the vertical columns represent data within each patient record.

Each of the fields in the Patient List is a link that you can use to navigate into different sections of the patient record. The table below lists the columns in the Patient List, what each column represents, and where the link leads when clicked:

Column	Represents	Link Destination
Message Icon 	New message	Create Message screen. Opens a new message that relates to this patient.
Patient	Patient name, last name first	View Patient Information screen
ID	The Unique ID that helps your facility identify the patient. Most commonly used to display the medical record number.	View Patient Information screen
Reference	A note that helps identify something about the patient record. See the description in the "Viewing Patient Information" section below.	View Patient Information screen
Tasks	A reminder that some action needs to be taken regarding the patient record.	Tasks for Patient screen
Status	Shows whether the patient has been admitted, discharged, etc.	View Patient Information screen

Column	Represents	Link Destination
Auths	Shows the latest payor authorization received for the patient.	Authorization for Patient screen
Next Review	Shows when the next payor review is due.	Add/Edit Scheduled Task for Patient screen
Unread	Lists the unread messages received for the patient.	Unread Messages for Patient
Documents	Lists the documents filed for the patient.	Documents for Patient screen

As you become more familiar with ProviderLink's Main Window, you will learn shortcuts for navigating to the sections you wish to use by using the links in the various columns.

B. Navigating The Main Window With The List Summary And Column Headers

You may customize the information displayed on the Main Window using the links in the List Summary and the green column headers. By default, the Main Window will show you the list of patients in the work list sorted in ascending order alphabetically by the patient's last name.

To Change The Content On The Main Window Using The List Summary And Column Headers and Current View:

1. From the *Main Window*, click the **Unread Messages** link. The *Main Window* content changes to display all of the unread messages with the most recent message at the top of the list.



When you change the work list contents through a List Summary Link, the link turns green so that you will know what information is being displayed.

- a. You may change the list to display the oldest message first. Click the **Date** column header link. The list will refresh with the oldest unread message appearing first.
 - b. You may group messages by *Sender*. Click the **From** column header link. The message list will refresh with the Senders' names in ascending alphabetical order.
2. You may wish to see all of the tasks that are pending for your work list. In the List Summary, click the **Tasks** link. The *Main Window* will refresh to display only the patients that have tasks pending.
 3. To view items that are overdue or pending, click the **drop-down list** to the right of *Current View* and select from the following options:
 - a. *Patient List* - displays the patient list for the current work list (default option).
 - b. *Unread Messages List* - displays a list of unread patient messages.
 - c. *Task List* - displays a list of patient tasks.
 - d. *Reviews Due List* - displays a list of patient reviews due.
 - e. *Overdue Unread Messages* - displays a list of the overdue unread messages.**
 - f. *Message Needing a Reply* - displays a list of received messages waiting on a reply that were sent to that mailbox.**
 - g. *Message Waiting on a Reply* - displays a list of sent messages waiting on a reply that were sent from that mailbox. **
 - h. *Overdue Review Task* - displays a list of the overdue review tasks.**
 - i. *Overdue Reminder Task* - displays a list of the overdue reminder tasks.**

** Option only displays in the drop-down list if it has been activated by your Facility Administrator.

- To return the *Main Window* to its original state, displaying all of the patients, click **Patients** in the List Summary.

4. Viewing Patient Information

Now that you are familiar with the Main Window and its various uses, you may drill down to a specific patient record by accessing the View Patient Information screen. Each patient record can be considered a patient “folder” that stores all of the patient's messages, documents, and other vital information that relates to the patient.

To View Patient Information On The View Patient Information Screen:

- From the *Main Window*, click a **Patient Name** link in the *Patient* column. The *View Patient Information* screen appears.

The screenshot shows the 'View Patient Information' screen in the ProviderLink application. At the top, there is a navigation bar with links: Save, Status, Authorizations, Documents, Demographics, Send Message, Help, and Logout. Below this is the ProviderLink logo and a breadcrumb trail: Main Window → Patient, Test E. The main title is 'View Patient Information'.

The 'View Patient Information' section contains the following fields:

- Last Name: * Patient
- First Name: * Test
- Middle Name: E
- Suffix: (empty)
- Unique ID: MR123123123
- Birthdate: * 05 / 05 / 1966 (mm/dd/yyyy)
- SSN: 000 - 11 - 2222
- Column Reference: Rm. 652
- Message Reference: -Select a Message Reference-

Below this is the 'Linked Work Lists' section, which has two columns:

- All Available Work Lists: Add button. List includes: ACM Pre Authorization, capitalgroup, Credit Balance Report Demo, CSR One.
- Work Lists Linked to this Patient: * Remove button. List includes: AnotherTestGroup, Kathy DME Test.

At the bottom, there are two sections:

- Status**: Current Status: Discharged; Current Admission Date: None; Last Discharge Date: 08/01/2005; Deceased Date: None.
- Linked Mailboxes**: Add button. List includes: providerlink - Main (Online icon), Providerlink Michael Hall - Michael Hall (Fax Only icon).

- The View Patient Information screen is divided into different sections. From this screen, you can access anything relating to this patient.
 - The top section, also labeled “View Patient Information,” includes the patient's name, date of birth, and Social Security Number.
 - The center section displays the work lists that are linked to this patient record. In other words, it shows which department or which staff member is working with this patient record.
 - The bottom left section, the *Status* section, shows a brief overview what has happened with this patient record.
 - You can see when the patient was admitted or discharged.
 - You can see when the last payor review was received and when the next review is due.
 - More importantly, you will see how many tasks and unread messages are pending for this patient.
 - You may also access the patient's History Items and Audit Trail.

A Hands-On Tour of ProviderLink

- d. The bottom right section, the *Linked Mailboxes* section, lists the mailboxes that are currently linked to this patient record. You may think of these linked mailboxes as message “speed dials” that allow you to create messages to send to these mailboxes quickly without having to search for them each time.
3. The menu bar has changed to include other areas that hold information about the patient you are viewing. From the menu bar, click **Documents**. The list of Documents stored with this patient record appears.

Name	Type	Facility	User	Date
Fax response: RE: TEst 2	Fax	providerlink	Ron Priebe	06/18/2005 6:45 PM
Copy of NC Medicaid FL2 06/18/2005 06:13 PM	E-Form FL2	providerlink	Ron Priebe	06/18/2005 6:30 PM
Copy of VA UAI 06/18/2005 06:18 PM	E-Form UAI	providerlink	Ron Priebe	06/18/2005 6:30 PM
Copy of NC Medicaid FL2 06/18/2005 06:13 PM	E-Form FL2	providerlink	Ron Priebe	06/18/2005 6:30 PM
Copy of NC Medicaid FL2 06/18/2005 06:13	E-Form FL2	providerlink	Ron Priebe	06/18/2005 6:28 PM
VA UAI 06/18/2005 06:18 PM	E-Form UAI	providerlink	rpriebe	06/18/2005 6:18 PM
NC Medicaid FL2 06/18/2005 06:13 PM	E-Form FL2	providerlink	rpriebe	06/18/2005 6:13 PM
Test Referral Form	Print	providerlink	Admin ProviderLink	06/02/2005 3:33 PM
NC Medicaid CMNPA 02/10/2005 10:49 AM	E-Form CMNPA	providerlink	Admin ProviderLink	02/10/2005 10:49 AM
Fax response: RE:	Fax	providerlink	Admin ProviderLink	02/10/2005 8:53 AM
LAW Hemi Wheelchair 02/09/2005 11:49 AM	E-Form LAW Hemi Wheelchair	providerlink	Admin ProviderLink	02/09/2005 11:49 AM
Glucose Monitor 01/14/2005 03:07 PM	E-Form Glucose Monitor	providerlink	Admin ProviderLink	01/14/2005 3:07 PM
DMERC Oxygen 11/24/2004 10:46 AM	E-Form DMERC484.2	providerlink	Admin ProviderLink	11/24/2004 10:46 AM



Notice the different types of documents listed in the *Types* column: Fax, E-Form, and Print. These document types are described fully in the *Name* column.

4. Choose one of the documents that is an *E-Form* and click its **name** link in the *Name* column. The E-Form appears. Take a look at the how the E-Form is set up.

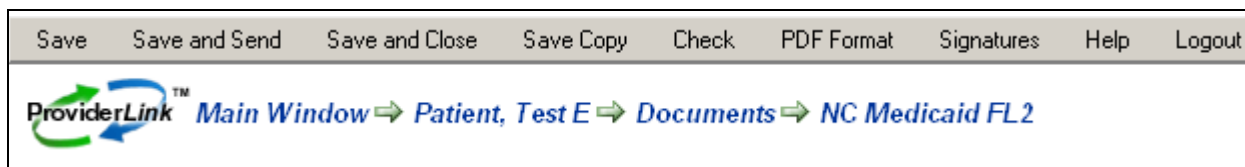
A. Navigating The Breadcrumb Trail

The ProviderLink system does not use the Internet Explorer “Back” button to navigate back to other pages. Instead, there is a *breadcrumb trail*, a navigation tool that allows you to see where the current page is in relation to the path you took to get there. The term “breadcrumb trail” comes from the story of Hansel and Gretel, who left a trail of breadcrumbs as they walked through the forest so they could trace their way back home. In this same way, ProviderLink's breadcrumb trail acts as a “You Are Here” sign and shows you the path to get back to a previous screen. ProviderLink's breadcrumb trail is the set of links located near the top of the screen just below the menu bar

You may trace your path back one-step at a time, or you may skip steps and jump back to a previous location earlier in the breadcrumb trail. For example, all breadcrumb trails will begin from the Main Window and clicking the **Main Window** link will return you to the Main Window. Clicking the **Patient Name** link in the breadcrumb trail will return you to the *View Patient Information* screen

To Use The Breadcrumb Trail To Navigate Within ProviderLink:

1. From an open E-Form (or any other section of a patient record), click the **Documents** link to return to the list of documents.



2. In the breadcrumb trail, click the **Patient's Name** link. You will return to the *View Patient Information* screen.

- Click the **Main Window** link in the breadcrumb trail. You will return to the *Main Window*. Notice the breadcrumb trail is a one-way path back to previous screens. To re-enter the *View Patient Information* screen, click the **patient's name** link.

The breadcrumb trail is a powerful tool for navigating back to the screens you have already visited. After you become familiar with how the breadcrumb trail works, you will learn to use it to navigate more quickly throughout the ProviderLink system.

B. Viewing A Patient's History Items And Audit Trail

One of the foremost benefits in using ProviderLink for communication is that the system tracks every message sent or received regarding the patient in that patient's History Items. The patient's History Items screen will show you who the message is from, whom the message is addressed to, whether or not a message was sent successfully, when the message was sent, the message subject, and the number of documents attached to the message. If the recipient is also online with ProviderLink, you will see whether or not the recipient has read the message, when the message was read, and whether or not the recipient sent a reply. Clicking on the message subject link will open the message for you.


If you need more detailed information about the history of the patient's record, you may view the patient's Audit Trail. The Audit Trail keeps an accurate record of not only a running history of the messages, but also the patient's documents, tasks, and the work lists linked to the patient record.

To View A Patient's History Items And Audit Trail:


- From the *View Patient Information* screen's *Status* section, click **History Items**. The *Message History for Patient* screen appears.

Audit Trail Print Help Logout								
 Main Window → Arrington, Regina → History								
Message History for Patient: Arrington, Regina								
15 Total, 1 of 1 page(s) ⏪ ⏩ ⏴ ⏵								
Date Sent	User	To	From	Subject	0	Status	Read	Reply
03/13/2008 1:00 AM	Kate Miller	Critical Care - Main	Medical_Center	No Subject	1	Failed	Unread	03/13/2008 1:00 AM
03/13/2008 1:00 AM	Kate Miller	Medical_Center - Main	Medical_Center	Fax Failed Warning: Critical Care	0	Sent	Unread	

- The *Message History* screen shows a complete history of any messages sent or received regarding this patient.
- By default, the message history is sorted by date and time with the most recent message at the top of the list. Like other lists you have seen, you may sort this list by clicking on the column header links. Click the **From** column header to sort the list by message sender.
- To return the list to its original state, sorted by date and time, click the **History** link in the breadcrumb trail.
- To view a more detailed history of the patient record, click **Audit Trail** on the menu bar
- The Audit Trail tracks the activities of the users who have been working with this patient record. You may use the column header links to sort the list by Date, User Name, Patient, or Audit Entry in order to find an entry more quickly.

Print Help Logout			
 Main Window → Garrott, George → History → Audit Trail			
View Audit Trail for Patient: Garrott, George			
80 Total, 1 of 2 page(s) 12			
Date	User Name	Patient	Audit Entry
01/25/2007 10:35 AM	Kate Miller	Garrott , George	Patient Created. Patient Name: George Garrott DOB: 1931-10-01 23:00:00.0 Member Reference:
01/25/2007 10:35 AM	Kate Miller	Garrott , George	Work list Updated. Added: {Admissions} Revised list: {Admissions}

7. Click **Main Window** in the breadcrumb trail to return to the *Main Window*.



Neither the Message History nor the Audit Trail is editable, so you will always be assured an accurate record history from the time the patient record was created to the present time.

5. Changing Your Work List View

ProviderLink allows you to view the work lists for other users within your facility. This enables you to check the status of a patient or access a patient's documents without having to wait for the user to send it to you. Also, if you are away from your workstation, another user may access your patients' information. You may also view patients in all work lists to get a summary of everyone in your system.

To Change Your Work List View:

1. From the Main Window, click the **View:** link in the *View Information* section in the upper right corner. The *Choose Work List View* screen appears.
2. From the **View** drop-down list, choose the work list you wish to view. Click the **Submit** button. The chosen work list appears.



Choose Work List View	
User Name:	admin
Facility Name:	providerlink
View:	ACM Pre Authorization
<input type="button" value="Submit"/>	

6. Working With Patient Records

ProviderLink stores all messages and documents with their respective patient records. Before you can store a document or send a message, you will need to access an existing patient record or create a new one.

Before creating a new patient record, you will want to prevent duplicating patient records by searching for existing patient records first.

To Search For A Patient Record:

1. From the *ProviderLink Main Window* menu bar, click **Lookup** → **Patient**. The *Patient Lookup* screen appears.

Search New Help Logout

ProviderLink™ Main Window → Patient Search

Patient Lookup

Search For a Patient

Unique ID:


Last Name:

First Name:

SSN: (111223333 or 111-22-3333)

Birthdate: / / (mm/dd/yyyy)

2. Enter the criteria for which you wish to search, and click the **Search** button. The system will search your existing patient database for records that match your criteria.



For the best search results, you may want to only enter the first few letters of the patient's name, or use the Unique ID. This way, you will still be able to find the patient record in case the patient's name is spelled differently in the record.

3. If the system finds any patient records matching your criteria, you will see a list of matching records at the bottom of the *Patient Lookup* screen.
4. If the system found the patient record you were searching for, click one of the blue links to access the patient's *View Patient Information* screen.

Search New Help Logout

ProviderLink™ Main Window → Patient Search

Patient Lookup

Search For a Patient

Unique ID:

Last Name:

First Name:

SSN: (111223333 or 111-22-3333)

Birthdate: / / (mm/dd/yyyy)

2 Total, 1 of 1 page(s)

First Name	Last Name	Middle Name	DOB	ID #
York	Macy	-	06/12/1989	
Julie	McCoy	-	12/11/1948	MR1234567

5. If the system does not find the record you were searching for, the following message displays: "There were no patients found matching that criteria." You may change your search criteria and try the search again.
6. If you are unable to find the patient record, a record may not yet exist for that patient. To create a new patient record, click **New** from the *Search Results* menu bar to display the *Add Patient* screen.

A. Creating A New Patient Record

If no patient record exists, you will need to create one before creating any documents or sending any messages for that patient.

To Create A New Patient Record:

1. From the *ProviderLink Main Window* menu bar, click **New → Patient**. The *Add Patient* screen appears.

2. Notice the required fields as noted with red asterisks (*). You must complete these three fields in order to successfully save your new patient record. Enter data in the required fields, at a minimum.



Although the other fields are optional, it is generally a good idea to enter as much information as you have for each patient record. Later, when you create E-Forms for this patient, the system can use this data to populate the fields on the E-Form.

3. The optional **Unique ID** field is generally used to record the patient's medical record number or other identifier that uniquely relates to that patient.
4. The **Column Reference** is also optional and is generally used to note something about that patient record. For example, you may use this field to remind yourself and your coworkers what is pending (e.g., "Placement pending") or to note the patient's room number.
5. It may be necessary to link your work list to this patient record so that, when you view your work list, this patient record will be included in the list. View the *Linked Work Lists* section in the center of the screen to ensure the desired work list appears in the right-most list box and will be linked.

6. When you are finished entering the patient's basic information and choosing the work lists to link, click the **Save** button to save the record. The patient record is saved and the screen refreshes to show you the saved patient record with more options.

7. Logging Out of ProviderLink

When you are finished working in ProviderLink, you should end your ProviderLink session. Logging out is important, especially if you share a computer with other users. This creates an accurate message history and audit trail by ensuring that the user ID logged in is actually the user who is working in the system.

To Log Out Of ProviderLink:

1. From virtually any view, click **Logout** on the menu bar.



2. The system will log you out, show you a log out confirmation screen, and after a few seconds, returns you to the *ProviderLink Login* screen.

A. Automatic Logout

ProviderLink also has an automatic logout feature. For security reasons, the system will log you out after a designated period of inactivity. In other words, if the ProviderLink system determines that you have not changed or refreshed a screen within this timeframe, the system will log you out and return to the main *ProviderLink Login* screen. Log into ProviderLink again.

Section 2 Summary

After this hands on tour through the ProviderLink system, you should now know:

- what to do if you are unable to log into ProviderLink
- what appears on the Main Window and how the Patient List is organized

And how to:

- access the ProviderLink system
- log into ProviderLink
- view Patient information
- use the breadcrumb trail to navigate within ProviderLink
- view a patient's History Items and Audit Trail
- change your Work List view
- look up and create patient records
- log out of ProviderLink

Section III - Using ProviderLink In Your Daily Work

1. Utilization Review

ProviderLink brings much needed structure and accountability to the communications required for utilization review. Both hospital and payor request messages are automatically routed to the associated patient record. All information requests are time and date stamped and kept in an audit trail that both the sender and recipient (if online) can see. Sending information through ProviderLink is like sending certified mail that cannot be lost or forgotten. ProviderLink affords the case manager a single screen for viewing an assigned caseload.

A. Linking Payor Contacts To A Patient Record

ProviderLink gives you the ability to link frequently used contacts to individual patient records. These “Quick Links” will enable to you quickly send messages, including reviews and authorization requests, to the patient’s insurance payors without having to search for the respective payor contacts each time.

Once you have linked the payor mailbox to the patient record, you may edit the link to add the patient’s subscriber or account number. Then, whenever you send a message to the payor on behalf of that patient, the patient’s subscriber number will appear with the message to assist the payor in processing the request.

To Link A Contact To The Patient Record:

1. From the *View Patient Information* screen in the lower right section labeled “Linked Mailboxes,” click the **Add** button. The *Facility Search* screen appears.

2. Click the **Facility Type** drop-down list and select “Payor/Reviewer.”
3. Enter your search criteria in the appropriate fields. At a minimum, enter the first few letters of the payor’s name in the **Facility Name** field. After entering your search criteria, click the

Submit button. The system will search for payors matching your criteria and display the *Search Results* screen.

Note: If the system does not find the payor you were searching for, the following message displays: "There were no facilities found matching that criteria." You may change your search criteria and try the search again.

- View the mailboxes or individual contacts to choose the mailbox you want to use and then check the **box** in the first column.

Save New Contact Close Help										
Search Results										
2 Total, 1 of 1 page(s)										
Mailbox Name	Facility Name	First Name	Last Name	Unique ID	Fax Number	City	County	State	Zip	
<input type="checkbox"/> Inpatient Reviews	BCBSNC	Inpatient	Reviews			Chape Hill		NC	27702	
<input type="checkbox"/> Claims Attachments	BCBSNC	Claims	Attachments			Chape Hill		NC	27702	

Save Select All Unselect All

- If needed, click the **Facility name** link to view the contact information, for that facility. The *Facility Information* screen appears. Click **Close** to return to the *Search Results* screen.

Close Help	
Facility Information	
Facility Name:	BCBSNC
Main Phone Number:	919-765-7884
Facility Type:	Payor/Reviewer
Access:	Online
City:	Chape Hill
State:	NC
Zip:	27702
County:	No County Selected

- On the *Search Results* screen, once you have verified the mailbox, click **Save** on the menu bar. The payor contact will be linked to the patient and the system will return you to the *View Patient Information* screen.
- Through ProviderLink, you will send messages the same way using the same interface whether the payor facility is online with ProviderLink or fax only.
- You are now ready to add the patient's payor subscriber or account number to the link. On the *View Patient Information* screen, click the **Edit Link** icon to the right of the payor link. The *Edit Link* screen appears.

Save Help Logout

ProviderLink™ Main Window → McCoy, Julie → Edit Link

Edit Link for Patient: McCoy, Julie

Facility Name: BCBSNC-Commercial


Mailbox Name: Inpatient Reviews

Payor/Reviewer Type: Primary Unlink Payor

Other Reference: 987654-321JM

Non-Viewable Comments:

9. Enter the reference information in the **Other Reference** field and click the **Save** button. You will return to the *View Patient Information* screen.



Any information that is entered in the "Other Reference" field will be sent with all messages to the "linked" payor regarding this patient. Entering a reference into this field will help the payor who receives a message from your hospital to identify the patient record.

B. Changing The Patient's Admission Date

You will want to notify the patient's insurance payor of any change in the patient's status (e.g., admission, discharge, etc.). ProviderLink simplifies this process with the "Current Admission" link from the *View Patient Information* screen and the "Status" option on the menu bar

To Change The Patient's Admission Date:

1. From the ProviderLink Main Window menu bar, click **Status → Admitted**. The *Patient Admitted* screen appears.

Save Help Logout

ProviderLink™ Main Window → McCullen, Emily → Admitted

Patient Admitted: McCullen, Emily

Unique ID: * MR1234567

Status Change: Admitted

Date of above Status Change: * (mm/dd/yyyy)

Viewable Comments:

Save

2. If necessary, enter the patient's unique ID in the **Unique ID** field.
3. Enter the admission date in the **Date of above Status Change** field by entering the date or choosing the date using the calendar pop-up tool.

4. You may use the **Viewable Comments** field to note the conditions or circumstances under which the patient was admitted.
5. Click the **Save** button to change the patient's status and send the message(s) to the payor(s). The system displays the *View Patient Information* screen, changes the patient's Status field to "Admitted," and updates the Current Admission Date.



You may also change the patient's status to "Admitted" by clicking Status → Admitted from the View Patient Information screen menu bar.

C. Creating Reminder Tasks

A *task* is a work item that needs to be performed by a certain due date. ProviderLink helps you remember to accomplish these work items through the Tasks function on each patient record.

There are two types of tasks you can assign through the patient's Task function: reminder tasks and review tasks. Insurance payors generally require clinical reviews to determine whether the services you are requesting are medically necessary. Online payors can assign review tasks when they send their authorizations, and users can set review tasks for payors that are fax-only contacts. To help remember other work items that are not reviews, you can assign reminder tasks. For example, when a patient is admitted, you may create a task to remind you to send clinical information to the insurance payor. You may assign review or reminder tasks to your own work list or to another linked facility, as necessary.

To Create A Reminder Task:

1. From the *View Patient Information* screen *Status* section, click **Tasks**. The *Tasks For Patient* screen appears.
2. From the menu bar, click **New** to view the *Add/Edit Scheduled Task for Patient* screen.

A screenshot of the 'Add/Edit Scheduled Task for Patient: McCoy, Julie' screen in the ProviderLink system. The interface includes a top navigation bar with 'Save', 'Print', 'Help', and 'Logout' buttons. Below this is a breadcrumb trail: 'ProviderLink™ Main Window ⇒ Patient Search ⇒ McCoy, Julie ⇒ Tasks ⇒ Add Task'. The main title is 'Add/Edit Scheduled Task for Patient: McCoy, Julie'. Underneath is a green header 'Add/Edit Scheduled Task'. The form contains several fields: 'Task Type' is a dropdown menu set to 'Reminder'; 'Description' is a text input field with a red asterisk indicating it is required; 'Due Date' is a text input field with a calendar icon and '(mm/dd/yyyy)' format, also with a red asterisk; 'Send a Message To' is a dropdown menu set to '- Select a Facility -'. Below these fields is a large text area labeled 'Non-Viewable Comments:'. At the bottom left is a 'Save' button. A red asterisk legend at the bottom indicates '* Required field'.

Note the required fields as indicated by the red asterisks. Enter the task description in the **Description** field.

3. Each task needs a due date. You may either enter the date in the **Due Date** field, or use the pop-up calendar tool.
4. Enter your notes in the **Non-Viewable Comments** field, if desired.
5. When you are finished setting up the task, click the **Save** button. This saves the task and returns you to the *Add/Edit Scheduled Task for Patient* screen.

D. Adding Documents To Patient Records

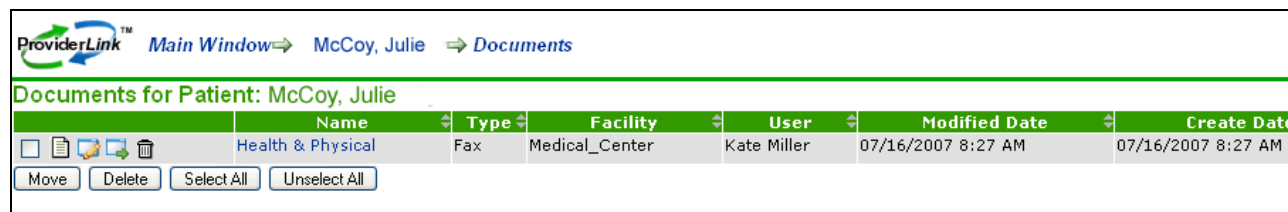
ProviderLink enables you to store patient-related documents with each patient record. Any document that is sent to you online or faxed into the system can be added to a patient's record. You can also use the online E-Forms function in ProviderLink to create documents. In addition, virtually any hard copy, paper document, or any report you can print to a local printer can be added to a ProviderLink patient record and be sent in a message to another facility.

To Add A Hard Copy Document To A Patient Record (Fax Attach):

1. From the *View Patient Information* screen's menu bar, click **Documents** to view the *Documents For Patient* screen.
2. On the menu bar, click **Add Document → Add By Fax**. The *Add A Fax* screen appears.
3. Enter a document name that fits the type of document you are adding.

4. Click **Print** on the menu bar or the **Print** button. The system will generate a bar-coded cover page.

5. Click **Print** on the menu bar to display the print options and print the cover page on your printer.
6. After the cover page prints, click **Close** on the menu bar to close the cover page and return to the *Documents for Patient* screen.
7. Once the cover page prints, place it on top of the hard copy documents and fax the package to the number indicated on the cover page. After the fax sends successfully, the document will be listed on the *Documents For Patient* screen (this screen may need to be refreshed).



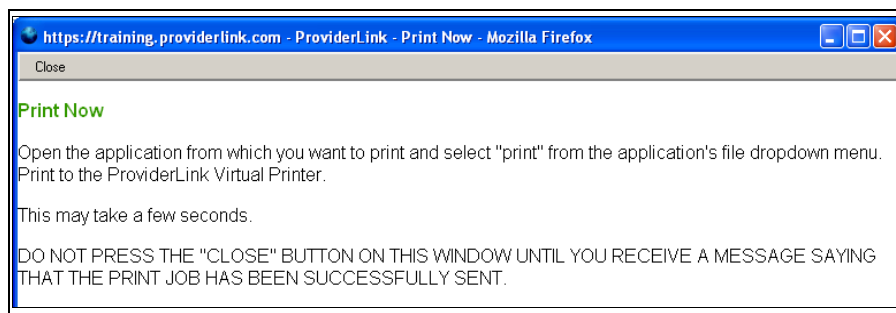
8. You may click the document **Name** link to view the document you added.

To Add A Document From Another System To A Patient Record (Print Attach):

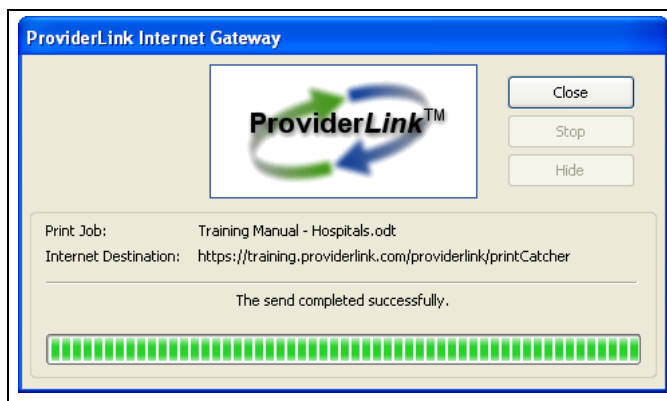
1. From the *View Patient Information* screen's menu bar, click **Documents** to view the *Documents For Patient* screen.

Note: A new version of the print application is available that allows you to print attach while not logged in to ProviderLink. Contact ProviderLink Customer Support for instructions on upgrading to the newest version.

- On the menu bar, click **Add Document → Add By Print Job**. The *Add A Print Job* window appears.
- Enter a document name that fits the type of document you are adding.
- Click the **Print** button. The *Print Now* screen appears and the system is ready to receive the document from another application.



- Leaving the ProviderLink windows open, open the **clinical system** that contains the report and prepare to print it.
- Change the printer options to print the report using **ProviderLink Virtual Printer**. The document will spool to the printer and the *ProviderLink Internet Gateway* dialog box appears.



- After the status bar fills and the window displays the message "The send completed successfully," click the **Close** button.
- Minimize or close the clinical system and return to ProviderLink.
- Close the *Print Now* window. The *Documents For Patient* Screen will refresh and you should see the document you print attached added the list.

Note: Documents added to the patient record using the *Add By Print Job* feature can only be attached to a message and **faxed** if the document is saved as a **PDF file**. However, documents saved as Word, text, PDF files, etc. using the *Add By Print Job* feature can all be sent **online** (electronically) using ProviderLink.

Documents for Patient: McCoy, Julie						
	Name	Type	Facility	User	Modified Date	Create Date
<input type="checkbox"/>	Health & Physical	Fax	Medical_Center	Kate Miller	07/16/2007 8:27 AM	07/16/2007 8:27 AM
<input type="checkbox"/>	Benefits Summary	Print	Medical_Center	Amy Parriss	05/22/2007 2:05 PM	05/22/2007 2:05 PM

Move Delete Select All Unselect All

To Add An Electronic Form (E-Form) To A Patient Record:

1. From the *View Patient Information* screen's menu bar, click **Documents** to view the *Documents For Patient* screen.
2. On the menu bar, click **E-Forms** to view the available forms.
3. Select the appropriate **Form Name**. The system will display the form you selected.
4. Complete the fields on the E-Form, paying particular attention to the required fields as indicated by the red asterisks.
5. After completing the form, click **Save** on the menu bar.

Note: Remember to Save often.

6. To have the system check to see if the form's required fields have been completed correctly, click **Check** on the menu bar. After checking the form, the system will display red text below the fields to show any errors. Fix the errors and check the form again.
7. Once you are confident there are no errors on the form, click **Save** on the menu bar.
8. To close the form, click **Save and Close** on the menu bar.

E. Sending Reviews To Payors

ProviderLink makes the process of sending clinical reviews to insurance payors easier and more efficient. When using tasks, as described above, ProviderLink will remind you when reviews are due and you can send a message containing the review from the task itself.

To Send A Review To A Payor From The Task:

1. If you are using tasks to remind you when a review is due (see "Creating Reminder Tasks"), click **Tasks** from the *View Patient Information* screen *Status* section. The *Tasks For Patient* screen appears with the listed tasks.
2. Find the task for which you are sending the review and click the task's **Description** link. The *Add/Edit Scheduled Task for Patient* screen appears.
3. Choose the facility to which you want to send the review from the **Send A Message To** drop-down list and click the **Send Message** icon (a small envelope). The *Create Message* screen appears with the message already addressed to the chosen facility.


4. Select the necessary clinical documents from the **Available Documents** drop-down list or copy and paste the clinical data into the **Message** field.

Note: When including an attachment to a message to a *fax-only facility*, only documents saved as PDF or TIF files (i.e., faxes) can be sent. If other file types are attached (e.g., Word doc, text file, Excel spreadsheet, etc.), a warning will display stating that this file type cannot be sent to a fax-only facility.

5. Fill in a message **Subject**. Be sure the message includes the patient reference number or other insurance information to identify the patient.
6. If you want to track whether or not you have received a response, click the **Request a Reply** check box.
7. You can be reminded that you are awaiting a reply from the payor by selecting the **Create a Reminder Task** check box.

<input checked="" type="checkbox"/>	Request a Reply
<input checked="" type="checkbox"/>	Include Fax-Back Cover Page (For Fax Only Recipients)
<input checked="" type="checkbox"/>	Create a Reminder Task

8. When you are satisfied with your message, click **Send**. The system will send the message and return you to the *Add/Edit Scheduled Task* screen.



Regardless of whether the message recipient is online or fax-only, you will send the message the same way. ProviderLink will determine the facility type and send the message accordingly.

If the recipient is online, the receiving facility will receive your review as an unread message in their work list. They will reply to you online as well.

If the facility is fax-only, they will receive your review over their fax, complete with a bar-coded, ProviderLink fax-back cover page. When the facility replies, they will use the fax-back cover page.

With either type of reply, you will receive the response as an unread message attached to the patient record.

9. Now that you have completed the task, from the menu bar click **Complete** → **Without Notes**. The system will return you to the *Tasks for Patient* screen.

To Send A Review To A Payor From The View Patient Information Screen:

1. From the *View Patient Information* screen *Linked Mailboxes* section, click the **Payor Name** link. The *Create Message* screen appears with the message already addressed to the chosen facility.
2. Follow Steps 4 - 8 above to send the review to the payor. When finished, you will return to the *View Patient Information* screen.

F. Handling Payor Responses

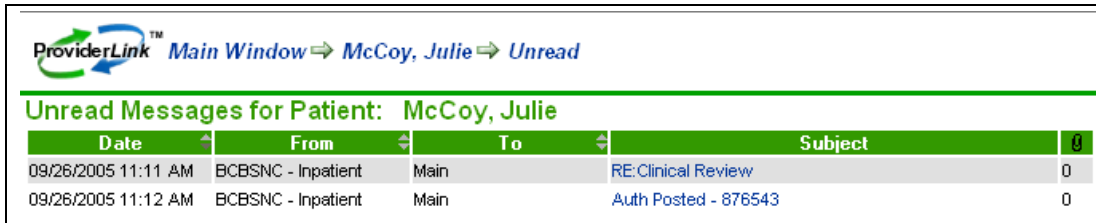
Insurance payors will send authorizations to you through ProviderLink. Whether they send the message through an online reply or with a fax-back cover page, the system will route the message to the patient record and it will appear as an unread message.

	Patient	ID	Reference	Task	Status	Auths	Next Review	Unread	Document
	McCoy, Julie	MR234569		1	Admitted	09/26/2005	09/28/2005	2	09/23/2005

If the payor is online, they should post the authorization to the patient record through ProviderLink's Authorization feature. When the authorization is posted, the patient's authorization date is updated on the *Main Window* and on the *View Patient Information* screen. The payor can also assign you a task for when the next review is due. For authorizations received from fax-only payors, you can document the authorization and set up the next review task.

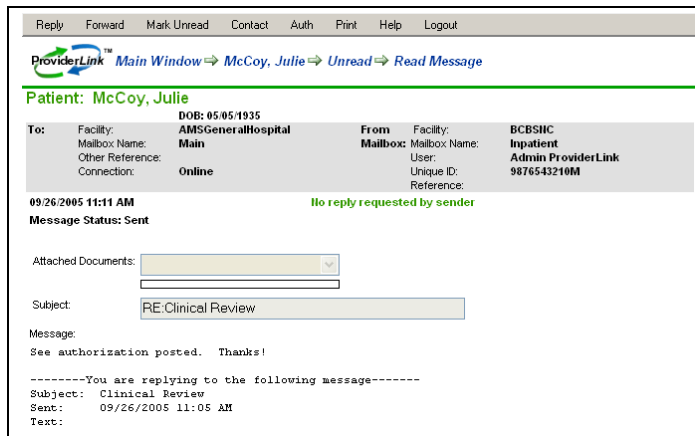
To Read Messages:

1. From the *View Patient Information* screen *Status* section, click the **Unread Messages** link. The *Unread Messages For Patient* screen appears with the oldest message appearing at the top of the list.



Date	From	To	Subject	
09/26/2005 11:11 AM	BCBSNC - Inpatient	Main	RE:Clinical Review	0
09/26/2005 11:12 AM	BCBSNC - Inpatient	Main	Auth Posted - 876543	0

2. Click the **Subject** link for the message you wish to read. The *Message* screen appears.
3. Each message shows you the related patient information, who the message sender and recipient are, when and how the message was sent, the message subject and text, and any document attachments. Also, you can see if the sender requested a reply.



Reply Forward Mark Unread Contact Auth Print Help Logout
 ProviderLink™ Main Window ⇒ McCoy, Julie ⇒ Unread ⇒ Read Message
 Patient: McCoy, Julie
 DOB: 05/05/1935
 To: Facility: AMSGeneralHospital From: Facility: BCBSNC Inpatient
 Mailbox Name: Main Mailbox Name: Admin ProviderLink
 Other Reference: Connection: Online User: 9876543210M
 Unique ID: Reference:
 09/26/2005 11:11 AM No reply requested by sender
 Message Status: Sent
 Attached Documents:
 Subject: RE:Clinical Review
 Message:
 See authorization posted. Thanks!
 -----You are replying to the following message-----
 Subject: Clinical Review
 Sent: 09/26/2005 11:05 AM
 Text:

4. If you wish to reply to the message, click **Reply** on the menu bar. A *Create Message* screen will appear with the **To Recipient** and **Subject** fields already populated for you. Fill in the rest of the fields accordingly and send the reply.
5. If you wish to forward the message to another user or facility, click **Forward** on the menu bar. A *Create Message* screen will appear with the **Subject** and **Message** fields already populated for you. Fill in the rest of the fields accordingly and forward the message.
6. If you wish to mark the message unread, click **Mark Unread** on the menu bar. You will return to the *Unread Messages For Patient* screen.
7. Once you have finished reading the message, you may return to the *Unread Messages For Patient* screen by clicking the **Unread** link in the breadcrumb trail.

To Post Authorizations Received From Fax-Only Payors:

1. From the *View Patient Information* screen *Status* section, click the **Current Authorization** link, or click **Authorizations** from the menu bar. The *Authorizations For Patient* screen appears.



In order to add an authorization for a fax-only facility that facility **MUST** be linked to the patient record first. See "Linking Payor Contacts To A Patient Record."

2. From the menu bar, click **Add Authorization**. The *Add/Edit Authorization* screen appears.
3. If necessary, select the correct insurance payor from the **Issuer** drop-down list.

ProviderLink™ Main Window → McCoy, Julie → Authorizations → Add Auth

Add/Edit Authorization McCoy, Julie

Authorization Information

Created: Available Documents:

Creator: Documents To Attach:

Issuer:

Recipient:

Approval:

Authorization:

Description:

Current Admission Date: (mm/dd/yyyy)

From Date: (mm/dd/yyyy)

To Date: (mm/dd/yyyy)

4. Fill in the authorization number in the required **Authorization** field.
5. Enter the date range the authorization covers in the **From Date** and **To Date** fields.
6. You may enter comments about what the authorization covers in the **Viewable Comments** or **Non-Viewable Comments** fields, if desired.
7. In the *Next Review* section, use the **Review Date** field to set up a task for the date the next review is due.
8. Once you have documented the authorization, click **Save** to save the authorization and return to the *Authorizations For Patient* screen.

Authorizations for Patient: McCoy, Julie

Created	Issuer	Recipient	Authorization	Description	Notes		Creator
09/26/2005 1:19 PM	American Healthcare	AMSGeneralHospital	123		No	0	admin@AMSGeneralHospital

G. Changing The Patient's Discharge Date

As with the patient's admission date, you will want to update the patient record and inform the patient's insurance payor(s) of the patient's discharge. You can do this by changing the patient's status on the *View Patient Information* screen.

To Change The Patient's Discharge Date:

1. From the *View Patient Information* screen *Status* section, click the **Last Discharge Date** link. The *Patient Discharged* screen appears.
2. If necessary, enter the patient's unique ID in the required **Unique ID** field.
3. Enter the admission date in the **Date of above Status Change** field by entering the date or choosing the date using the calendar pop-up tool.
4. You may use the **Viewable Comments** field to note the conditions or circumstances under which the patient was admitted.

ProviderLink™ Main Window → McCoy, Julie → Discharged

Patient Discharged: McCoy, Julie

Unique ID: *

Status Change:

Date of above Status Change: * (mm/dd/yyyy)

Viewable Comments:

- Click the **Save** button to change the patient's status and send the message(s) to the payor(s). The system displays the *View Patient Information* screen, changes the patient's Status field to "Admitted," and updates the Current Admission Date.

H. Managing Your Work Lists

Patient records are often moved through a workflow. Tasks and patients can be easily moved from one work list to another and so on to complete a workflow. When a patient is moved from one work list to another, all of the properties of that patient such as tasks, overdue items, etc., move to the new work list. So if a patient is moved, for example, from one unit to another in a hospital setting, all of that patient's open tasks and overdue items are automatically added to the new case manager's work lists. The new case manager can also see all related documents, forms, communication histories, authorizations, open communication requests, etc.

After your portion of the patient's workflow is completed, you may remove a patient from a work list. The system will display a message if the patient record has any unread messages, incomplete tasks, or overdue items. If yours is the last work list linked to the patient, you will need to process all outstanding items (i.e., all unread messages and undone tasks) before removing the patient from your work list.

To Link Another Work List To The Patient Record:

- From the *View Patient Information* screen, locate the *Linked Work Lists* section in the center of the screen.
- Select the work list you wish to add from the **All Available Work Lists** list box and click the **Add** button. The chosen work list will be added to the **Work Lists Linked to this Patient** list box.
- On the menu bar, click **Save**. The system saves patient record and adds it to the linked work list(s).

To Remove A Work List From The Patient Record:

- From the *View Patient Information* screen, locate the *Linked Work Lists* section in the center of the screen.
- Select the work list you wish to remove from the **Work Lists Linked to this Patient** list box and click the **Remove** button. The chosen work list will be removed from the **Work Lists Linked to this Patient** list box.

- On the menu bar, click **Save**. The system will check to see if there are any unread messages or incomplete tasks and, if there are, it will display an "Open Items" message. Review the message and click the **Remove** button.
- If there are no other work lists linked to the patient record, the system will not allow you to remove the work lists and will display a message. Click the **Continue** button to return to the patient record and close the outstanding items.
- Once the patient is removed from the work list, the updated work list appears with the remaining patient records.

2. Discharge Planning

Discharge planners deal with some of the most time critical communications in the hospital. They often need to get a payor authorization prior to discharging. Medicaid in most states requires the completion of a manual hard copy form and that referrals be sent to all providers within a certain mile radius. Discharge planners must keep up with changing discharge dates and skilled nursing bed availability. They are often manually sending out communication requests trying to answer questions like, "Who has an available male bed in this geography, a secure ward, provides dialysis transportation, and takes MARSA patients?" Referral packages have to be compiled based on information from several different systems and paper-based charts. Broadcasting referral packages to numerous facilities is costly and time consuming. Tracking the referral status, which facilities have responded and which ones need additional information, can be overwhelming.

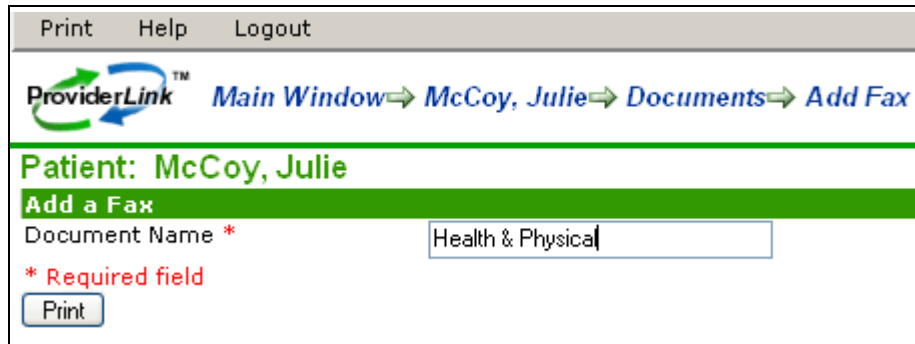
With ProviderLink, clinical information can be imaged right from a discharge planner's desk from many clinical systems using our virtual printer. Paper hard copy information can be imaged using any fax machine as a scanner using our fax imaging process. All images from any source can be attached to a single referral and then sent online as a paperless package to a specific provider or broadcasted to customer-defined distribution lists. Online providers will receive the referral package electronically and offline providers will receive the package on their fax machines. Online providers can reply instantly to accept the patient or to request additional information. Offline providers can respond using the supplied fax-back cover page, which will route their reply directly to the discharge planner's screen and open request. Either way, this is a simple and paperless process. At a glance, discharge planners can see who has responded and who has not. Online or fax-only providers usually set up their alerts to page them whenever a new referral arrives through ProviderLink, eliminating the need for a phone call and speeding up response times. Several states now offer their Medicaid authorization forms and process online through ProviderLink. The form can be completed and sent online with authorizations appearing automatically back on the discharge planner's screen organized by patient. Authorizations can then be forwarded to others as needed. Once imaged, referral information can be sent to any online or offline facility instantly.

A. Adding Documents To Patient Records

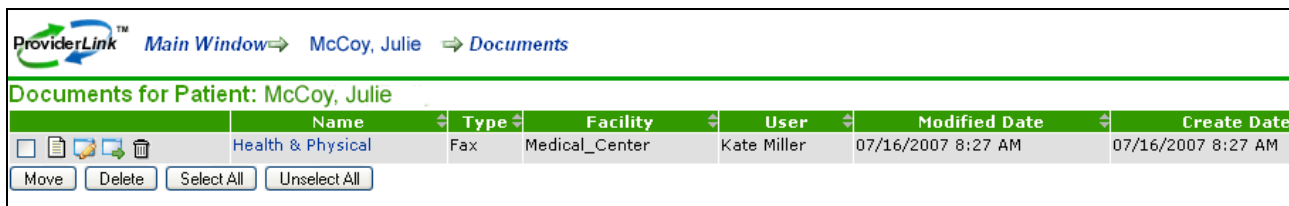
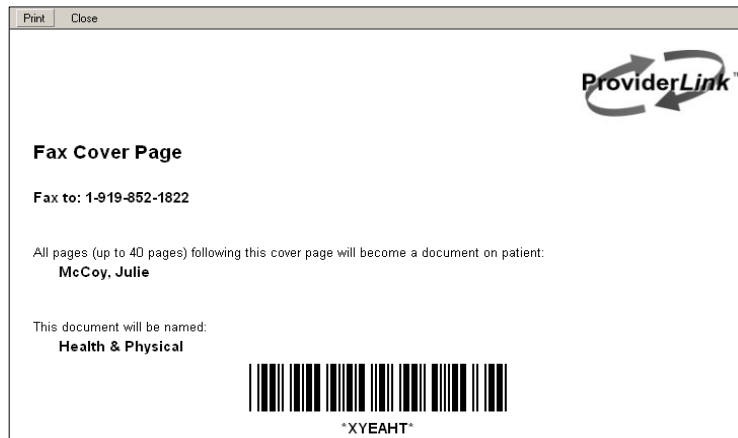
Often times you will need to send the skilled facilities or payors additional clinical information to get placement offers or authorizations for services. ProviderLink enables you to store patient-related documents with each patient record. Any document that is sent to you online or faxed into the system can be added to a patient's record. You can also use the online E-Forms function in ProviderLink to create documents or you can copy information from clinical systems and paste it into a blank notes E-Form. In addition, virtually any hard copy, paper document or any report you can print to a local printer can be added to a ProviderLink patient record and be sent in a message to another facility.

To Add A Hard Copy Document To A Patient Record (Fax Attach):

1. From the *View Patient Information* screen's menu bar, click **Documents** to view the *Documents For Patient* screen.
2. On the menu bar, click **Add Document → Add By Fax**. The *Add A Fax* screen appears.
3. Enter a document name that fits the type of document you are adding (e.g., Health & Physical).



4. Click **Print** on the menu bar or the **Print** button. The system will generate a bar-coded cover page.
5. Click **Print** on the menu bar to display the print options and print the cover page on your printer.
6. After the cover page prints, click **Close** on the menu bar to close the cover page and return to the *Documents for Patient* screen.
7. Once the cover page prints, place it on top of the hard copy documents and fax the package to the number indicated on the cover page. After the fax sends successfully, the document will be listed on the *Documents For Patient* screen (this screen may need to be refreshed).

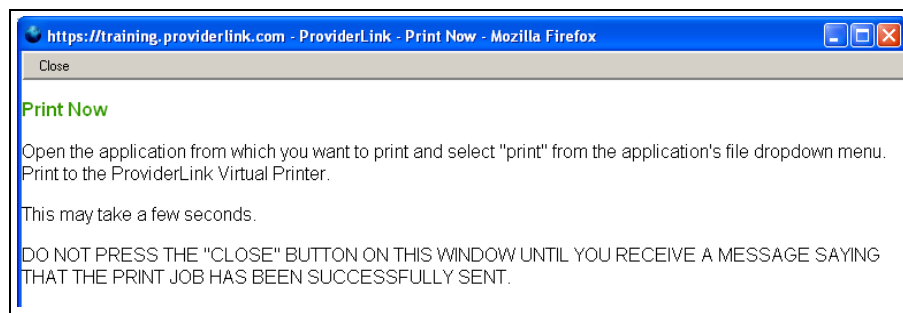


8. You may click the document **Name** link to view the document you added.

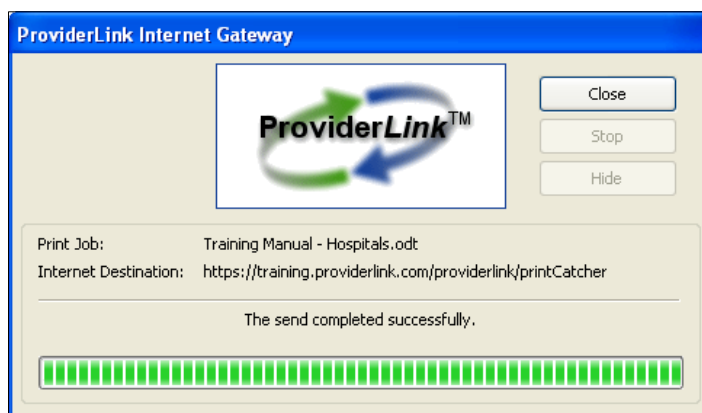
To Add A Document From Another System To A Patient Record (Print Attach):

1. From the *View Patient Information* screen's menu bar, click **Documents** to view the *Documents For Patient* screen.
Note: A new version of the print application is available that allows you to print attach while not logged in to ProviderLink. Contact ProviderLink Customer Support for instructions on upgrading to the newest version.
2. On the menu bar, click **Add Document -> Add By Print Job**. The *Add A Print Job* pop-up window appears.
3. Enter a document name that fits the type of document you are adding.
4. Click the **Print** button. The *Print Now* screen appears and the system is ready to receive the document from another application.

Using ProviderLink in Your Daily Work



5. Leaving the ProviderLink windows open, open the clinical system that contains the report and prepare to print it.
6. Change the printer options to print the report using **ProviderLink Virtual Printer**. The document will spool to the printer and the ProviderLink Internet Gateway dialog box appears.
7. After the status bar fills and the window displays the message "The send completed successfully," click the **Close** button.
8. Minimize or close the clinical system and return to ProviderLink.
9. Close the *Print Now* window. The *Documents For Patient* screen will refresh and you should see the document you print-attached added to the list.



Documents for Patient: McCoy, Julie

	Name	Type	Facility	User	Modified Date	Create Date
	Health & Physical	Fax	Medical_Center	Kate Miller	07/16/2007 8:27 AM	07/16/2007 8:27 AM
	Benefits Summary	Print	Medical_Center	Amy Parriss	05/22/2007 2:05 PM	05/22/2007 2:05 PM

Move Delete Select All Unselect All

To Add An Electronic Form (E-Form) To A Patient Record:

1. From the *View Patient Information* screen's menu bar, click **Documents** to view the *Documents For Patient* screen.
2. On the menu bar, click **E-Forms** to view the available forms.
3. Select the appropriate **Form Name**. The system will display the form you selected.
4. Complete the fields on the E-Form, paying particular attention to the required fields as indicated by the red asterisks.
5. After completing the form, click **Save** on the menu bar
6. To have the system check to see if the form's required fields have been completed correctly, click **Check** on the menu bar After checking the form, the system will display red text below the fields to show any errors. Fix the errors and check the form again.
7. Once you are confident there are no errors on the form, click **Save** on the menu bar
8. To close the form, click **Save and Close** on the menu bar

B. Getting A Signature For Your Documents

Through ProviderLink, you have the ability to sign any document, whether added electronically or by fax attaching. Medicaid and most skilled facilities require a physician's signature for the approval request form to be valid. Depending on your workflows and practices, you can easily obtain and process these signatures for your ProviderLink documents.

There are three ways to obtain signatures documents in ProviderLink: 1) electronic signatures using a physician's user name and password; 2) sending the document to the physician's office with a bar-coded, fax-back cover page; or 3) printing the form for signature and scanning it into ProviderLink with a bar-coded cover page.

Once the form is signed, the signature is stored with the document, in the Documents list, and the form is tagged with the signature icon. When the signed form is transmitted to another facility, a copy of the original form is attached to the signed form.

C. Electronic Signatures

Because of modern technology and the desire to move to paperless processes, more and more healthcare organizations will accept electronic signatures on documents. In fact, most of these organizations have a written policy for electronic signature acceptance. You will need to verify your organization's electronic signature policy before using it to sign your ProviderLink documents.

To Electronically Sign A Document:

1. From the menu bar of the form or document (screen) you wish to sign, click **Signatures** **Electronically Sign**. The *Add Signature* screen appears.

Note: If the Signatures option does not appear on the menu bar, you will need to **Save** the E-Form first.

2. Select your **name** from the *I am* drop-down list and enter your **Password**. Click the **Sign Document** button.
3. After you enter the correct password and submit the signature, the system will return you to the form or document you signed. Notice the menu bar now has fewer options.



HIPAA guidelines recommend that healthcare organizations archive a copy of every form that is signed or sent to other facilities. Because of this, ProviderLink locks the form as soon as it is signed or attached to a message and it may not be altered. When you need to change the data on the form, you must create a copy of the form with the "Save

Copy” option on the menu bar and change the form data on the copy. If required, the new copy of the form will need to be signed.

D. Printing The Document For Signature

After completing a form, you may print the document and attach it to the patient's chart so that the physician can sign it. With the document, the system will generate a bar-coded cover page that is used to scan (fax) the signed document back into the patient's document list. The signed document is archived with the patient's record and can be transmitted to anyone who needs it.

To Print The Document For Signature:

1. From the menu bar of the form or document you wish to sign, click **Signatures → Print for Signature**. The system will render the form as a PDF document and you will be asked to open it using your PDF reader.

Note: If the Signatures option does not appear on the menu bar, you will need to **Save** the E-Form first.

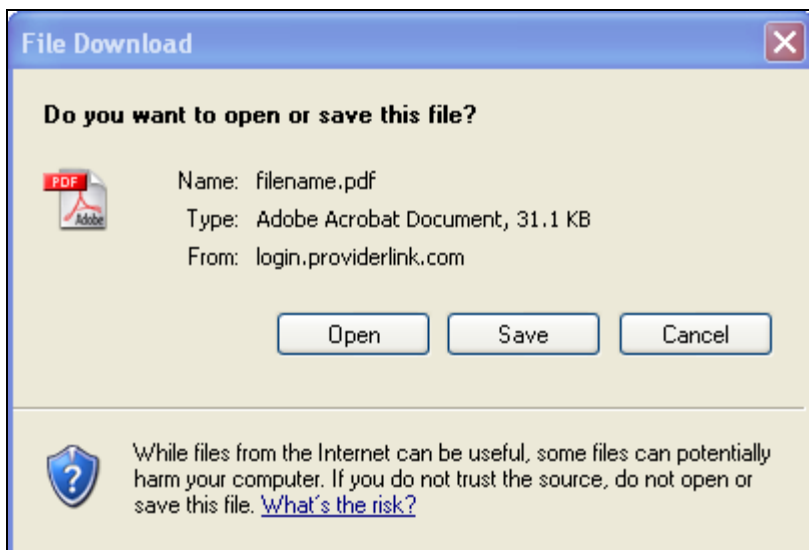


If you are using Windows XP with Service Pack 2 installed, Internet Explorer may display a security message at the top of the page: and prevent the file from appearing:

To help protect your security, Internet Explorer blocked this site from downloading files to your computer. Click here for options...

If this occurs, simply click the yellow security message and, when the pop-up menu appears, choose to **DOWNLOAD THE FILE**.

2. Click the **Open** button to open your PDF reader and view the file. The first page will be the bar-coded cover page, followed by the document itself.



3. Using your PDF reader's print function (usually File > Print), print all pages of the document on your desktop or network printer.
4. Place the form where the physician can sign it.
5. Once the form is signed, place the bar-coded cover page on top of the form and fax it to the number on the cover page. Once the ProviderLink system receives the fax and reads the bar code, the signed document will appear in the patient's documents list.

E. Sending The Document To A Fax Contact For Signature

If the physician is not in your facility to sign the document, you may use ProviderLink to send the document to a fax machine for signature. A fax-back cover page is provided so that, after the document is signed, the physician may fax it back to you through ProviderLink. When it arrives, the system will automatically route the signed document to the list of documents in the patient's record.

To Send The Document To A Fax Contact For Signature:

1. From the menu bar of the form or document you wish to sign, click **Signatures → Send for Signature**. The *Create Message* screen appears with the document already attached, the **Subject** is completed, and the **Request a Reply** and **Create a Reminder Task** check boxes are selected for you.

Note: If the Signatures option does not appear on the menu bar, you will need to **Save** the E-Form first.

2. Click the **To Recipients** drop-down arrow, and select the appropriate distribution list or mailbox for the office of the person whose signature you need.
3. If the mailbox does not appear in the drop-down list, you can find it by clicking the **Search** button. The *Facility Search* pop-up window appears.
4. Enter the **search criteria**.
5. Click **Search**.

6. The *Search Results* screen displays. Select the **recipient** from the list and click **Save**.
7. The *Create Message* screen returns with the selected recipient in the *To Recipients* field.
8. Enter an appropriate message **Subject** (e.g., “Level 1 PASARR”).

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Send Templates Print Help Logout

ProviderLink™ Main Window ⇒ McCoy, Julie ⇒ Documents ⇒ NC Medicaid FL2 ⇒ Create Message

Patient: McCoy, Julie DOB: 05/05/1925

To Recipients: *
 Link All Recipients

From Mailbox:

Available Documents: Request a Reply

Documents To Attach:
 Include Fax-Back Cover Page (For Fax Only Recipients)
 Create a Reminder Task



The message subject is important for several reasons. First, the subject alerts the recipient to the potential importance of your message. Second, the message subject may assist the recipient to route your message to the person or department who can best complete your request. Also, ProviderLink uses your message subject as the link to open the message and displays it in the Message History. A descriptive subject should give users an idea of what the message contains without having to open the message itself.

9. If necessary, enter a message in the **Message** field.
10. If there are any required form fields that have not been filled in or formatted correctly, you will see red error messages highlighting the errors. To fix the errors, you will need to return to the form by clicking **Form Name** (e.g., NCMedicaidFL2) in the breadcrumb trail.

Available Documents: Request a Reply

Documents To Attach:
 Include Fax-Back Cover Page (For Fax Only Recipients)
 Create a Reminder Task

The form 'NC Medicaid FL2 10/10/2005 10:14 AM' has the following errors.

- Requested Care Level is a required field.
- Patient County Number is a required field.
- Current Setting is a required field.
- Medicaid ID Number is a required field.
- PASARR Number is a required field for this care level.
- At least one Medication should be entered (or enter 'none').
- Physician First Name is a required field.
- Physician Last Name is a required field.

Subject:

11. When you are ready to send the message, click **Send**. The system will send the document for signature, create a reminder task (to remind you that you are waiting for a signature), and return you to the form screen.



When the physician signs the document and faxes it back using the bar-coded, fax-back, cover page, ProviderLink will read the bar code and route the signed document to the patient's record. You will see an unread message for that patient appear on your work list. When the signed document arrives, the system will also mark the reminder task as complete.

F. Sending Referrals To Other Facilities

Most hospitals use an E-Form as a referral tool and transmit it to other facilities to seek placement for their patients. ProviderLink makes the referral process easy, as hospitals can choose to send the referral form and supporting documentation to a single facility or broadcast the information to several facilities at once using distribution lists.

Because ProviderLink can send messages to fax contacts as easily as online contacts, the discharge planner may use the same *Create Message* screen for either type of contact. Fax contacts will receive the ProviderLink message on their fax machine and, when you request a reply, can respond using a bar-coded, fax-back cover page. ProviderLink online contacts will receive the message electronically as an unread message in their work list and can respond to you electronically through ProviderLink. When either type of contact replies, you will receive the response as an unread message attached to the patient record in your work list.

To Send The Referral Message:

1. From the *View Patient Information* screen menu bar, click **Send Message**. The *Create Message* screen appears.

2. Select the message recipients from whom you are requesting placement.
 - a. From the **Select Recipients** drop-down list, select the appropriate distribution list. The distribution lists may be arranged by county, geographic area (e.g., 50-mile radius, etc.), or specialty (e.g., SNF Vent, SNF Dialysis, etc.).

- b. If there is no distribution list that contains the desired facility(ies), you may need to search for the recipient(s).

The screenshot shows a web application window titled 'Search' with a menu bar containing 'Search', 'New Contact', 'Close', and 'Help'. Below the menu bar is a 'Search' header and a 'Facility Search' tab. The main content area is titled 'Search For a Facility' and contains the following fields:

- Facility Type: Select a Facility Type (dropdown)
- Facility Name: [Text input]
- Unique ID: [Text input]
- Fax Number: [Text input]
- Last Name: [Text input]
- First Name: [Text input]
- Main Phone Number: [Text input]
- City: [Text input]
- State/Province: No State Selected (dropdown) Zip: [Text input]
- County: Select a State First (dropdown)
- Show: Online Fax-Only System Fax-Only

A 'Search' button is located at the bottom left of the form.

- i. Click the **Search** button. The *Facility Search* pop-up window appears.
- ii. Choose the type of facility for which you are searching from the **Facility Type** drop-down list (e.g., Skilled Facility).
- iii. If you are looking for a specific facility, type in the first few letters of the **Facility Name**.



It is generally not recommended that you enter the entire facility name in the "Facility Name" field when searching for recipients. ProviderLink will look for exactly what you enter as search criteria. If you spell the facility name differently than it appears in your system, ProviderLink will not find the facility. For this reason, enter only the first few letters of the facility name. This way, you have the best chance of finding the facility, if it is already set up in your system.

- iv. If searching for all of the facilities in a city, zip code, county, or state, use the **City** and **Zip Code** fields or the **State/Province** and **County** drop-down lists to narrow your search by geographic area. If searching by county, you will need to select the state first.
- v. When you have finished entering search criteria, click the **Search** button to view the Search Results.

The screenshot shows a web application window titled 'Search Results for Patient: McCoy, Julie' with a menu bar containing 'Save', 'New Contact', 'Close', and 'Help'. Below the menu bar is the search results header and a table of results.

21 Total, 1 of 1 page(s)

	Mailbox Name	Facility Name	First Name	Last Name	Unique ID	Fax Number	City	County	State	Zip
<input type="checkbox"/>	Radiology	Hilltop Assisted Living Center	Radiology			555-555-1212		BRUNSWICK	NC	
<input type="checkbox"/>	Admissions	Hilltop Assisted Living Center	Admissions			555-555-2242		BRUNSWICK	NC	

- vi. The Search Results are listed in alphabetical order by the facility name. If you do not see the facility for which you are searching, click **Close** on the menu bar to try your search again by repeating the steps above.

- vii. Select the mailbox which you want to send the message by clicking the **check box** for the mailbox.
- viii. Once you have selected the mailbox(es) to which you will send the message, click **Save** on the menu bar to add the mailboxes to the list of message recipients.
- ix. If, after searching for a fax-only facility, you are unable to find the facility and are certain it does not exist in your system, your facility administrator will need to create the facility and contact mailbox in your system before you will be able to send the message to that facility's fax machine. Online facilities are automatically added to ProviderLink as they become ProviderLink subscribers.

Note: Once a facility is created by the facility administrator, users can add fax-contacts from the *Add/Edit Contact Mailbox* screen.

3. Attach the referral form and the necessary supporting documentation to include with your request.
 - a. From the **Select a Document** drop-down list in the *Available Documents* section, select the referral form and any other document you wish to send to the message recipients. Once selected, the document appears in the list of **Documents to Attach**. You must select each document individually.



When sending a referral to more than a couple of facilities, send limited information such as a referral form and face sheet. If a facility responds that they have bed availability, then you can send more detailed clinicals such as an H&P. Sending a smaller referral packet will save your facility money by reducing the number of fax pages used. It should also transmit the referral faster since fewer pages will need to be sent to each recipient.

- b. To remove a document from the list of **Documents to Attach**, double-click on the name of the document.
4. Enter your message **Subject** (e.g., "Placement request").
5. Enter your **Message** text.
 - a. You may wish to enter any other information that might assist the recipients in evaluating your request or is not included elsewhere in the message or supporting documentation.
 - b. You may use a template to add standardized wording to help complete your message if available.
 - i. From the menu bar, click **Templates** to view the list of available templates. Your facility administrator can create templates for you.
 - ii. Templates simply add frequently used wording to your message and you may edit or add to the message as necessary.
6. Request a reply from your message recipients.
 - a. Click the **Request a Reply** check box.

Available Documents:	<input type="text" value="-- Select a Document --"/>	<input checked="" type="checkbox"/> Request a Reply
Documents To Attach:	<input type="text" value="NC Medicaid FL2 10/10/2005 10:14 AM"/>	<input checked="" type="checkbox"/> Include Fax-Back Cover Page (For Fax Only Recipients)
		<input checked="" type="checkbox"/> Create a Reminder Task

- b. To enable fax contacts to reply to your message, you will need to leave the **Include Fax-Back Cover Page** check box selected.
 - c. You will most likely wish to remove the check mark from the **Create a Reminder Task** check box if you are sending the message to several fax contacts.
7. Once you are satisfied with your message, click **Send**.



The “Create a Reminder Task” option, when selected, creates a reminder task in your work list for each message recipient included in the outgoing message. It is as if to say, “Create a reminder task to remind me that I am waiting for a reply from each of the message recipients.” Each reminder task is removed only when the recipient responds to your message or you withdraw the request. While online contacts must reply to your message before they may remove the patient from their work lists, fax contacts are not systematically required to respond.

While creating reminder tasks may seem desirable, it is unrealistic to assume that each of the message recipients that are fax contacts will use the fax-back cover page to reply to your message. If the recipient fails to reply within a specified time frame (usually 24 hours), an alert is triggered notifying you that you have not yet received the reply. You will then need to remove each request and clear the associated alert before you can remove the patient from your work list.

G. Processing Incoming Messages

As stated earlier, ProviderLink uses a single interface to send messages to both online and fax contacts. Once you send the message, ProviderLink sends the message to online contacts electronically and sends a fax transmission to fax contacts.

Once they receive your request, either type of contact can reply to your message in the same way they received it. Online contacts can send their reply as an electronic message that will be attached to the corresponding patient message. Fax contacts will send their replies using the bar-coded, fax-back cover page, which ProviderLink will convert to an electronic message and attach it to the corresponding patient record. In other words, replies to your requests will appear as unread messages attached to the patient record.

You may access and read incoming messages using several methods, though it is usually recommended that you first navigate to the *View Patient Information* screen and then read the incoming messages.

To Process Incoming Messages:

1. From the Main Window List Summary, click **Unread Messages** to change to the *Current View: Unread Message List*. The list of unread messages is sorted in order by date and time received with the oldest message at the top. You may click any of the green column headers to re-sort the list.

The screenshot shows the ProviderLink interface. At the top, there are navigation buttons: New, Lookup, Setup, Reports, Print, Refresh, Help, and Logout. Below these is the ProviderLink logo and a summary of unread messages: Unread Messages: 1. It also shows statistics: Patients: 2, Reviews Due: 0, Tasks: 0, Alerts: 0. The facility is providerlink, the view is SteveGroup, and the user is admin. The main section is titled "Current View: Unread Message List" and shows "1 Total, 1 of 1 page(s)". Below this is a table with columns: Patient, ID, Date, From, To, Subject, and a count column. The table contains one row: McCoy, Julie; MR234567; 01/04/2006 8:16 AM; Breezybrook Acres -; providerlink - Main; RE: Placement Request; 1.

Patient	ID	Date	From	To	Subject	
McCoy, Julie	MR234567	01/04/2006 8:16 AM	Breezybrook Acres -	providerlink - Main	RE: Placement Request	1

2. Click the **Patient** link to access the *View Patient Information* screen for the patient whose message you wish to read.
3. In the *Status* section in the bottom left corner, click the **Unread Messages** link. The *Unread Messages For Patient* screen appears, showing you the list of unread messages, sorted by date and time, with the oldest message appearing first.



You may navigate directly to the unread message by clicking the “Subject” link. However, the breadcrumb trail will only reflect the steps you took to read the message (Main Window > Read Message) and you will not be able to navigate to the associated patient’s *View Patient Information* screen to access any of the patient’s information

without first returning to the Main Window.
 By navigating to the View Patient Information screen and then the Unread Messages For Patient screen, the patient's name is added to the breadcrumb trail (Main Window > Patient Name > Unread > Read Message). This enables you return to the View Patient Information screen to continue processing the patient's record.

4. Click the **Subject** link of the message you wish to read. The message appears. The message header shows you who the message is from, the mailbox the message arrived through, the date and time the message arrived, whether or not the sender requested a reply (i.e., if an online contact), who read the message and when, the message text, and the names of the attached documents.

Reply Forward Resend Mark Unread Contact Auth Print Help Logout

ProviderLink™ Main Window → View Message

View Message for Patient: McCoy, Julie

To: Facility: **Medical_Center**
 Mailbox Name: **Main**
 Other Reference:
 Connection: **Online**

From: Facility: **Medical_Center**
 Mailbox: **Main**
 User: **Kate Miller**
 Unique ID: **MR1234567**
 Reference:

07/16/2007 1:23 PM **No reply requested by sender**
Message Status: Sent

Attached Documents:

Subject:

Message:

5. Click the **Attached Documents** links to open the attachments. ProviderLink will open the attachment using the appropriate viewer.

ProviderLink™ Main Window → McCoy, Julie → Unread → Read Message → Attachment Viewer

Patient: McCoy, Julie

Zoom In | Zoom Out | Rotate Left | Rotate Right | Flip

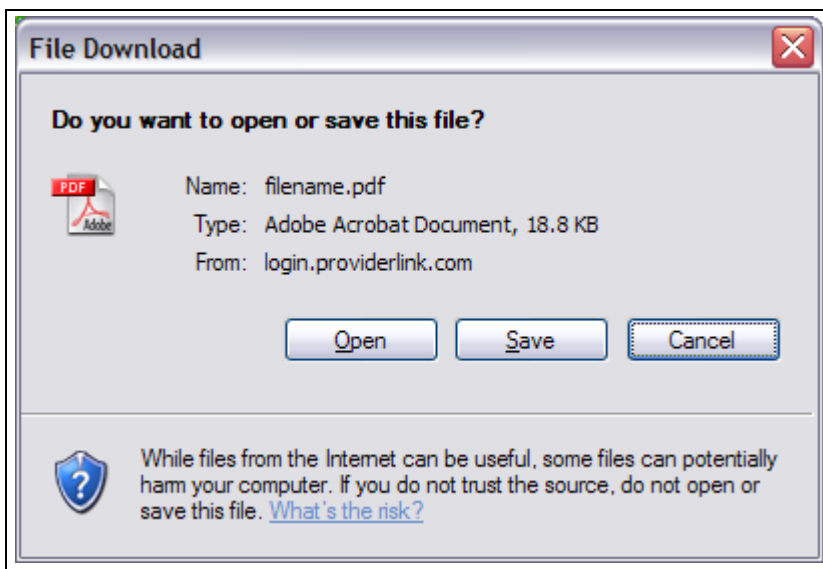
JEN: 04-2005-08:07.From: ProviderLink, Inc. Sun 07/16/2007 11:35 FAX TO 1-800-563-9620

FAX BACK COVER PAGE
FAX TO 1-800-563-9620

Please use this cover page to fax your reply. The bar code routes your reply back to me.

27MMV6

6. If necessary, print the document.
 - a. To print the page you are viewing, click **Print Page** on the menu bar. The *Print dialog box* appears, allowing you to choose your printer.
 - b. If you wish to print the entire document, click **PDF Format** on the menu bar.
 - i. Depending on your operating system and PDF document reader (if installed), you may see a dialog box appear asking you whether you want to open or save the document. If the dialog box appears, click the **Open** button.



- ii. When the document opens in your PDF reader application, use the application's print instructions to print the document.
 - iii. After the document prints, close the PDF reader and return to ProviderLink.
7. When you are finished working with the attached documents, you may click **Read Message** in the breadcrumb trail to return to the message and send a reply. Use the same guidelines as outlined beginning on Page 36 to format and send your reply.

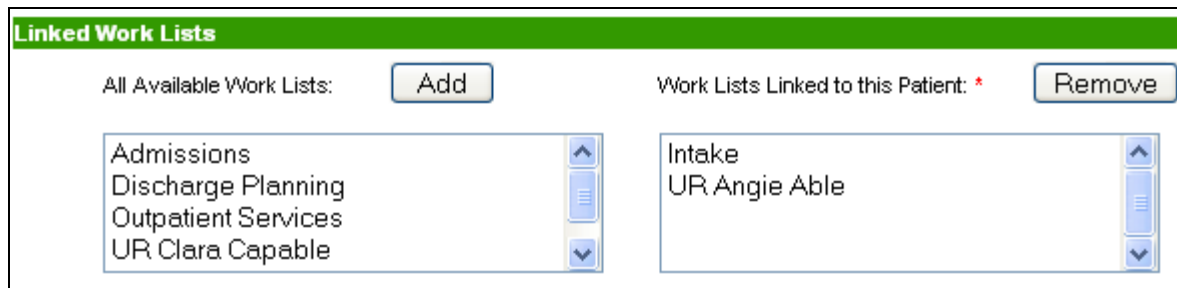
H. Managing Your Work Lists

Patient records are often moved through a workflow. Tasks and patients can be easily moved from one work list to another and so on to complete a workflow. When a patient is moved from one work list to another, all of the properties of that patient such as tasks, overdue items, etc., move to the new work list. So if a patient is moved, for example, from one unit to another in a hospital setting, all of that patient's open tasks and overdue items are automatically added to the new case manager's work lists. The new case manager can also see all related documents, forms, communication histories, authorizations, open communication requests, etc.

After your portion of the patient's workflow is complete, you may remove a patient from a work list. The system will display a message if the patient record has any unread messages, incomplete tasks, or overdue items. If yours is the last work list linked to the patient, you will need to process all outstanding items (i.e., all unread messages and undone tasks) before removing the patient from your work list.

To Link Another Work List To The Patient Record:

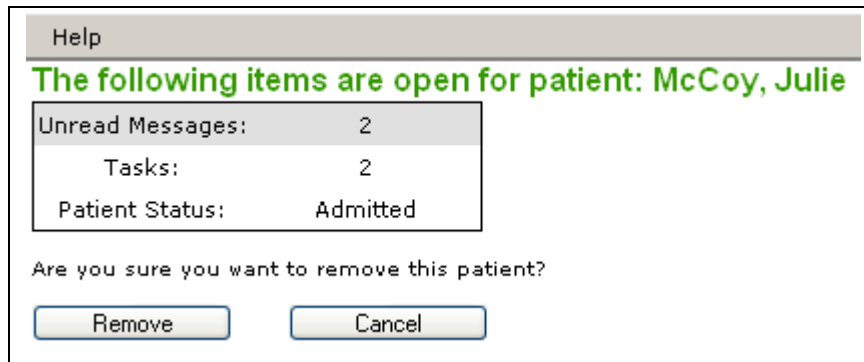
1. From the *View Patient Information* screen, locate the *Linked Work Lists* section in the center of the screen.



2. Select the work list you wish to add from the **All Available Work Lists** list box and click the **Add** button. The chosen work list will be added to the **Work Lists Linked to this Patient** list box.
3. On the menu bar, click **Save**. The system saves the patient record and adds it to the linked work list(s).

To Remove A Work List From The Patient Record:

1. From the *View Patient Information* screen, locate the *Linked Work Lists* section in the center of the screen.
2. Select the work list you wish to remove from the **Work Lists Linked to this Patient** list box and click the **Remove** button. The chosen work list will be removed from the **Work Lists Linked to this Patient** list box.
3. On the menu bar, click **Save**. The system will check to see if there are any unread messages and incomplete tasks and, if there are, it will display an *Open Items* message. Review the message and click the **Remove** button.



4. If there are no other work lists linked to the patient record, the system will not allow you to remove the work lists and will display a message. Click the **Continue** button to return to the patient record and close the outstanding items.
5. Once the patient is removed from the work list, the updated work list appears with the remaining patient records.

3. Virtual Fax Service

ProviderLink Virtual Fax Service (VFS) enables you to forward a fax line and receive all incoming faxes as imaged documents, which are processed and stored online. This provides a single interface and workflow for all your incoming fax and online communications.

In ProviderLink, all incoming faxes to your facility are directed to an “incoming fax folder” then processed using the Document Viewer screen. The options and features on the Document Viewer screen are used to process incoming faxes by moving them to other folders or by attaching them to a message addressed to a mailbox within your facility. Options on the screen also allow a fax to be split into separate documents, renamed, and processed in a single step.

The manner in which a fax is processed depends on the type of folder in which the fax is stored. There are two types of fax folders in ProviderLink: 1) Messages and 2) Folders. Your incoming fax folder will be set up in the manner that best fits your workflow for receiving fax messages. With either type of folder, you have the ability to add metadata information to a document. Once a document is stored with metadata, you may use that information as search criteria to make it easier to find the document later.

A. Message-Type Folder

The Message type is the most commonly used. Considering that an incoming fax is a type of message from an outside sender to someone in your facility, this workflow is best completed using a Message folder type. This type enables you to add the fax document to a patient record and route the incoming fax message to one of your facility's mailboxes and its associated work list.

After the fax is routed, the person or department to which the fax is sent will see an unread message linked to the patient record. Since the fax document is attached to a patient record, it is then available to be attached to a message and sent. This workflow works best when the majority of incoming faxes are related to patients.

To Process An Incoming Fax (Message Workflow):

1. Be sure you are viewing the **Incoming Fax Folder** Main Window. You will see a list of the faxes received with the oldest faxes on top.

Name	Type	Facility	User	Modified Date	Create Date
Fax From 9191234565	Fax	Incoming Fax Daemon	Incoming Fax Daemon	11/10/2006 1:30 PM	11/10/2006 1:30 PM
Fax From 9191234567	Fax	Incoming Fax Daemon	Incoming Fax Daemon	11/21/2006 2:28 PM	11/21/2006 2:28 PM

2. You will normally want to process the oldest document in the list. To view the oldest document, click the **Get Next Fax** button. The fax message will appear in the *Document Viewer* screen.

Document Information: Received: 1/25/07 2:52 PM From: 919-123-4563

Originator: *

Page(s)* Document Name Category Patient* Mailbox*

Procedure Date: Procedure Type: Status:

Remove document from fax queue.

[Zoom In](#) | [Zoom Out](#) | [Rotate Left](#) | [Rotate Right](#) | [Flip](#)

3. Above the fax document image, notice the image control links (i.e., Zoom In, Zoom Out, Rotate Left, Rotate Right, and Flip). If the fax message contains more than one page, you will see a numbered link for each page.
4. ProviderLink will try to recognize the number from which the fax was sent and display the facility name in the required **Originator** field. If the **Originator** field is blank, the system does not yet have the fax number stored. If the **Originator** is not recognized, you will need to search for or create the fax contact.
 - a. Click the **Search** button to the right of the Originator field. The *Facility Search* screen appears.
 - b. Using the guidelines in the "To Send a Referral Message" section, search for the facility that sent the message. If the facility does not exist, your facility administrator can add it to the system.

5. If there are multiple pages, view each page to determine if the message contains documents for more than one patient.
 - a. If all the message pages relate to one patient record, accept the default “ALL” value in the Page(s) field.
 - b. If the message contains pages for more than one patient, click the **More** button to add another set of routing fields. Then, enter the appropriate page number or page range (e.g., 1-3) in the **Page(s)** field.
6. In the Document Name field, enter the type or name of the document.
7. Search for the patient to associate the fax document. Click the **Search** button to the right of the Patient field. The *Patient Lookup* screen appears.
8. Use the guidelines in the “To Create a New Patient Record” section to search for or create a new patient record.
9. Choose the **mailbox** to route the fax document.
10. You may add additional information in the “metadata” fields. In this example, additional information can be added in the *Status*, *Procedure Type*, and *Procedure Date* fields. This will aid users when searching for this document.
11. Once you have completed all of the required fields, you may choose how you wish to save the document(s).
 - a. The “Remove document from fax queue” check box is selected for you automatically. This means that, when you choose one of the save options, the fax message will be removed from the list. Remove this check mark to leave the fax message in the queue.
 - b. The “Save” button will process your routing options and return you to the same fax message for further processing.
 - c. The “Save and Next button” will process your routing options, close the fax message, and open the next oldest one in the incoming fax folder. You will use this option most often when processing multiple fax messages.
 - d. The “Save and Reply” button will process your routing options, close the fax message, and address an outgoing message to the sender of the fax. This enables you to request additional information from the fax originator.

B. Folder-Type Folder


The Folder type allows you to store documents without requiring you to link them with patient records. This workflow allows you to store documents in folders for easy access. You have the option of saving the fax to a patient folder or a more generic document folder. One limitation of documents that are not linked to patient records is that they may not be attached to messages or sent using ProviderLink.

Metadata is defined, most literally, as “data about data” or information known about the fax message in order to more easily find the document. Once a document is stored with metadata, you may use that information as search criteria with which to find the document later.

To Process An Incoming Fax (Folder):

1. Be sure you are viewing the Incoming Fax Folder Main Window. You will see a list of the faxes received with the oldest faxes on top.
2. You will normally want to process the oldest document in the list. To view the oldest document, click the **Get Next Fax** button. The fax message will appear in the *Document Viewer* screen.

Using ProviderLink in Your Daily Work

Page(s)*	Document Name	Category	Patient	Folder
<input type="text"/>	Fax From 919 465 1481	Order ▼	Choose a patient	Search Clear ▼ More
Status: <input type="text"/>	Procedure Type: <input type="text"/>	Procedure Date: <input type="text"/>		

3. ProviderLink will try to recognize the number from which the fax was sent and display the facility name in the required **Originator** field. If the **Originator** field is blank, the system does not yet have the fax number stored. If the **Originator** is not recognized, you will need to search for or create the fax contact.
 - a. Click the **Search** button to the right of the Originator field. The *Facility Search* screen appears.
 - b. Using the guidelines in the “To Send a Referral Message” section, search for the facility that sent the message. If the facility does not exist, your facility administrator can add it to the system.
4. The only field that is required is Page(s). If there are multiple pages, view each page to determine if the message contains documents for more than one patient.
 - a. If all the message pages relate to one patient record, accept the default “ALL” value in the Page(s) field.
 - b. If the message contains pages for more than one patient, click the **More** button to add another set of routing fields. Then, enter the appropriate page number or page range (e.g., 1-3) in the **Page(s)** field.
5. In the *Document Name* field, enter the type or name of the document.
6. Instead of choosing a mailbox, you have the choice of linking the document to a patient record or a folder.
 - a. To link the document to a patient record, search for the patient to associate the fax document. Click the **Search** button to the right of the Patient field. The *Patient Lookup* screen appears. Use the guidelines in the “To Create a New Patient Record” section to search for or create a new patient record.
 - b. To link the document to a folder, select the folder from the *Folder* drop-down list.
7. You may add additional information in the “metadata” fields. In this example, additional information can be added in the *Status*, *Procedure Type*, and *Procedure Date* fields. This will aid users when searching for this document.
8. Once you have completed all of the fields, you may choose how you wish to save the document(s).
 - a. The “Remove document from fax queue” check box is selected for you automatically. This means that, when you choose one of the save options, the fax message will be removed from the list. Remove this check mark to leave the fax message in the queue.
 - b. The “Save” button will process your routing options and return you to the same fax message for further processing.
 - c. The “Save and Next button” will process your routing options, close the fax message, and open the next oldest one in the incoming fax folder. You will use this option most often when processing multiple fax messages.
 - d. The “Save and Reply” button will process your routing options, close the fax message, and address an outgoing message to the sender of the fax. This enables you to request additional information from the fax originator.

Section 3 Summary

After this demonstration of how the ProviderLink system assists you in your daily work, you should know how to:

Utilization Review

- link payor contacts to a patient record
- change the patient's status
- create a task for reminder or review
- add documents to patient records
- send reviews to payors
- process payor responses
- manage your work lists

Discharge Planning

- add documents to patient records
- access, complete, and process referral forms
- print or send documents for signature
- electronically sign documents
- send requests for patient referrals
- process incoming messages
- manage your work lists

Virtual Fax Service

- process incoming messages with messaging and folder workflows

Section IV - Appendices

Appendix A – Troubleshooting ProviderLink Issues

This section describes how to troubleshoot issues encountered while using ProviderLink. The table below lists common ProviderLink functions and respective issues, the steps you can take to resolve the issue, and some explanation of why the issue occurred. Most issues can be resolved using the instructions cited in this guide and the references to the appropriate sections are noted in the “Steps To Resolve” where appropriate.

Function	Issue	Steps To Resolve	What To Do Now
Unable to log into ProviderLink	The ProviderLink Login screen does not appear.	Can you access other websites (e.g., google.com, etc.)?	Yes – Contact the ProviderLink Help Desk to determine if there are any system issues. No – Contact your IT network staff to determine if your facility is having network or Internet issues.
		Are you trying to access the correct web address?	Be sure you are entering https://healthcare.covisint.com into the web browser's Address bar.
	I forgot my password and/or user ID.	Go to the Covisint login screen (https://healthcare.covisint.com) and click “Forgot your password?” or “Forgot your User ID?”	For password, enter your User ID and answer your challenge question to reset your password. For user ID, enter your email address, and your user ID will be emailed to you.
	I've been suspended.	If you enter an incorrect password 5 times within 5 minutes, your Covisint-ProviderLink account will be locked due to an excessive number of invalid login attempts. Go to the Covisint login screen (https://healthcare.covisint.com) and click “Forgot your password?”	In order to unlock your account, simply use your challenge question and answer to reset your password. Or your Facility Administrator can unsuspend your user account.
Patient Records	I can't find the patient record I was working with.	Search for the patient record using the Patient Lookup feature.	ProviderLink saves patient records indefinitely.

Appendices

Function	Issue	Steps To Resolve	What To Do Now
Messaging	I sent a message to a facility. How can I be sure it was received?	Check the History Items for the patient.	The History Items list records every incoming and outgoing message for the patient and whether or not a message is sent successfully.
	A message I was reading isn't in the Unread Messages list. Where can I find it?	Check the History Items for the patient.	Once you've read a message, it is removed from the Unread Messages list.
Documents Management	I faxed my document 20 minutes ago and I don't see it in the patient's Documents list.	Look for the document in your facility's Incoming Fax Folder. Route the document to the appropriate folder.	When ProviderLink is not sure where to route a document, the system will route the document to the Incoming Fax Folder.
	I don't see the ProviderLink Virtual Printer in my list of printers.	You must install the ProviderLink Virtual Print Driver before you can print attach any documents.	The ProviderLink Virtual Print Driver can be downloaded and installed from the Help menu on the Main Window.
	The ProviderLink Printer gives me an error message: "Please attach a case within ProviderLink before attempting to print."	Print attach a document into a ProviderLink patient record. Also, contact ProviderLink Customer Support for newest version of the Virtual Print Driver.	You must first start in the patient's record and choose to add a document by print job before printing using the ProviderLink Virtual Printer.

Appendix B – ProviderLink Quick Reference Guide

ProviderLink Quick Reference Guide

To Log Into ProviderLink:

1. In the IE window Address bar, type <https://healthcare.covisint.com> and press the **Enter** key. The Covisint login screen will appear.
2. Enter your **User ID** and **Password**.
3. Click **Login**. The Covisint Healthcare home page displays. In the left-hand menu, under Secured Applications, click **ProviderLink** to launch the application, which opens in a new window.

To Unsuspend Your ProviderLink Account:

If you try to log in and fail 5 times in 5 minutes, the system will suspend your user account and you will need to reset your password. In order to unlock your account, simply use your challenge question and answer. This will automatically unlock your account.

1. From the <https://healthcare.covisint.com> page, click “Forgot your password?.”
 - a. The screen expands displaying a field to enter your **User ID** and then click **Submit**. The *Reset Password* screen displays.
 - b. Enter the **answer** to your challenge question in the *Challenge Answer* field and click **Submit**.
 - c. Upon successful submission, the first half of the password displays on the screen, while the second half is sent to email address you submitted during the registration process.
2. Alternatively, you may contact your facility Security Administrator to request that he/she perform the password reset and unlock your account.

ProviderLink Quick Reference Guide

To Check ProviderLink For And Read Incoming Messages:

1. Once logged into the system and viewing the *Main Window* screen, click the **View** link in the top right corner.
2. Click the **View** drop-down arrow and choose your **Work List**.
3. Click **Submit** to display your Work List. The *Main Window* screen will appear.
4. When viewing your work list, the number of **Unread Messages** will appear at the top of the screen and in the **Unread** column in the patient list. Clicking either of these numbers will display the message list.
5. To read a message, click the patient's name link in the **Patient** column.
6. When the *View Patient Information* screen appears, click the **Unread Messages** link in the *Status* section in the bottom right corner.
7. When the *Unread Messages for Patient* screen appears, you may read a message by clicking the **Subject** link. The message will appear on the *Read Message* screen.
8. From the menu bar, you may **Reply**, **Forward**, **Mark** the message **Unread**, view information about the sender **Contact**, and **Print** the message.
9. If there are any **Attached Documents**, you may click the links to read the attachments.
10. To go back and read more unread messages, you may click on **Unread Messages** or the **patient's name** in the breadcrumb trail at the top of the screen.

ProviderLink Quick Reference Guide

To Process An Incoming Fax Message:

1. From the *Default Incoming Fax Folder* screen, click the **Get Next Fax** button. The first page of the fax message appears.
2. Once you determine which provider the message is from, click the **Originator** drop-down list to see if the provider appears. If so, select the provider.
3. If the provider is not in the **Originator** list, click the **Search** button to bring up the *Facility Search* window.
4. Enter the necessary criteria to search for the provider and click **Search**. The system will display the search results based on the criteria you specified. If the provider you are searching for does not appear, modify the search criteria and repeat the search.
5. If the provider still does not appear, you may need to create the facility. See "To Create a New Fax-Only Facility."
6. Identify the type of document and enter it into the **Document Name** field.
7. Next to the Patient Name field, click **Search**. Use the *Patient Lookup* window to find the patient record. If no patient record exists, you may need to create a new one. See "To Create a New Patient Record."
8. Click the **Mailbox** drop-down arrow to display the list of mailboxes to route the message. Choose the appropriate recipient's mailbox.
9. For multi-page fax messages, click the page numbers to check if multiple messages were sent in the same transmission. If so, you will need to split the message and route each part separately. To set up the split, click the **More** button to bring up a new row for each message part. The Document Name, patient Name, and Mailbox will carry forward to each new row and may need to be changed.
10. In the **Pages** field, enter the pages to send for each message part. For all pages, accept the default "All" value.
11. Once you have filled in all of the fields for each message part, make sure **Remove document from the fax queue** is selected and click the **Save and Next** button to pull up the next fax message.

To Create A New Patient Record:

1. From the *Patient Search Results* window, click **New** on the menu bar. The *Add/Edit Patient Information* screen appears.
2. Fill in, as a minimum, the patient's **Last Name**, **First Name**, and **Birthdate** in the respective required fields. You do not have to select a work list.
3. Click **Save**. The patient's name will appear in the Patient field.

Note: This also works from the *Main Window* screen (New > Patient).

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To Create A New Fax-Only Facility:

1. From the *Main Window*, click *Lookup > Facility*. The *Search* window displays. Click **New** on the menu bar. The *Add/Edit Fax Facility Information* screen appears.
2. Enter name of the provider in the **Fax Facility Name** field, which is the only required field.
3. If needed, enter the: **Main Phone Number; City; State/Province; Zip; and County**.
4. Choose the type of provider from the **All Facility Types** list box and click **Select**. There may be more than one applicable provider type. If you have added a facility type and want to remove it, you may highlight the facility type and click **Unselect**.
5. When you have checked your entries for accuracy, click **Save**.

To Add Documents To A Patient Record With The Virtual Printer:

1. Start from the patient's *View Patient Information* screen, and click **Documents** on the menu bar.
2. When the *Documents* screen appears, click **Add Document** on the menu bar, and then select **Add By Print Job** from the drop-down list.
3. When the *Add a Print Job* window appears, enter a name in the required **Document Name** field.
4. Click **Print**. The *Print Now* window appears and the system is ready to receive the document.
5. Without logging out of ProviderLink, open the document you wish to print.
6. For most applications, click **File** ⇒ **Print**, select "ProviderLink Virtual Printer" from the list of printers, and click **Print**.
7. The *ProviderLink Internet Gateway* window will appear and the document will be sent to the patient record. When you see "The send completed successfully" message, click the **Close** button.
8. Minimize the document window to get back to the ProviderLink *Print Now* window and click **Close**.
9. Navigate back to the ProviderLink window (look for the "Documents Management" button on the task bar) and the document will appear in the list.
10. You may click the **Document Name** link to ensure the authorization was added successfully.

ProviderLink Quick Reference Guide

To Add A Paper (hard copy) Document To A Patient Record

1. Start from the patient's *View Patient Information* screen, and click **Documents** from the menu bar.
2. When the *Documents* screen appears, click **Add Document** on the menu bar and then select **Add By Fax** from the drop-down list.
3. When the *Add a Fax* screen appears, type a Document **Name** and click **Print**.
4. You will see a bar-coded cover page appear. Click **Print** from the menu bar and print the document to your printer.
5. Take the bar-coded cover page, PUT IT IN FRONT of the document you wish to add, and fax it to the number on the cover page. After the fax sends the document to ProviderLink, the document will appear in the patient's list of documents (i.e. on the Documents screen).

Note: It may take a few moments for the document to appear in the patient's documents list, depending on the number of pages in the fax message.

To Send A Message Through ProviderLink

1. Start from the patient's *View Patient Information* screen, and click **Send Message** from the menu bar. The *Create Message* screen appears.
2. Select the provider name from the **To Recipients** drop-down list. If the provider does not appear in the list, you may search for the facility in the same way as in "To Process an Incoming Fax Message" steps 3-5.
3. The **From Mailbox** should already be set for you.
4. Click the **Attached Documents** drop-down list to select the documents you wish to attach. Note: When including an attachment to a message to a *fax-only facility*, only documents saved as PDF or TIF files (i.e., faxes) can be sent. If other file types are attached (e.g., Word doc, text file, Excel spreadsheet, etc.), a warning will display stating that this file type cannot be sent to a fax-only facility.
5. Enter an appropriate **Subject**, which will appear on the fax cover page. For example, "OP Requisition."
6. You may enter a **Message** that will appear on the fax cover page. You may also choose to use a **Template** to enter a standardized Message.
7. If you want the recipient to reply, click the **Request a Reply** check box. You may want to deselect the **Create a Reminder Task** check box if you do not wish to be reminded you are requesting a response.
8. Click **Send**. The message will be delivered to the recipients you specified.

To View Another Work List

1. Start from the *Main Window* screen and click the **View** link in the top right corner (it will say "View" followed by the work list name). The *Choose Work List View* screen will appear.
2. Click the **View** drop-down arrow to display the list of work lists and folders available for your organization.
3. Select the work list you wish to view.
4. Click the **Submit** button to view the work list.

ProviderLink Quick Reference Guide

To Set A Reminder Task On A Patient Record

1. Start from the patient's *View Patient Information* screen.
2. In the bottom left corner in the *Status* section, click **Tasks**. The *Tasks* screen appears.
3. On the menu bar, click **New**. The *Add/Edit Scheduled Task* screen appears.
4. Enter the task **Description** and **Due Date**. You may use the calendar pop-up window by clicking the calendar icon .
5. In the **Non-viewable Comments** field, you may enter any special instructions or other comments regarding this task.
6. Click **Save** to save the task and set the reminder. You will return to the *Tasks* screen.

To Complete Or Delete (remove) A Task

1. Start from the patient's *View Patient Information* screen.
2. In the bottom left corner in the *Status* section, click **Tasks**. The *Tasks* screen appears.
3. Find the task you wish to complete and click the **Description** link. The *Add/Edit Scheduled Task* screen appears for that task.
 - a. To COMPLETE the task, click **Complete** on the menu bar and then select either **With Notes** or **Without Notes**. If you chose to complete the task with notes, enter the notes in the **Viewable Comments** field and click the **Complete Task** button.
 - b. To DELETE the task, click **Delete** on the menu bar and then select either **With Notes** or **Without Notes**. If you chose to delete the task with notes, enter the notes in the **Viewable Comments** field and click the **Delete Task** button.
4. After completing or deleting the task, you will return to the *Tasks* screen.

To View A Patient's Message History And Audit Trail

1. Start from the patient's *View Patient Information* screen and click **History Items** to view the *Message History* screen and every message sent or received relating to that patient.
2. To view a message, click the message **Subject** link.
3. Clicking **History** in the breadcrumb trail will take you back to the *Message History* screen.
4. For a more detailed record of the patient record history, click **Audit Trail** on the menu bar. This will show you a detailed history of virtually every activity regarding the patient record including what occurred, when it occurred, and the associated user name and patient record.

To Remove A Patient Record From Your Work List:

1. Start from the patient's *View Patient Information* screen in the *Linked Work Lists* section.
2. In the **Work Lists Linked To This Patient** list, select your work list name and click **Remove**.
3. When the system asks you to confirm, click **Remove**.
4. The system will display your updated work list with the patient record removed.

ProviderLink Quick Reference Guide

To Log Out Of ProviderLink:

1. From almost any screen, click **Logout** on the menu bar.
2. After you have successfully logged out, you may close the browser window.

Note: Be sure to log out before you close the browser window to prevent any unauthorized access to protected healthcare information.

To Get Help:

1. Check the online help – click **Help** on the menu bar.
2. Read the User Training Manual.
3. Contact YOUR facility administrator.
4. Contact the ProviderLink Help Desk at 866-373-0878 or email support@providerlink.com.