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a subsidiary of Compuware Corporation

ProviderLink User Training Manual

VIRTUAL FAX SERVICE

ProviderLink
User Training Manual
Virtual Fax Service

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I. Overview - Virtual Fax Service

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

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

II. Types Of Folders

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

Message Folder

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

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

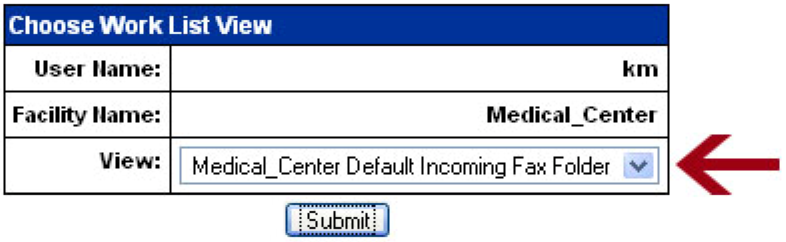
Folder Folder

The Folder folder type allows you to store documents without requiring you to link them with patient records. This workflow allows you to move documents from folder to folder without moving a patient record. One limitation of documents that are not linked to patient records is that they may not be attached to messages or sent using ProviderLink.

III. Processing An Incoming Fax

To Process An Incoming Fax In A Message-Type Folder:

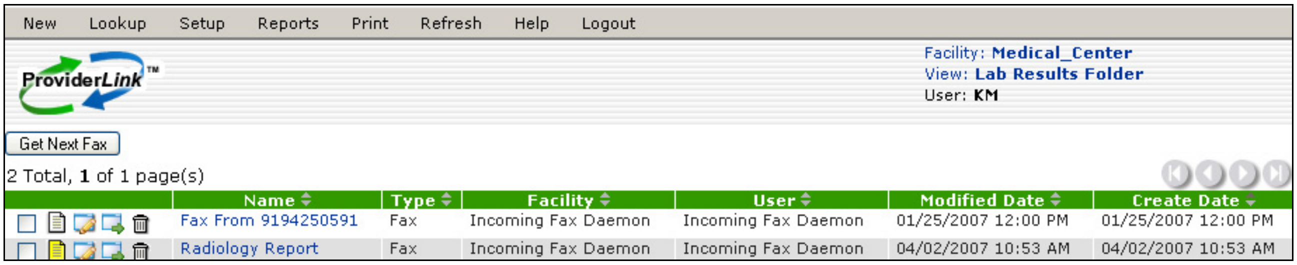
1. Open your *Internet Explorer* browser and launch the *ProviderLink* application.
2. On the *Choose Work List View* screen:
    a. Select your facility’s **Default Incoming Fax Folder**.



Choose Work List View

User Name:	**km**
Facility Name:	**Medical_Center**
View:	Medical_Center Default Incoming Fax Folder

b. Click **Submit**. The *Documents* screen displays. You will see a list of the faxes received with the oldest faxes on top.

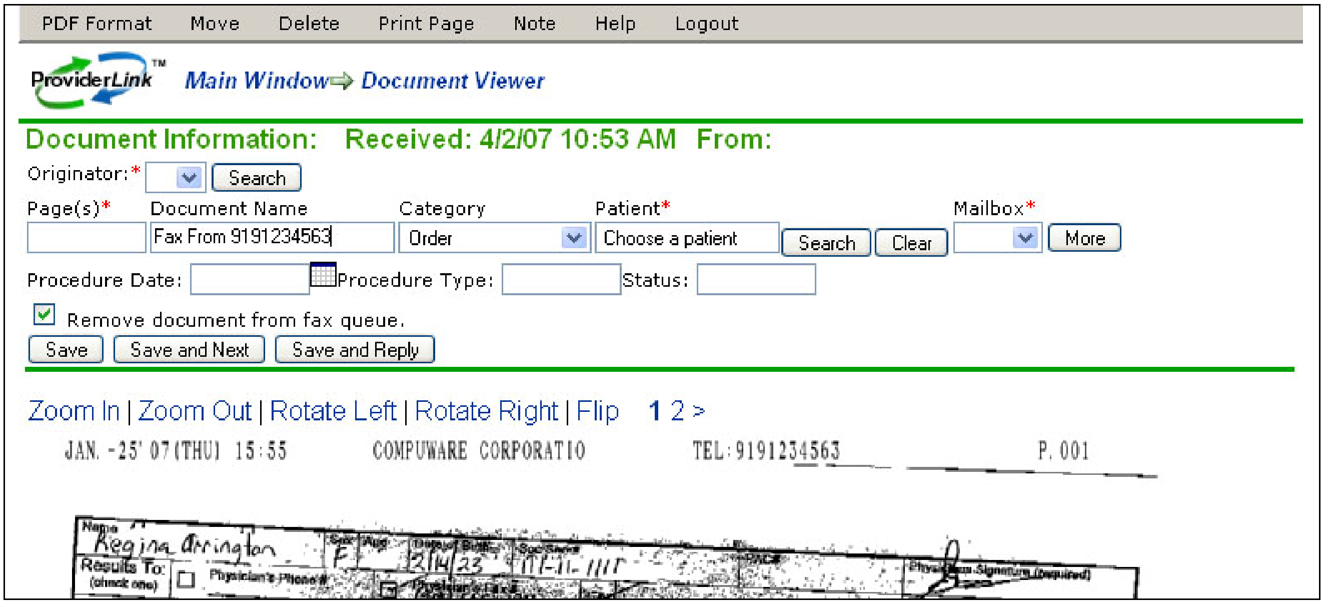

New
Lookup
Setup
Reports
Print
Refresh
Help
Logout
ProviderLink™
Get Next Fax

Facility: **Medical_Center**
View: **Lab Results Folder**
User: **KM**

2 Total, **1** of 1 page(s)

Name	Type	Facility	User	Modified Date	Create Date
Fax From 9194250591	Fax	Incoming Fax Daemon	Incoming Fax Daemon	01/25/2007 12:00 PM	01/25/2007 12:00 PM
Radiology Report	Fax	Incoming Fax Daemon	Incoming Fax Daemon	04/02/2007 10:53 AM	04/02/2007 10:53 AM

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

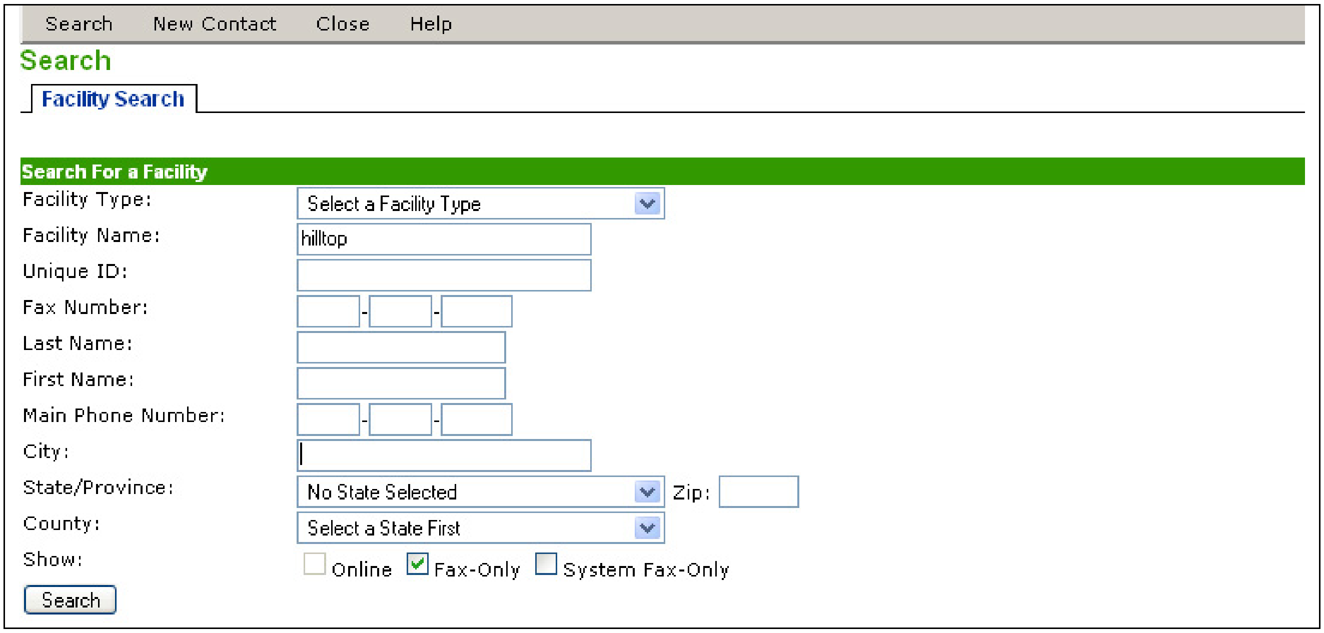

PDF Format
Move
Delete
Print Page
Note
Help
Logout
ProviderLink™
Main Window ⇨ Document Viewer
Search
Search
Clear
More
Save
Save and Next
Save and Reply
Zoom In | Zoom Out | Rotate Left | Rotate Right | Flip
1 2 >

Document Information: Received: 4/2/07 10:53 AM From:

Originator:*
Page(s)*
Document Name: Fax From 9191234563
Category: Order
Patient*: Choose a patient
Mailbox*
Procedure Date:
Procedure Type:
Status:
☑ Remove document from fax queue.

JAN.-25'07(THU) 15:55 COMPUWARE CORPORATIO TEL:9191234563 P.001

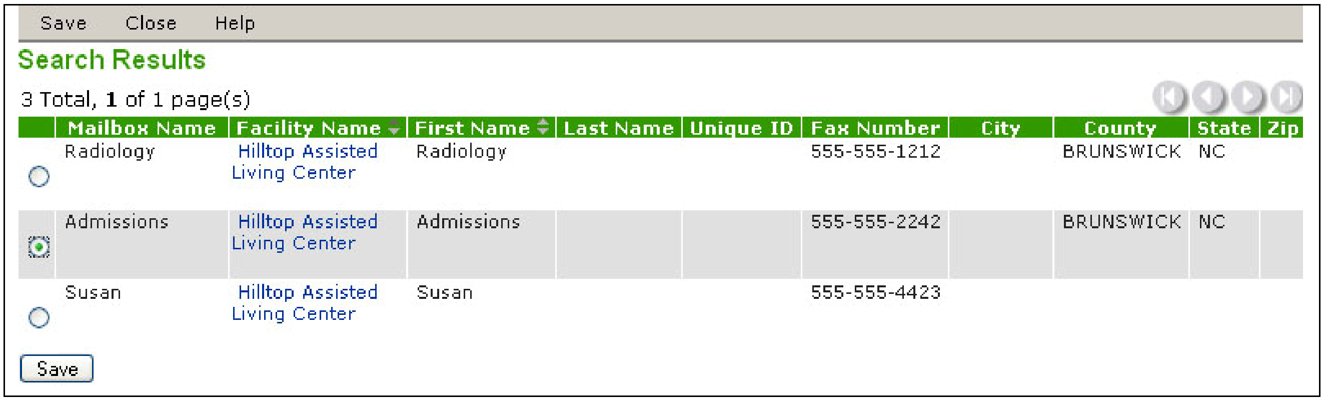
4. Above the fax document image, notice the image control links (i.e., Zoom In, Zoom Out, Rotate Left, Rotate Right, Flip). If the fax message contains more than one page, you will see a numbered link for each page. ProviderLink indicates which page you are currently viewing by displaying the page number in bold face.
5. ProviderLink will try to recognize the number from which the fax was sent and display the facility name in the required *Originator* field. If the *Originator* field is blank, the system does not yet have the fax number stored. If the Originator is not recognized, you will need to search for or create the fax contact.
   a. Click the **Search** button to the right of the *Originator* field. The *Facility Search* screen appears.



Facility Type: Select a Facility Type
Facility Name: hilltop
Unique ID:
Fax Number: - -
Last Name:
First Name:
Main Phone Number: - -
City:
State/Province: No State Selected Zip:
County: Select a State First
Show: ☐ Online ☑ Fax-Only ☐ System Fax-Only

b. Enter the search criteria to search for the facility that sent the message. The *Search Results* screen displays.
  i. Select the **fax contac**t by clicking the button in the first column.
  ii. Click **Save** to complete the process and return to the *Document Viewer* screen.

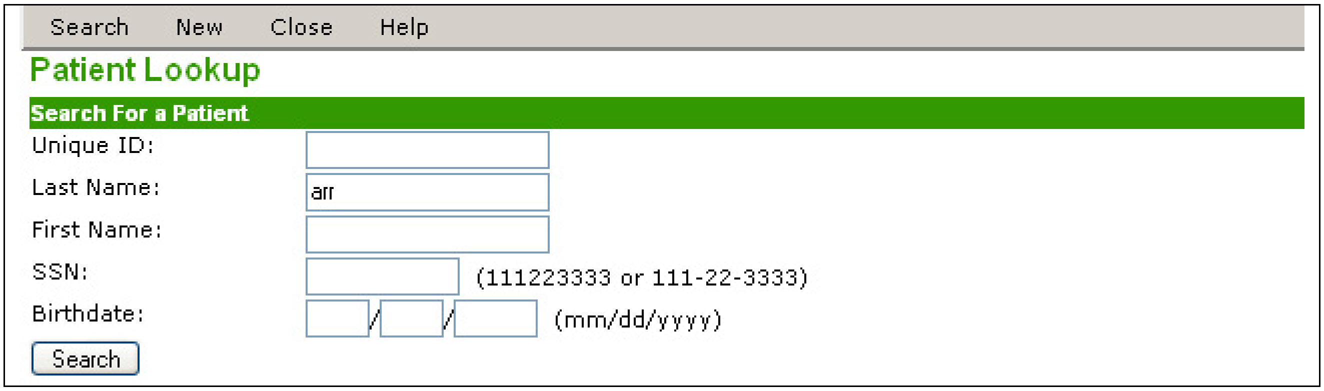
Note: If the facility does not exist, your facility administrator can add it to the system.



3 Total, **1** of 1 page(s)

	Mailbox Name	Facility Name	First Name	Last Name	Unique ID	Fax Number	City	County	State	Zip
○	Radiology	Hilltop Assisted Living Center	Radiology			555-555-1212		BRUNSWICK	NC	
●	Admissions	Hilltop Assisted Living Center	Admissions			555-555-2242		BRUNSWICK	NC	
○	Susan	Hilltop Assisted Living Center	Susan			555-555-4423				

6. On the *Document Viewer* screen, if the fax contains multiple pages, view each page to determine if the message contains documents for more than one patient.
   a. If all the message pages relate to one patient record, leave **ALL** in the Page(s) field.
   b. If the message contains pages for more than one patient, click the **More** button to add another set of routing fields. Then, enter the appropriate page number or page range (e.g., 2-5) in the *Page(s)* field.
7. In the *Document Name* field, enter the **type** or **name** of the document.
8. Search for the patient to associate to the fax document. Click the **Search** button to the right of the *Patient* field. The *Patient Lookup* screen appears.
   a. Enter the **search criteria** to search for the patient record.
   b. Click **Search**.


Search
New
Close
Help
Patient Lookup
Search For a Patient
Search

Unique ID:

Last Name: arr

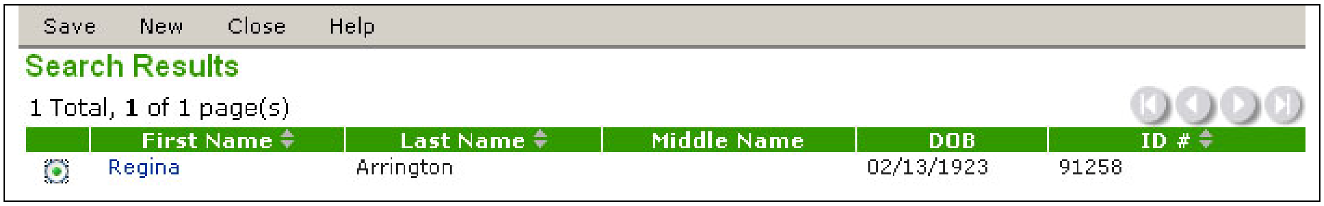
First Name:

SSN: (111223333 or 111-22-3333)

Birthdate: / / (mm/dd/yyyy)

c. The *Search Results* screen displays. Select the patient by clicking the **button** in the first column.

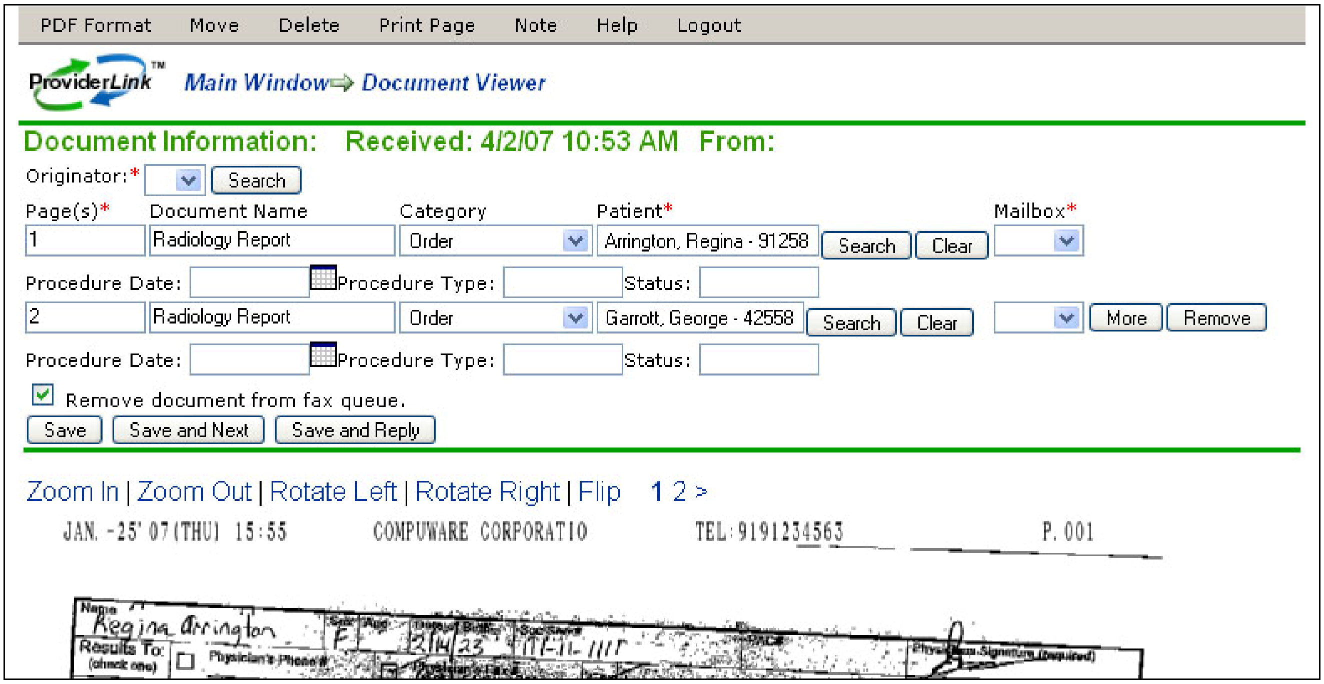
d. Click **Save**.


Save
New
Close
Help
Search Results

1 Total, **1** of 1 page(s)

	First Name	Last Name	Middle Name	DOB	ID #
●	Regina	Arrington		02/13/1923	91258

9. The *Document View* screen returns. The name of the selected patient now appears in the *Patient* field.
10. If the fax contains pages for more than one patient, click the **More** button to add another set of routing fields. Repeat the instructions in this step to assign pages of this fax to another patient. In the example below, page 1 is a lab report for the first patient, and page 2 is a lab report for the second.


PDF Format
Move
Delete
Print Page
Note
Help
Logout
ProviderLink
Main Window
Document Viewer
Search
Search
Clear
Search
Clear
More
Remove
Save
Save and Next
Save and Reply
Zoom In | Zoom Out | Rotate Left | Rotate Right | Flip
1 2 >

Document Information: Received: 4/2/07 10:53 AM From:

Originator:*

Page(s)*	Document Name	Category	Patient*	Mailbox*
1	Radiology Report	Order	Arrington, Regina - 91258	
2	Radiology Report	Order	Garrott, George - 42558	

Procedure Date: Procedure Type: Status:

☑ Remove document from fax queue.

JAN. -25' 07(THU) 15:55 COMPUWARE CORPORATIO TEL:9191234563 P. 001

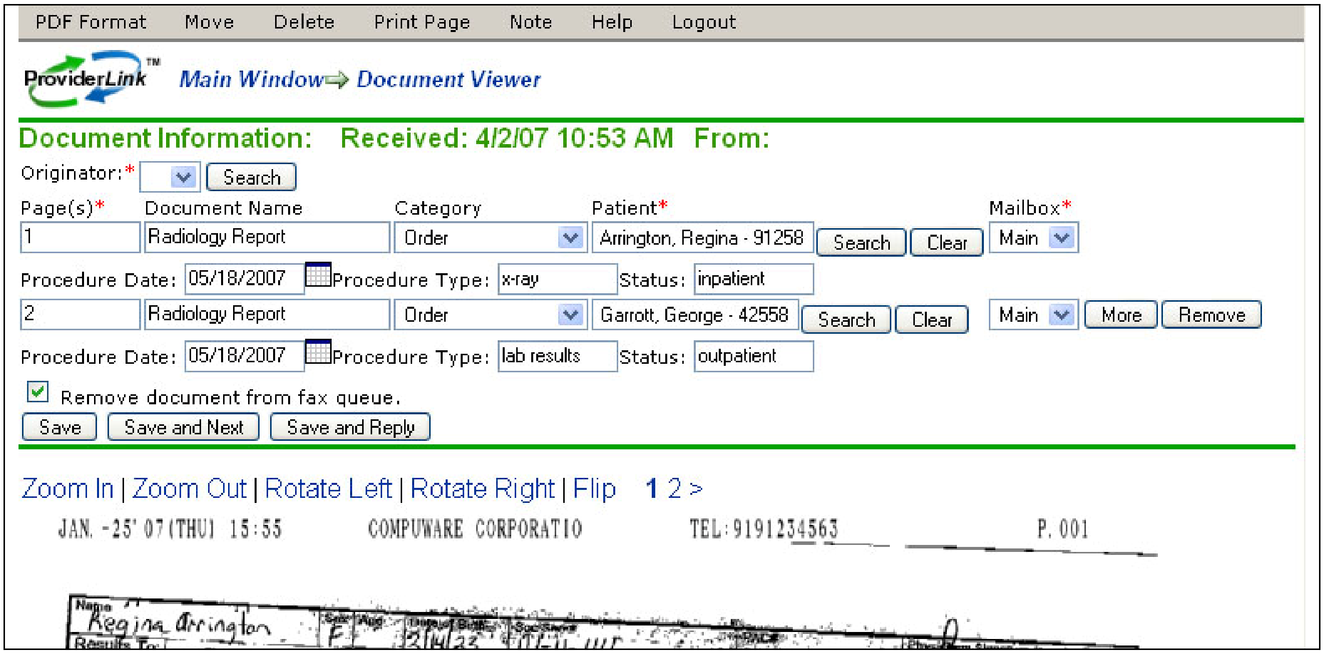
Name Regina Arrington

Results To: (check one) ☐ Physician's Phone #

11. Next, choose the mailbox to route the fax document for each patient listed. Click the **down arrow** in the *Mailbox* field, and then select the **mailbox** from the drop-down list.

12. You may want to add metadata information to the document, which will make it easier to search for it within the ProviderLink system.
    a. Select the document category by clicking the **down arrow** in the *Category* field.
    b. Depending on how your facility administrator sets up the metadata feature, one to three metadata fields will display. In the example below, *Procedure Date*, *Procedure Type, and Status* are the available metadata fields. Enter a keyword or date that applies to the metadata field. Remember, these entries will be used later to search for this document.

    Note: The metadata fields don't display automatically. Your facility administrator will need to work with ProviderLink Support to configure and activate this feature.



Document Information: Received: 4/2/07 10:53 AM From:

Originator:*

Page(s)*	Document Name	Category	Patient*	Mailbox*
1	Radiology Report	Order	Arrington, Regina - 91258	Main
2	Radiology Report	Order	Garrott, George - 42558	Main

Page 1 – Procedure Date: 05/18/2007 Procedure Type: x-ray Status: inpatient

Page 2 – Procedure Date: 05/18/2007 Procedure Type: lab results Status: outpatient

☑ Remove document from fax queue.

JAN. -25' 07 (THU) 15:55 COMPUWARE CORPORATIO TEL:9191234563 P. 001

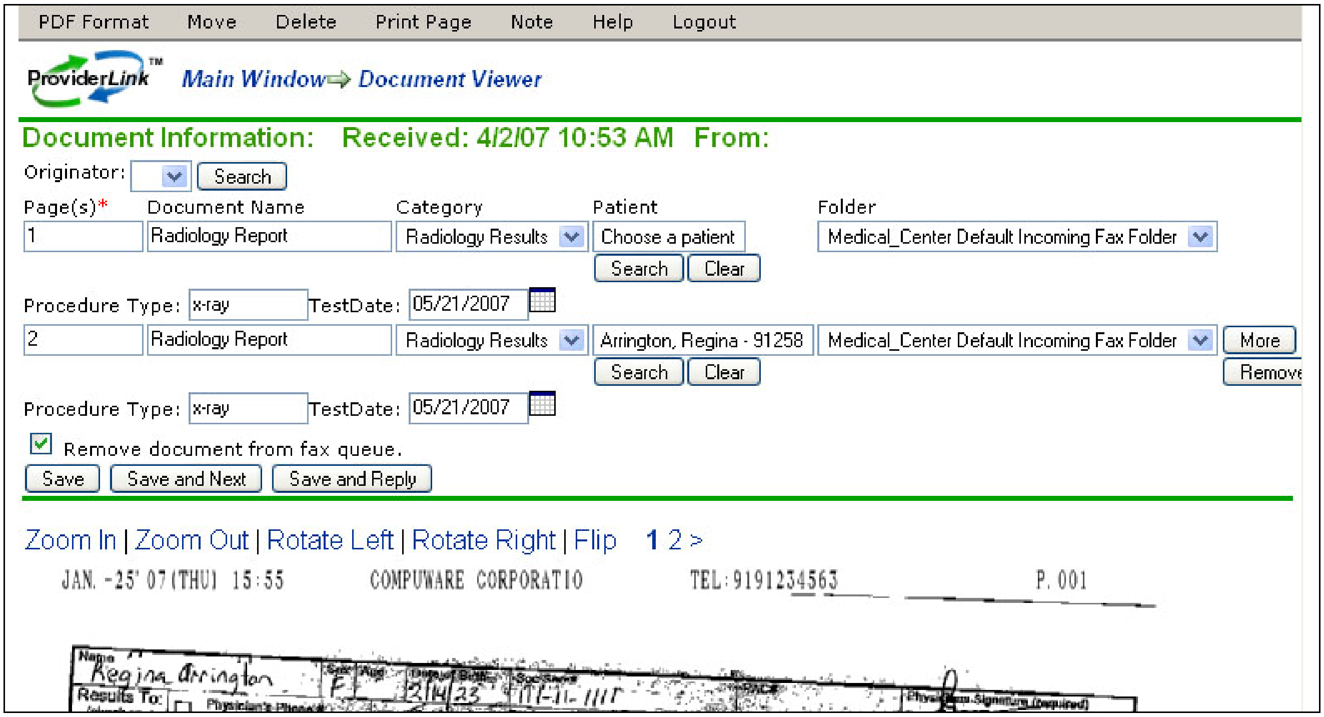
13. Once you have completed all of the required fields, you may choose how you wish to save the document(s).
    a. The "Remove document from fax queue" check box is selected for you automatically. This means that, when you choose one of the save options, the fax message will be removed from the list. Remove this check mark to leave the fax message in the queue.
    b. The "Save" button will process your routing options and return you to the same fax message for further processing.
    c. The "Save and Next" button will process your routing options, close the fax message, and open the next oldest one in the incoming fax folder. You will use this option most often when processing multiple fax messages.
    d. The "Save and Reply" button will process your routing options, close the fax message, and address an outgoing message to the sender of the fax. This enables you to request additional information from the fax originator.

To Process An Incoming Fax In A Folder-Type Folder:

1. Open your *Internet Explorer* browser and launch the *ProviderLink* application.
2. On the *Choose Work List View* screen:
    a. Select your facility's **Default Incoming Fax Folder**.
    b. Click **Submit**. The *Documents* screen displays. You will see a list of the faxes received with the oldest faxes on top.

3. You will normally want to process the oldest document in the list. To view the oldest document, click the **Get Next Fax** button. The fax message will appear in the *Document Viewer* screen.
4. You will process the fax in much the same way as outlined in the Message workflow with the following exceptions:
    a. The only field that is required is Page(s). It is recommended that you include as much routing information as possible (e.g., Originator, Patient, etc.), but not required.
    b. Instead of choosing a mailbox, you have the choice of linking the document to a 1) patient record or 2) using the *Folder* drop-down list to store the document in a folder, or both.
5. You may want to add metadata information to the document, which will make it easier to search for it within the ProviderLink system.
    a. Select the document category by clicking the **down arrow** in the *Category* field.
    b. Depending on how your facility administrator sets up the metadata feature, one to three metadata fields will display. In the example below, *Procedure Date*, *Procedure Type, and Status* are the available metadata fields. Enter a keyword or date that applies to the metadata field. Remember, these entries will be used later to search for this document.

Note: The metadata fields don't display automatically. Your facility administrator will need to work with ProviderLink Support to configure and activate this feature.



Document Information: Received: 4/2/07 10:53 AM From:

Originator:

Page(s)*	Document Name	Category	Patient	Folder
1	Radiology Report	Radiology Results	Choose a patient	Medical_Center Default Incoming Fax Folder

Procedure Type: x-ray TestDate: 05/21/2007

Page(s)*	Document Name	Category	Patient	Folder
2	Radiology Report	Radiology Results	Arrington, Regina - 91258	Medical_Center Default Incoming Fax Folder

Procedure Type: x-ray TestDate: 05/21/2007

☑ Remove document from fax queue.

JAN. -25' 07(THU) 15:55 COMPUWARE CORPORATIO TEL:9191234563 P. 001

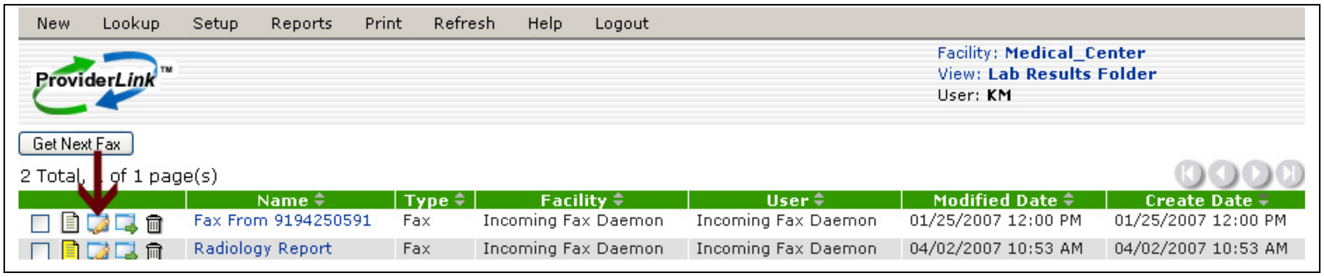
IV. Renaming A Document/Fax

The Rename option allows you to give a document a more descriptive name. In the case of a fax, the default name is the incoming fax number so renaming the fax to reflect the type of content (e.g., lab results, radiology report, etc.) or patient's name will help you to distinguish between faxes with the same incoming fax number.

To Rename A Document/Fax:

1. Open your *Internet Explorer* browser and launch the *ProviderLink* application.

2. On the *Choose Work List View* screen:
    a. Select a **folder**.
    b. Click **Submit**. The *Documents* screen displays. You will see a list of the documents and faxes received with the oldest items on top.
3. On the *Documents* screen, click the **Rename** icon in the same row as the item you want to rename.

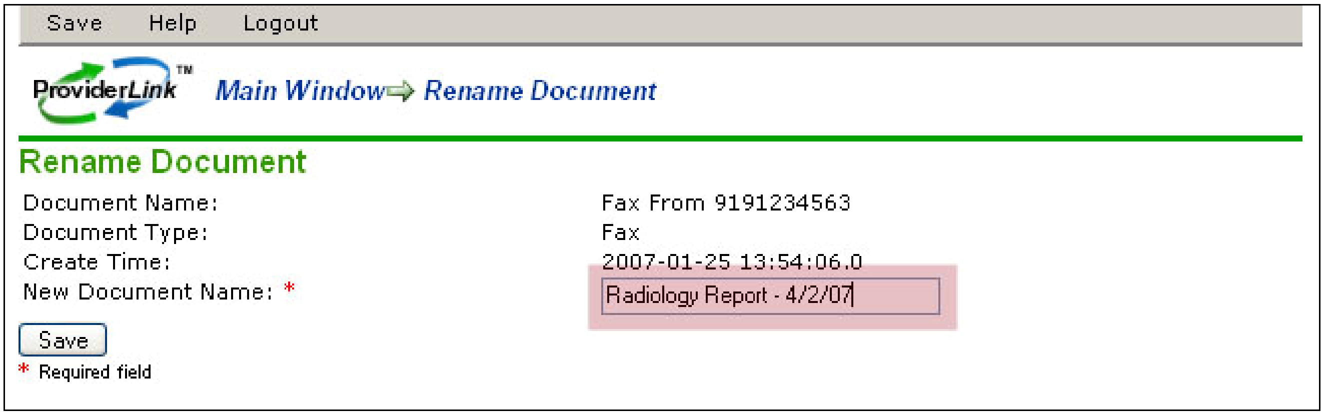


Facility: Medical_Center
View: Lab Results Folder
User: KM

2 Total, of 1 page(s)

	Name	Type	Facility	User	Modified Date	Create Date
☐	Fax From 9194250591	Fax	Incoming Fax Daemon	Incoming Fax Daemon	01/25/2007 12:00 PM	01/25/2007 12:00 PM
☐	Radiology Report	Fax	Incoming Fax Daemon	Incoming Fax Daemon	04/02/2007 10:53 AM	04/02/2007 10:53 AM

4. The *Rename Document* screen displays. In the *New Document Name* field, enter a **descriptive name** for the document or fax.
   Note: The original document name appears in the *Document Name* field.
5. Click **Save** to complete the process.



Rename Document

Document Name: Fax From 9191234563
Document Type: Fax
Create Time: 2007-01-25 13:54:06.0
New Document Name: * Radiology Report - 4/2/07

* Required field

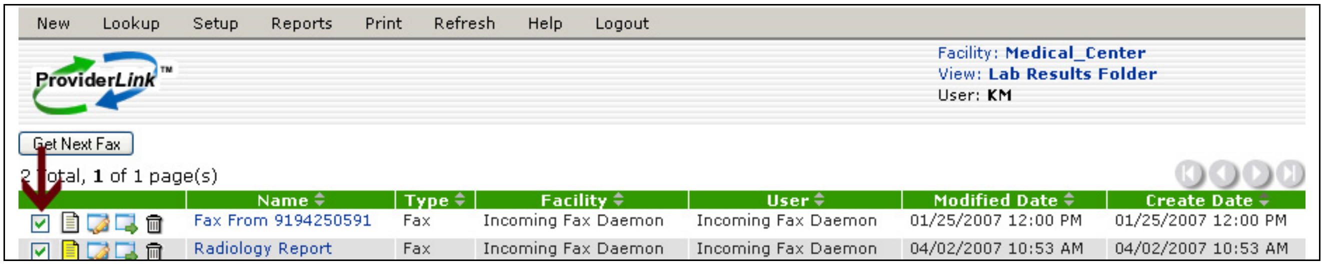
6. The *Documents* screen redisplays and the renamed document/fax displays in the list.

V. Moving A Document/Fax

The Move option allows you to move one or multiple documents to a different patient record and/or facility folder. If the document type is "File" or is an "e-form," the document should only be moved to another patient. Document types "Fax" or "Print" can be moved to either a different patient record and/or facility folder.

To Move Multiple Documents/Faxes:

1. Open your *Internet Explorer* browser and launch the *ProviderLink* application.
2. On the *Choose Work List View* screen:
    a. Select a **folder**.
    b. Click **Submit**. The *Documents* screen displays. You will see a list of the documents and faxes received with the oldest items on top.
3. Click the **check box** in the same row as the item you want to move. You can select one or more items or to select everything listed, click **Select All**.

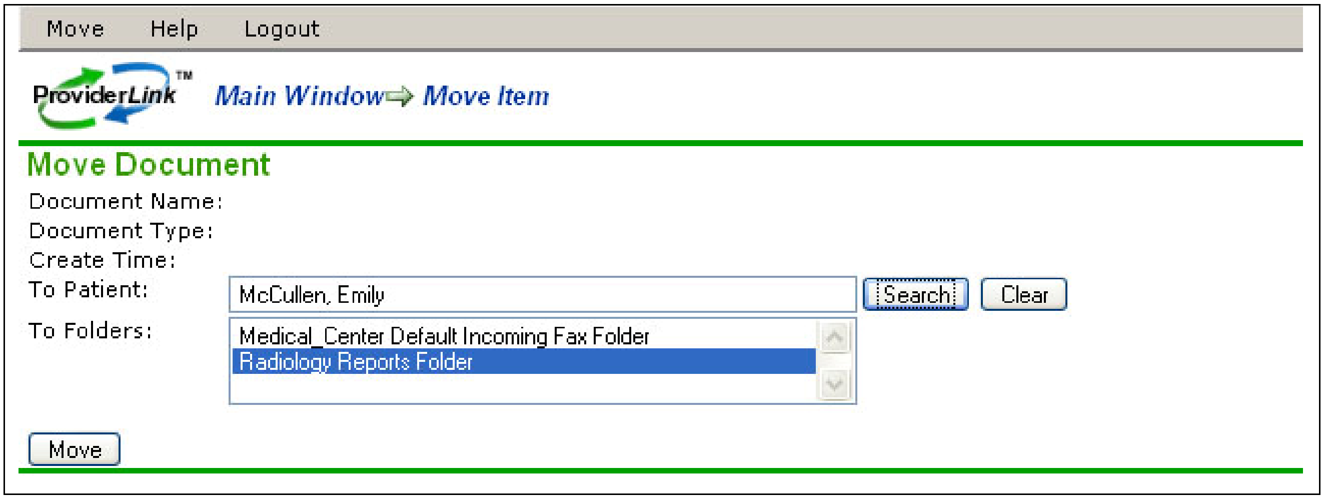


Facility: **Medical_Center**
View: **Lab Results Folder**
User: **KM**

2 Total, **1** of 1 page(s)

	Name	Type	Facility	User	Modified Date	Create Date
☑	Fax From 9194250591	Fax	Incoming Fax Daemon	Incoming Fax Daemon	01/25/2007 12:00 PM	01/25/2007 12:00 PM
☑	Radiology Report	Fax	Incoming Fax Daemon	Incoming Fax Daemon	04/02/2007 10:53 AM	04/02/2007 10:53 AM

4. Click **Move**. The *Move Document* screen displays.
   Note: When moving multiple documents, the *Document Name*, *Document Type*, and *Create Time* fields are blank.



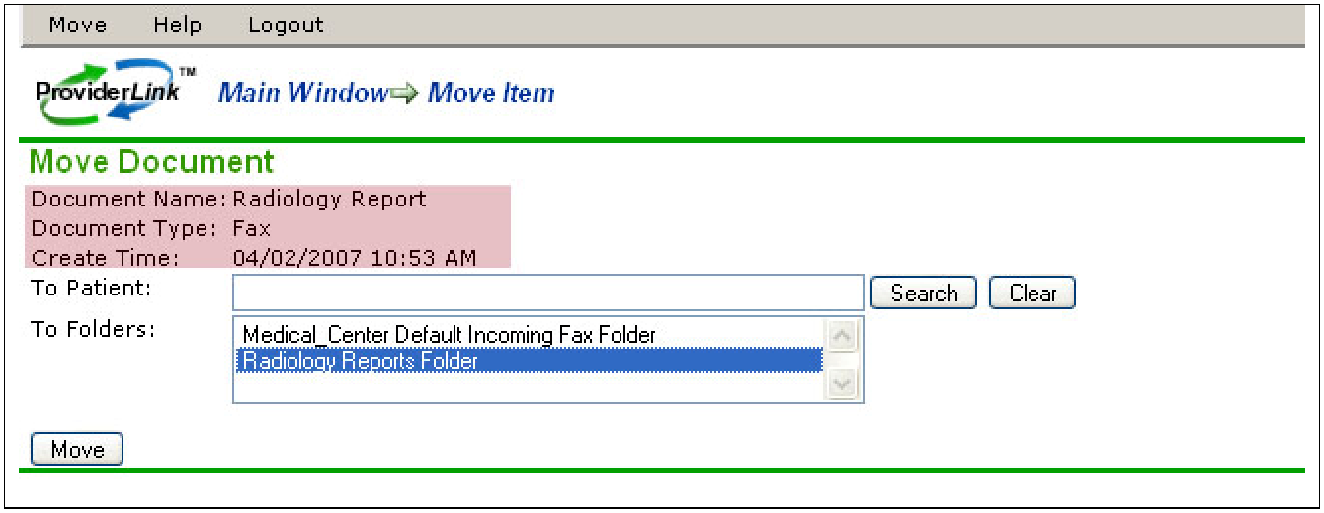
Move Document

Document Name:
Document Type:
Create Time:
To Patient: McCullen, Emily
To Folders: Medical_Center Default Incoming Fax Folder / Radiology Reports Folder

5. In this example, the documents are faxes so you have the option to move them to a patient and/or a folder.
   a. To move a fax to a patient record:
      i. In the *To Patient* field, click **Search**. The P*atient Lookup* screen displays.
      ii. Enter the **search criteria** and click **Search**. The *Search Results* screen displays.
      iii. Select the **patient** and click **Save**. The name of the patient now appears in the *To Patient* field on the *Move Document* screen.
   b. To move a fax to a folder:
      i. In the *To Folders* field, select the **folder** from the drop-down list.
6. After selecting the patient and/or folder, click **Move** to transfer the fax(es).

To Move A Single Document/Fax:

1. On the *Documents* screen, click the **Folder** icon in the same row as the fax you want to move. The *Move Document* screen displays.
   Note: The *Document Name*, *Document Type*, and *Create Time* fields contain data since you are moving only one document.
2. Follow the steps in 5a, 5b, and 6 above.


Move
Help
Logout
ProviderLink™
Main Window ⇨ Move Item
Move Document
Search
Clear
Move

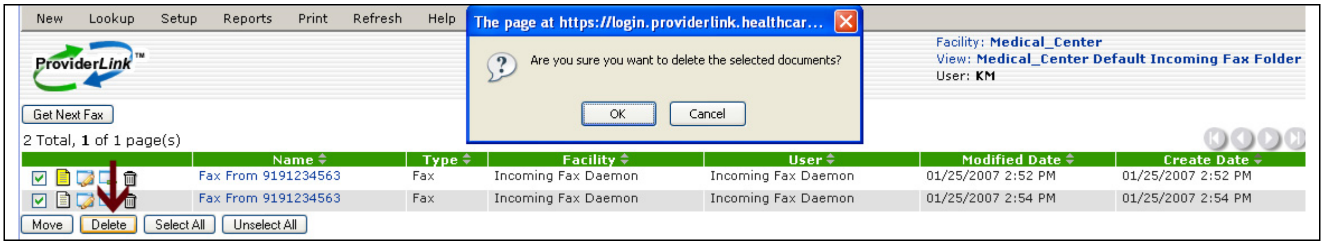
Document Name: Radiology Report
Document Type: Fax
Create Time: 04/02/2007 10:53 AM
To Patient:
To Folders: Medical_Center Default Incoming Fax Folder
Radiology Reports Folder

VI. Deleting A Document/Fax

The Delete option allows you to remove a single or multiple documents and/or faxes from a folder. The items are moved to the Trash folder.

To Delete Multiple Documents/Faxes:

1. Open your *Internet Explore*r browser and launch the *ProviderLink* application.
2. On the *Choose Work List View* screen:
    a. Select a **folder**.
    b. Click **Submit**. The *Documents* screen displays. You will see a list of the documents and faxes received with the oldest items on top.
3. Click the **check box** in the same row as the fax you want to delete. You can select one or more items or to select everything listed, click **Select All**.
4. Click **Delete**. A *delete verification* screen displays.
5. Click **OK** to remove the items from the folder. The items are transferred to the *Trash* folder.


New
Lookup
Setup
Reports
Print
Refresh
Help
ProviderLink™
Get Next Fax
OK
Cancel
Move
Delete
Select All
Unselect All

The page at https://login.providerlink.healthcar...

Are you sure you want to delete the selected documents?

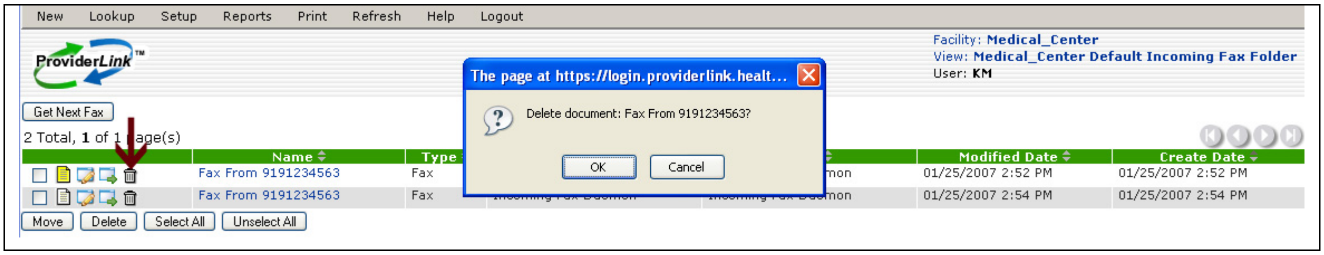
Facility: Medical_Center
View: Medical_Center Default Incoming Fax Folder
User: KM

2 Total, 1 of 1 page(s)

	Name	Type	Facility	User	Modified Date	Create Date
☑	Fax From 9191234563	Fax	Incoming Fax Daemon	Incoming Fax Daemon	01/25/2007 2:52 PM	01/25/2007 2:52 PM
☑	Fax From 9191234563	Fax	Incoming Fax Daemon	Incoming Fax Daemon	01/25/2007 2:54 PM	01/25/2007 2:54 PM

To Delete A Single Document/Fax:

1. On the *Documents* screen, click the **Delete** icon in the same row as the fax you want to delete. A *delete verification* screen displays.
2. Click **OK** to remove the item from the folder. The item is transferred to the *Trash* folder.


New
Lookup
Setup
Reports
Print
Refresh
Help
Logout
ProviderLink™
Get Next Fax
OK
Cancel
Move
Delete
Select All
Unselect All

Facility: Medical_Center
View: Medical_Center Default Incoming Fax Folder
User: KM

The page at https://login.providerlink.healt...

Delete document: Fax From 9191234563?

2 Total, 1 of 1 page(s)

	Name	Type			Modified Date	Create Date
☐	Fax From 9191234563	Fax		mon	01/25/2007 2:52 PM	01/25/2007 2:52 PM
☐	Fax From 9191234563	Fax		mon	01/25/2007 2:54 PM	01/25/2007 2:54 PM