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ProviderLink for Physicians

User Training Manual

3/10/11

ProviderLink
User Training Manual
For Physicians

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

Compuware-Covisint

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Section I - Introduction to ProviderLink

1. What is ProviderLink?

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

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

Any document, whether electronic or handwritten, or any other information about a patient can be placed in the patient record and securely sent to recipients. As long as the document can be printed or faxed, it can be added to 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 page to have any replies automatically routed back to the appropriate patient record. In either case, ProviderLink streamlines all of your communications.

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

2. Benefits of Using ProviderLink

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

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

Physicians

a. Electronically request and receive patient information from other facilities
b. Electronically request or provide signatures
c. Electronically send referrals to other providers
d. Create eForms to support practices workflows
e. Electronically manage and store incoming faxes

Hospitals

a. Utilization Review
b. Discharge Planning
c. Business Office
d. Electronically receive requests for medical records
e. Outpatient Services

Skilled Nursing Facilities

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

HME/DME

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

Payors

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

3. Conventions Used In This Guide

CONVENTIONS USED IN THIS SUPPORT MATERIAL	
Definition	**Example**
When introducing you to a new term, the term will appear in italics.	*eForms*
If you need to press a key on your keyboard, the text on the key will appear in a **bold font**.	Press the **`Enter`** key.
When you need to click a link or a button on the screen, the link or button name will appear in **bold letters**.	Click the **`Submit`** button.
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.	

Prerequisites

It is assumed that you:

- have been approved and set up in the Covisint portal
- use Internet Explorer 7

Icons and Notes

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

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

How This Guide Is Organized

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

Section II - A Hands-On Tour of ProviderLink

1. How Do I Access ProviderLink?

ProviderLink is a browser-based web application, meaning it runs completely in an Internet browser requiring no additional hardware or software. You can access ProviderLink from virtually any computer as long as it is connected to the Internet. While ProviderLink may work in other web browsers, Microsoft Internet Explorer 7 is recommended.

To Access ProviderLink:

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



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

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



Figure 1. Covisint Healthcare Home Page

A. Getting Help with ProviderLink

There are a number of resources to assist you in using ProviderLink:

- While you are logged in to ProviderLink, check the online help – click **Help** on the menu bar.



Figure 2. Online Help Menu Option

- Read the User Training Manual (this document).
- Contact your facility administrator.

2. Logging into ProviderLink

A. The First Time You Log In

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

1. Open Internet Explorer.
2. In the URL address bar, enter http://www.covisint.com/web/guest/login-healthcare. The *Covisint* login screen displays.
3. Enter your **User ID** and **Password**.
4. Click **Login**. The *Covisint Healthcare* home page displays.
5. In the left-hand menu, under *Secure Applications*, click **ProviderLink** to launch the application (see previous screen shot).
   a. The *ProviderLink Terms and Conditions of User Agreements* screen displays.

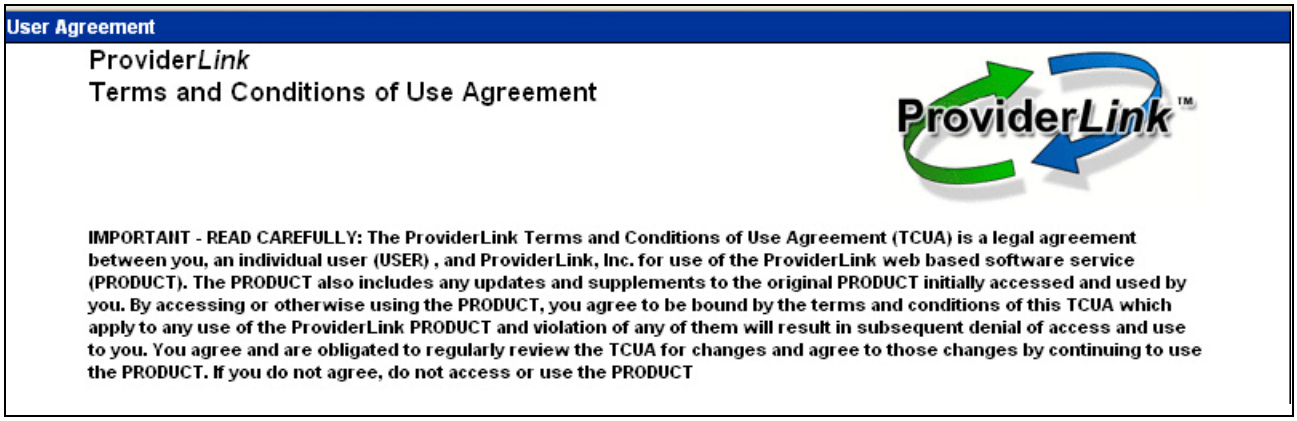


Figure 3. Terms and Conditions

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

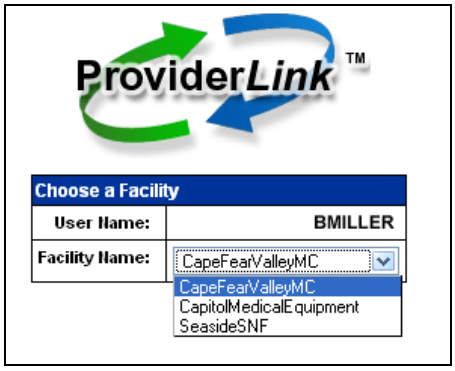


Figure 4. Choose a Facility

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

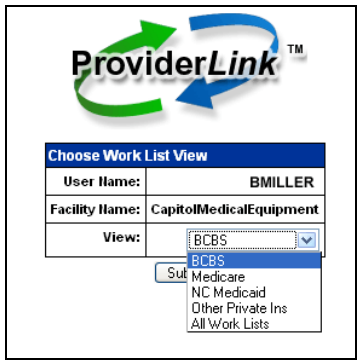


Figure 5. Choose a Work List

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

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

B. Failed Login

The ProviderLink system is a secure system 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. If you mistype either of these, you will not be allowed to enter, and the system will display the failed login message, "You have entered an invalid password and/or User ID, please try again."

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

C. User Account Suspended

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

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

1. From the http://www.covisint.com/web/guest/login-healthcare page, click **Forgot your password?**
   a. The screen expands displaying a field to enter your **User ID** and then click **Submit**. The *Reset Password* screen displays.
   b. Enter the **answer** to your challenge question in the *Challenge Answer* field and click **Submit**.
   Note: You create your Challenge Question and Answer during the registration process.

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

3. A Look at the ProviderLink Window

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

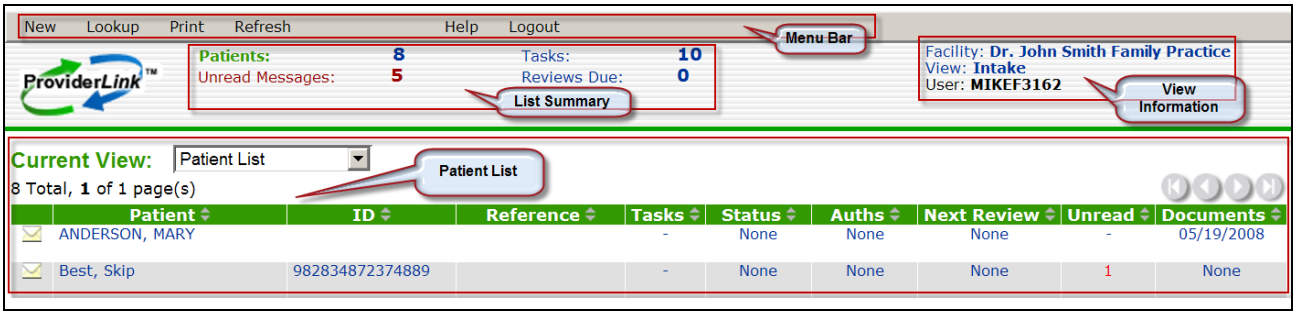


Figure 6. Main Window Patient List

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

ProviderLink is a web-based application, and colored text usually indicates a *hyperlink* or *link*. Each link is a shortcut, and clicking on a link will take you to another page or section within ProviderLink. For example, clicking on one of the date links in the *Documents* column will take you to that patient's documents. If you're not sure if text is hyperlinked, move your cursor over the text. Hyperlinked text will cause the cursor to appear as a pointing hand ( ).

A. Understanding the Patient List

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

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

Column	Represents	Link Destination
Message Icon	New message	Create Message screen. Opens a new message that relates to this patient.
Patient	Patient name: last name, first name	View Patient Information screen
ID	The Unique ID that helps your facility identify the patient. Most commonly used to display the medical record number.	View Patient Information screen
Reference	A note that helps identify something about the patient record. See the description in the "Viewing Patient Information" section below.	View Patient Information screen
Tasks	A reminder that some action needs to be taken regarding the patient record.	Tasks for Patient screen
Status	Shows whether the patient has been admitted, discharged, etc.	View Patient Information screen
Auths	Shows the latest payor authorization received for the patient.	Authorization for Patient screen
Next Review	Shows when the next review is due. Examples, payor authorization, case management services review.	Add/Edit Scheduled Task for Patient screen
Unread	Lists the number of unread messages received for the patient.	Unread Messages for Patient
Documents	Lists the last date a document was added to the patient's document folder.	Documents for Patient screen

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

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

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

To change the content on the Main Window using the List Summary and Column Headers and Current View:

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



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

   a. You may change the list to display the oldest message first. Click the **Date** column header link. The list will refresh with the oldest unread message appearing first.

b. You may group messages by *Sender*. Click the **From** column header link. The message list will refresh with the Senders' names in ascending alphabetical order.

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

   ** Option only displays in the drop-down list if it has been activated by your Facility Administrator.
4. To return the *Main Window* to its original state, displaying all of the patients, click **Patients** in the List Summary.

4. Viewing Patient Information

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

To View Patient Information on the View Patient Information Screen:

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

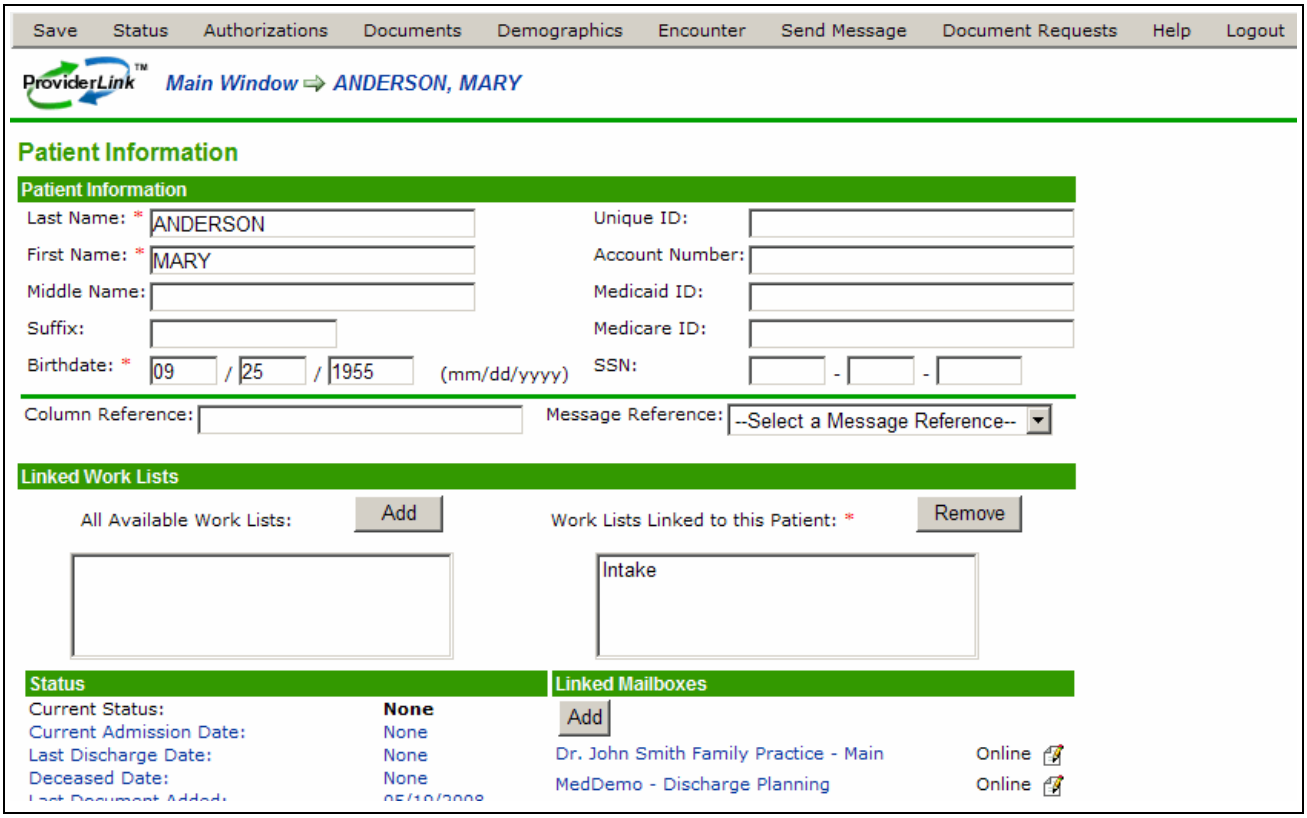


Figure 7. View Patient Information

2. The *View Patient Information* screen is divided into different sections. From this screen, you can access anything relating to this patient.
   a. The top section, also labeled "View Patient Information," includes the patient's name, date of birth, and Social Security Number.
   b. The center section displays the work lists that are linked to this patient record. In other words, it shows which department or which staff member is working with this patient record.
   c. The bottom left section, the *Status* section, shows a brief overview what has happened with this patient record.
      - You can see when the patient was admitted or discharged.

- You can see when the last payor review was received and when the next review is due.
- More importantly, you will see how many tasks and unread messages are pending for this patient.
- You may also access the patient's History Items and Audit Trail.

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.

To View Patient Documents:

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

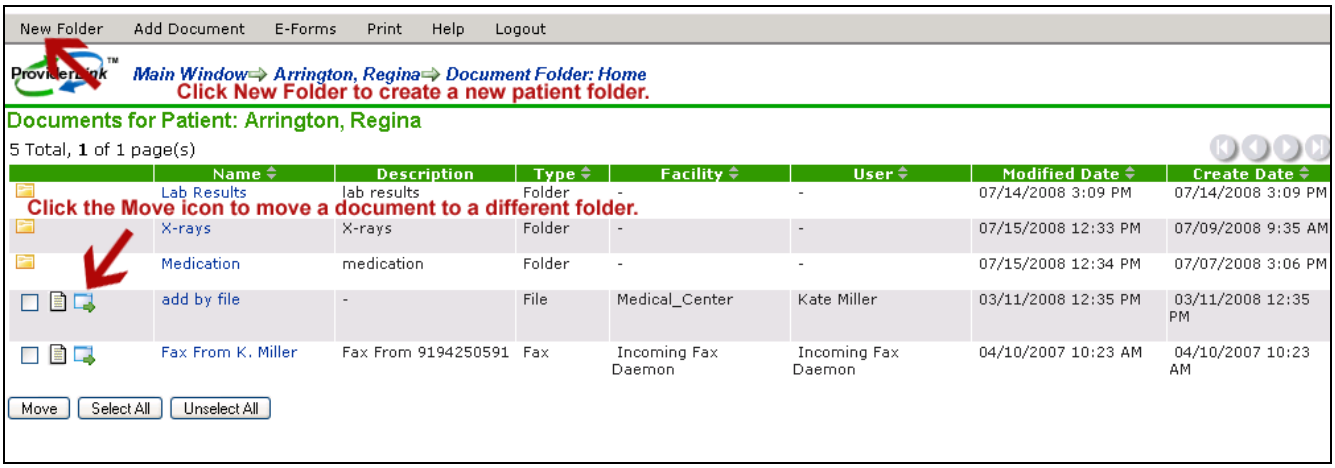


Figure 8. Document Folder Home

2. 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.

To Move a Patient Document to a Subfolder:

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

Note: In the first column, the folder icon indicates a subfolder. 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.

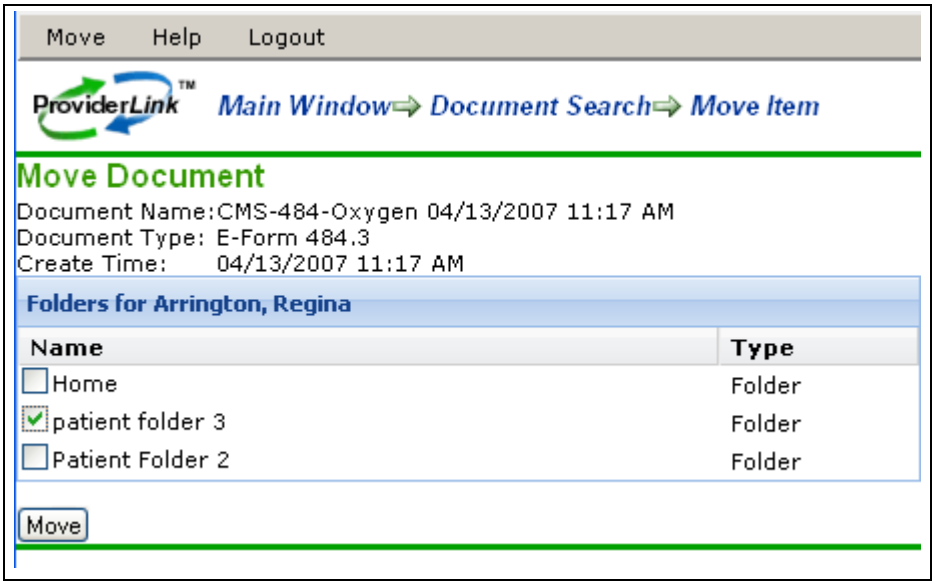


Figure 9. Move Document Item

4. The *Documents* 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* screen, click **New Folder** on the menu bar. The *Add Folders* screen displays.
2. Enter the following information:
   a. **Folder Name**
   b. **Description**
3. To create more than one folder, click the **More** button. The application adds another blank row. Repeat Step 3b.

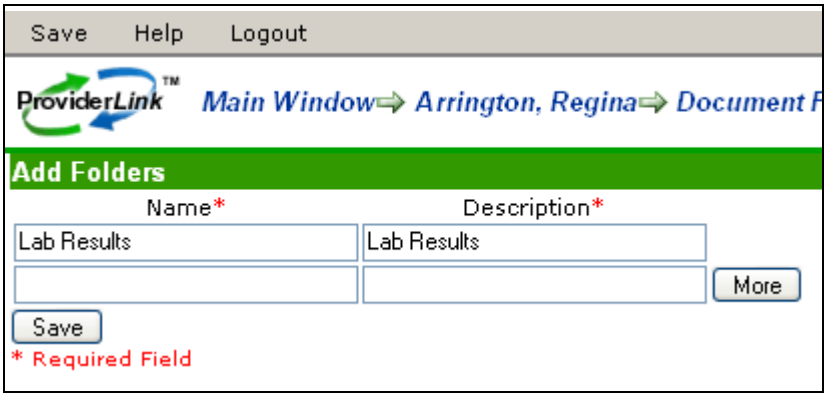


Figure 10. Add Multiple Document Folders

4. Click **Save**. The *Documents* screen returns displaying the newly added folder.

A. Navigating the Breadcrumb Trail

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

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

To use the Breadcrumb Trail to Navigate within ProviderLink:

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

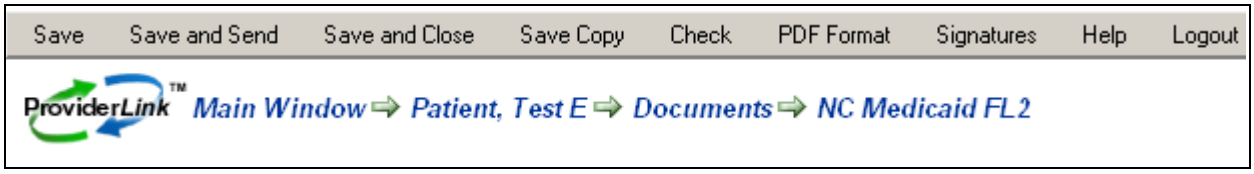


Figure 11. Navigation with the Breadcrumb Trail

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

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

B. Viewing a Patient's History Items and Audit Trail

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

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

To view a Patient's History Items and Audit Trail:

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



Figure 12. Patient Message History

2. 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 the **History** link in the breadcrumb trail.
5. To view a more detailed history of the patient record, click **Audit Trail** on the menu bar
6. The Audit Trail tracks the activities of the users who have been working with this patient record. You may use the column header links to sort the list by Date, User Name, Patient, or Audit Entry in order to find an entry more quickly.

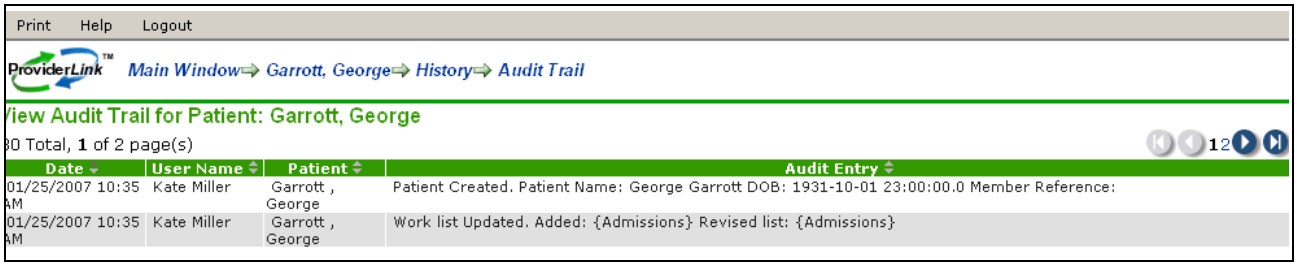


Figure 13. Patient Audit Trail

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



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

5. Changing Your Work List View

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

To change your Work List View:

1. From the Main Window, click the **View:** link in the *View Information* section in the upper right corner. The *Choose Work List View* screen appears.

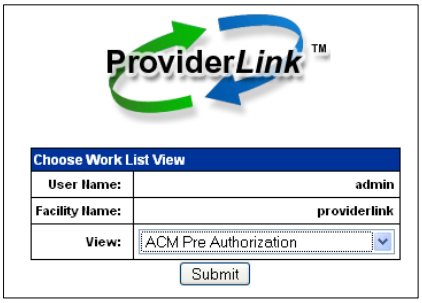


Figure 14. Change Your Work List View

2. From the **View** drop-down list, choose the work list you wish to view. Click the **Submit** button. The chosen work list appears.

6. Working with Patient Records

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

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

To search for a Patient Record:

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

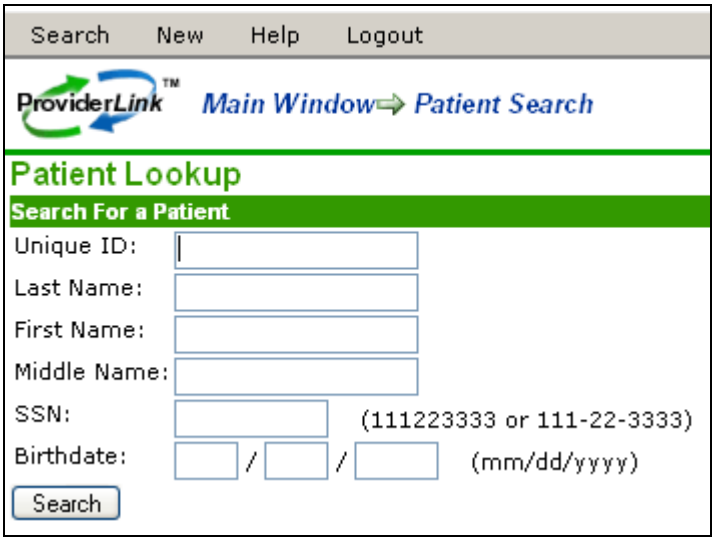


Figure 15. Patient Lookup Search

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



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

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

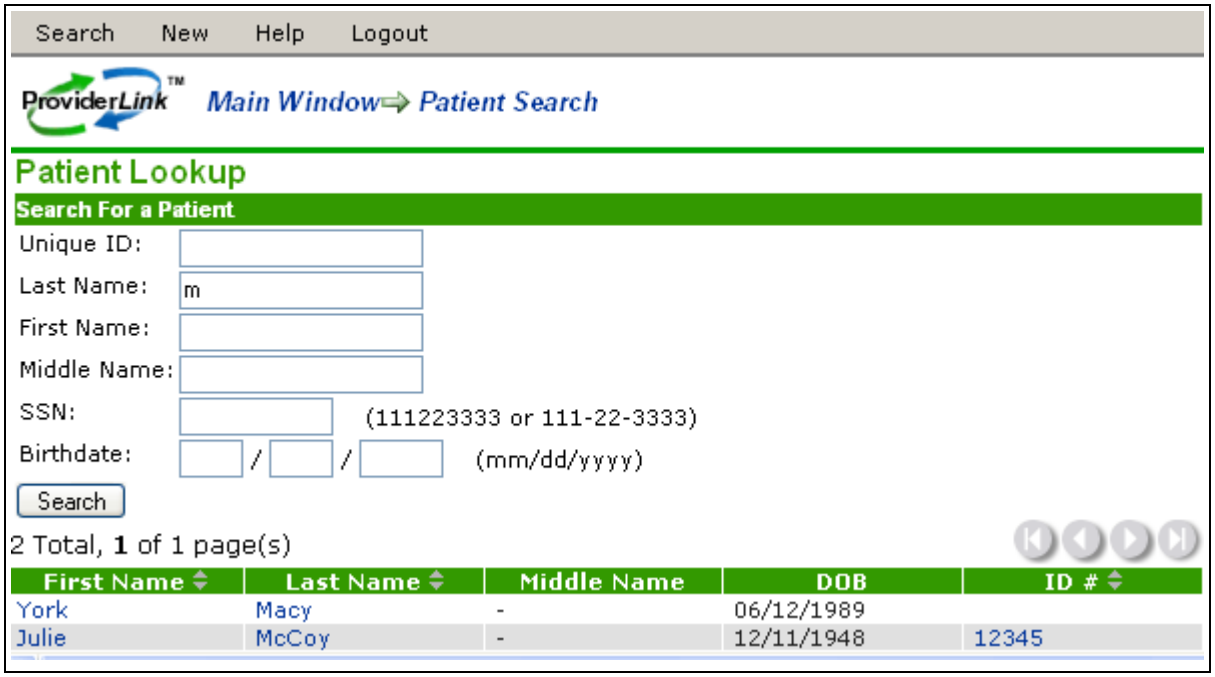


Figure 16. Patient Lookup

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

A. Creating a New Patient Record

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

To create a New Patient Record:

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

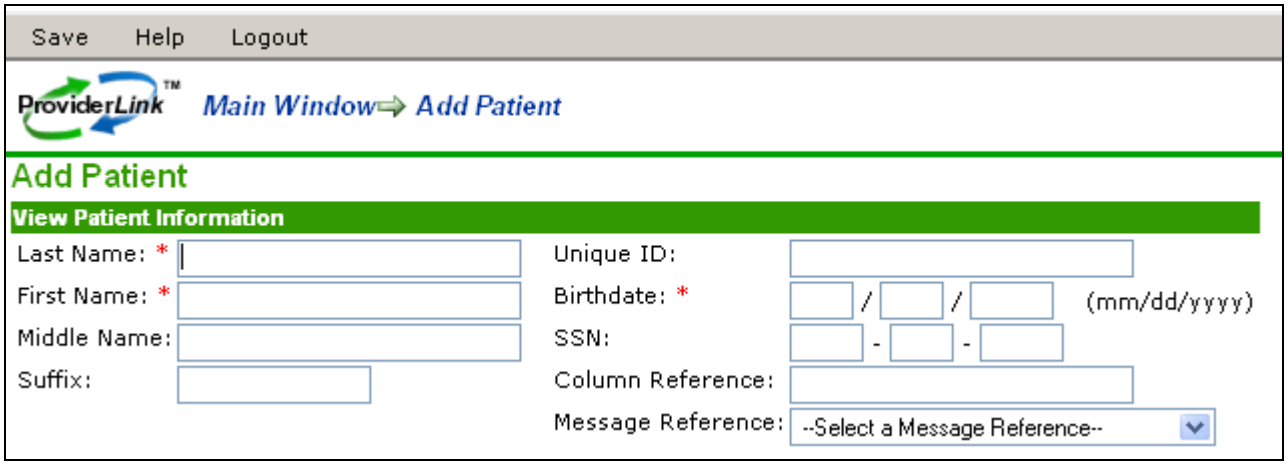


Figure 17. Add a Patient

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



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

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

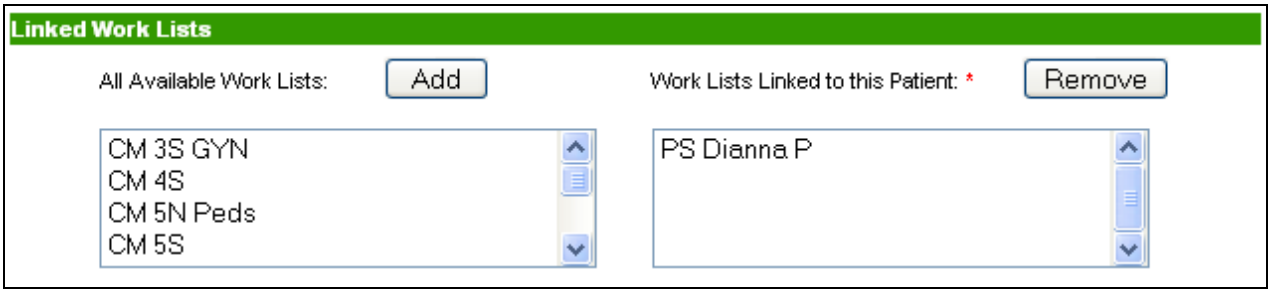


Figure 18. Link Work Lists to Patient

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

7. Working with Messages

Messages communicate information about patients. ProviderLink seamlessly connects you to electronic messages and fax messages

When you **send** messages, ProviderLink automatically sends the messages to online contacts electronically and sends fax transmissions to fax contacts.

Contacts **reply** to your messages in the same way they received them.

- Online contacts can their reply in an electronic message that will be attached to the corresponding patient record.
- Fax contacts can send their replies by fax. If they use the bar-coded, fax-back cover page, ProviderLink will convert the fax to an electronic message and attach it to the corresponding patient record.



Check your incoming fax folder regularly to ensure you are aware of messages that were sent without a fax-back cover page. Fax messages sent without a fax-back cover page must be processed. For details, see "To Process an Incoming Fax," below.

A. Sending a New Message through ProviderLink

A message contains patient-related communications you want to send to a contact using ProviderLink. When you send messages, ProviderLink sends them to the selected contacts electronically, or as faxes, depending on the contact communications requirements.

To send a New Message through ProviderLink:

1. Navigate to the associated patient's *View Patient Information* screen.
2. Click **Send Message** from the menu bar.

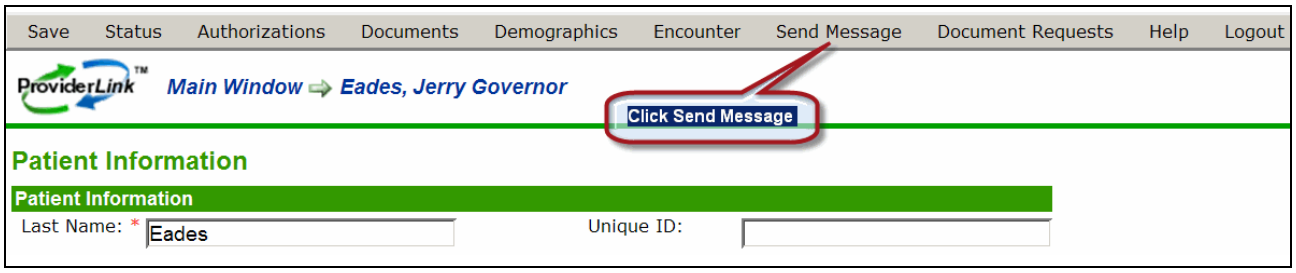


Figure 19. Send Message Menu Option

3. The *Create Message* screen appears. Select the provider name from the To Recipients drop-down list. If the provider does not appear in the list, click **Search** to search for the facility. For more details about searching for facilities, see "To Process an Incoming Fax Message."

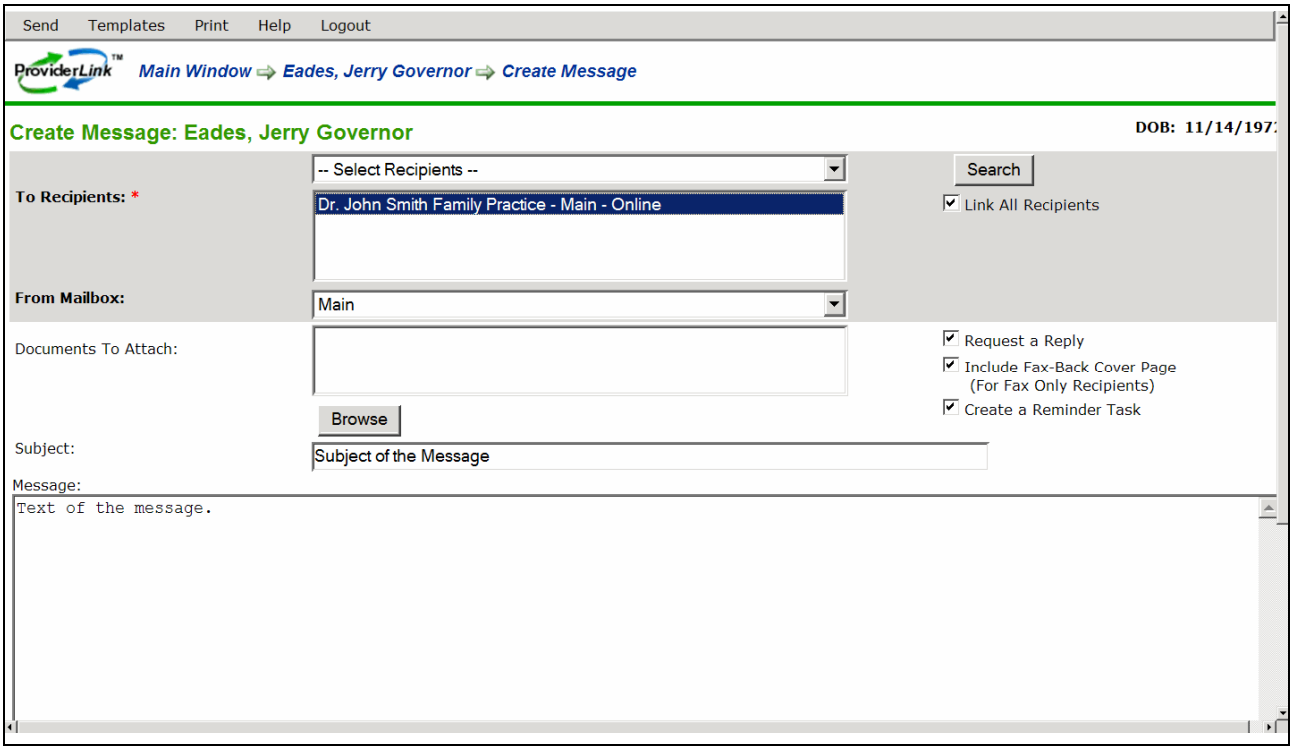
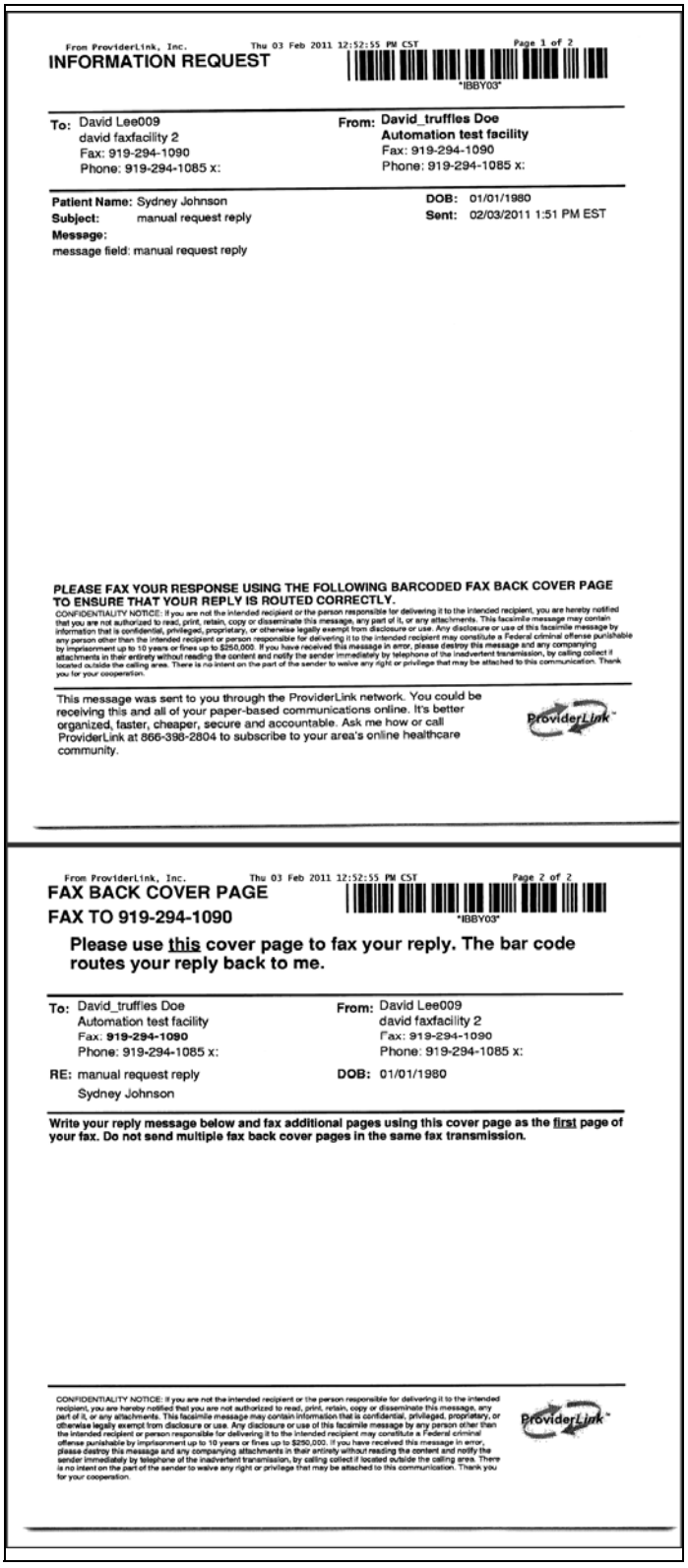


Figure 20. Patient Create Message Screen

4. The *From Mailbox* field is populated for you.
5. Click the **Browse** button to select the documents you wish to attach.

   Note: If you are sending the message to a fax-only facility, only PDF or TIF documents can be attached. If you attach other file types, such as Word documents or Excel spreadsheets, a warning will display stating that this file type cannot be sent to a fax-only facility.
6. Enter an appropriate **Subject**, which will appear on the fax cover page. For example, "OP Requisition."
7. You may enter a message that will appear on the fax cover page.
8. Select reply options.
   - If you want the recipient to reply, click the **Request a Reply** check box.
   - If any of the recipients are not online contacts, select the **Include Fax-Back Cover Page** check box. A fax-back cover page will not be sent to online recipients.
   - Select the **Create a Reminder Task** check box if you want to be reminded you are requesting a response.
9. Click **Send**. The message will be delivered to the recipients you specified.

   The following images illustrate how fax messages appear to recipients.



From ProviderLink, Inc. Thu 03 Feb 2011 12:52:55 PM CST Page 1 of 2

INFORMATION REQUEST

IBBY03

To: David Lee009
david faxfacility 2
Fax: 919-294-1090
Phone: 919-294-1085 x:

From: **David_truffles Doe**
Automation test facility
Fax: 919-294-1090
Phone: 919-294-1085 x:

Patient Name: Sydney Johnson
Subject: manual request reply
Message:
message field: manual request reply

DOB: 01/01/1980
Sent: 02/03/2011 1:51 PM EST

PLEASE FAX YOUR RESPONSE USING THE FOLLOWING BARCODED FAX BACK COVER PAGE TO ENSURE THAT YOUR REPLY IS ROUTED CORRECTLY.

CONFIDENTIALITY NOTICE: If you are not the intended recipient or the person responsible for delivering it to the intended recipient, you are hereby notified that you are not authorized to read, print, retain, copy or disseminate this message, any part of it, or any attachments. This facsimile message may contain information that is confidential, privileged, proprietary, or otherwise legally exempt from disclosure or use. Any disclosure or use of this facsimile message by any person other than the intended recipient or person responsible for delivering it to the intended recipient may constitute a Federal criminal offense punishable by imprisonment up to 10 years or fines up to $250,000. If you have received this message in error, please destroy this message and any companying attachments in their entirety without reading the content and notify the sender immediately by telephone of the inadvertent transmission, by calling collect if located outside the calling area. There is no intent on the part of the sender to waive any right or privilege that may be attached to this communication. Thank you for your cooperation.

This message was sent to you through the ProviderLink network. You could be receiving this and all of your paper-based communications online. It's better organized, faster, cheaper, secure and accountable. Ask me how or call ProviderLink at 866-398-2804 to subscribe to your area's online healthcare community.

ProviderLink™

From ProviderLink, Inc. Thu 03 Feb 2011 12:52:55 PM CST Page 2 of 2

FAX BACK COVER PAGE

FAX TO 919-294-1090

IBBY03

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

To: David_truffles Doe
Automation test facility
Fax: **919-294-1090**
Phone: 919-294-1085 x:

From: David Lee009
david faxfacility 2
Fax: 919-294-1090
Phone: 919-294-1085 x:

RE: manual request reply
Sydney Johnson

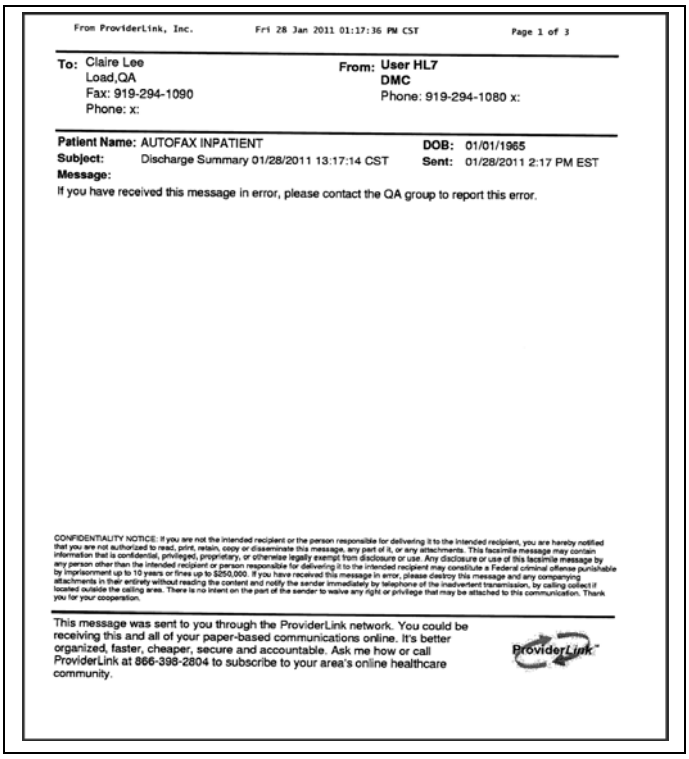
DOB: 01/01/1980

Write your reply message below and fax additional pages using this cover page as the first page of your fax. Do not send multiple fax back cover pages in the same fax transmission.

CONFIDENTIALITY NOTICE: If you are not the intended recipient or the person responsible for delivering it to the intended recipient, you are hereby notified that you are not authorized to read, print, retain, copy or disseminate this message, any part of it, or any attachments. This facsimile message may contain information that is confidential, privileged, proprietary, or otherwise legally exempt from disclosure or use. Any disclosure or use of this facsimile message by any person other than the intended recipient or person responsible for delivering it to the intended recipient may constitute a Federal criminal offense punishable by imprisonment up to 10 years or fines up to $250,000. If you have received this message in error, please destroy this message and any companying attachments in their entirety without reading the content and notify the sender immediately by telephone of the inadvertent transmission, by calling collect if located outside the calling area. There is no intent on the part of the sender to waive any right or privilege that may be attached to this communication. Thank you for your cooperation.

ProviderLink™

Figure 21. Fax With Fax-Back Cover Page



From ProviderLink, Inc. Fri 28 Jan 2011 01:17:36 PM CST Page 1 of 3

To: Claire Lee
Load,QA
Fax: 919-294-1090
Phone: x:

From: User HL7
DMC
Phone: 919-294-1080 x:

Patient Name: AUTOFAX INPATIENT **DOB:** 01/01/1965
Subject: Discharge Summary 01/28/2011 13:17:14 CST **Sent:** 01/28/2011 2:17 PM EST
Message:
If you have received this message in error, please contact the QA group to report this error.

CONFIDENTIALITY NOTICE: If you are not the intended recipient or the person responsible for delivering it to the intended recipient, you are hereby notified that you are not authorized to read, print, retain, copy or disseminate this message, any part of it, or any attachments. This facsimile message may contain information that is confidential, privileged, proprietary, or otherwise legally exempt from disclosure or use. Any disclosure or use of this facsimile message by any person other than the intended recipient or person responsible for delivering it to the intended recipient may constitute a Federal criminal offense punishable by imprisonment up to 10 years or fines up to $250,000. If you have received this message in error, please destroy this message and any companying attachments in their entirety without reading the content and notify the sender immediately by telephone of the inadvertent transmission, by calling collect if located outside the calling area. There is no intent on the part of the sender to waive any right or privilege that may be attached to this communication. Thank you for your cooperation.

This message was sent to you through the ProviderLink network. You could be receiving this and all of your paper-based communications online. It's better organized, faster, cheaper, secure and accountable. Ask me how or call ProviderLink at 866-398-2804 to subscribe to your area's online healthcare community.

ProviderLink

Figure 22. Fax Without Fax-Back Page

B. Reading and Replying to Messages

When patient related messages are send to you, whether they are sent electronically or by fax, you will read and respond to the messages through ProviderLink. ProviderLink will organize the messages for reading, and will maintain an audit and history trail of the messages.

To Read and Reply to a Message:

1. You can access messages from the Main window and from patient pages. This procedure assumes you are on the ProviderLink Main Window. On the *Main Window*, click **Unread Messages**.

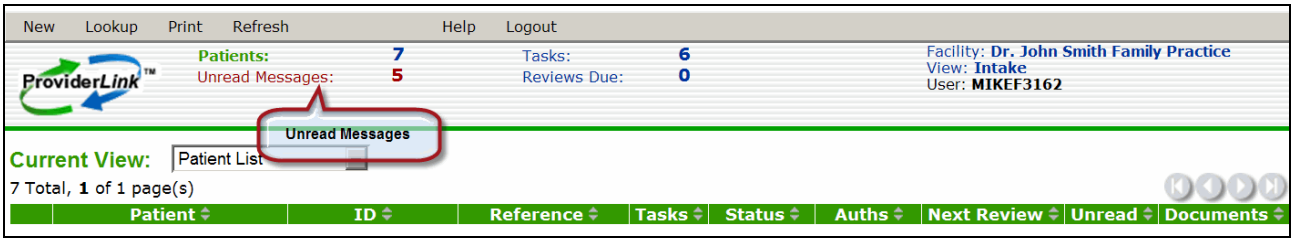


Figure 23. Unread Messages Menu Option

2. The *Unread Message* screen displays, listing the messages with the oldest message appearing at the top of the list.

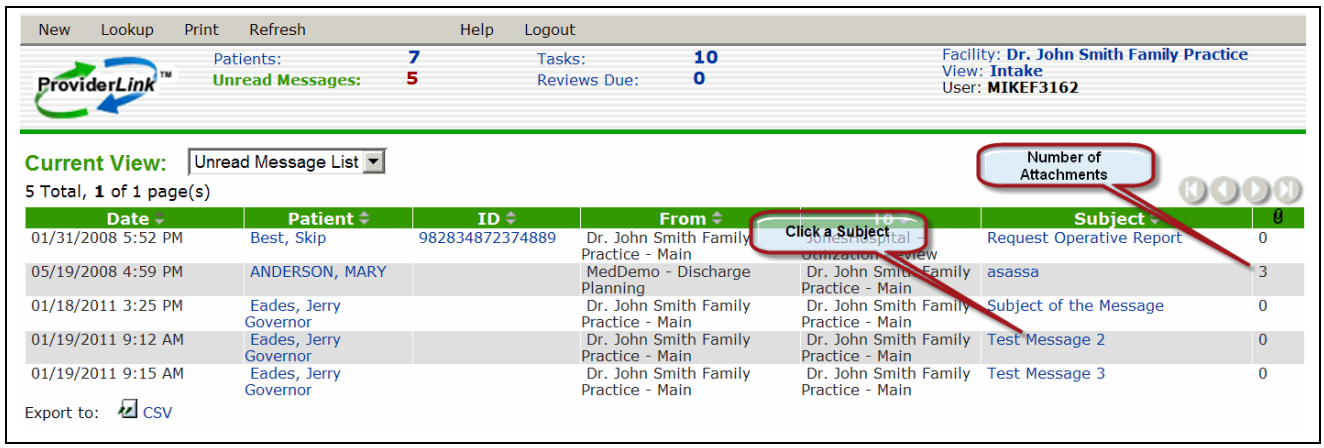


Figure 24. Unread Messages List

3. Click the **Subject** link of the message you want to read. The *View Message* screen displays.

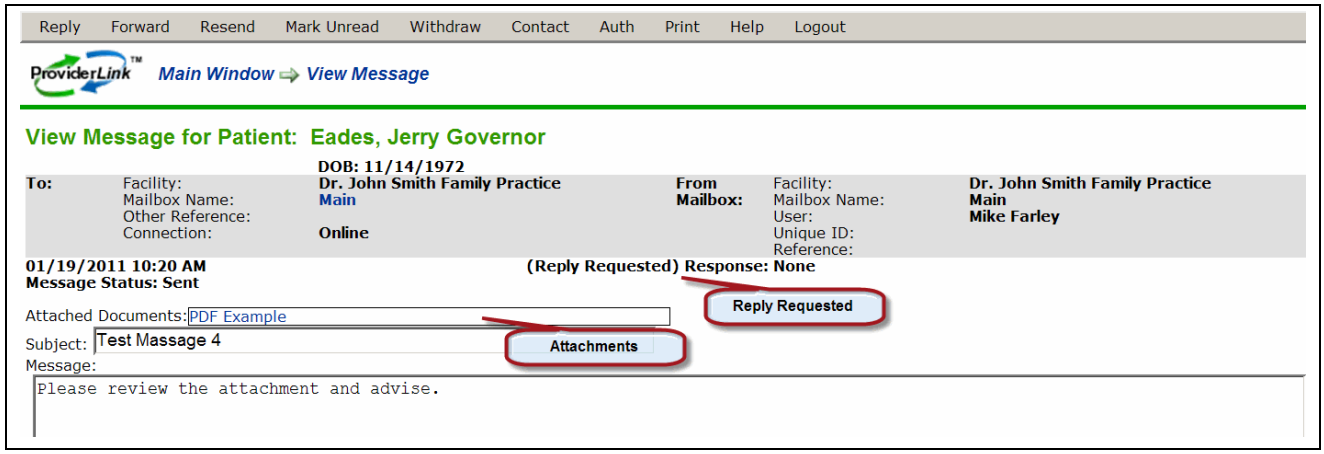


Figure 25. View Message

4. The *View Message* screen displays the related patient information, the message sender and recipient, 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.

   Read the message. Read each attached document by clicking its link in the Attached Documents window. When you click an attachment, follow your PC prompts to open it.

   Note that in the example, your reply is requested.

5. Choose your response to the message. If you want to:

   - Reply to the message, click **Reply** on the menu bar.
   - Forward the message to another user or facility, click **Forward** on the menu bar.
   - Mark the message unread, so it is not removed from the Unread Messages List, click **Mark Unread** on the menu bar. You will return to the *Unread Messages For Patient* screen. After a message is read, you can still view it. See :To view a Patient's History Items and Audit Trail."

   Continue these steps to reply to the message.

6. Click **Reply** on the menu bar. The *Create Message* screen displays, with the information from the original message.



Figure 26. Create Message Screen

7. Type your reply in the **Message** window and add any new attachments and recipients as required. For details, refer to "To send a New Message through ProviderLink."
8. Click **Send** to send your reply.

C. Processing an Incoming Fax

If you receive a fax message that does not use the ProviderLink fax-back cover page, you need to manually process the message and associate it with the correct patient.

To process an Incoming Fax:

1. If you are not viewing the Default Incoming Fax Folder screen, click the **View** ink, in the upper right area of the ProviderLink window.

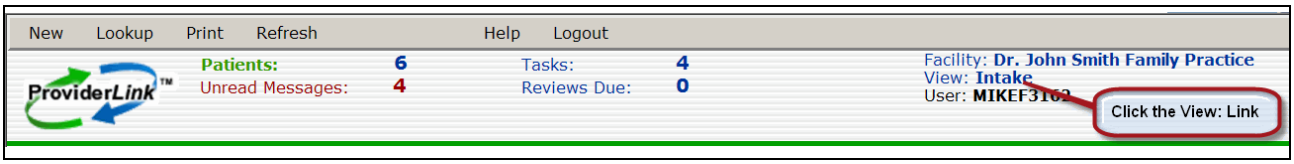


Figure 27. Main Window View Option

2. On the *Choose Work List* View screen, select **Folder – Incoming Faxes**, then click **Submit**.

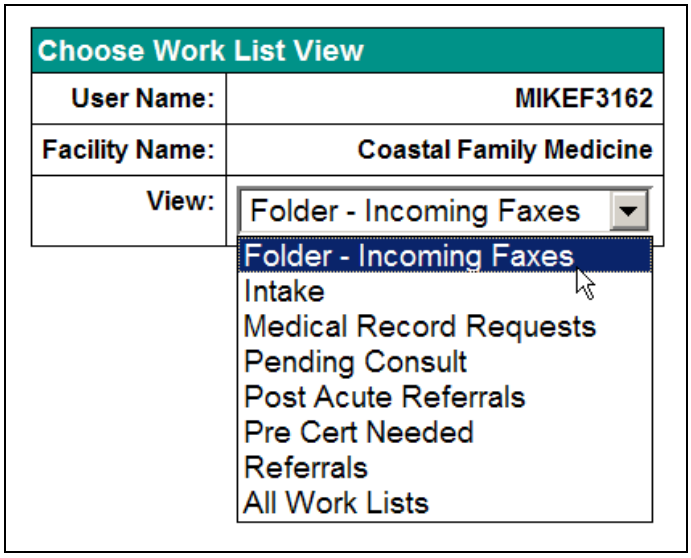


Figure 28. View Incoming Fax Folder

3. The *Incoming Fax Folder* screen displays, similar to the following.

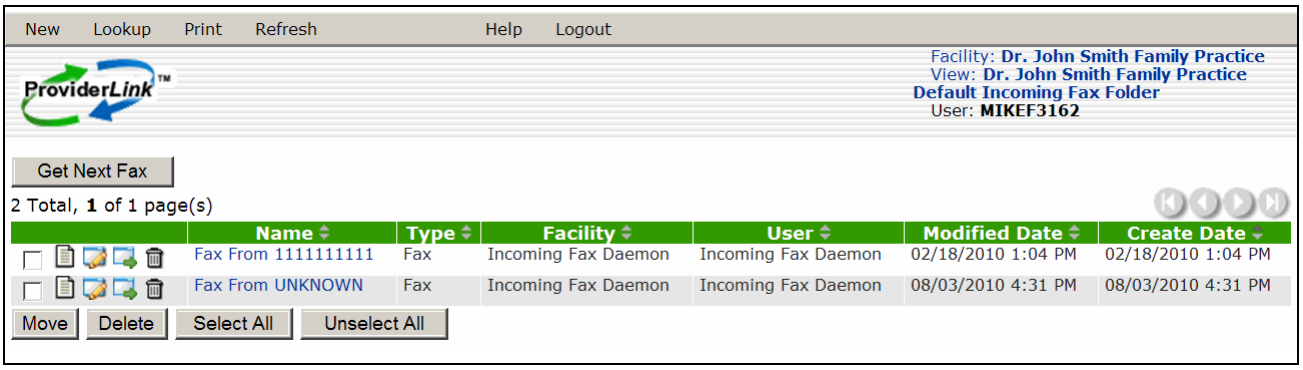


Figure 29. Incoming Fax Folder

4. From the Default Incoming Fax Folder screen, start processing the oldest fax message by clicking the **Get Next Fax** button. The first page of the fax message displays in the *Document Viewer* screen.

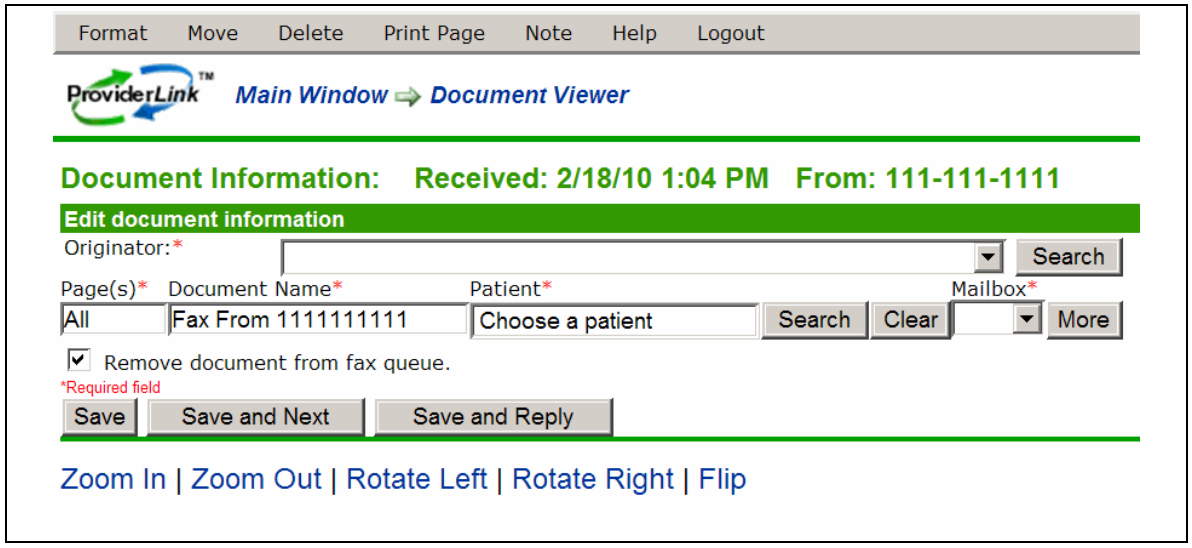


Figure 30. Document Viewer Screen

5. Determine which provider the message is from, and click the **Originator** drop-down list to see if the provider appears. If so, select the provider. If the provider is not in the Originator list, click the Search button to bring up the *Facility Search* window.

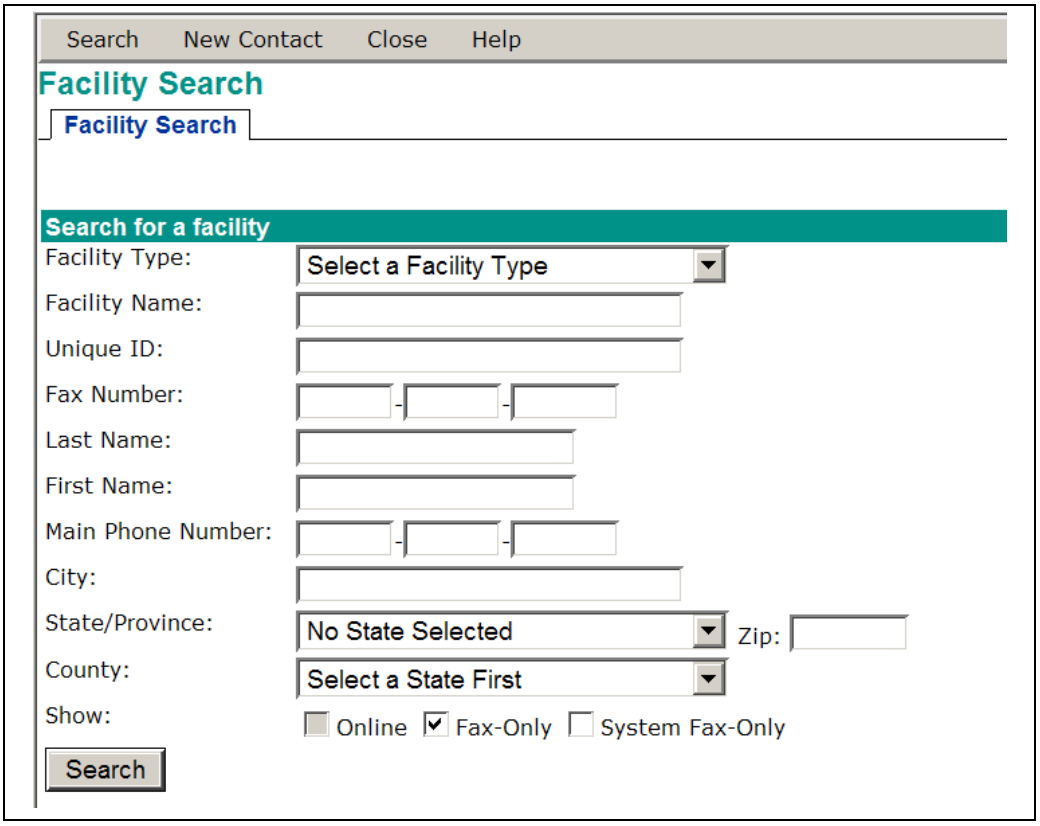


Figure 31. Facility Search

6. Enter the necessary criteria to search for the provider. If you do not enter search criteria in at least one field, the system will return all the available facilities in the search results. You can narrow the search results by:
    - Selecting a Facility Type from the drop-down list.
    - Entering partial or complete information in fields such as Facility Name, Last Name, etc.
    - Selecting a State and County
7. 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.
8. If the provider still does not appear, you may need to create the facility. See "To Create a New Fax-Only Facility."
9. If there are multiple pages, view each page to determine if the message contains documents for more than one patient.
    a. If all the message pages relate to one patient record, accept the default "ALL" value in the Page(s) field.
    b. If the message contains pages for more than one patient, click the **More** button to add another set of routing fields. Then, enter the appropriate page number or page range (e.g., 1-3) in the **Page(s)** field.

    Note: In the rows you add with the More button, modify the Pages, Document Name, Patient, and Mailbox fields as described in the following steps.
10. Enter a logical name for the document in the *Document Name* field.
11. Next to the *Patient Name* field, click **Search**. In the Patient Lookup window, enter patient search criteria and click **Search**.

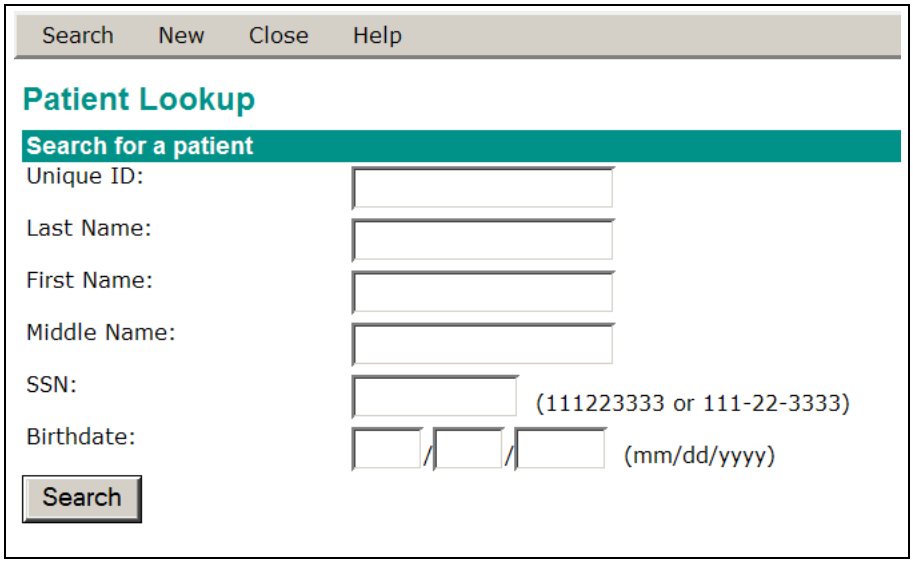
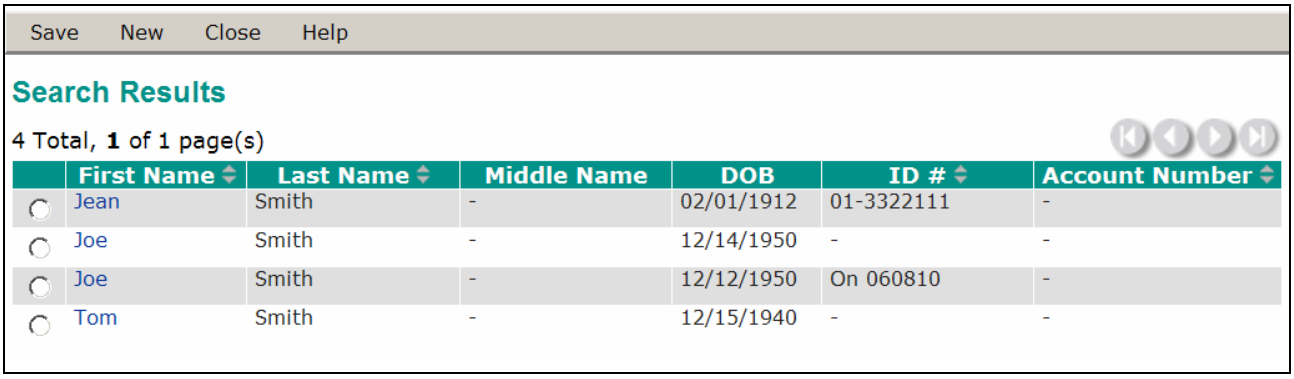


Figure 32. Patient Lookup Search

12. Select a Patient for the fax by clicking the appropriate radio button in the search results window. Click **Save**. Note: If no patient record exists, you may need to create a new one. See "To Create a New Patient Record."



	First Name	Last Name	Middle Name	DOB	ID #	Account Number
○	Jean	Smith	-	02/01/1912	01-3322111	-
○	Joe	Smith	-	12/14/1950	-	-
○	Joe	Smith	-	12/12/1950	On 060810	-
○	Tom	Smith	-	12/15/1940	-	-

Figure 33. Patient Search Results

13. The *Documents* window for the selected patient displays. Select the check box for the folder for the message, and click **Save**.
14. In the *Document Viewer* window, click the **Mailbox** drop-down arrow and select the Mailbox for the message.
15. Depending upon the details of the message, you may be able to add additional information in "metadata" fields. For example, fields such as *Status*, *Procedure Type*, and *Procedure Date* may be available. Adding metadata will aid users who search for this document in the future.
16. 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.

8. Managing Documents

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 eForms function in ProviderLink to create documents. In addition, virtually any hard copy, paper document, or any report you can print to a local printer can be added to a ProviderLink patient record and be sent in a message to another facility.

A. Adding Documents to a Patient Record — Virtual Printer

You can add any document you can open from your computer to a patient record with ProviderLink's Virtual Printer feature.

Note: Please verify the Virtual Printer driver is installed on your PC before you attempt to add documents to patient records as described below. For help troubleshooting the Virtual Printer, see Appendix A, "Documents Management."

To add Documents to a Patient Record with the Virtual Printer:

1. From the *View Patient Information* screen's menu bar, click **Documents**. The Documents Folder screen displays.

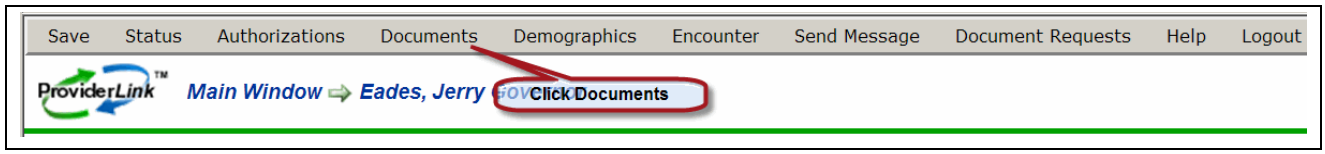


Figure 34. Documents Menu Option

2. On the *Documents Folder* screen, click **Add Document** on the menu bar, and then select **Add By Print Job** from the drop-down list.

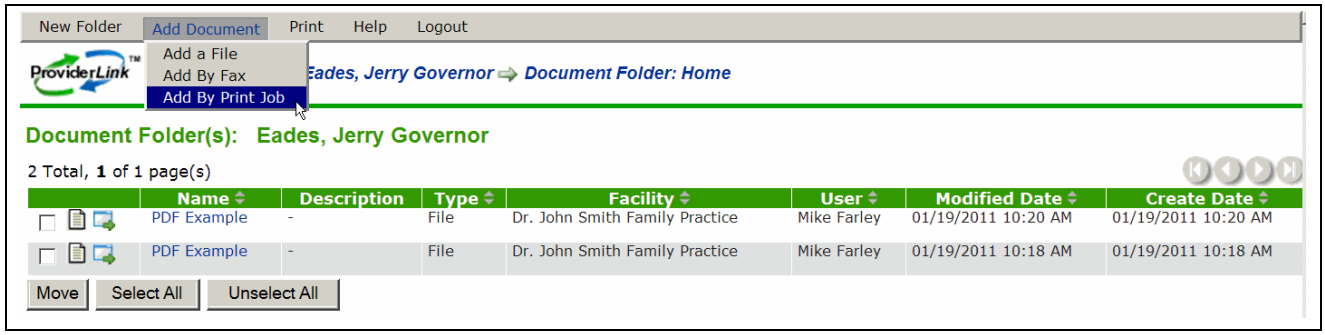


Figure 35. Add Document Menu Options

3. The *Print Attach* window displays. Type a logical name in the Document Name field.

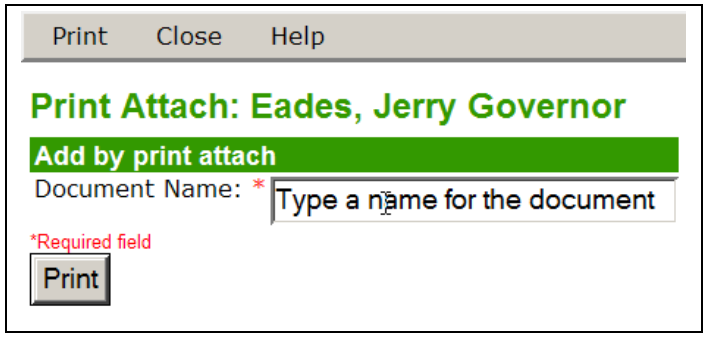


Figure 36. Print Attach, Document Name

4. Click **Print**. The *Print Now* window appears and the system is ready to receive the document. Do not close the Print Now window.
5. Without logging out of ProviderLink, open the document you want to add to the patient's record.
6. Use the application with which you opened the document to navigate to its print menu. For example, click **File>Print**, then select **ProviderLink Printer** from the list of printers. Click **OK**.

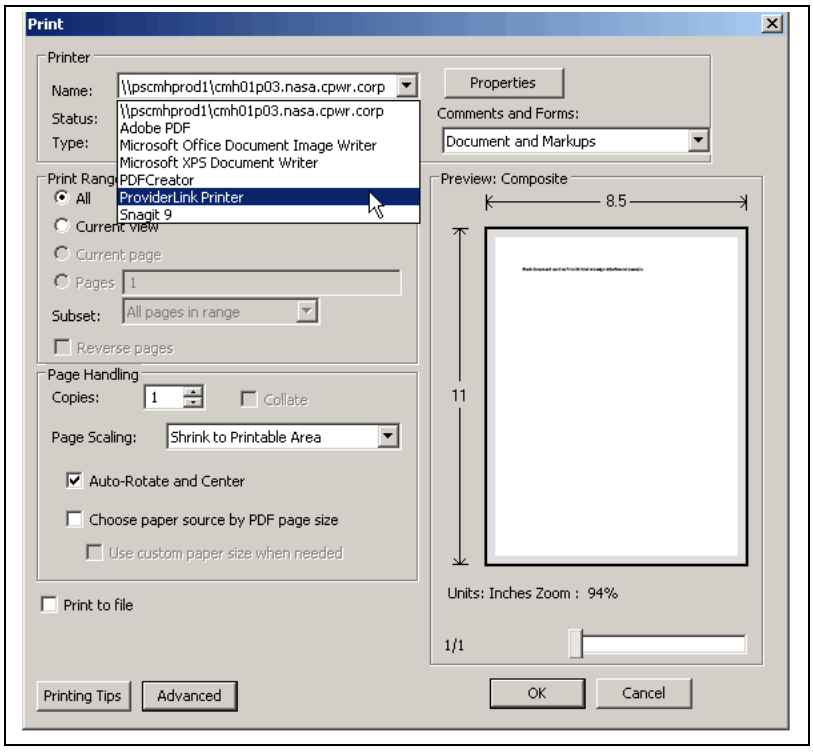


Figure 37. Print to ProviderLink Printer

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 window's **Close** button.

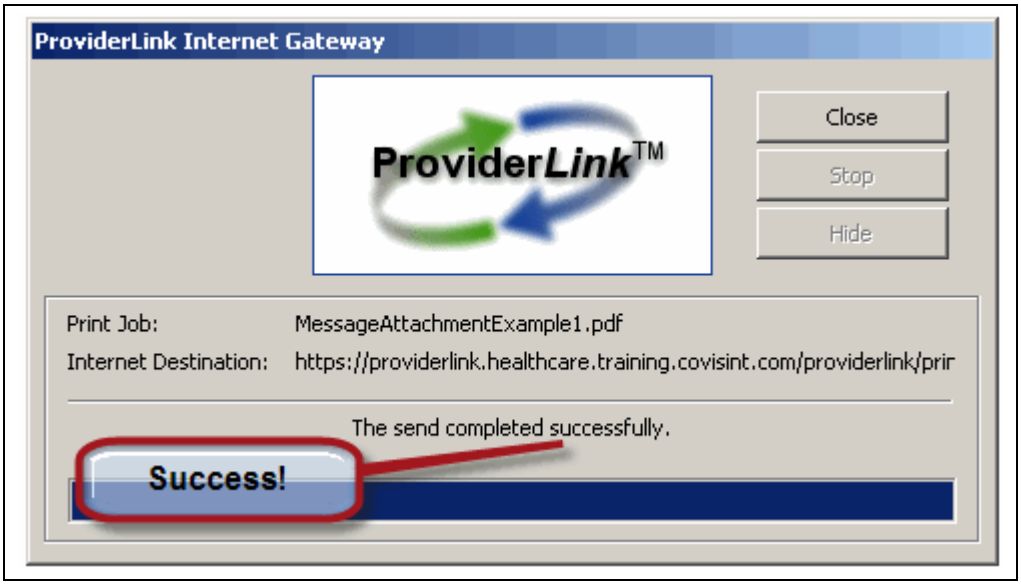


Figure 38. ProviderLink Print Success Indicator

8. Return to the *Print Now* screen and click **Close**.
9. Return to the *Documents Folder* screen that opened at step 2. The document you added appears in the list.

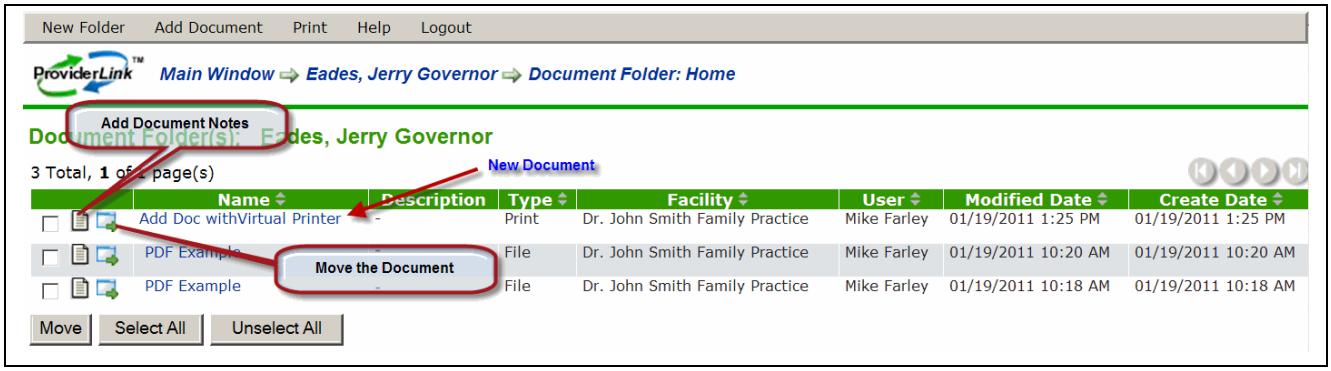


Figure 39. Document Folder with Added Document

10. You can:
    - Click the Document Notes icon to add notes about the document.
    - Click the Move icon to move the document to a different folder.
    - Click the Document Name link to view the document to verify it was added successfully.

B. Adding Documents to a Patient Record — Hard Copy/Fax

If you have a hard copy of a document, you can add it to a Patient Record, using the ProviderLink fax feature.

To add Documents to a Patient Record with Hard Copy and Fax:

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

2. On the menu bar, click **Add Document → Add By Fax**. The *Fax Attach* screen appears.
3. Type a logical name in the **Document Name** field.

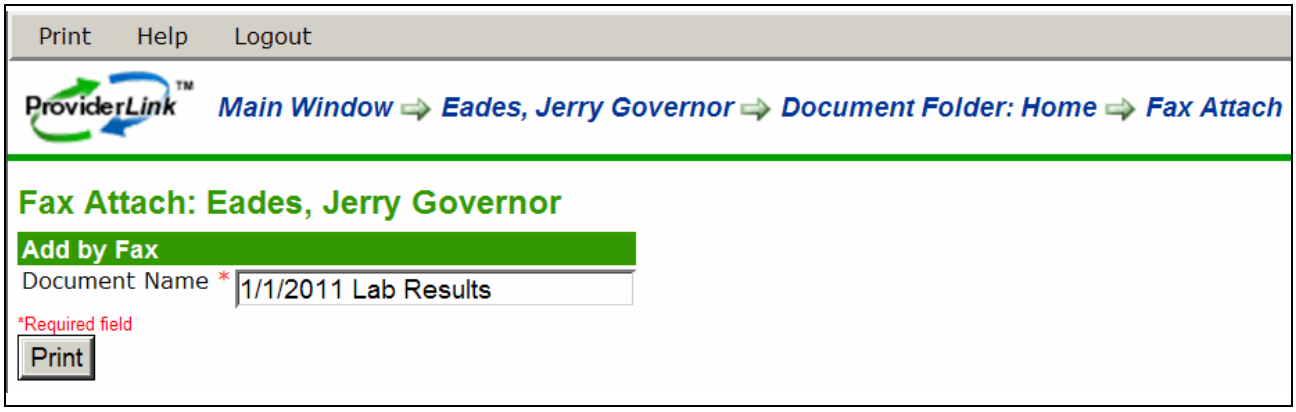


Figure 40. Add Document, Fax Attach

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

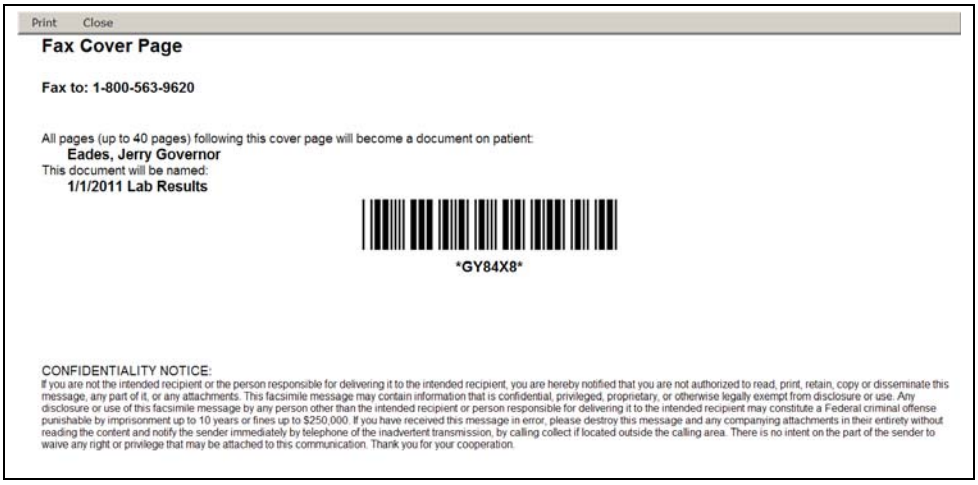


Figure 41. Fax-back Cover Page

5. Click **Print** on the menu bar to display the print options. Print the cover page on your printer.
6. After the cover page prints, click **Close** on the menu bar to close the cover page and return to the *Documents Folder* screen.
7. Once the cover page prints, place it on top of the hard copy documents (maximum of 40 pages, not counting the cover page) and fax the package to the number indicated on the cover page. After the fax sends successfully, the document will be listed on the *Documents Folder* screen (this screen may need to be refreshed).
8. You can:
   - Click the Document Notes icon to add notes about the document.
   - Click the Move icon to move the document to a different folder.
   - Click the Document Name link to view the document to verify it was added successfully.

C. Adding Documents to a Patient Record — eForms

EForms are electronic versions of commonly used healthcare forms. EForms can include the capabilities to check for errors, to validate entries, and to ensure required fields are completed prior to saving.

EForms can be added to a patient's record, printed or sent to another facility for review or signature via ProviderLink.

You can work with available eForms, and you can work with a Facility Administrator to create new eForms to help automate your workflows.

Important: Only a ProviderLink Facility Administrator can add or maintain eForms for your facility. If there are no eForms created for your facility, the eForms menu options described below will not display on your ProviderLink *Document Folders* windows.

To add Documents to a Patient Record with eForm:

1. From the View Patient Information screen, click **Documents** on the menu bar. The *Document Folder* screen displays.
2. Click **eForms**, and then select the appropriate eForm from the drop-down list.

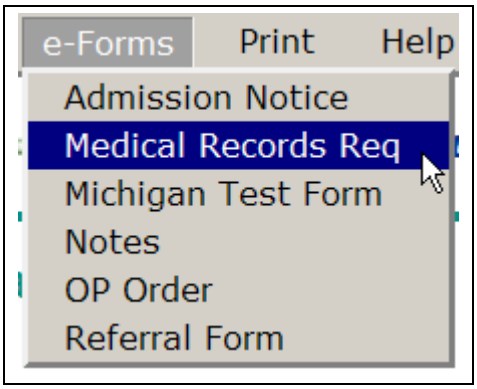


Figure 42. eForms Menu Options

3. The eForm displays. The following eForm screen shot is provided for example only, and may not match a form on your facility.

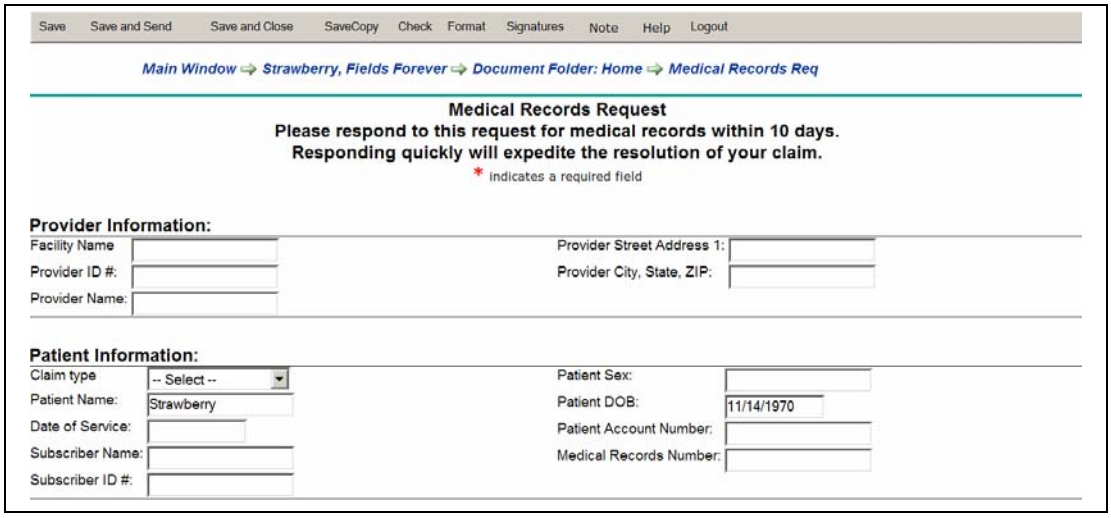


Figure 43. Medical Records Request

4. Complete the form as required.
5. Click Check to verify there are no errors in your form. If there are errors, correct them and repeat this step.
6. Select one of the following Save options:
   - Click **Save** periodically to save the eForm as you are completing it.
   - Click **Save and Send** to send the form as an attachment to a message. For details about the Create Message window, see "To send a New Message through ProviderLink."
   - Click **Save and Close** to close the form and return to the Documents section.

     Note: If you do use the Save and Close option, the eForm is added to the patient record. If the eForm is an information-requesting form, you will need to open it later and use the Save and Send option to send it to the appropriate facility.
7. When you click Save and Close or complete the Save and Send process, the *Documents Folder* screen displays, with the eForm attached to the patient's record. You can click the document name to open it. When opened, you can use the options on the menu bar to attach the eForm to a message, print it, send it for signature, or create a copy.

9. Managing Contacts

With ProviderLink, you can exchange information with online facilities (other ProviderLink users) and fax-only facilities. Online facilities become available for information exchange as they join ProviderLink. You can add fax-only facilities as required by your business needs. Once you create fax-only facilities, you can exchange information with them through ProviderLink.

There are two steps to the process for managing fax-only contacts:

A. Create a fax-only facility.

B. Add one or more contacts to the facility.

A. Creating a Fax-Only Facility

Create a fax-only facility to enable information sharing with an entity that is not already a ProviderLink facility.

To Create a Fax-Only Facility:

1. From the *Main Window*, click **New > Facility**.

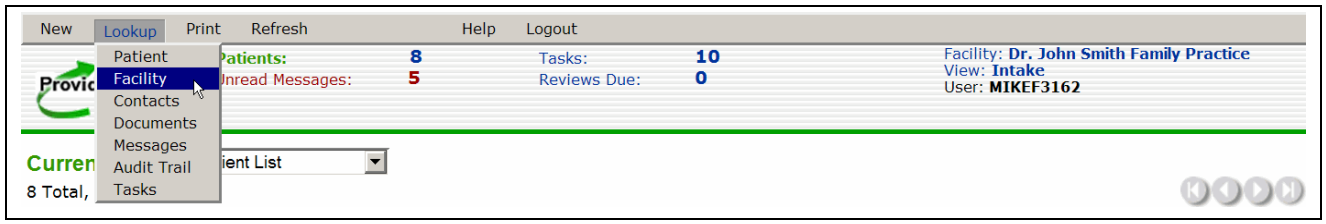


Figure 44. Lookup > Facility Menu Option

2. The *Add Fax Facility* screen displays. Enter the name of the provider in the *Fax Facility Name* field, which is the only required field.

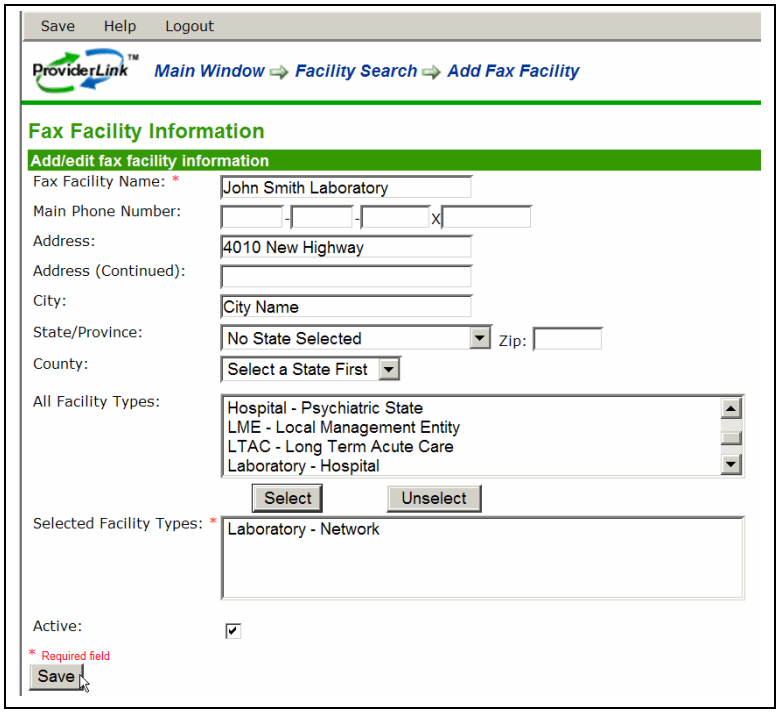


Figure 45. Add Fax Facility

3. Enter the: Main Phone Number; City; State/Province; Zip; and County, as required.
4. Choose the type of provider from the *All Facility Types* list box and click **Select**. There may be more than one applicable provider type. If you add a facility type and want to remove it, highlight the facility type and click **Unselect**.
5. Check your entries for accuracy, and click **Save**. The *Facility Contact Information* screen displays.

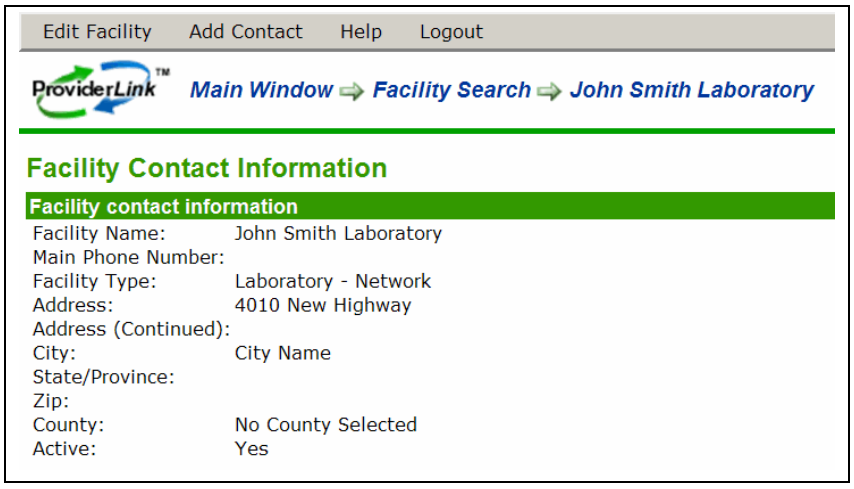


Figure 46. New Facility, Contact Information

Note: At this point you have created a fax-only facility, but the facility is not yet ready for use with ProviderLink. To complete setting up the facility, see “Add Contacts to a Fax-Only Facility.”

B. Add Contacts to a Fax-Only Facility

Adding contacts to a fax-only facility sets it up for information exchange through ProviderLink. Before you can add contacts, you must create the associated facility. See "To Create a Fax-Only Facility."

After you successfully complete this procedure, the fax-only facility will become available for use with ProviderLink for tasks such as sending and receiving messages.

Important: If you cannot access the ProviderLink menus described in this procedure, then you do not have the permissions required add contacts. In such cases, you can:

- Request your domain or facility administrator to add the contacts.
- Request the required administrator permissions for your ProviderLink account.

To Add Contacts to a Fax-Only Facility:

1. From the *Main Window*, select **Lookup > Facility**. The *Facility Search* screen displays.
2. Enter search criteria as required to search for the fax-only facility you previously created. Click **Search**. The results display at the bottom of the screen. If your facility is not listed, modify your search criteria and search again.

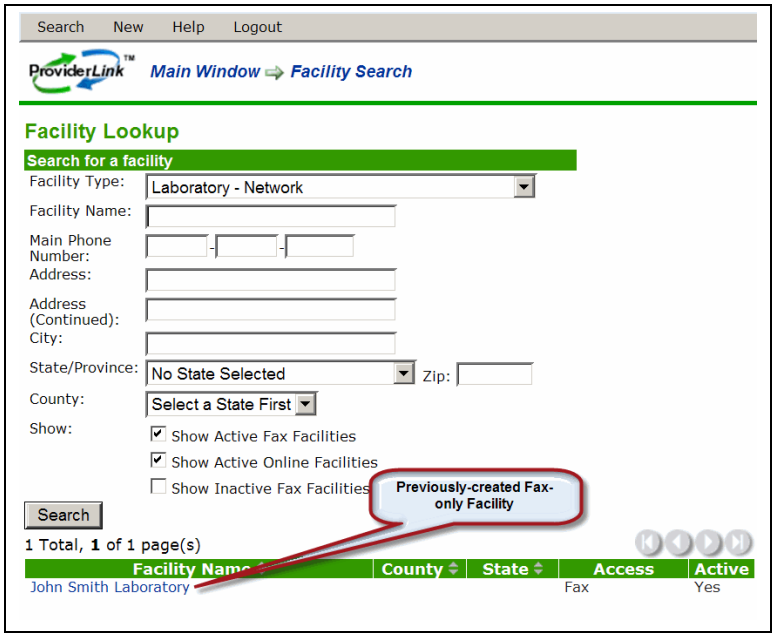


Figure 47. Fax Facility Search

3. In the search results, click the name of the facility to which you want to add a contact. The *Facility Contact Information* screen displays.
4. On the *Facility Contact Information* screen, click **Add Contact**. The *Contact Mailbox Information* screen displays.

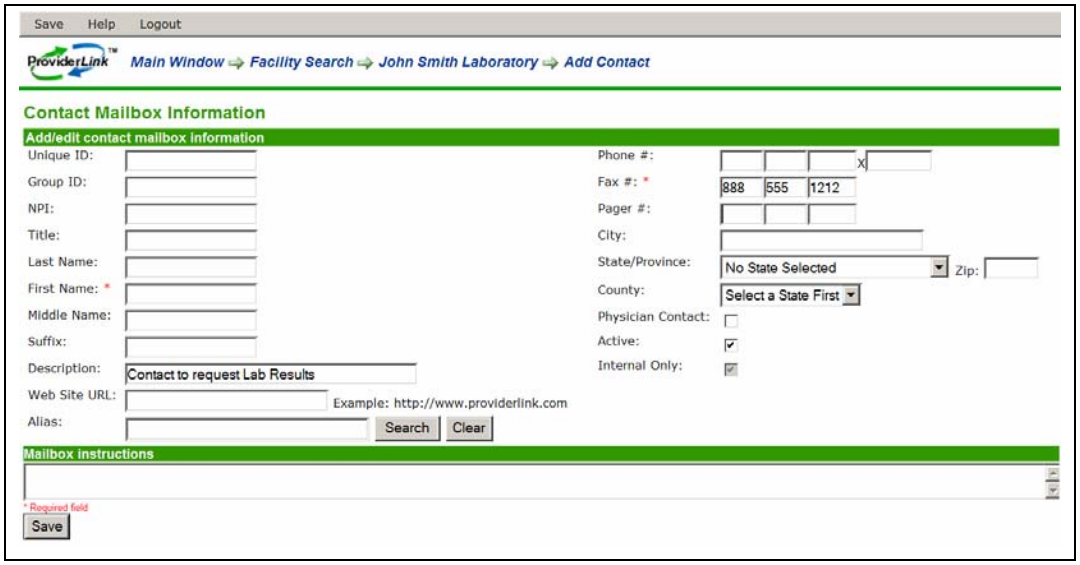


Figure 48. Add Contact to Fax Facility

5. Complete the fields as required and click **Save**.

   Note: Enter values for Last and First names, add the fax number and verify the Active check box is selected. If you miss any required values, when you click Save, the system will prompt you to enter the needed information.

6. When the new contact is successfully saved, the *Facility Contact Information* screen displays, with the contact link near the bottom of the screen.

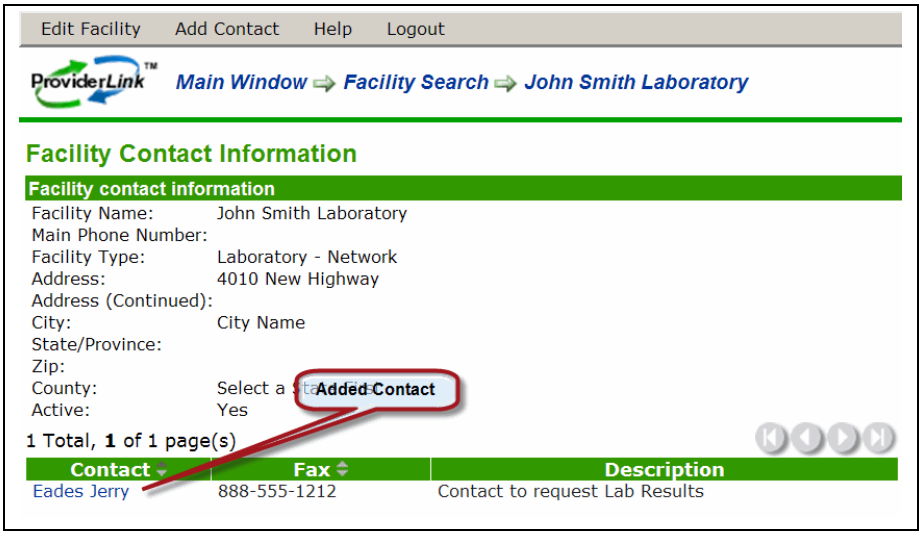


Figure 49. Facility Contact Information

Once you see the *Facility Contact Information* screen display with at least one contact listed, the new fax-only facility is ready to use with ProviderLink.

10. Logging Out of ProviderLink

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

To log out of ProviderLink:

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



Figure 50. Logout Menu Option

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

A. Automatic Logout

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

Section 2 Summary

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

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

And how to:

- access the ProviderLink system
- log into ProviderLink
- view Patient information
- 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
- process, send, and receive messages
- add documents to patient records via fax, virtual printer, and eForms
- manage fax-only facilities and contacts
- log out of ProviderLink

Section III - Using ProviderLink In Your Daily Work

1. Transitioning from Paper to Electronic Communications

ProviderLink brings structure and accessibility to healthcare communications. ProviderLink messages are automatically associated with the related patient record. All communications are time and date stamped and comprise an audit trail that both senders and recipients (if they are online, rather than fax contacts) can view.

A. Benefits of Transitioning to Electronic Patient Communications

Transitioning from paper to electronic communications within the framework of ProviderLink provides significant benefits to patients and healthcare institutions and practitioners:

- Information is entered one time, electronically, and associated with a patient record
    - Audit and history trail of documents, dates, and staff
    - Reduced time to find information
    - Reduction of handwriting errors
    - Reduction in transcription errors
- Informed decision making through a comprehensive view of all ProviderLink inputs to a patient record
    - Aggregates patient information from other healthcare institutions
    - Helps physicians avoid replicated tests and procedures
    - Reduces reliance on patients' memory of current and past tests, medications, and procedures
- Information is readily available whenever it is needed
- Rapid transfer of information regarding referral requests, information requests, prescriptions, etc., with other healthcare facilities without telephone calls, voice messages, manual faxing, etc.
- Customizable to support your organization's workflow and business needs
- Supports compliance with healthcare industry regulations for electronic record keeping

ProviderLink also makes it easier to transition to electronic communications by providing fax and virtual printer capabilities that help your organization get existing paper records into the system.

B. Understanding Workflow Support in ProviderLink

When you use ProviderLink, you are working in an environment that was set up to support the kind of work you do in a general way. Once you understand how ProviderLink can be customized, it is relatively easy to set up work lists and eForms that add efficiencies to your practice.

The following high level topics are designed to help you better understand how to customize ProviderLink to better support your practice's workflow and information needs:

- Assessing your workflow
- Analyzing work lists

- Identifying needed eForms

Assessing Your Workflow

To decide how to customize ProviderLink, you need to verify your understanding of the workflows performed by the various staff groups in your office. It helps to document your understanding, at least at a high level. You can document workflows at a high level by:

- Listing each work role in your organization, even if that role is not a full time assignment. For example, work roles could include:
    - Doctor
    - Nurse Practitioner
    - Physician's Assistant
    - Office Manager
    - Receptionist
- Making a simple diagram of how patients move through your organization. For example, patients might:
    - Check in with a receptionist
    - Go to a station for collection of commonly-monitored attributes such as weight, blood pressure, etc.
    - Move to an office where more information is collected about symptoms or the visit reason
    - See a doctor, and receive medications, prescriptions, referrals, or other treatment instructions
    - Meet with the office manager to resolve charges and schedule appointments

Once you have documented the work that's done and the process you use to assess and treat patients, you can move to the next step.

Analyzing Work Lists

Work lists have general and ProviderLink-specific definitions. They can be:

- Lists of tasks performed by the various roles in your organization
- ProviderLink work categories available from the *Choose Work List View* screen

ProviderLink work list categories can be used to group patient-related tasks associated with the work roles you identified in Assessing Your Workflow, above.

When you use work lists in this way, patient interactions are recorded by staff in various work roles. The patient information moves through the ProviderLink work lists, as the patient-related work moves from one role to another. For example, when a patient enters your organization:

- A receptionist might record updated information in a form available with the Receptionist work list, and then move the patient to the Nurse Practitioner work list.
- The Nurse Practitioner might record patient vital statistics and symptoms in forms available with the Nurse Practitioner work list, then move the patient to the Doctor work list.

- The doctor might record prescriptions, referrals, or other treatment options in forms available with the Doctor work list, then move the patient to the Office Manager work list.
- The Office Manager might record information about charges in a form available with the Office Manager work list.

When all the patient-related communications are completed, the responsible role removes the patient from all work lists. This does not remove the patient's information, it just indicates there is no outstanding activity for the patient.

Customizing Work Lists

To customize ProviderLink work lists, you need to understand:

- Your organization's roles, workflow, and work tasks
- The ProviderLink work lists that are already available to your facility

If the existing work lists meet your organization's needs, then no customization is required.

If your organization would benefit from customized work lists, you will work with your ProviderLink facility administrator, who will create and manage the work lists for you.

If you need customized work lists, you may also need eForms that are not available to your facility. An overview of eForm creation and management is provided in the following section.

C. Creating and Managing eForms

Sections A and B above provided overviews of how you could collect information about your organization's roles and processes. This section provides an overview of how to better transition to electronic communications by adding eForms that will meet your organization's workflow and information needs to your facility.

An eForm is an electronic form. You can create eForms to collect the same information you are currently collecting in paper forms, spreadsheets, etc. When information is collected in an eForm it is automatically attached to the patient's record – no transcribing or data re-entry is required. You can even design eForms to send to other healthcare facilities to collect or provide information in the desired structured format.

Important: Only ProviderLink domain or facility administrators can create and manage eForms. The purpose of this section is to help you better understand how to work with the person who will create and manage your eForms. For details about eForms creation and management, refer to the ProviderLink Facility Administrator Manual.

First, you should determine if you need to create eForms. Review the eForms already available on your ProviderLink facility, and determine if additional eForms are required. If additional eForms are required, you will need to know the following information to effectively communicate with your ProviderLink facility administrator:

- What work task will the eForm support?
- Who will use the eForm?
- What information must be included in the eForm? Do you want the eForm to validate data such as telephone numbers or dates are in the correct formats?
- Which information in the form is required?
- How should the eForm be organized?

Once your ProviderLink facility administrator understands your needs, he or she will complete the process of designing, creating, testing, and implementing the form for your facility. After the eForm is implemented, it is available for use by anyone on your facility.

2. Sending Referrals

One of the tasks you probably perform frequently is communicating about patient referrals. ProviderLink makes it easy for you to send referrals and reply to referral-related messages with online and fax-only facilities.

A. Sending Referral Messages

You can use an eForm as a referral tool and transmit it to a provider that can meet your patient's needs. You send the eForm within a ProviderLink message. For details, see "Adding Documents to a Patient Record — eForms."

You can use ProviderLink to send referral messages to fax contacts as easily as to online contacts. Fax contacts will receive the ProviderLink message on their fax machines, and can respond using a bar-coded, fax-back cover page. When either type of contact replies, you will receive the response as an unread message attached to the patient record in your work list.

To send a Referral Message:

1. From the *View Patient Information* screen menu bar, click **Send Message**. The *Create Message* screen appears. For details, see "Sending a New Message through ProviderLink."
2. Select the recipient to whom you want to refer your patient.
3. Attach the referral form and the necessary supporting documentation to include with your request. For details, see "To send a New Message through ProviderLink."
4. Enter your message **Subject** (e.g., "Referral").
5. Enter your **Message** text.
6. Request a reply from your message recipients.
7. Once you are satisfied with your message, click **Send**.

B. 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 eForms function in ProviderLink to create documents or you can copy information from clinical systems and paste it into a blank notes eForm. In addition, virtually any hard copy, paper document or any report you can print to a local printer can be added to a ProviderLink patient record and be sent in a message to another facility.

To add a hard copy document to a Patient Record (Fax Attach):

1. From the *View Patient Information* screen's menu bar, click **Documents** to view the *Documents For Patient* screen.
2. On the menu bar, click **Add Document → Add By Fax**. The *Add A Fax* screen appears.
3. Enter a document name that fits the type of document you are adding (e.g., Health & Physical).
4. Click **Print** on the menu bar or the **Print** button. The system will generate a bar-coded cover page.
5. Click **Print** on the menu bar to display the print options and print the cover page on your printer.

6. After the cover page prints, click **Close** on the menu bar to close the cover page and return to the *Documents for Patient* screen.
7. Once the cover page prints, place it on top of the hard copy documents and fax the package to the number indicated on the cover page. After the fax sends successfully, the document will be listed on the *Documents For Patient* screen (this screen may need to be refreshed).
8. You may click the document **Name** link to view the document you added.

To add a document from another system to a Patient Record (Print Attach):

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

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

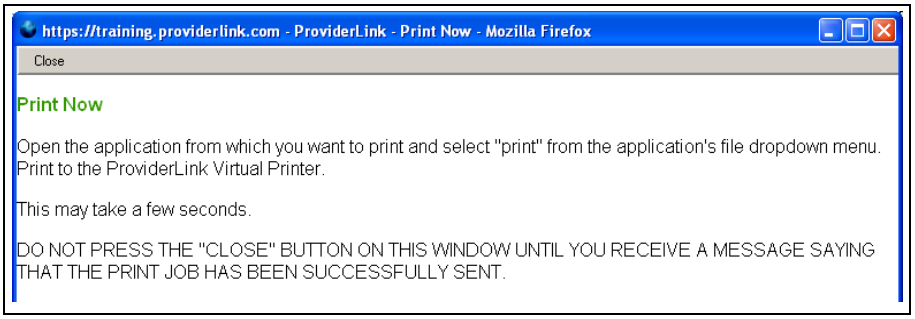


Figure 51. Print Now Screen

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

To add an Electronic Form (eForm) to a Patient Record:

1. From the *View Patient Information* screen's menu bar, click **Documents** to view the *Documents For Patient* screen.
2. On the menu bar, click **eForms** to view the available forms.

3. Select the appropriate **Form Name**. The system will display the form you selected.
4. Complete the fields on the eForm, 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

C. Messages and Electronic Signatures

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

There are three ways to obtain signatures documents in ProviderLink:

1. electronic signatures using a physician's user name and password
2. sending the document to the physician's office with a bar-coded, fax-back cover page
3. printing the form for signature and scanning it into ProviderLink with a bar-coded cover page.

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

Electronic Signatures

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

To electronically sign a document:

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

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

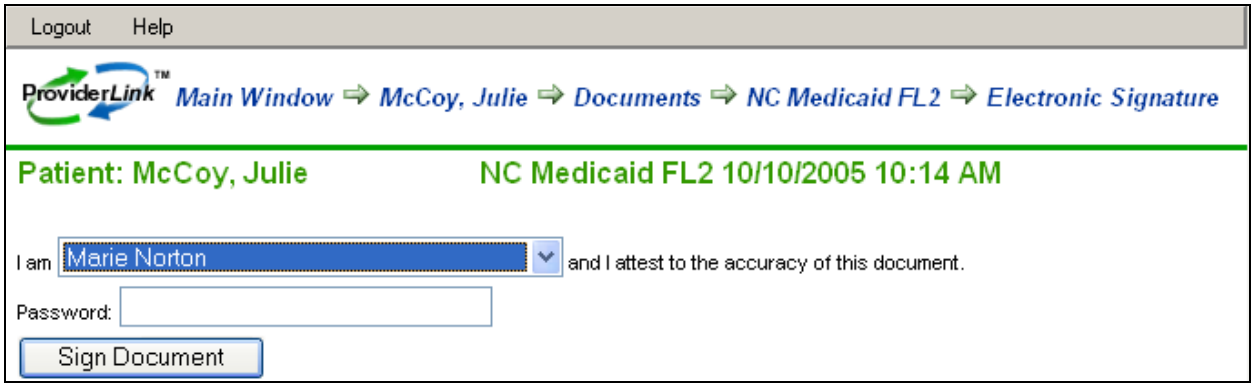


Figure 52. Electronically Sign a Document

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

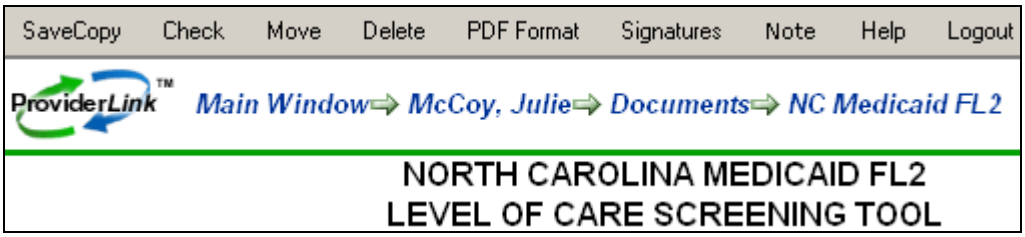


Figure 53. Document View after Electronic Signature

To maintain the integrity of the electronic signature, ProviderLink locks the form as soon as it is signed or attached to a message. A locked form cannot 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 generated a bar-coded cover page that is used to scan (fax) the signed document back into the patient's document list. The signed document is archived with the patient's record and can be transmitted to anyone who needs it.

To print the document for signature:

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

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

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



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

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

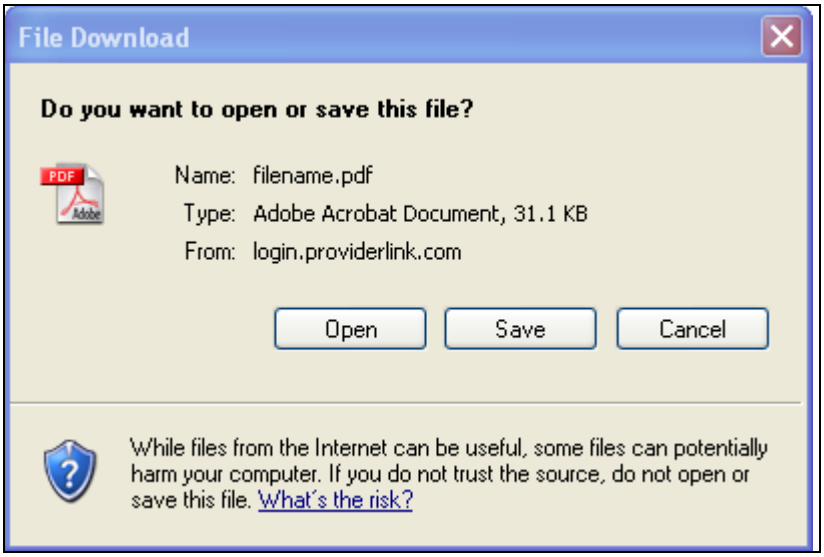


Figure 54. PC File Download Prompt

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

Sending the Document to a Fax Contact for Signature

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

To send the document to a Fax Contact for Signature:

1. From the menu bar of the form or document for which you need a signature, click **Signatures → Send for Signature**.

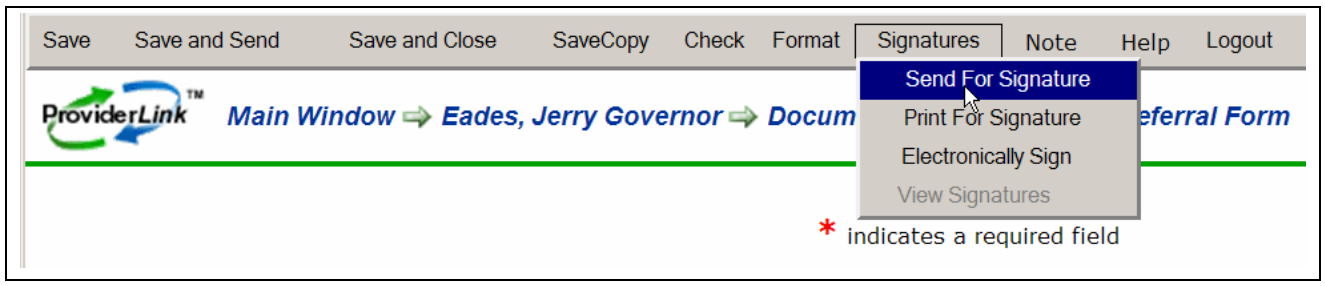


Figure 55. Signatures Menu Options

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

2. The *Create Message* screen appears with the document already attached, the **Subject** is completed, and the **Request a Reply** and **Create a Reminder Task** check boxes are selected for you.
3. 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.
4. If the mailbox does not appear in the drop-down list, you can find it by clicking the **Search** button. The *Facility Search* pop-up window appears.
5. Enter the **search criteria** and click **Search**.

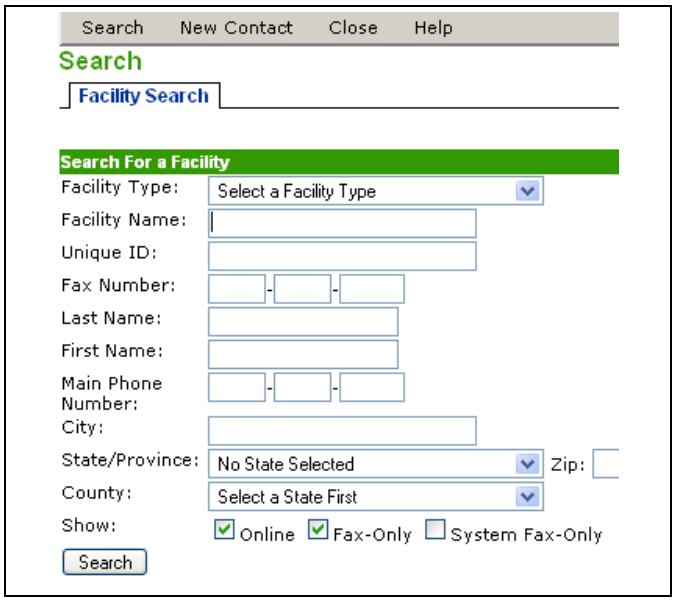


Figure 56. Facility Search

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

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

9. If necessary, enter a message in the **Message** field.

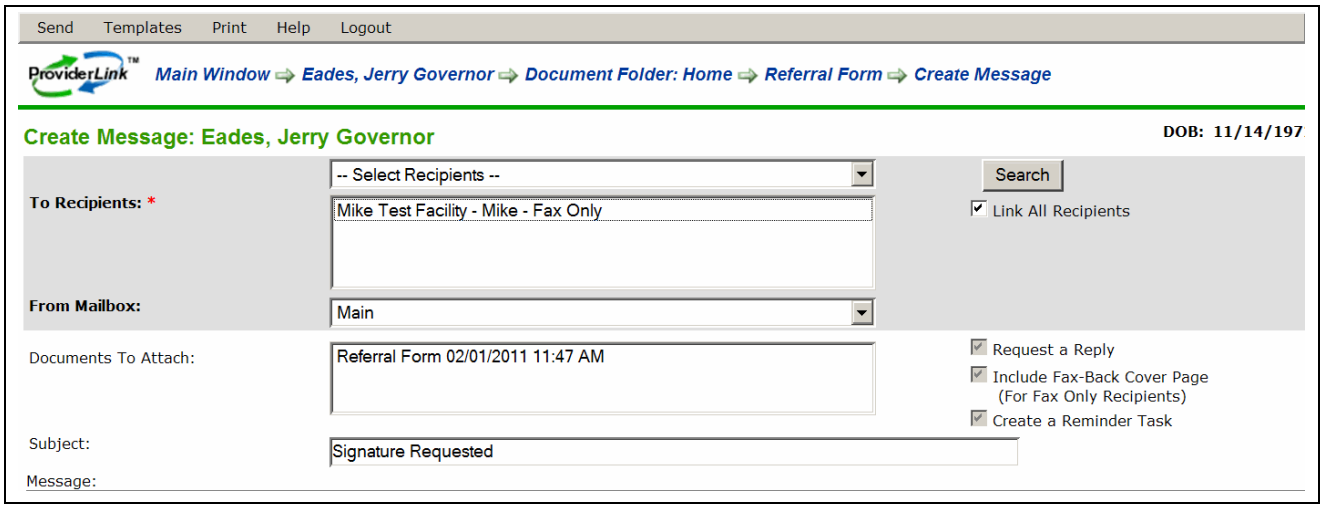


Figure 57. Sending a Document for Signature

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

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

Processing Incoming Messages

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

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

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

To process Incoming Messages:

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

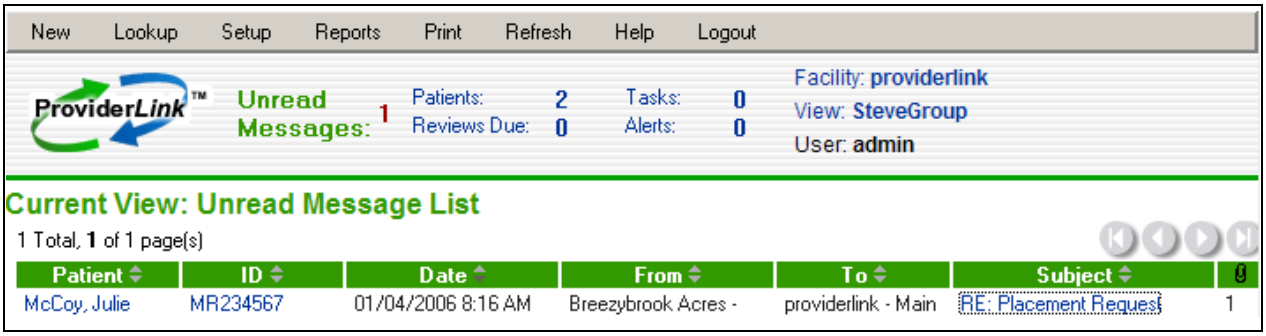


Figure 58. Unread Message List

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



You may navigate directly to the unread message by clicking the “Subject” link. However, the breadcrumb trail will only reflect the steps you took to read the message (Main Window > Read Message) and you will not be able to navigate to the associated patient's View Patient Information screen to access any of the patient's information without first returning to the Main Window.

By navigating to the View Patient Information screen and then the Unread Messages For Patient screen, the patient's name is added to the breadcrumb trail (Main Window > *Patient Name* >Unread > Read Message). This enables you return to the View Patient Information screen to continue processing the patient's record.

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

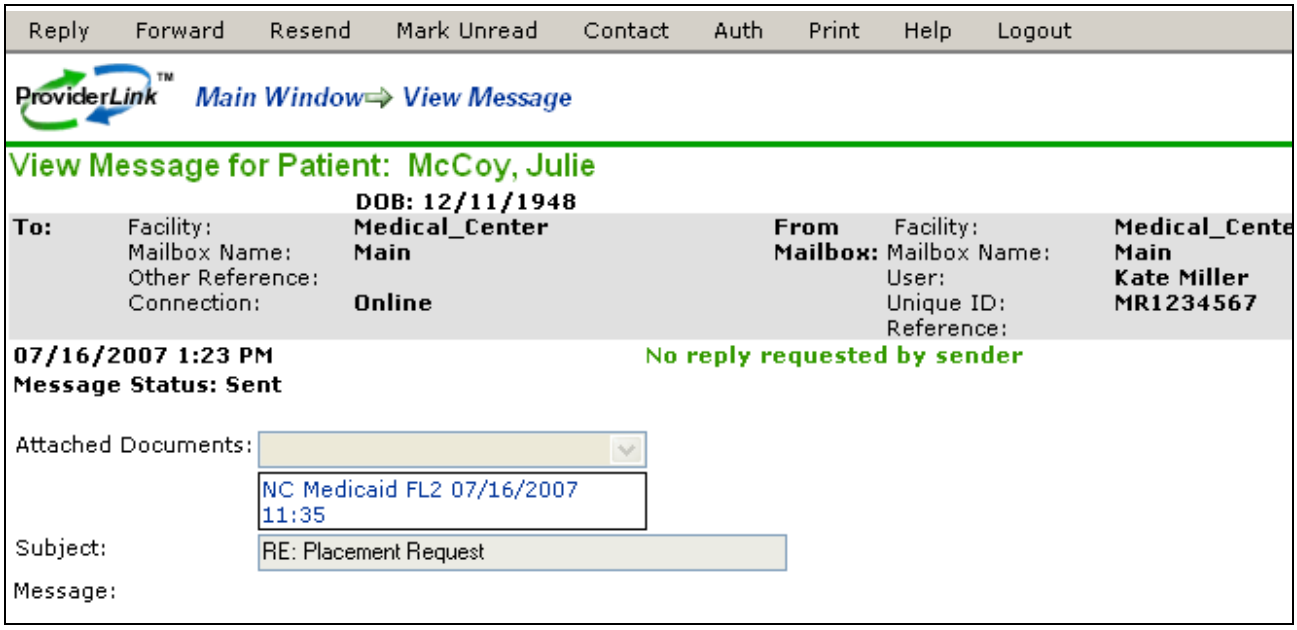


Figure 59. View Message

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

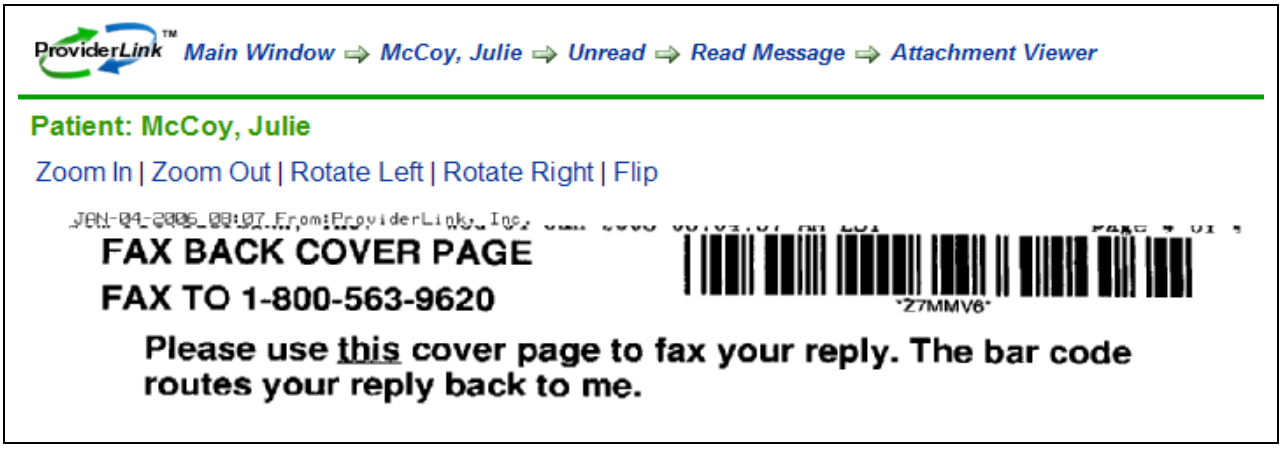


Figure 60. Attachment Viewer

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

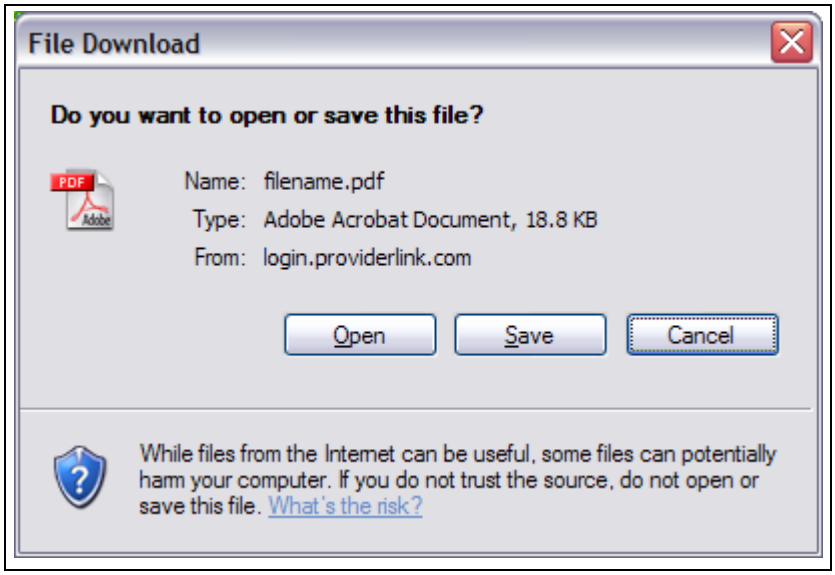


Figure 61. PC File Download Options

ii. When the document opens in your PDF reader application, use the application's print instructions to print the document.

iii. After the document prints, close the PDF reader and return to ProviderLink.

7. When you are finished working with the attached documents, you may click **Read Message** in the breadcrumb trail to return to the message and send a reply. For details about replying to a message, see "To Read and Reply to a Message."

D. Managing Your Work Lists

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

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

To link another Work List to the Patient Record:

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

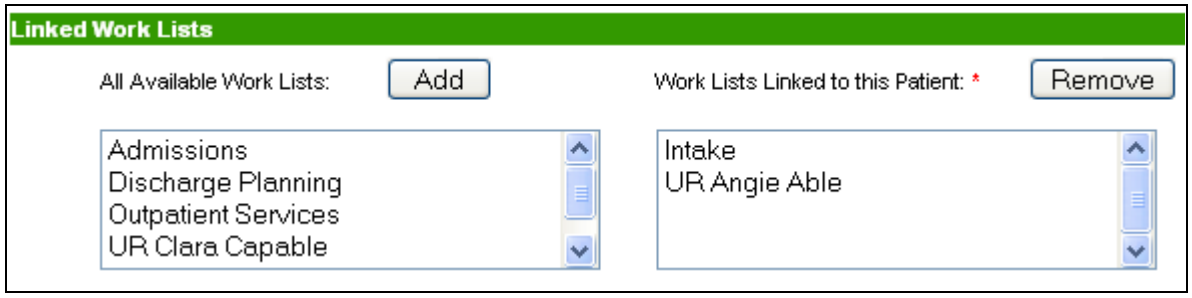


Figure 62. Add a Linked Work List to a Patient

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

To remove a Work List from the Patient Record:

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

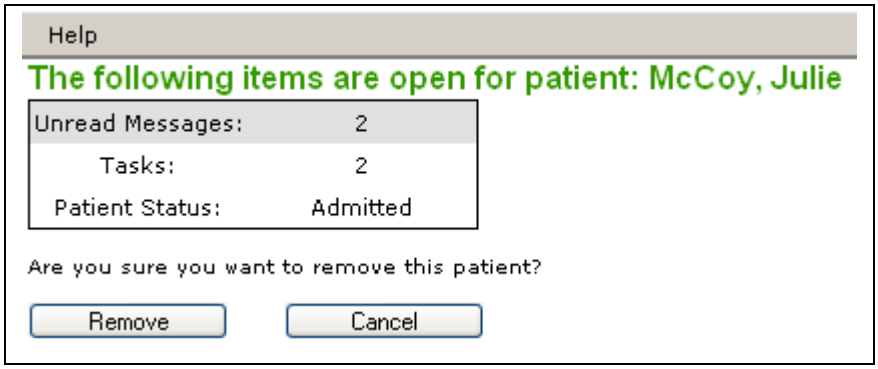


Figure 63. Patient's Open Items

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

3. Requesting Medical Records and Other Patient Information

ProviderLink makes it easy to electronically request patient-related documents and information from other facilities. You can send the requests to online and fax-only facilities. When the facility responds, the information is associated with the related patient's record.

You request medical records and other patient information by sending a ProviderLink message with a reply request to the required facilities.

To Request Medical Records:

1. Navigate to the desired *Patient Information* screen. For details, see "Viewing Patient Information." Click **Send Message**.

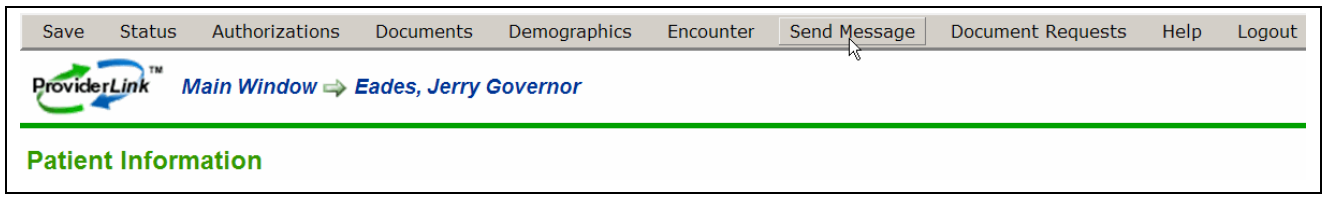


Figure 64. Send Message Menu Option

2. The *Create Message* screen displays. Click **Templates**. Select a medical records request template from the list of available templates. Your template list may not match the screen shot.



Figure 65. Templates Menu Option

3. The *Create Message* screen displays, with the template contents included.

   Note: Your template may differ from the template example shown in the screen shot.

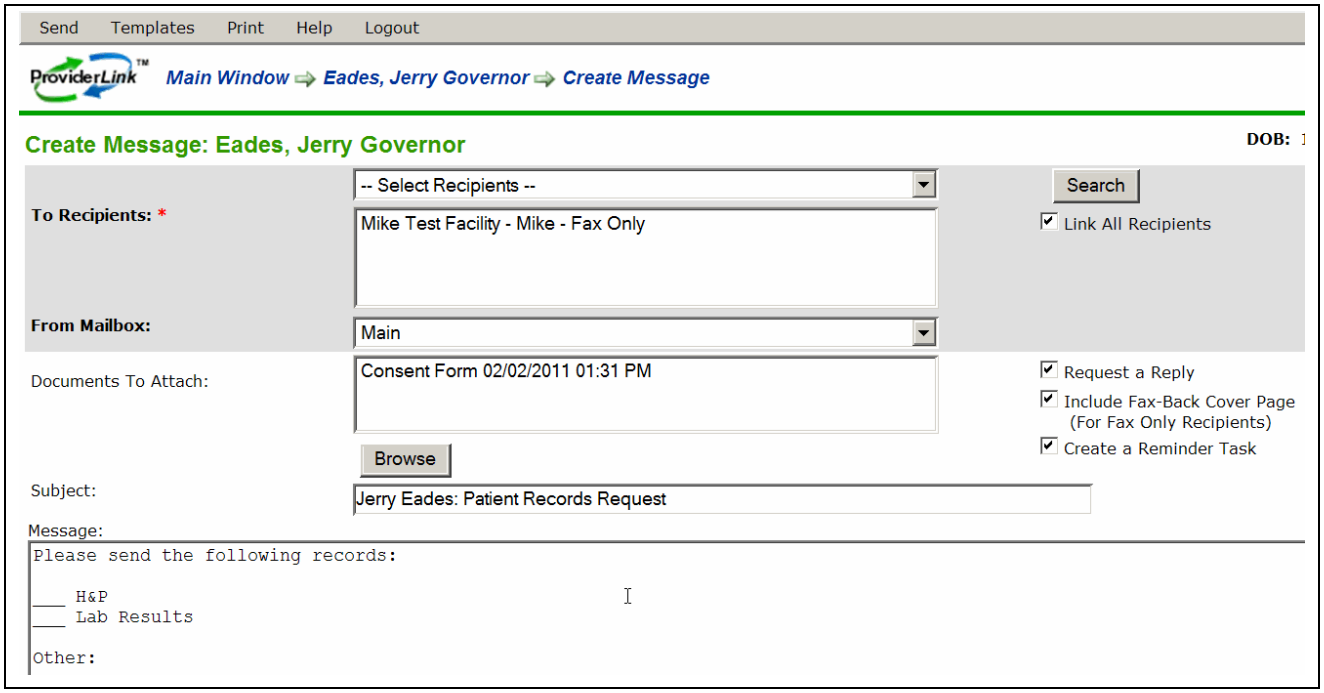


Figure 66. Message with Record Request Template

4. Edit the information the template inserted into the Message field as required.
5. Complete the message:
   - Select Recipients from the drop-down list, or click **Search** and search for the facility to which you want to send the request.
   - Select your **From Mailbox** from the drop-down list.
   - Enter a meaningful Subject, for example, “Patient Records Request.”
6. Attach other documents, such as a signed patient consent form, as required:
   - Click **Browse**. A Documents window for the selected patient displays.
   - Select the documents you want to attach to the message.
   - In the Documents window, click **Save**. The Create Message screen displays.
7. Select the **Request a Reply** and **Include Fax-Back Cover Page** check boxes. Select the **Create a Reminder Task** check box if you want to be reminded that you requested the information.
8. When you are finished entering information on the Create Message screen, click **Send**.
9. When the other facility replies to your request, it will appear as an unread message for the related patient.

When a facility from which you requested medical records replies to your request using a ProviderLink message or a fax-back cover page, the response will appear as an unread message for the related patient.

If a fax-only facility responds without using the fax-back cover page your request message provided, the fax is not automatically associated with the patient.

Such faxes are routed to your incoming fax folder, and must be processed. For details, see "*To process an Incoming Fax*."

Once the fax message is processed, you can read it as described in "*To Read a Response to a Medical Records Request*."

To Read a Response to a Medical Records Request:

1. When a facility responds to your request for medical records, the response appears as an unread message for a patient. Click the **Unread** indicator for the selected patient.

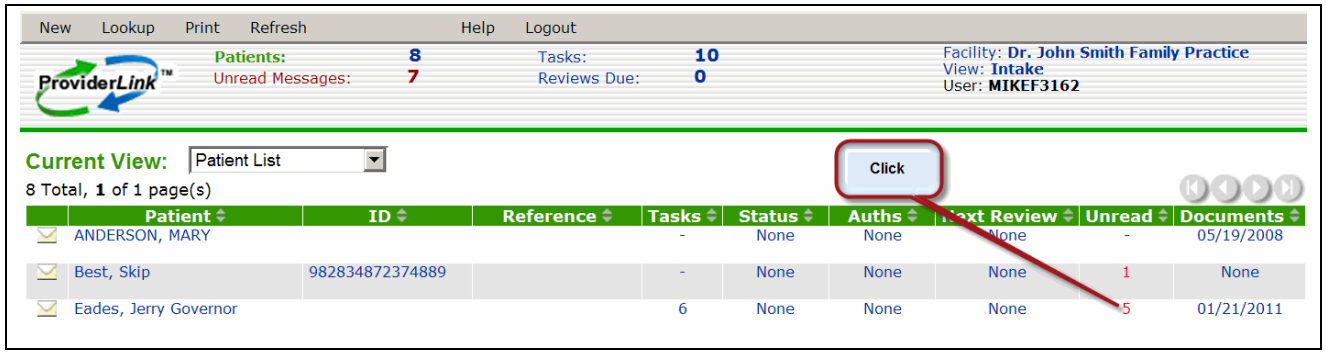


Figure 67. Unread Messages for Patient Link

2. The *View Unread Messages* screen displays. Click the link of the document request message you want to read.

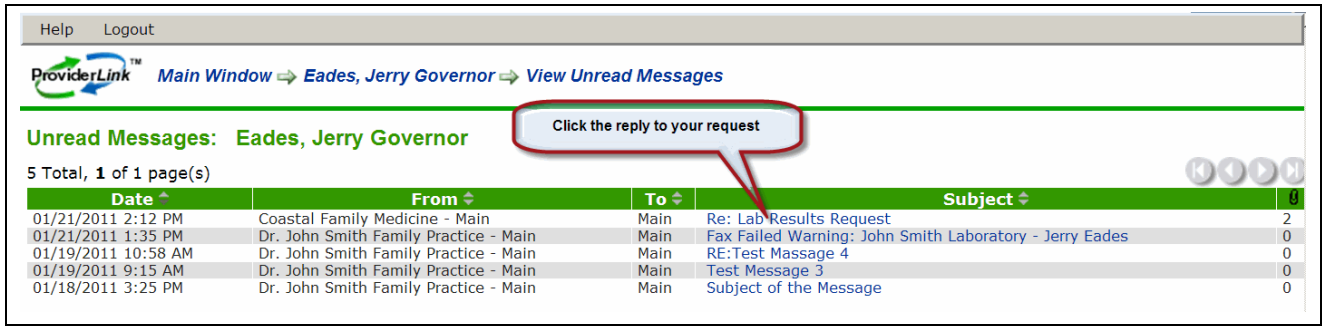


Figure 68. View Unread Messages for Patient

3. The *View Message* screen displays.

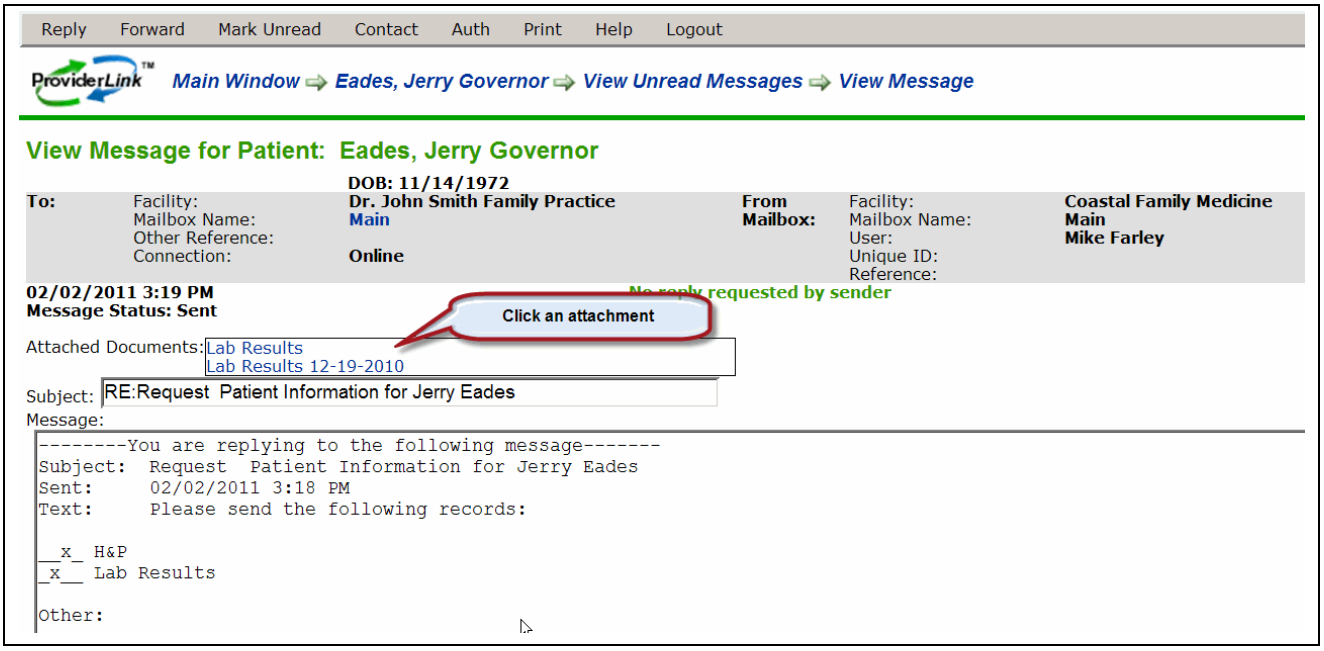


Figure 69. View Message for Patient

4. Click the link(s) in the **Attached Documents** field. Follow your PC's prompts to open or save the documents as required.
5. If you want to view the information in the future, it is stored under *History Items, available on the Patient Information screen.*

Other ProviderLink facilities may request medical records from your facility. When a medical records request is made, it will appear as an unread message for the related patient. If you receive such a request, you should read the message and respond to it.

To Respond to a Message Requesting Medical Records:

1. A request for documents appears as an unread message for a patient. From the Patient Information screen, click the number in the **Unread** column.

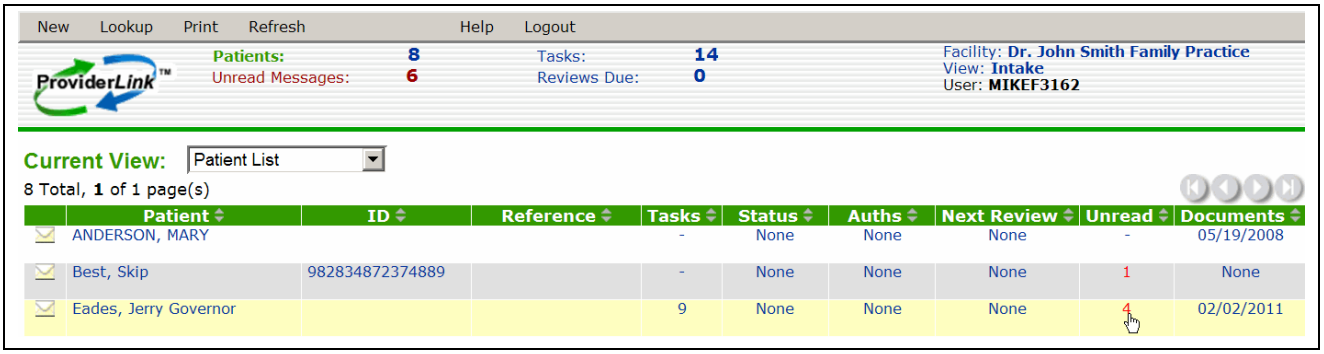


Figure 70. Unread Messages Link

2. The *View Message* screen displays. Click the link for the message to which you want to respond.

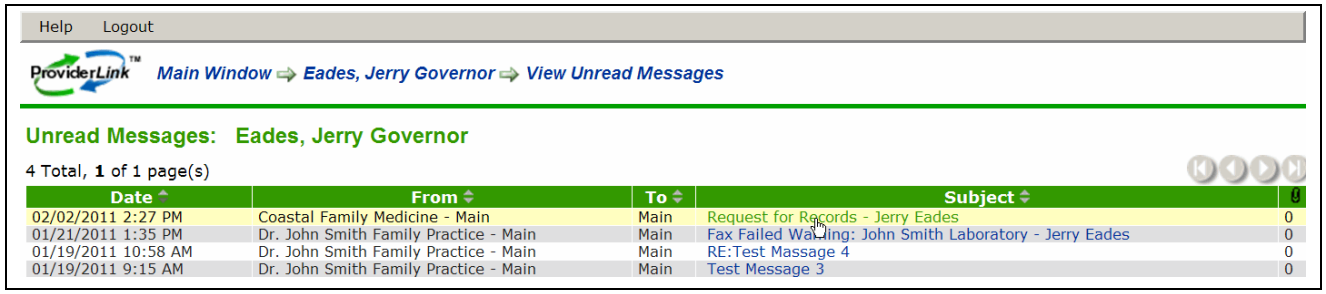


Figure 71. Select Unread Message

3. The message displays. Click **Reply**. The message reply displays in the *Create Message* screen.
4. Click **Browse**. The *Documents for* (patient name) pop-up window displays the available document folders for the selected patient.
5. Navigate through the folder structure as required, select the requested documents, and click **Save**.
6. The completed response displays in the *Create Message* screen. Add comments and select reply request options as required,

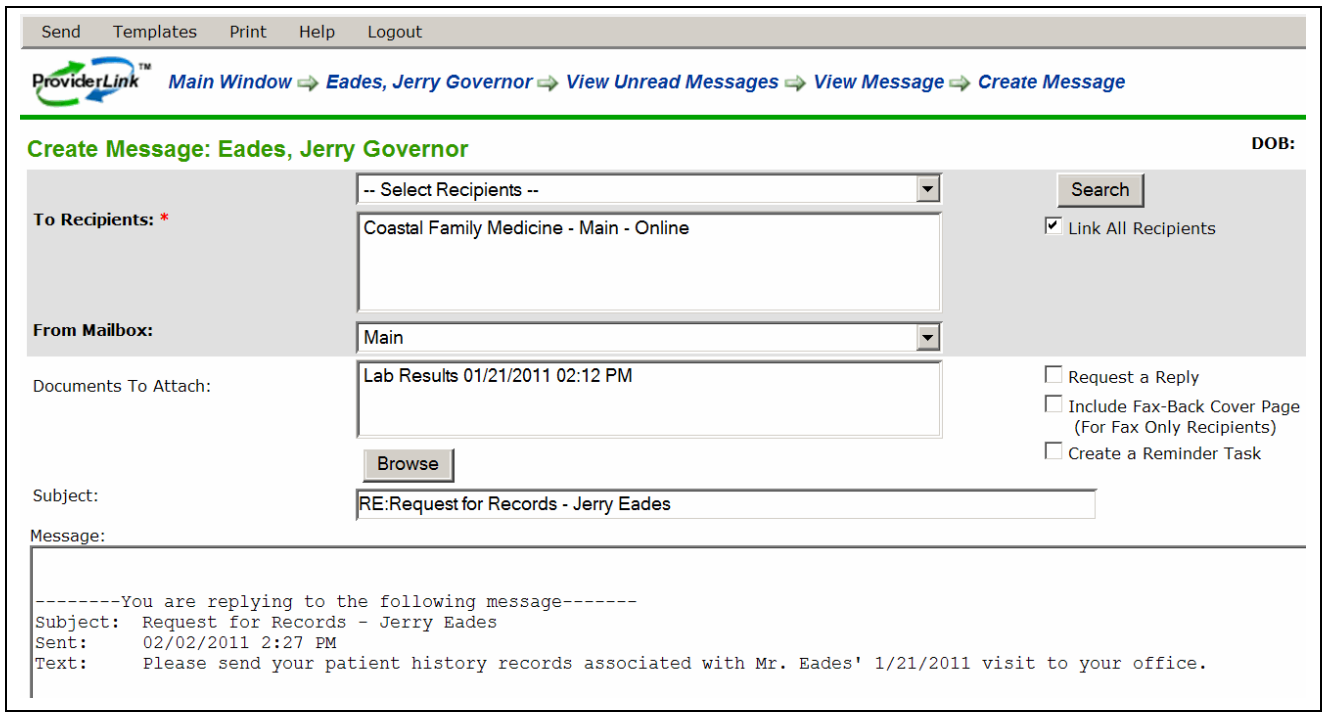


Figure 72. Response to a Patient Information Request

7. Click **Send**. Your response to the medical records request is sent to the requesting facility.

4. Managing Incoming Faxes (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.

This section describes how faxes are processed in a message based workflow. Message based workflows are typical for new practices. If you want to learn about other options, refer to the *ProviderLink Facility Administrator Manual*.

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

You have the ability to add metadata information to a document. Once a document is stored with metadata, you can use the added information as search criteria to make it easier to find the document later.

A. Processing Incoming Fax Messages

When you receive fax messages that are not sent with a fax-back cover page, they cannot be automatically associated with a patient. Such messages need to be processed to add the fax document to a patient record and route the message to one of your facility's mailboxes and its associated work list.

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

To process an Incoming Fax:

1. Be sure you are viewing the **Incoming Fax Folder** Main Window. For details, see “To process an Incoming Fax.” You will see a list of the faxes received with the oldest faxes on top.



Your incoming fax folder may be named something other than “Incoming Fax Folder.”

If you cannot identify the fax folder by reviewing the list available when you click the **View** link, see your facility administrator.

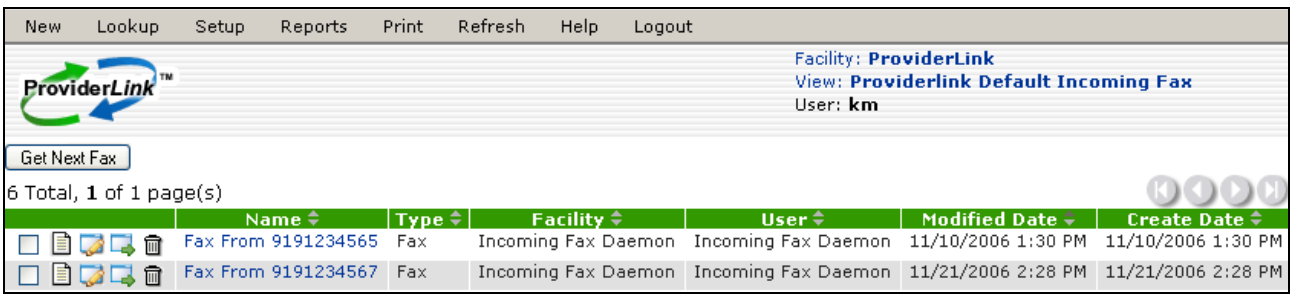


Figure 73. Incoming Fax List

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

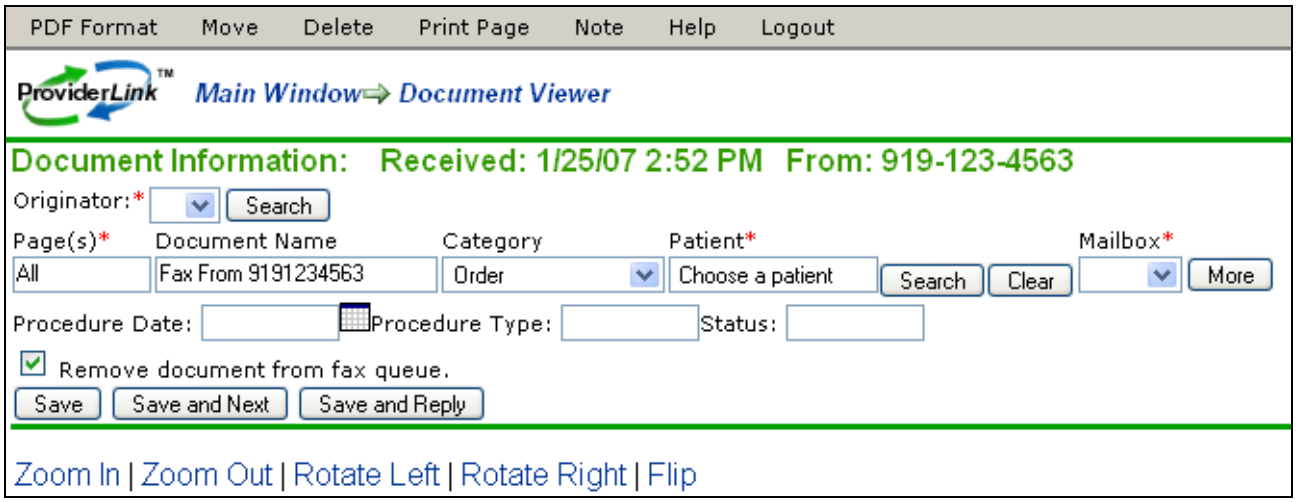


Figure 74. View Fax in Document Viewer

3. Above the fax document image, notice the image control links (i.e., Zoom In, Zoom Out, Rotate Left, Rotate Right, and Flip). If the fax message contains more than one page, you will see a numbered link for each page.
4. ProviderLink will try to recognize the number from which the fax was sent and display the facility name in the required **Originator** field. If the **Originator** field is blank, the system does not yet have the fax number stored. If the **Originator** is not recognized, you will need to search for or create the fax contact.
   a. Click the **Search** button to the right of the Originator field. The *Facility Search* screen appears.
   b. Using the guidelines in the "To Send a Referral Message" section, search for the facility that sent the message. If the facility does not exist, your facility administrator can add it to the system.
5. If there are multiple pages, view each page to determine if the message contains documents for more than one patient.
   a. If all the message pages relate to one patient record, accept the default "ALL" value in the Page(s) field.
   b. If the message contains pages for more than one patient, click the **More** button to add another set of routing fields. Then, enter the appropriate page number or page range (e.g., 1-3) in the **Page(s)** field.
6. In the *Document Name* field, enter the type or name of the document.
7. Search for the patient to associate the fax document. Click the **Search** button to the right of the Patient field. The *Patient Lookup* screen appears.
8. Use the guidelines in the "To Create a New Patient Record" section to search for or create a new patient record.
9. Choose the **mailbox** to route the fax document.

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

Section 3 Summary

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

Transitioning from Paper to Electronic Communications

- understand the benefits of transitioning to electronic communications
- understand how ProviderLink supports your workflows
- understand how to create and implement eForms

Sending Referrals

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

Requesting Medical Records

- send request messages
- read responses to request messages
- respond to medical record requests sent to your facility

Virtual Fax Service

- process incoming fax messages

Section IV - Appendices

Appendix A – Troubleshooting ProviderLink Issues

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

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

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

Appendix B – ProviderLink Quick Reference Guide

ProviderLink Quick Reference Guide

To login to ProviderLink:

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

ProviderLink Quick Reference Guide

To check ProviderLink for and read Incoming Messages:

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

ProviderLink Quick Reference Guide

To process an Incoming Fax Message:

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

To create a New Patient Record:

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

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

ProviderLink Quick Reference Guide

To create a New Fax-Only Facility:

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

To add Documents to a Patient Record with the Virtual Printer:

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

ProviderLink Quick Reference Guide

To add a Paper (hard copy) Document to a Patient Record

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

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

To send a Message through ProviderLink

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

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

To complete or select (remove) a Task

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

ProviderLink Quick Reference Guide

To view a Patient's Message History and Audit Trail

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

To remove a Patient Record from your Work List:

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

To log out of ProviderLink:

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

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

To get Help:

1. Check the online help – click **Help** on the menu bar.
2. Read the User Training Manual.
3. Contact YOUR facility administrator.