

ProviderLink Frequent Tasks

To Log Into ProviderLink

1. Open Internet Explorer and enter the following address: <https://healthcare.covisint.com>.
2. On the login screen, enter your **User ID** and **Password** and click **Login**. If you mistype either your User Name or Password, the system will ask you to try again.
3. If you try to log in and fail 5 times within 5 minutes, the system will suspend your user account. Go to <https://healthcare.covisint.com>. Click **Forgot Your Password?** to use your challenge question and answer to reset your password.

To Check ProviderLink For and Read Incoming Messages

1. Once logged into the system and viewing the *Main Window*, click the **View** link in the top right corner.
2. Click the **View** drop-down arrow and choose your work list. (Note: Choose *Default Incoming Fax Folder* to view the list of incoming faxes. See "To Process an Incoming Fax Message").
3. Click **Submit** to display your work list. The *Main Window* 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.
7. When the *Unread Messages for Patient* screen appears, you may read a message by clicking the **Subject** link. The message will appear.
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 either **Unread** or the *patient's name* in the breadcrumb trail at the top of the screen.

To Process an Incoming Fax Message

1. On the *Default Incoming Fax Folder Main Window* screen, click the **Get Next Fax** button. The first page of the oldest 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 in 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") (Note: If you are a folder based facility, a pop up requesting which patient folder to place the document in will appear).
8. Click the **Mailbox** drop-down arrow to display the list of mailboxes to which 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, enter "All."
11. Once you have filled in all of the fields for each message part, make sure the **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 Lookup* window, click **New** on the menu bar. The *Add Patient* screen appears.
2. Fill in, at 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 (New > Patient).

To Create a New Fax-Only Facility

1. From the *Search Results* window, click **New Contact** on the menu bar. The *Add Fax Only Facility/Contact* screen appears.
2. Enter name of the provider in the **Fax Facility Name** field.

ProviderLink Frequent Tasks

3. 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**.
4. Enter the fax contact's **First Name**. If you are unsure of the name, you may enter "**Main**".
5. Enter the **fax number** in the *Fax #* field. DO NOT enter any dashes or parentheses.
6. When you have checked your entries for accuracy, click **Save**. The provider will now appear in the *To Recipients* field.

NOTE: This also works from the Main Window (New > Facility).

To Add Documents To a Patient Record With the Virtual Print Driver

1. Start from the patient's *View Patient Information* screen, and click **Documents** from the menu bar.
2. When the Documents list appears, click **Add Document > Add By Print Job** from the menu bar.
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**, and then select **ProviderLink 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," click the **Close** button.
8. Minimize or close 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.

To Add a Paper 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 list appears, click **Add Document > Add By Fax** from the menu bar
3. When the "Add a Fax" screen appears, type a document name in the **Document Name** field and click **Print**.
4. You will see a bar-code cover page appear. Click **Print** from the menu bar and print the document to your printer.
5. Take the bar-code 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.

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 **Browse** button to select the documents you wish to attach.
5. Enter an appropriate **Subject**, which will appear on the fax cover page. For example, "OP Requisition." If available, you may also select **Template** on the menu bar to enter a standardized subject.
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.
8. Click **Send**. The message will be delivered to the recipients you specified.

To View Another Work List

1. Start from the *Main Window* 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.

To Set a Reminder Task On a Patient Record

1. Start from the patient's *View Patient Information* screen.
2. In the *Status* section, click **Tasks**. The *Tasks for Patient* screen appears.
3. On the menu bar, click **New**. The *Add/Edit Scheduled Task For Patient* 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

ProviderLink Frequent Tasks

this task.

6. Click **Save** to save the task and set the reminder. You will return to the *Tasks for Patient* screen.

To Complete or Delete (remove) a Task

1. Start from the patient's *View Patient Information* screen.
2. In the *Status* section, click **Tasks**. The *Tasks for Patient* screen appears.
3. Find the task you wish to complete and click the **Description** link. The *Add/Edit Scheduled Task For Patient* 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 for Patient* 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 for Patient* 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 for Patient* 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 to include what and when it occurred and the associated user name.

To View Overdue and Pending Items

1. On the *Main Window* screen 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 domain or facility administrator.

To Remove a Patient Record From Your Work List

1. Start from the patient's *View Patient Information* screen.
2. In the *Work Lists Linked To This Patient* list, select your work list name and click **Remove**.
3. Click the **Save** button on the menu bar or the bottom of the screen.
4. If the patient has unread messages, or unfinished tasks, the system prompts you to confirm removal. When the system asks you to confirm, click **Remove**.
5. The system will display your updated work list with the patient record removed.

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. Access the online help by clicking **Help** on the menu bar at the top of the screen.
2. Contact your ProviderLink facility administrator who, if necessary, will contact the ProviderLink Help Desk.

ProviderLink Frequent Tasks

Common Troubleshooting Issues			
Function	Issue	Steps To Resolve	What To Do Now
Unable to log into ProviderLink	The login screen does not appear.	Can you access other websites (e.g., cnn.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 user name and/or password	Use either the "Forgot your UserID?" or "Forgot your password?" features.	Go to the Covisint login screen, https://healthcare.covisint.com , and click the appropriate link.
	I have been suspended.	Contact your facility administrator.	Your facility administrator can unsuspend your user account.
Patient Records	I cannot find the patient record I was working with.	Search for the patient record using <i>Lookup > Patient</i> .	ProviderLink saves patient records indefinitely.
Messaging	I sent a message to a facility. How can I be sure it was received?	Check the History Items for the patient using the <i>History Items</i> link from the patient's View Patient Information screen.	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 is not in the Unread Messages list. Where can I find it?	Check the History Items for the patient from the patient's View Patient Information screen.	Once you have read a message, it is removed from the Unread Messages list.
Documents Management	I faxed my document 20 minutes ago and I do not see it in the patient's Documents list.	Look for the document in your facility's Incoming Fax Folder. Route the document using the fax splitter.	When ProviderLink is not sure where to route a document, the system will route the document to the Incoming Fax Folder.
	I do not 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 screen.
	The ProviderLink Print Driver gives me an error message: "Please attach a case within ProviderLink before attempting to print."	Follow the steps above to print attach a document into a ProviderLink patient record.	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.