

ProviderLink User Guide For Skilled Nursing Facilities

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1. Introduction to ProviderLink

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.

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 some of the benefits current customers of different provider types have enjoyed since coming online with ProviderLink:

Skilled Facilities

- Receive referrals from hospitals electronically
- Pager notification lets you know the moment a referral arrives
- Electronically receive and process Medicaid authorizations and prior approvals
- Broadcast referrals to assisted living, nursing homes, and other facilities

Hospitals

- **Utilization Review**
 - Less time spent faxing and on the phone
 - Extensive history and audit trail
- **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
- **Business Office**
 - Electronically receive requests for medical records
 - Respond to requests more quickly to shorten the A/R cycle

A Hands-On Tour of ProviderLink

- **Outpatient Services**
 - Central fax server allows central processing of all physician orders
 - Workflow management for outpatient processes
 - Streamline internal communication processes in one workflow

HME/DME

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

Payors

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

How This Guide Is Organized

Section 1 – The *Introduction To ProviderLink* 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 application. 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 application 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.

Conventions Used In This Guide

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.

CONVENTIONS USED IN THIS SUPPORT MATERIAL

Definition	Example
If you need to press a key on your keyboard, the text on the key will appear in a bold text .	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 text .	Click the Submit button.
When you are asked to use the menu bar, the instructions will include bold text and arrows (>) .	Lookup > Facility
A tip or important note providing helpful hints, requirements, or other important notes is indicated by the symbol to the right.	
The book icon is used to introduce an idea or concept for the first time.	

2. A Hands-On Tour Of ProviderLink

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 7.0 is recommended.

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

To Access ProviderLink:

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

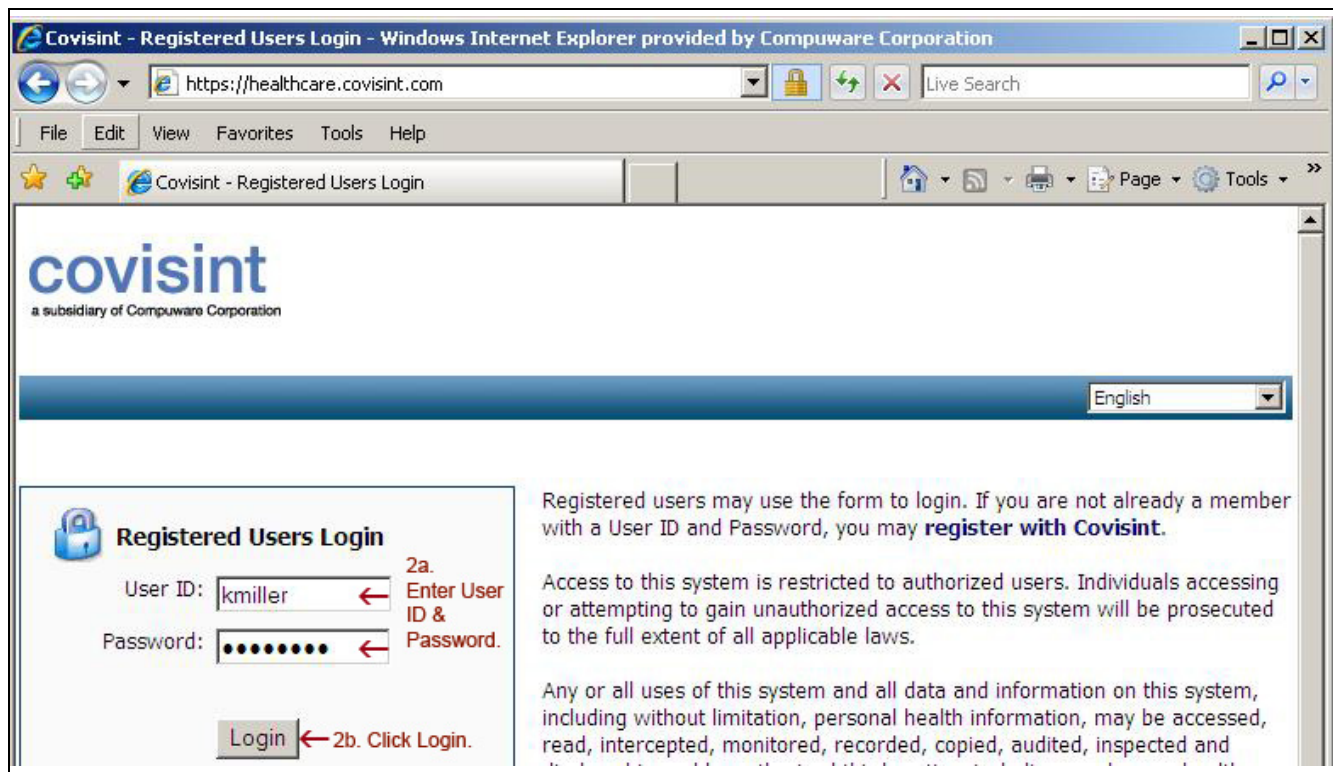


Figure 1 - Covisint login screen



Note: 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.

A Hands-On Tour of ProviderLink

3. The *Covisint Healthcare* home page displays. In the left-hand menu, under *Secure Applications*, click **ProviderLink** to launch the application.

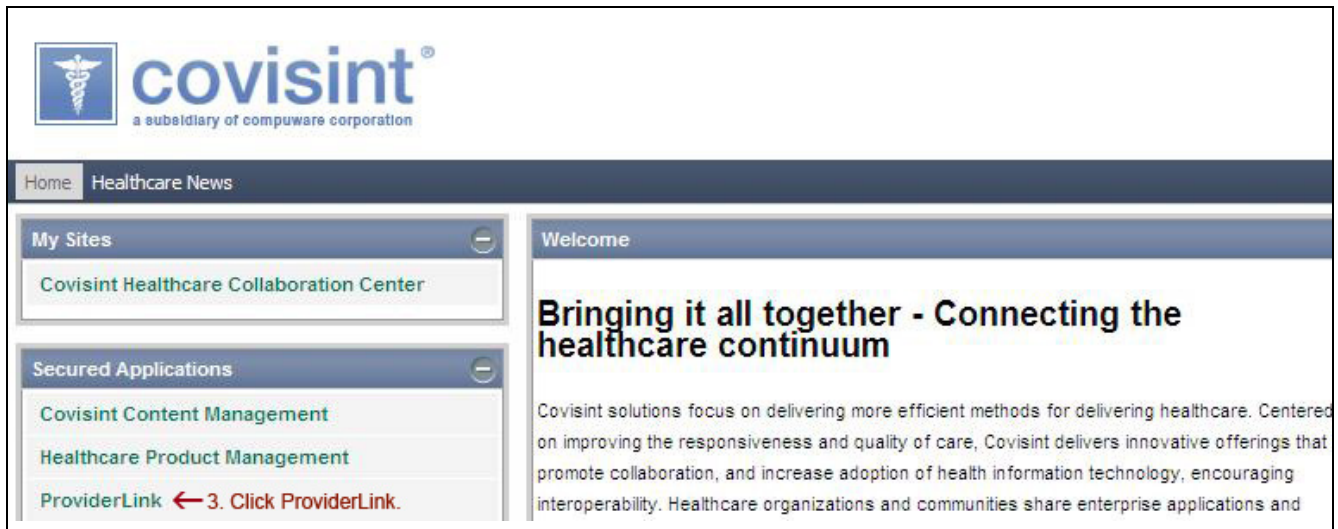


Figure 2 - Covisint Healthcare home page

RESULT:

The *ProviderLink* application opens in a new Internet Explorer window.

4. The FIRST time you login to ProviderLink, the *ProviderLink Terms and Conditions of Use Agreements* screen displays (Note: It will not display the next time you log in). Scroll down to the BOTTOM of the screen and click the **Yes** button to accept the terms of the agreement.

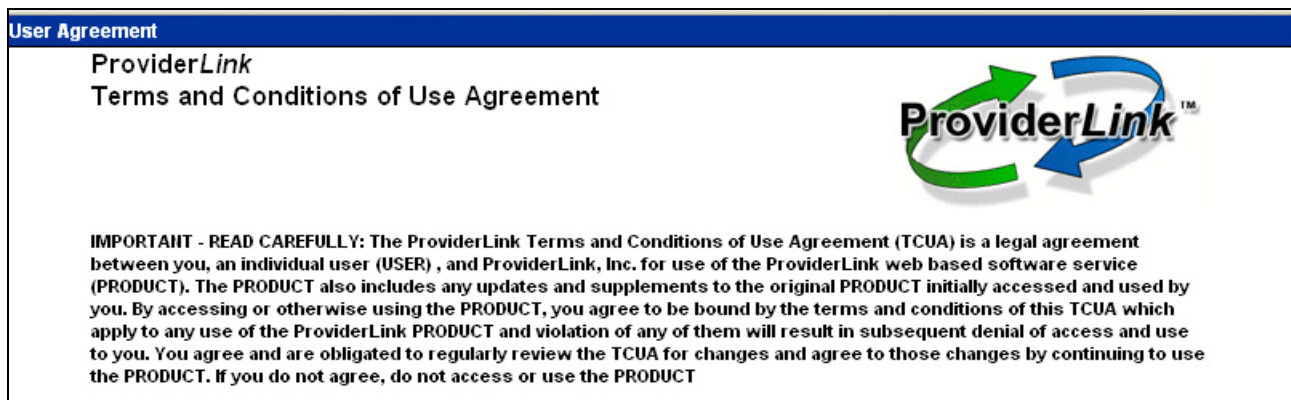


Figure 3 - ProviderLink Terms and Conditions of User Agreements screen

A Hands-On Tour of ProviderLink

5. The *ProviderLink News* screen displays. After reading the *ProviderLink News*, click the **Proceed to Application** button.



Figure 4 - ProviderLink News screen

6. The *Choose a Facility* screen displays. IF you are a multi-facility domain, select your **facility** from the drop-down list. Skip this step if you are a single-facility domain.

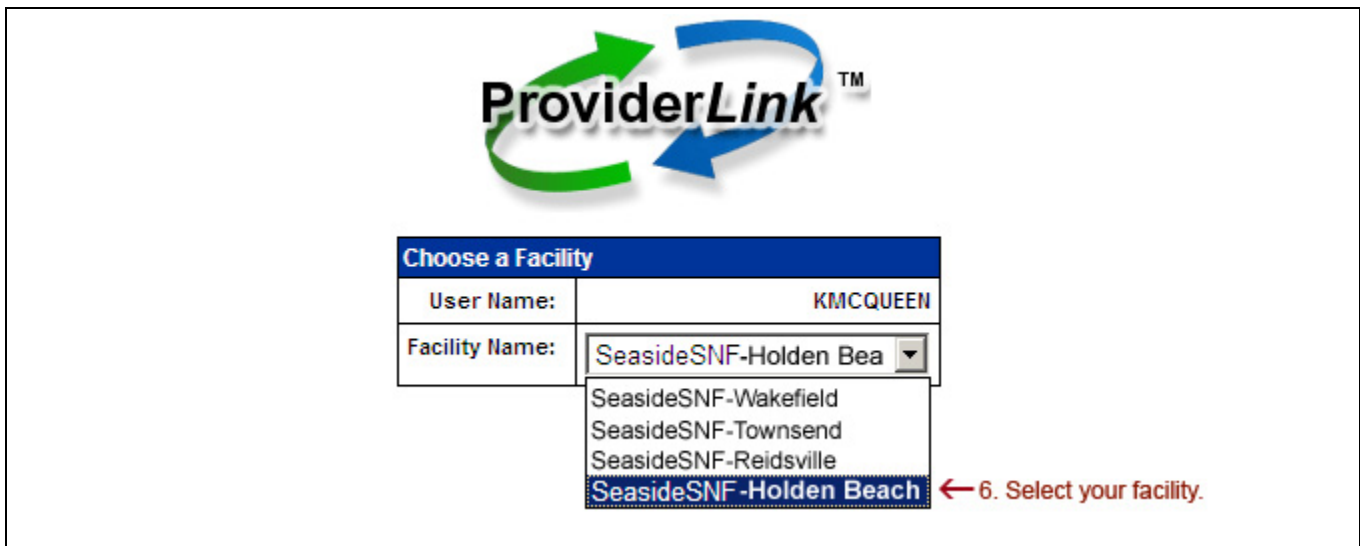


Figure 5 – Choose a Facility screen

A Hands-On Tour of ProviderLink

7. The *Choose Work List View* screen displays. *Choose Work List View* can be thought of as a caseload, or “in basket.”
 - a. Click the **View** drop-down arrow to select the work list you wish to view. The work lists are listed alphabetically.
 - b. Click the **Submit** button.

Figure 6 - Choose Work List View



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.

RESULT:

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

Failed Login

The ProviderLink application is a secure system that 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 via the Covisint login screen (see *Figure 1*). 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.

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:
 - a. Click **Forgot your password?** in the bottom left corner of the Covisint login screen.
 - b. The screen expands displaying a field to enter your **User ID** and then click **Submit**. The *Reset Password* screen displays.

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- c. 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.
 - d. Upon successful submission, the first half of the password displays on the screen, while the second half is sent to the 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.

RESULT:

You have unlocked your account and reset your password.

ProviderLink Main Window Overview

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” with which you are currently working.

1. **Menu Bar** – The Menu Bar at the top of the screen is the main navigation method to different parts of the ProviderLink application.
2. **List Summary** – This section gives an overview of the patients listed in the Main Window and displays a total of the following items in your work list:
 - Patients
 - Unread Messages
 - Tasks
 - Reviews Due
3. **View Information** – This section displays information about the current view, including the facility name, work list name, and the current user.
4. **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.

Patient	ID	Reference	Tasks	Status	Auths	Next Review	Unread	Documents
Arrington, Regina	MR123455	Bed offer	-	Admitted	None	None	1	10/01/2009
Crawford, Scott			-	None	None	None	-	None


Figure 7 – ProviderLink Main Window

Since ProviderLink is a web-based application, everywhere **blue** or **red** text displays 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 (e.g., [10/01/2009](#)) in the *Documents* column (see *Figure 7* above) will take you to that patient's documents.

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	Patient Information screen
ID	The Unique ID that helps your facility identify the patient. Most commonly used to display the medical record number.	Patient Information screen
Reference	A note that helps identify something about the patient record. See the description in the "Viewing Patient Information" section below.	Patient Information screen
Tasks	A reminder that some action needs to be taken regarding the patient record.	Tasks screen
Status	Shows whether the patient has been admitted, discharged, etc.	Patient Information screen
Auths	Shows the latest payor authorization received for the patient.	Authorizations screen
Next Review	Shows when the next payor review is due.	Scheduled Task Information screen
Unread	Lists the number of unread messages received for the patient.	Unread Messages screen
Documents	Lists the last date a document was filed for the patient.	Documents Folder 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.

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:

1. From the *ProviderLink Main Window* (see *Figure 7* above), click the **Unread Messages** link at the top of the screen. The *Main Window* content changes to display all of the unread messages.



Note: 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 (e.g., The Unread Messages link turns from blue to green).

- a. You may change the list to display either the newest or oldest messages by clicking the **Date** column header. The list will refresh with either the newest or oldest unread message appearing first.
- b. You may group messages by Sender by clicking the **From** column header. 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* section, 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:
 - *Patient List* - displays the patient list for the current work list (default option).
 - *Unread Messages List* - displays a list of unread patient messages.
 - *Task List* - displays a list of patient tasks.
 - *Reviews Due List* - displays a list of patient reviews due.
 - *Overdue Unread Messages* - displays a list of the overdue unread messages.**
 - *Message Needing a Reply* - displays a list of received messages waiting on a reply that were sent to that mailbox.**
 - *Message Waiting on a Reply* - displays a list of sent messages waiting on a reply that were sent from that mailbox.**
 - *Overdue Review Task* - displays a list of the overdue review tasks.**
 - *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.
4. To return the *Main Window* to its original state, displaying all of the patients, click **Patients** in the List Summary section.

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 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:

1. From the *Main Window* (see *Figure 7* above), click a **patient name** link in the *Patient* column.
2. The *Patient Information* screen displays. The screen is divided into different sections. From this screen, you can access anything relating to this patient.
 - a. The top section, also labeled *Patient Information*, includes the patient’s name, date of birth, and Social Security Number, etc.
 - b. The *Linked Work Lists* 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.
 - c. The bottom left section, the *Status* section, shows a brief overview of 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.

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- 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.

Save Status Authorizations Documents Demographics Send Message Document Requests Help Logout

ProviderLink™ Main Window => Arrington, Regina

Patient Information

Patient Information

Last Name: * Arrington Unique ID: MR123455
First Name: * Regina Account Number:
Middle Name: SSN: 111 - 11 - 1111
Suffix: Column Reference: Bed offer
Birthdate: * 02 / 13 / 1923 (mm/dd/yyyy) Message Reference: --Select a Message Reference--

Linked Work Lists

All Available Work Lists: Add Work Lists Linked to this Patient: * Remove

Discharge
UR

Admissions
Intake
Radiology

Status

Current Status: None
Current Admission Date: None
Last Discharge Date: None

Linked Mailboxes

Add
Hilltop Assisted Living Center - Admissions Fax Only

Figure 8 –Patient Information screen

RESULT:

You have accessed and viewed the information on a patient record.

To View Patient Documents:

1. The menu bar on the *Patient Information* screen includes links to functions (e.g., Save, Status, Authorizations, Documents, etc.) on other screens that hold information about the patient you are viewing. On the menu bar, click **Documents** (see *Figure 8 above*).
2. The list of documents stored with this patient record appears on the *Documents Folder* screen.

A Hands-On Tour of ProviderLink

New Folder Add Document E-Forms Print Help Logout

ProviderLink™ Main Window → Arrington, Regina → Document Folder: Home
Click New Folder to create a new patient folder.

Documents for Patient: Arrington, Regina
5 Total, 1 of 1 page(s)

	Name	Description	Type	Facility	User	Modified Date	Create Date
	Lab Results	lab results	Folder	-	-	07/14/2008 3:09 PM	07/14/2008 3:09 PM
	X-rays	X-rays	Folder	-	-	07/15/2008 12:33 PM	07/09/2008 9:35 AM
	Medication	medication	Folder	-	-	07/15/2008 12:34 PM	07/07/2008 3:06 PM
<input type="checkbox"/>	add by file	-	File	Medical_Center	Kate Miller	03/11/2008 12:35 PM	03/11/2008 12:35 PM
<input type="checkbox"/>	Fax From K. Miller	Fax From 9194250591	Fax	Incoming Fax Daemon	Incoming Fax Daemon	04/10/2007 10:23 AM	04/10/2007 10:23 AM

Move Select All Unselect All

Figure 9 – Documents Folder screen



Notice the different types of documents listed in the Types column: e-Form, File, and Fax. These document types are described in the *Description* column.

3. To view a document:
 - a. If the document is stored in one of the patient's subfolders, click on the **folder name** in the *Name* column. The screen refreshes and displays all of the documents stored in the subfolder. Click the **document name** link in the *Name* column. The document displays.
 - b. If the document is stored in the home folder, it appears on the screen after the subfolders (see "Fax From K. Miller" in the above screen shot), click its **name link** in the *Name* column. The document displays.

RESULT:

You have accessed and viewed documents attached to a patient's record.

To Move a Patient Document to a Subfolder:

1. On the *Documents Folder* screen (see *Figure 9* above), click the **Move icon** in the first column of the document you want to move.
2. The *Move Document* screen displays. Click the **checkbox** in front of the folder.
3. Click **Move**.

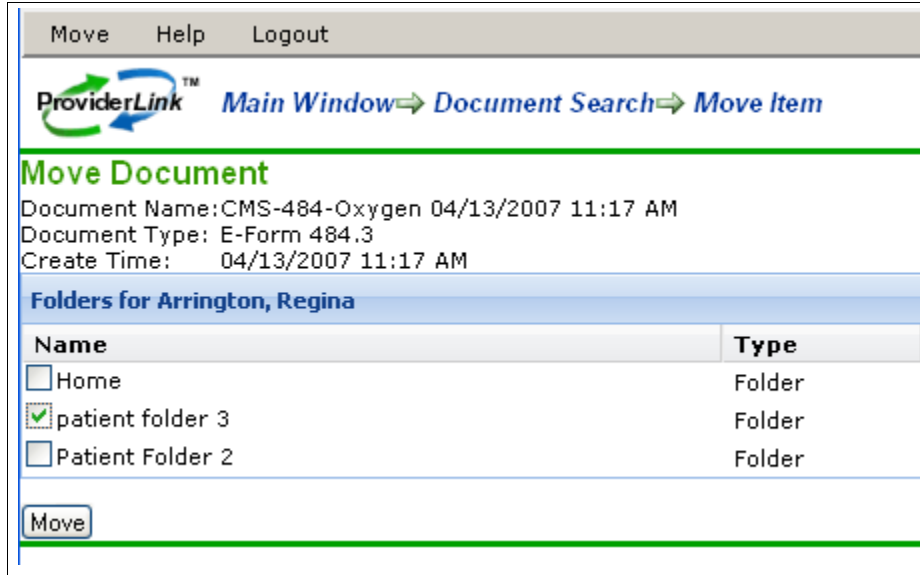



Figure 10 – Move Document screen



Note: In the first column, the  folder icon indicates a subfolder (see the Lab Results folder in Figure 9 above). A patient record must have at least one subfolder to move a document from the “Home” folder. See the next topic on how to create patient subfolders.

RESULT:

The *Documents Folder* screen returns and the document is now stored in the selected folder.

To Add New Patient Folders

With ProviderLink, you can organize patient documents by creating subfolders.

1. On the *Documents Folder* screen, click **New Folder** on the menu bar (see Figure 9).
2. The *Add Folders* screen displays. Enter the subfolder name and a description in the following fields:
 - a. **Name**
 - b. **Description**
3. To create more than one subfolder, click the **More** button. The application adds another blank row.
4. Click **Save**.

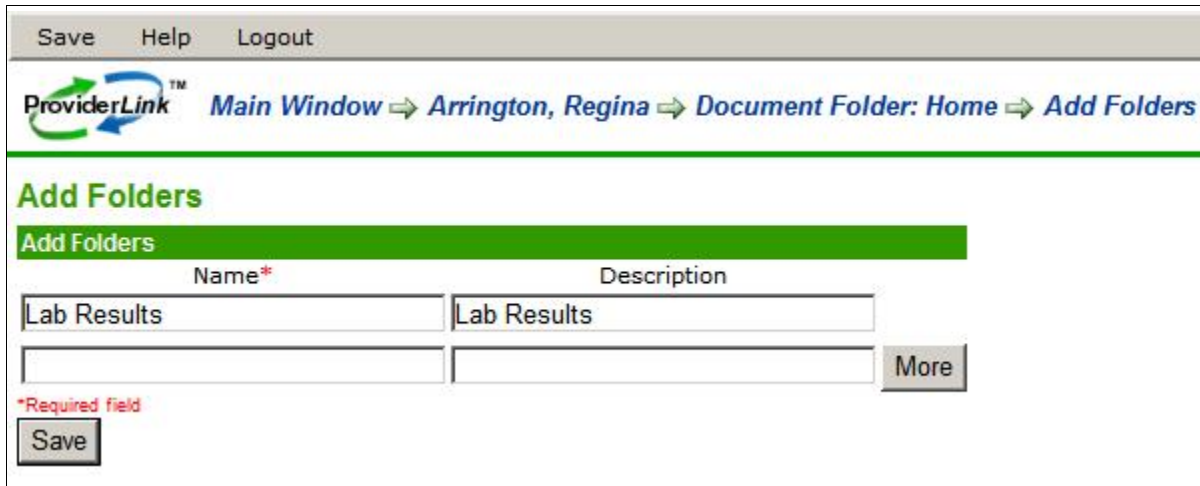



Figure 11 – Add Folders screen

RESULT:

The *Documents Folder* screen returns displaying the newly added subfolder.

Navigating The Breadcrumb Trail

The ProviderLink application 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 *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), in the *breadcrumb trail*, click **Documents** to return to the list of documents.
2. In the *breadcrumb trail*, click the **patient's name** to return to the *Patient Information* screen.

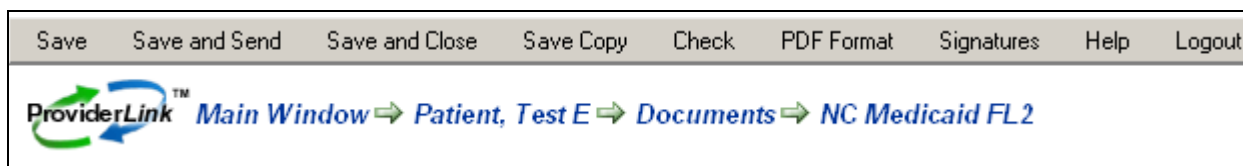


Figure 12 – Breadcrumb Trail

3. Click *Main Window* in the breadcrumb trail to return to the *Main Window*. Notice the breadcrumb trail is a one-way path back to previous screens. From the *Main Window* to re-enter the *Patient Information* screen, click the patient's name in the work list.

RESULT:

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 application.

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:

1. From the *Patient Information* screen's *Status* section, click **History Items** (see *Figure 8* above).
2. The *Message History* screen displays. The *Message History* screen shows a complete history of any messages sent or received regarding this patient.
3. 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.
4. To return the list to its original state, sorted by date and time, click **View Message History** in the *breadcrumb* trail.

Date Sent	User	To	From	Subject	#	Status	Read	Reply
06/02/2009 9:53 AM	Kate Miller	Medical_Center - Main	Raleigh Physical Therapy	Incoming Fax: Radiology Report	1	Sent	06/02/2009 9:53 AM	
04/20/2009 2:57 PM	Kate Miller	Medical_Center - Intake	Hilltop Assisted Living Center	Incoming Fax: Fax From 9191234563	1	Sent	Unread	

Figure 13 – Message History screen

5. To view a more detailed history of the patient record, click **Audit Trail** on the menu bar. The *Audit Trail* screen 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.
6. Click **Main Window** in the *breadcrumb* trail to return to the *Main Window*.



Figure 14 –Audit Trail screen



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

RESULT:

You have accessed and viewed the patient’s history items and audit trail.

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 (see *Figure 7*).
2. The *Choose Work List View* screen displays. From the *View* drop-down list, choose the **work list** you wish to view. Click the **Submit** button.

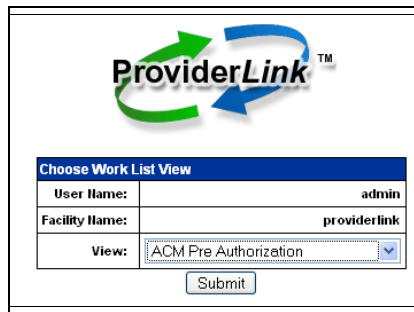


Figure 15 – Choose Work List View

RESULT:

You have changed the work list view.

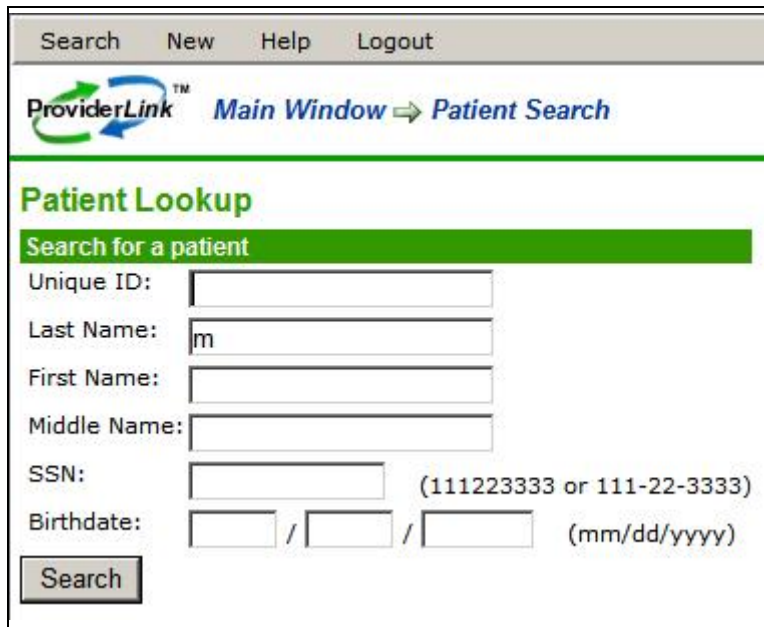
Working With Patient Records

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 (see *Figure 7*), click **Lookup > Patient**.
2. The *Patient Lookup* screen displays. 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.



The screenshot shows a web browser window titled "Search New Help Logout". Below the title bar is the ProviderLink logo and navigation links "Main Window" and "Patient Search". The main heading is "Patient Lookup" with a sub-heading "Search for a patient". The form contains input fields for Unique ID, Last Name (with "m" entered), First Name, Middle Name, SSN (with example "(111223333 or 111-22-3333)"), and Birthdate (with format "(mm/dd/yyyy)"). A "Search" button is at the bottom left.

Figure 16 – Patient Lookup screen



Note: 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.

Search New Help Logout

ProviderLink™ Main Window → Patient Search

Patient Lookup

Search for a patient

Unique ID:

Last Name:

First Name:

Middle 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 #	Account Number
York	Macy	-	06/12/1989	-	-
Julie	McCoy	-	12/11/1948	12345	-

Figure 17 – Patient Lookup screen with search results

- If the system found the patient record you were searching for, click one of the blue links to access the patient's *Patient Information* screen.
- 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.

RESULT:

You have accessed an existing patient record in ProviderLink.

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:

- From the *ProviderLink Main Window* menu bar (see *Figure 7*), click **New > Patient**.
- The *Add Patient* screen displays. 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.



Note: 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.

- 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.
- 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.

Figure 18 – Add Patient screen

- 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.

Figure 19 – Add Patient screen: Linked Work Lists section

- When you are finished entering the patient's basic information and choosing the work lists to link, click the **Save** button to save the patient record.

RESULT:

The patient record is created and saved. The screen refreshes to show you the saved patient record on the *Patient Information* screen.

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's working in the system.

To Log Out of ProviderLink:

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



Figure 20 – ProviderLink Menu Bar: Logout

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.

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 application 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 application , 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 application
- log into ProviderLink
- view Patient information
- move Patient documents
- create Patient folders
- 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

3. Section III - Using ProviderLink In Your Daily Work

Skilled Nursing Facilities

Skilled Nursing Facilities (SNF) have been rapidly changing the way they do business with their local and regional hospitals by adopting a paperless referral process made possible by ProviderLink. ProviderLink enables these SNFs to view and respond to electronic referral forms and documents that hospitals send to them online.

In most medical communities, timely and accurate decision making regarding potential admissions dramatically affects the type and volume of residents the facility admits and thereby affects the financial position of the facility. This faster process also improves the revenue cycle for these facilities as they can send and receive information, through ProviderLink, to and from their corporate offices, payors, medical directors, and other parties related to the residents plan of care. Facility administrators and corporate managers can easily review referrals to see where their business comes from and how their personnel respond.

During and following the admission of its new resident, the SNF can use ProviderLink to manage all of its admission-related documents and correspondences such as exchanges with its medical director, dialysis centers, pharmacy, billing center, transportation, and other related providers. Communications with Medicaid programs and other payors can also be transacted and documented automatically on the patient record providing a complete history of all documents, forms, and communications leading up to the admissions decision. ProviderLink affords a single screen for managing all communication for both online and offline (i.e., fax only) business associates via a bi-directional fax server. Online and faxed-back signature collection can also be transacted through ProviderLink.

ProviderLink also provides a HIPAA compliant way to do discharge planning from a SNF to home or lower level of care. ProviderLink is rapidly becoming a best practice for hospital-based discharge planners and improving overall work flows for SNF admissions coordinators.

Processing Online Referrals

ProviderLink brings much needed organization and accountability to the hospital and SNF referral process. Hospital discharge planners can send referral requests with the necessary documentation online instead of via fax. Admission coordinators and the other decision makers at a SNF can now access all of the necessary information they need regarding any potential resident's admission online. If additional information is needed, they can request it directly from the discharge planner online and the reply will be matched up with your patient record.

The hospital's discharge planner creates an online referral package in ProviderLink by print imaging and fax imaging all of the necessary documents. A customized online referral form can also be used. The referral packet is then sent to the SNF. The SNF admission coordinator can automatically be notified of a new referral in ProviderLink by pager, e-mail, or text messaging. The referral packet can be viewed online from any computer with Internet access. All of the information you receive is already imaged and can be effortlessly forwarded on to the patient's payor or attending physician. Employees who take part in decision making such as bookkeepers, administrators, and administrative nurses can be linked to online information in an orderly fashion or access referrals themselves. Admission coordinators can broadcast messages to other SNFs to verify remaining patient benefit days, and they can request additional information from the hospital by simply replying to the referral message. If the SNF decides to make an offer, it can use ProviderLink to reply insuring that both the facility and the hospital have a date and time-stamped audit trail of the fact they have formally offered a bed. All of the information exchanged between the SNF and the hospital remains indefinitely online for both parties to review creating much needed accountability in this process.

To Process An Incoming Referral (see *Figure 7*):

1. From the *Main Window screen*, check for unread messages. Perhaps the best place to look to see if you have any unread messages is in the section at the top of the *Main Window* screen while viewing the Intake work list.
2. For any referral you receive, the patient's name will appear in the *Intake* work list. To access the patient's record, click the **patient's name** in the *Patient* column. The *Patient Information* screen displays.

Using ProviderLink in Your Daily Work

3. In the status section in the lower left corner of the screen, click **Unread Messages** to view the *Unread Messages* screen.
4. Any messages you have received regarding this patient that have yet to be read will appear here. You will see when the message was received, which facility sent it, the subject, and the number of attachments included. Click the **Subject** to open the message. The *View Message* screen displays.
5. The *View Message* screen gives you more details about the message including the sender (From), the recipient (To), the date and time the message arrived, whether or not the sender requested a reply, the Subject, the Message itself, and any Attached Documents.
6. To read the Attached Documents, click the *blue document name link* to open the document in its respective viewer (See the instructions for how *To Print A Document* if you need to print the attachment).
7. When you are finished viewing the document, you may return to the incoming message screen by clicking **Main Window** in the *breadcrumb trail* near the top of the screen.

RESULT:

You have processed an incoming referral.

To Print A Document:

1. There are two ways to print the document from the ProviderLink *document viewer* screen. The best way to print the entire document is to click **PDF Format** on the menu bar. The application will render the form as a PDF document and the *File Download* window will display.
 - a. If the Signatures option does not appear on the menu bar, you will need to **Save** the e-Form first.



Note: 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:

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

2. On the *File Download* window, click the **Open** button to open 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.

RESULT:

Once the document is printed, you may close your PDF reader and return to ProviderLink.

Responding to Referrals

Discharge planners deal with some of the most time critical communications in the hospital, which include keeping up with changing discharge dates and SNF bed availability. They compile referral packages based on information from several different systems and paper-based charts. They generally broadcast these referral packages to several SNFs to get the best chance for placing their patients and discharging them from the hospital. The sooner they can get responses from the SNFs, the sooner they can place the patients and discharge them from the hospital. Reducing length-of-stay is an important metric directly tied to a hospital's financial viability.

When the hospital or another referring facility sends a placement request through ProviderLink, the admissions coordinator can review the message that contains the admissions packet almost immediately. After reviewing the request and the attached documents, the admissions coordinator can usually make the determination to accept the request and admit the patient, deny the request, or ask for more information before making a determination. Most hospital discharge planners may not be immediately available to take phone calls regarding

patients they are trying to refer. Sending your responses to the discharge planners online through ProviderLink helps them get your responses immediately and allows them to process their referrals at once.

To Respond To A Referral Message:

1. From the *View Message* screen (the incoming message from the hospital), click **Reply** on the menu bar.

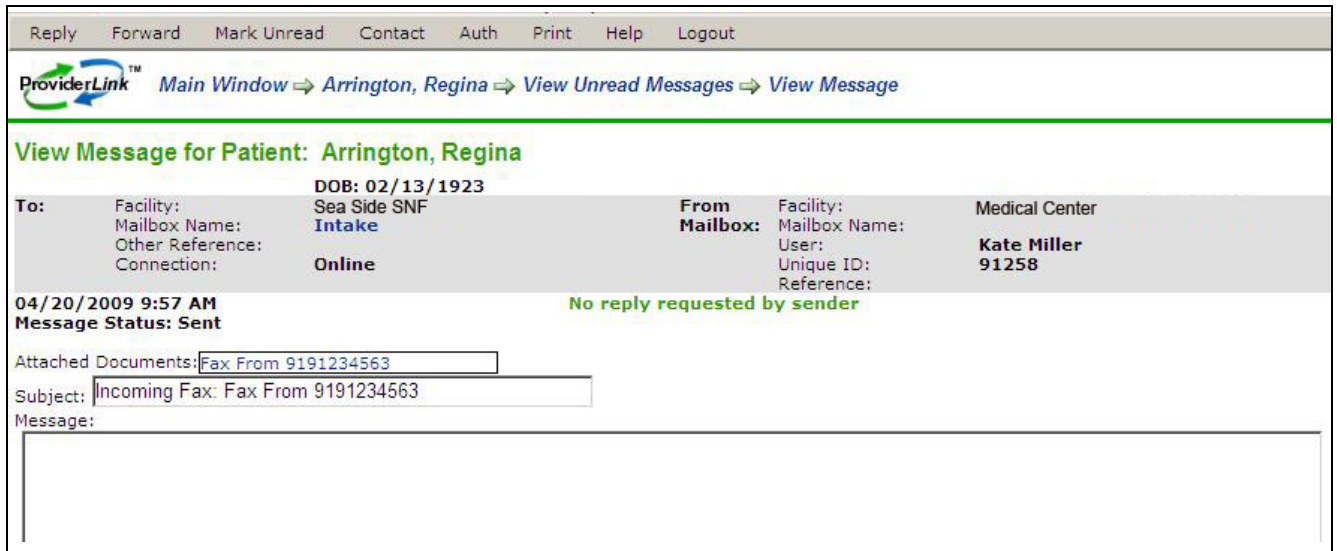


Figure 21 – View Message screen

2. The *Create Message* screen displays. Notice the message is already addressed to the referring facility as the mailbox appears in the **To Recipients** list box. The **From Mailbox** should already be chosen for you, as well.
3. If necessary, click the **Browse** button to select the document(s) you wish to attach to the message. The document, once chosen, is added to the **Documents To Attach** list box.



Note: If you have added a document to the *Documents To Attach* list box by mistake, you may remove it from the list. To remove a document from the *Documents To Attach* list box, simply **double-click** on the *Document* name.

4. The message **Subject** reflects you are replying to a message (RE:). You may change the message subject if you wish, though it is generally a good idea for your reply to have a subject related to the original message.
5. You should see the original message automatically quoted in the **Message** field. Enter your message in the **Message** field. You may use a message template by clicking **Templates** from the menu bar. You may customize or edit the text that was added by the template.



Message Templates are used for adding standardized text to the body of the message. This will help the outgoing messages from your facility stay consistent no matter which user sends them.

With the help of your facility administrator, you can create message templates to accept or turn down patient referrals, seek more information, and send bed availability notices.

6. There is no need to put a check in the **Request a Reply** check box as the hospital discharge planner is expecting your response.
7. Once you are satisfied with your reply to the message, click **Send** on the menu bar to send your message.

The screenshot shows the 'Create Message' interface in ProviderLink. At the top, there are navigation links: 'Send', 'Templates', 'Print', 'Help', and 'Logout'. Below that is the breadcrumb trail: 'Main Window ⇒ Arrington, Regina ⇒ View Unread Messages ⇒ View Message ⇒ Create Message'. The main title is 'Create Message: Arrington, Regina' with a 'DOB: 02/13/192...' field on the right. The form includes a 'To Recipients' dropdown menu (currently showing 'Medical_Center - Intake - Online'), a 'From Mailbox' dropdown (showing 'Main'), and a 'Documents To Attach' field (showing 'Radiology Report 06/02/2009 04:53 AM') with a 'Browse' button. The 'Subject' field contains 'RE:Radiology Report'. On the right side, there are several checkboxes: 'Link All Recipients' (checked), 'Request a Reply', 'Include Fax-Back Cover Page (For Fax Only Recipients)', and 'Create a Reminder Task'. At the bottom, there is a 'Message' text area containing a reply template: 'Enter your reply message here.' followed by a separator line and a sample message header: 'Subject: Incoming Fax: Fax From 9191234563', 'Sent: 04/20/2009 9:57 AM', and 'Text:'.

Figure 22 – Create Message screen

RESULT:

ProviderLink sends the reply and returns you to the incoming message screen (i.e., *View Message* screen).

Admitting A Patient To Your Facility And Organizing Your Work Lists

When you decide to accept a referral and admit a patient to your facility, ProviderLink can help you document the admission process and transmit the necessary information to the departments and facilities that need it.

Your work lists allow you to manage the patient records under your care. By linking your patient records to the different work lists in your facility, you are able to move the patient records to the people or departments that need them for processing.

To Update the Patient Record to Record the Admission:

1. Go to the patient's *Patient Information* screen (see *Figure 24* below). If you are currently viewing the *Main Window* screen, click the patient's **Name** link. If you are viewing another part of the patient's record, click the patient's name in the breadcrumb trail. The *Patient Information* screen displays.
2. To help ProviderLink properly store the patient record, enter the patient's account number or medical record number in the **Unique ID** field.
3. Enter the patient's Social Security Number in the **SSN** field.
4. Update the **Column Reference** field with information about the bed offer and your response. You may add any information in this field to track referrals.



The Column Reference field is used for documenting information about the patient's status, the patient's current setting, or anything else about the patient that may not fit into any other field. It can also serve as a reminder for you or a coworker, much the same way as a note attached to the patient record.

Anything entered in the Column Reference field on the Patient Information screen will appear on the Main Window screen in the Reference column. This allows you to see the reminders on the Main Window screen as soon as you log in.

5. Link the patient record to the Business Office work list.
 - a. In the middle section of the *Patient Information* screen, find the *Linked Work Lists* section.
 - b. The list box on the left, *All Available Work Lists*, shows all of the work lists that exist in the system that is not linked to the patient record. There you should find the Business Office work list.
 - c. Click the **Business Office** work list to select it.
 - d. Click the **Add** button to add the Business Office work list the list of *Work Lists Linked to this Patient*.
6. To save your changes, click **Save** on the menu.

Save	Status	Authorizations	Documents	Demographics	Send Message	Document Requests	Help	Logout
------	--------	----------------	-----------	--------------	--------------	-------------------	------	--------

ProviderLink™ Main Window ⇒ Arrington, Regina

Patient Information

Patient Information			
Last Name: *	Arrington	Unique ID:	MR123455
First Name: *	Regina	Account Number:	
Middle Name:		SSN:	111 - 11 - 1111
Suffix:		Column Reference:	Bed offer
Birthdate: *	02 / 13 / 1923 (mm/dd/yyyy)	Message Reference:	--Select a Message Reference--

Linked Work Lists

All Available Work Lists:	Add	Work Lists Linked to this Patient: *	Remove
Discharge UR		Admissions Intake Radiology	

Status	Linked Mailboxes
Current Status: None	Add
Current Admission Date: None	Hilltop Assisted Living Center - Admissions
Last Discharge Date: None	Fax Only

Figure 23 –Patient Information screen

RESULT:

You have updated the patient record to include admission information. Notice the comments you entered in the *Reference* column.

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.

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 records 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 *Patient Information* screen, locate the *Linked Work Lists* section in the center of the screen (see *Figure 24* above).
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**.

RESULT:

The system saves patient record and adds it to the linked work list(s).

To Remove a Work List From the Patient Record:

1. From the *Patient Information* screen, locate the *Linked Work Lists* section in the center of the screen (see *Figure 24* above).
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 or 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.

RESULT:

Once the patient is removed from the work list, the updated work list appears with the remaining patient records.

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 paper document or 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 *Patient Information* screen (see *Figure 24* above), click **Documents** on the menu bar to view the *Documents For Patient* screen. The *Documents Folder* screen displays.

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2. On the menu bar of the *Documents Folder* screen, click **Add Document → Add By Fax**.



Figure 24 – Documents Folder screen

3. On the *Fax Attach* screen in the **Document Name** field, enter a 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.

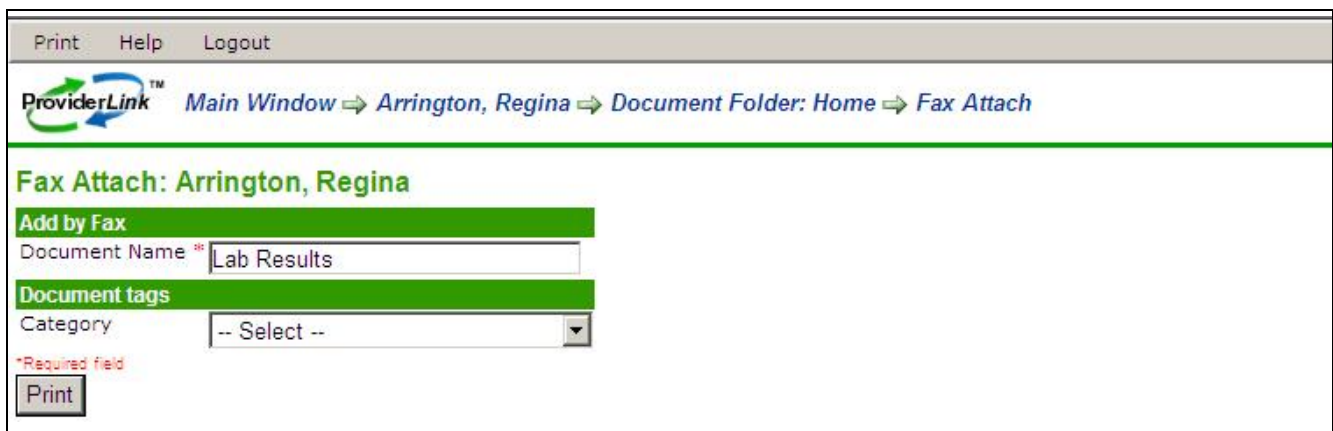


Figure 25 – Fax Attach screen

5. After the cover page prints, click **Close** on the *Fax Attach* screen's menu bar to close the cover page and return to the *Documents Folder* screen.
6. Once the cover page prints, place it on top of the documents and fax the package to the number indicated on the cover page. After the fax successfully sends, the document will be listed on the *Documents Folder* screen (this screen may need to be refreshed).
7. On the *Documents Folder* screen, click the document **Name** link to view the document you added.

RESULT:

A hard copy of a document has been added to the patient record by using the Fax Attach function.

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

1. From the *Patient Information* screen (see Figure 24), click **Documents** on the menu bar to view the *Documents Folder* screen.
2. On the menu bar of the *Documents Folder* screen (see Figure 25), click **Add Document → Add By Print Job**.
3. The *Print Attach* screen displays. In the **Document Name** field, enter a name that fits the type of document you are adding.
4. Click the **Print** button.

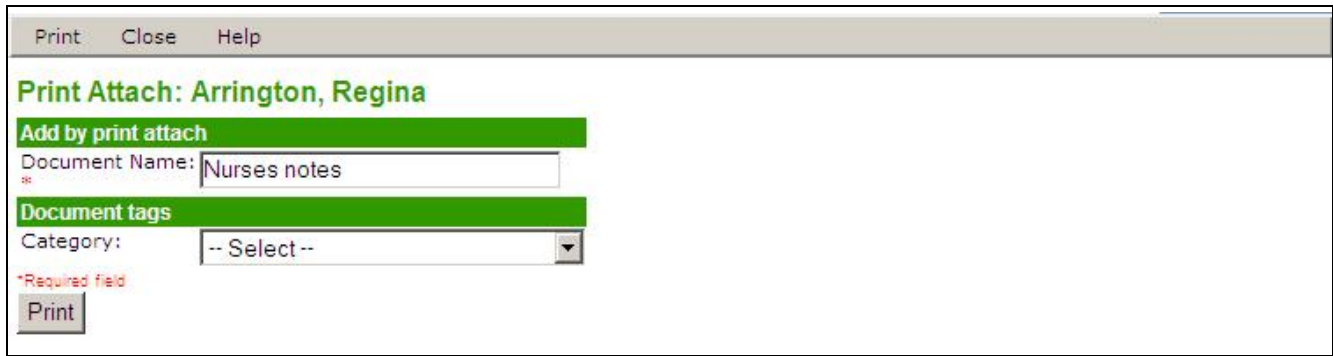


Figure 26 – Print Attach screen

5. The *Print Now* screen displays and the system is ready to receive the document from another application. Leaving the ProviderLink windows open, open the **system** that contains the document, and prepare to print it.
6. Change the printer options to print the report with the **ProviderLink Virtual Printer**. The document will spool to the printer and the ProviderLink Internet Gateway dialog box displays.
7. After the status bar fills and the dialog displays the message “The send completed successfully,” click the **Close** button.
8. Minimize or close the 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 the list.

RESULT:

A document, from another system, has been added to the patient record by using the Print Attach function.



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.

To Add An Electronic Form (e-Form) to a Patient Record:

1. From the *Patient Information* screen's menu bar (see *Figure 24*), click **Documents** to view the *Documents Folder* screen.
2. On the menu bar of the *Documents Folder* screen, click **e-Forms** to view the available forms.
3. From the drop-down list, select the **e-Form**.

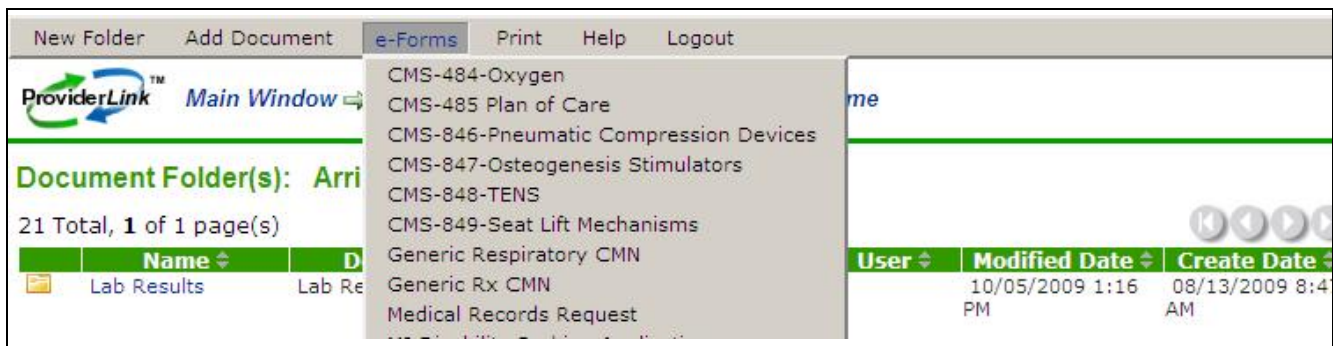


Figure 27 – Documents Folders screen: e-Forms list

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4. The system will display the e-Form on the *Form* screen. 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.

Save Save and Send Save and Close Check Format Help Logout

ProviderLink™ Main Window => Arrington, Regina => Document Folder: Home => CMS-484-Oxygen

CERTIFICATE OF MEDICAL NECESSITY
CMS-484 Oxygen
* indicates a required field

Section A

Certification Type: -- Select --

Initial Date: (mm/dd/yyyy)

Revised Date: (mm/dd/yyyy)

Recertification Date: (mm/dd/yyyy)

Patient Name: Regina Arrington

Supplier Name:

Figure 28 – e-Form example

RESULT:

The completed e-Form has been saved and added to the patient record.

Adding Signatures To 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 document to be valid. Depending on your workflow and practices, you can easily obtain and process these signatures on any ProviderLink document.

There are three ways to obtain signatures for your e-Forms and other documents in ProviderLink:

1. electronic signatures using a ProviderLink user name and password
2. sending the document to the signor's office with a bar-coded, fax-back cover page
3. or printing the form for signature and scanning it into ProviderLink with a bar-coded cover page. Once the document is signed, the signature is stored with the document and, in the Documents list, 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.

Electronic Signatures

Most state Medicaid departments and their subcontractors, most skilled facilities, and various other 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 e-Form or document you wish to sign, on the document viewer screen, click **Signatures → Electronically Sign**.

The screenshot shows the ProviderLink software interface. At the top is a menu bar with options: Save, Save and Send, Save and Close, SaveCopy, Check, Format, Signatures, Note, Help, Logout. The 'Signatures' menu is open, showing options: Send For Signature, Print For Signature, Electronically Sign, and View Signatures. Below the menu bar, the breadcrumb trail reads: Main Window → Arrington, Regina → Document Folder: Home → NC Medicaid PASARR → CMS-484 Oxygen. The main content area displays the title 'CERTIFICATE OF MEDICAL NECESSITY CMS-484 Oxygen' and a note: '* indicates a required field'. Below this is 'Section A' with several input fields: Certification Type (a dropdown menu), Initial Date (with a calendar icon), Revised Date (with a calendar icon), and Recertification Date (with a calendar icon). At the bottom, there are fields for Patient Name (containing 'Regina Arrington') and Supplier Name.

Figure 29 – e-Form: Signatures option

- a. If the Signatures option does not appear on the menu bar, you will need to **Save** the e-Form first.
2. The *Electronic Signature* screen displays. Select your name from the **Name** (“I am...”) drop-down list and enter your **Password**. Click the **Sign Document** button.

The screenshot shows the 'Electronic Signature' screen. The breadcrumb trail is: Main Window → Arrington, Regina → Document Folder: Home → NC Medicaid PASARR → Electronic Signature. The title is 'Electronic Signature: NC Medicaid PASARR 08/20/2009 09:32 AM'. Below the title is a green bar that says 'Add signature to the document'. The text reads: 'I am [Karen Daily] and I attest to the accuracy of this document.' Below this is a 'Password:' field and a 'Sign Document' button.

Figure 30 – Electronic Signature screen

RESULT:

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 on the e-Form screen now has fewer options.



HIPAA regulations require 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.

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, on the e-Form screen, click **Signatures** → **Print for Signature**. (see *Figure 30*). The system will render the form as a PDF document and you will be asked to open it using your PDF reader.
 - a. If the Signatures option does not appear on the menu bar, you will need to **Save** the e-Form first.



Note: 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:

If this occurs, simply click the yellow security message and, when the pop-up menu displays, 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, fax cover page on top of the form and **fax** it to the number on the cover page.

RESULT:

Once the ProviderLink application receives the fax and reads the bar code, the signed document will appear in the patient's documents list.

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 send 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, on the e-Form screen, click **Signatures** → **Send for Signature** (see *Figure 30*). The *Create Message* screen displays with the document already attached, the **Subject** is completed.
 - a. 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 look it by clicking the **Search** button. The *Facility Search* pop-up window displays. Enter the search criteria. Select the appropriate facility from the search results. Close the screen to return to the *Create a Message* screen.
4. On the *Create a Message* screen, enter an appropriate message **Subject** (i.e., "Level 1 PASARR").



Note: The message subject is important for several reasons. First, the subject alerts the recipient of your message 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.

5. If necessary, enter a **message**.
6. 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 the **document name** in the breadcrumb trail.
7. When you are ready to send the message, click **Send** on the menu bar.



Note: 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.

RESULT:

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.

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 Tasks for Patient screen:

1. If you are using tasks to remind you when a review is due, click **Tasks** from the *Status* section on the *Patient Information* screen (see *Figure 24*).
2. The *Tasks* screen displays with the listed tasks. Find the task for which you are sending the review and click the task's **Description** link.

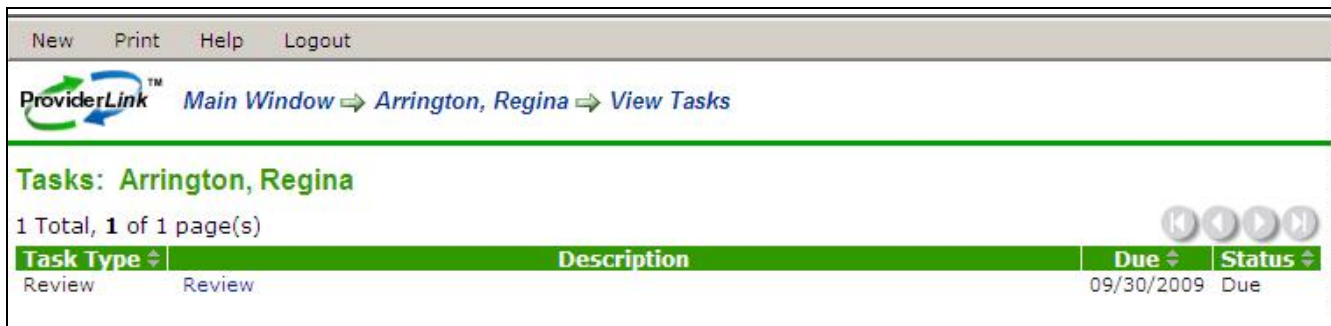


Figure 31 – Tasks screen

3. The *Scheduled Task Information* screen displays. 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 (i.e., envelope).

Figure 32 – Scheduled Task Information screen

4. The *Create Message* screen displays with the message already addressed to the chosen facility.
5. 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.

6. Fill in a message **Subject**. Be sure the message includes the patient reference number or other insurance information to identify the patient.
7. Because you will want the insurance payor to respond to you with authorization information, click the **Request a Reply** check box.
8. You can be reminded that you are awaiting a reply from the payor by selecting the **Create a Reminder Task** check box.
9. When you are satisfied with your message, click **Send** on the menu bar. The system will send the message and return you to the *Scheduled Task Information* 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.

10. Now that you have completed the task, from the *Scheduled Task Information* screen's menu bar click **Complete → Without Note**. The system will return you to the *Tasks* screen.

RESULT:

A clinical review has been sent the payor via an online message or fax.

To Send a Review to a Payor From the Patient Information screen:

1. From the *Patient Information* screen *Linked Mailboxes* section, click the **payor's name** link. The *Create Message* screen displays with the message already addressed to the chosen facility.
2. Follow Steps 4 to 9 above to send the review to the payor. When finished, you will return to the *Patient Information* screen.

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.

If the payor is online, they will 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 screen and on the 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 *Patient Information* screen *Status* section (see *Figure 8*), click the **Unread Messages** link. The *Unread Messages For Patient* screen displays with the oldest message appearing at the top of the list.
2. Click the **Subject** link for the message you wish to read. The *View Message* screen (see *Figure 22*) displays.
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.
4. If you wish to reply to the message, click **Reply** on the menu bar. The *Create Message* screen (see *Figure 23*) will appear with the **To Recipient** and **Subject** fields already populated for you. Fill in the rest of the fields accordingly, and click **Send** on the menu bar to send the reply.
5. If you wish to forward the message to another user or facility, click **Forward** on the menu bar. The *Create Message* screen will appear with the **Subject** and **Message** fields already populated for you. Fill in the rest of the fields accordingly, and click **Forward** on the menu bar to 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.

RESULT:

Patient messages from a payor have been accessed and read.

To Post Authorizations Received From Fax-only Payors:

1. From the *Patient Information* screen *Status* section (see *Figure 8*), click the **Current Authorization** link, or click **Authorizations** from the menu bar.
2. The *Authorizations* screen displays. From the menu bar, click **Add Authorization**.



Figure 33 – Authorizations screen

3. The *Authorization Information* screen displays. If necessary, select the correct insurance payor from the **Issuer** drop-down list.
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** on the menu bar to save the authorization.

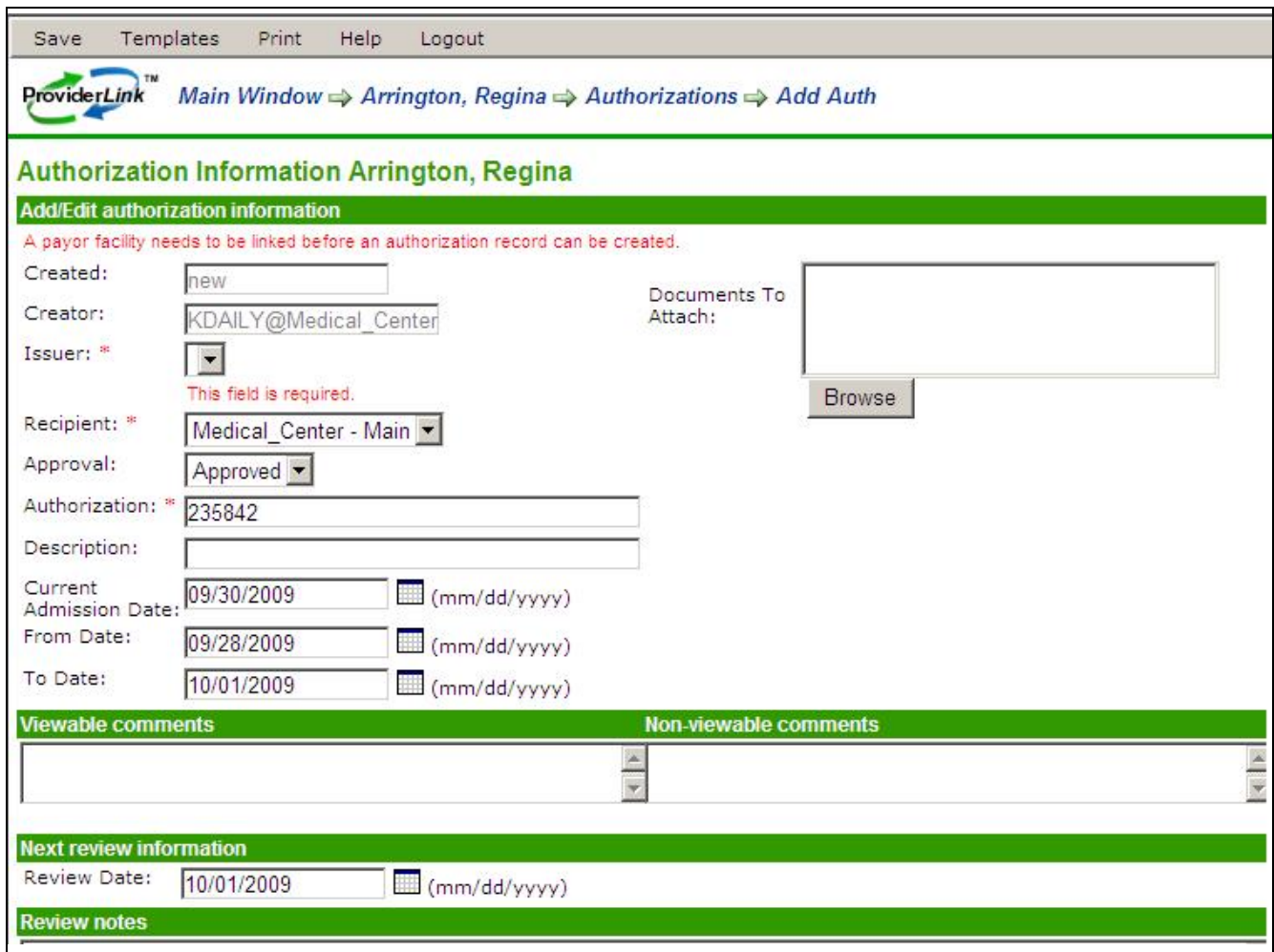


Figure 34 – Authorization Information screen

RESULT:

The authorization from a payor has been posted to the patient record and a task created for the next review date.

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 Patient Information screen.

To Change the Patient's Discharge Date:

1. From the *Patient Information* screen *Status* section (see *Figure 8*), click the **Last Discharge Date** link. If necessary, enter the patient's **Unique ID** in the required field.
2. The *Patient Discharged* screen displays. 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.
3. You may use the **Viewable Comments** field to note the conditions or circumstances under which the patient was admitted.
4. If there is a payor contact linked to the patient, you may choose to send a message to notify the payor of the patient's change in status by clicking the payor's check box (located below the *Viewable Comments* box).
5. Click **Save** on the menu bar to change the patient's status and send the message(s) to the payor(s).

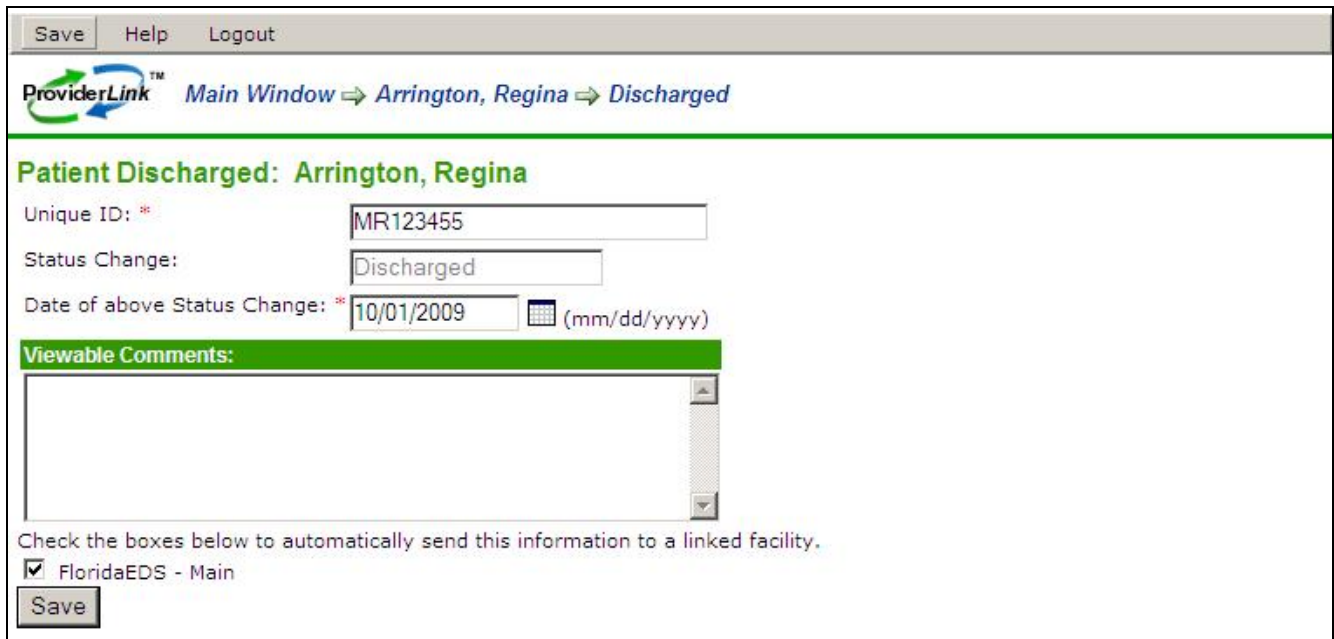


Figure 35 – Patient Discharged screen

RESULT:

The system changes the patient's Status field to "Admitted," and updates the Current Admission Date.

Section 3 Summary

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

- receive and respond to patient referrals
- admit a patient to your facility
- manage your work lists
- add documents to patient records
- add signatures to documents
- send reviews to payors
- process payor responses
- change the patient's discharge date

4. 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., 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 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.	
Patient Records	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.	
		I can't find the patient record I was working with.	Search for the patient record.	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.	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 Print Driver gives me an error message: "Please attach a case within ProviderLink before attempting to print."	Follow the steps on how to 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**. Choose **Default Incoming Fax Folder** to view the list of incoming faxes.
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 *Patient Information* screen displays, click the **Unread Messages** link in the *Status* section in the bottom right corner.
7. When the *Unread Messages for Patient* screen displays, 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 displays.
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 Lookup screen*, click **New** on the menu bar. The *Patient Information* screen displays.
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. Click **New > Patient** on the menu bar.

ProviderLink Quick Reference Guide

To Create A New Fax-Only Facility

1. From the *Main Window*, click **Lookup > Facility**. The *Facility Lookup* screen displays. Click **New** on the menu bar. The *Fax Facility Information* screen displays.
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 the **Select** button. 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 Print Driver

1. Start from the patient's *Patient Information* screen, and click **Documents** on the menu bar.
2. When the *Documents* screen displays, click **Add Document** on the menu bar, and then select **Add By Print Job** from the drop-down list.
3. When the *Print Attach* pop-up window displays, enter a name in the required **Document Name** field.
4. Click **Print**. The *Print Now* window displays 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 *Patient Information* screen, and click **Documents** from the menu bar.
2. When the *Documents* screen displays, click **Add Document** on the menu bar, and then select **Add By Fax** from the drop-down list.
3. When the *Fax Attach* screen displays, 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 *Patient Information* screen, and click **Send Message** from the menu bar. The *Create Message* screen displays.
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 search for and 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.

ProviderLink Quick Reference Guide

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.

To Set A Reminder Task On A Patient Record

1. Start from the patient's *Patient Information* screen.
2. In the bottom left corner in the *Status* section, click **Tasks**. The *Tasks* screen displays.
3. On the menu bar, click **New**. The *Scheduled Task Information* screen displays.
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 *Patient Information* screen.
2. In the bottom left corner in the *Status* section, click **Tasks**. The *Tasks* screen displays.
3. Find the task you wish to complete and click the **Description** link. The *Scheduled Task Information* screen displays 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.

ProviderLink Quick Reference Guide

To View A Patient's Message History And Audit Trail

1. Start from the patient's *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 *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.

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. Click **Help** on the menu bar of any ProviderLink screen.
2. Contact YOUR facility administrator.
3. Contact the ProviderLink Help Desk at 866-373-0878.