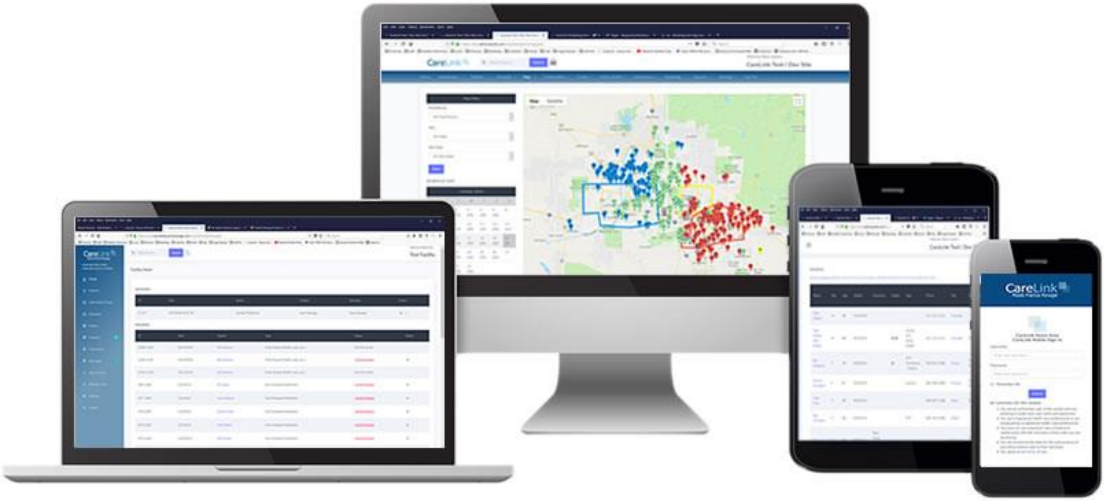

CareLink Mobile Practice Manager

CARE COLLABORATION TRAINING V1.8

www.MyMobilePracticeManager.com

CareLink Training For Administrators and Practitioners

- What is CareLink
- CareLink Features
- Getting Started
- Scheduling Module
- Practitioner Mobile Site
- Collaboration Module
- Home Health Module
- Transitional Care Module
- Using Workbooks
- Data Integration
- CareLink Reports

CareLink
Mobile Practice Manager

What is CareLink?

- CareLink is a powerful practice management tool which provides a direct a link between patient's care givers, assisted living homes, group homes, doctors’ offices, and others who are managing the care of a large group of patients within your practice.
- CareLink has powerful patient scheduling features to help streamline patient scheduling and minimize provider travel
- Data stored and transmitted via CareLink is secure

CareLink Features

FEATURES FOR OFFICE STAFF AND MEDICAL FACILITIES

- CareLink Features for Office Staff
  - Add new patient information and link providers to patients, see patients on map
  - Patient scheduling and schedule optimization tools
  - Create and send orders to facilities and specialists
  - Workbooks to manage new patients, referrals and transitional patient follow ups
  - View Reports

- CareLink Features for Medical Facilities
  - Securely transmit new patients and demographic data
  - Acknowledge successful receipt of new patient information, documents and patient inquiries
  - Securely transmit patient documents
  - Share patient notes between care facility and your practice
  - Submit patient inquiries and order requests

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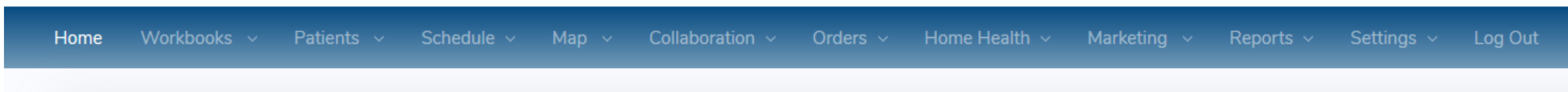
Getting Started with CareLink

MENU BAR AND USER ROLES

The menu bar contains links to all pages within CareLink
Click on Heading to View Page Details



Different Roles have different access rights
Currently there are 4 Roles for Patient Scheduling:

1. **Sysadmin**: Access to all system level configuration and reports
2. **Office User**: Access to all patient functions and scheduling
3. **Practitioner**: Allowed to be scheduled in system, access to all patient functions and mobile site
4. **MA**: Access to all patient functions, scheduling and mobile site

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Getting Started with CareLink

PORTAL AREAS AND FUNCTIONS

Administrator Portal Logon

- Patient Scheduling
- Manage patients, facilities, and specialists
- Workbooks
- Reports

Mobile Practitioner Site

- Mobile Phone Version of CareLink optimized for Practitioners on the Go
- View Practitioner schedule for day / appointment check in

Facility Portal Logon (Collaboration Module Only)

- Add New patients
- View Orders, Create Inquiries and Messages

Specialist Portal Logon (Collaboration Module Only)

- View Orders
- Create Home Health Order Requests

Physician Portal Logon (Collaboration Module Only)

- View and Sign Face to Face Encounters Orders
- View and Sign Home Health Orders

Getting Started with CareLink

LOGON

The system administrator will create your account and send the logon information to you with your specific links.

Demonstration Links used for Training

Administrator Logon
https://www.MyMobilePracticeManager.com/CareLink/admin/

Practitioner Mobile Site Logon
https://www.MyMobilePracticeManager.com/CareLink/mobile/

Facility Portal Logon (Collaboration Module Only)
https://www.MyMobilePracticeManager.com/CareLink/facility/

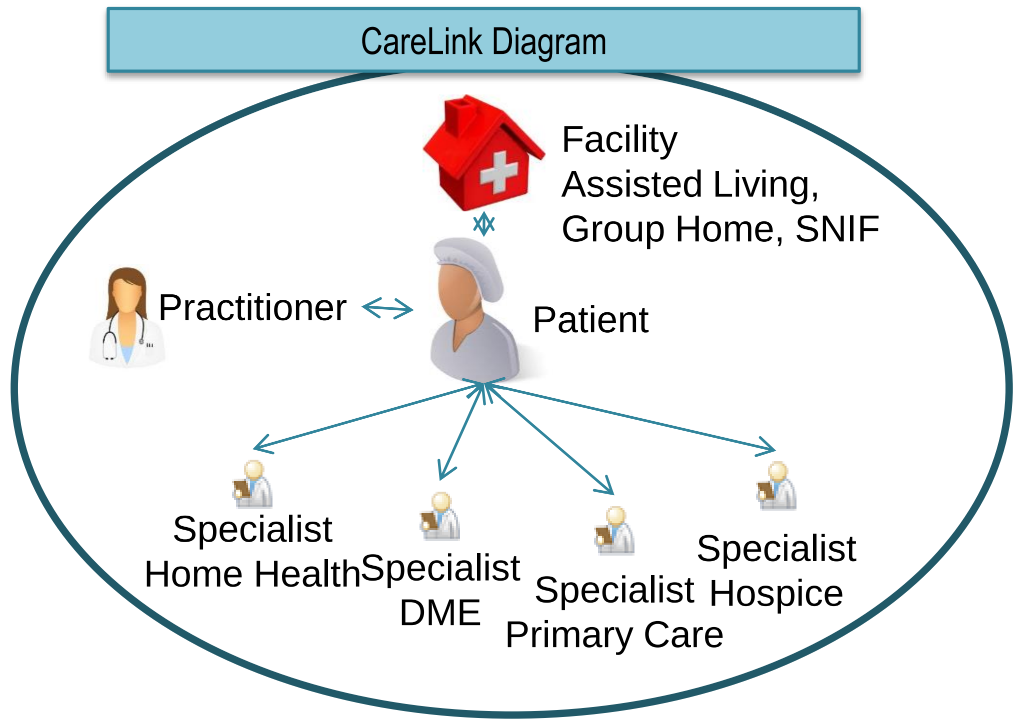
Specialist Portal Logon (Collaboration Module Only)
https://www.MyMobilePracticeManager.com/CareLink/specialist/

Physician Portal Logon (Collaboration Module Only)
https://www.MyMobilePracticeManager.com/CareLink/physician/

Patient Management

RELATIONSHIP BETWEEN PATIENTS, FACILITIES AND SPECIALISTS

- All Data Revolves around Patients
- Patients are linked to 1 Facility
- Patients are linked to 1 Practitioner
- Patients Can be linked to many specialists



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Patient Management

ROLE OF FACILITIES AND SPECIALISTS WITH PATIENT

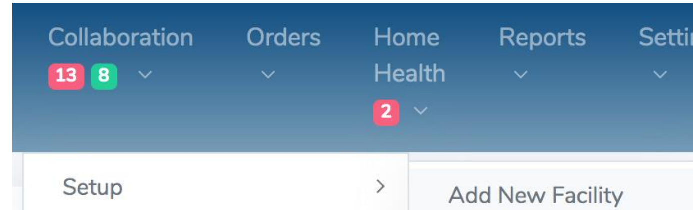
- Facilities: Patients are linked to only one facility. Facilities have their own logon and can see all patient history. Facilities can send inquiries, documents and receive orders. Facilities are typically the Assisted Living or Group home where a patient resides or the transitional facility that referred the patient. Facilities can be transitional or non-transitional type.

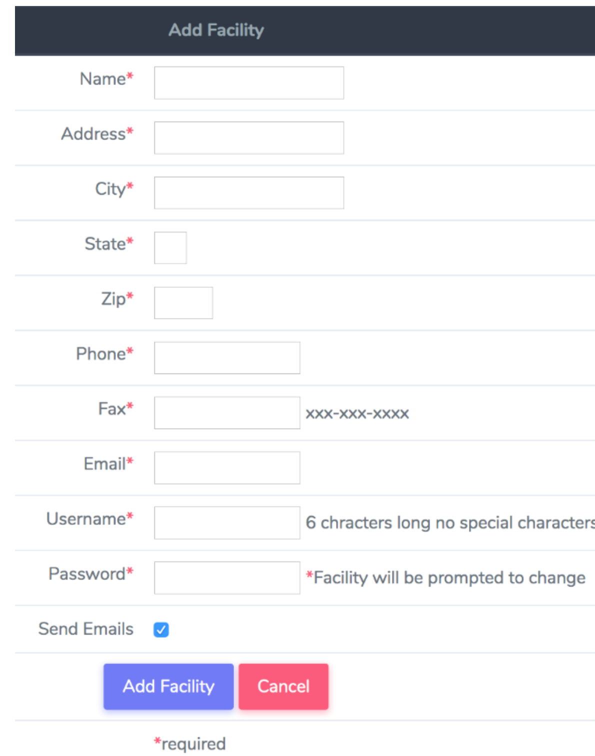
- Specialists: Patients can be linked to more many specialist. Specialists can receive orders only and view them online.

Patient Management

ADDING PATIENT FACILITIES

- To add a new Facility go to **Collaboration** -> Setup -> Add New Facility
- Enter in Facility Address Details, Email Address, Password
- Facility will receive Logon Information and be prompted to Change password
- Check Transitional Box to collect transitional data for patients tied to this facility





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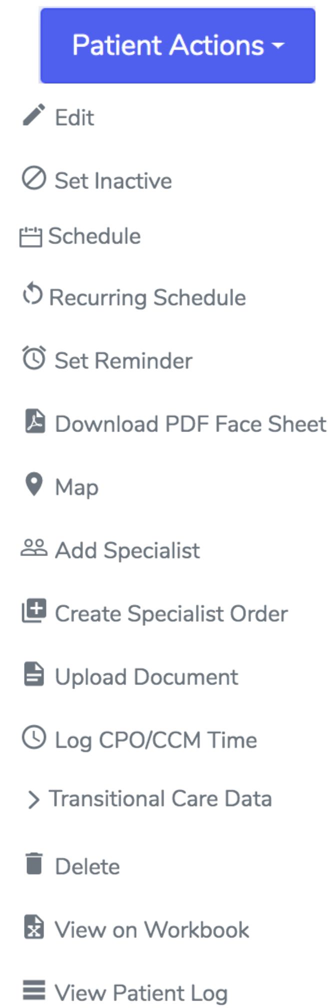
Patient Management

ADDING NEW PATIENTS AND LINKING THEM TO FACILTIES AND SPECIALISTS

- To add a new patient click on “Add New” under the ‘**Patients**’ menu
- One a patient is added we can add specialists, create orders and send inquiries
- Patient Actions



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Patient Management

PATIENT ACTIONS AVAILABLE IN CARELINK

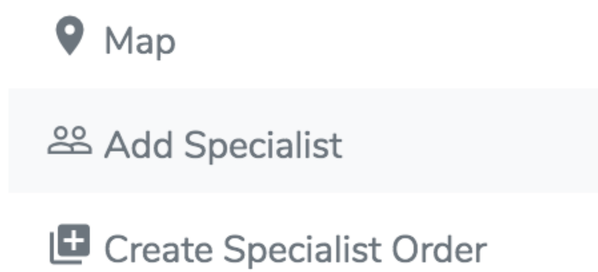
- **Edit Patient:** Edit patient demographic information
- **Edit in Worksheet:** Edit patient referral data
- **Add Inquiry:** Send an inquiry to patient's facility
- **Add Order:** Send an order to patient's facility
- **Add Specialist Order:** Send an order to a patient's specialist
- **Add Document:** Send a document to patient's facility
- **New Patient Forms†:** Link to create patient social and medical history form
- **View on Map:** View a map to patient's address
- **Transitional Care Data†:** Enter in patient's transitional care data (for transitional facilities only)
- **Set Patient Visit Frequency:** For use when scheduling patients

† optional features must be enabled to us

Patient Management

ADD A PATIENT SPECIALIST

- To add a specialist to a patient click on 'Add Specialist' link

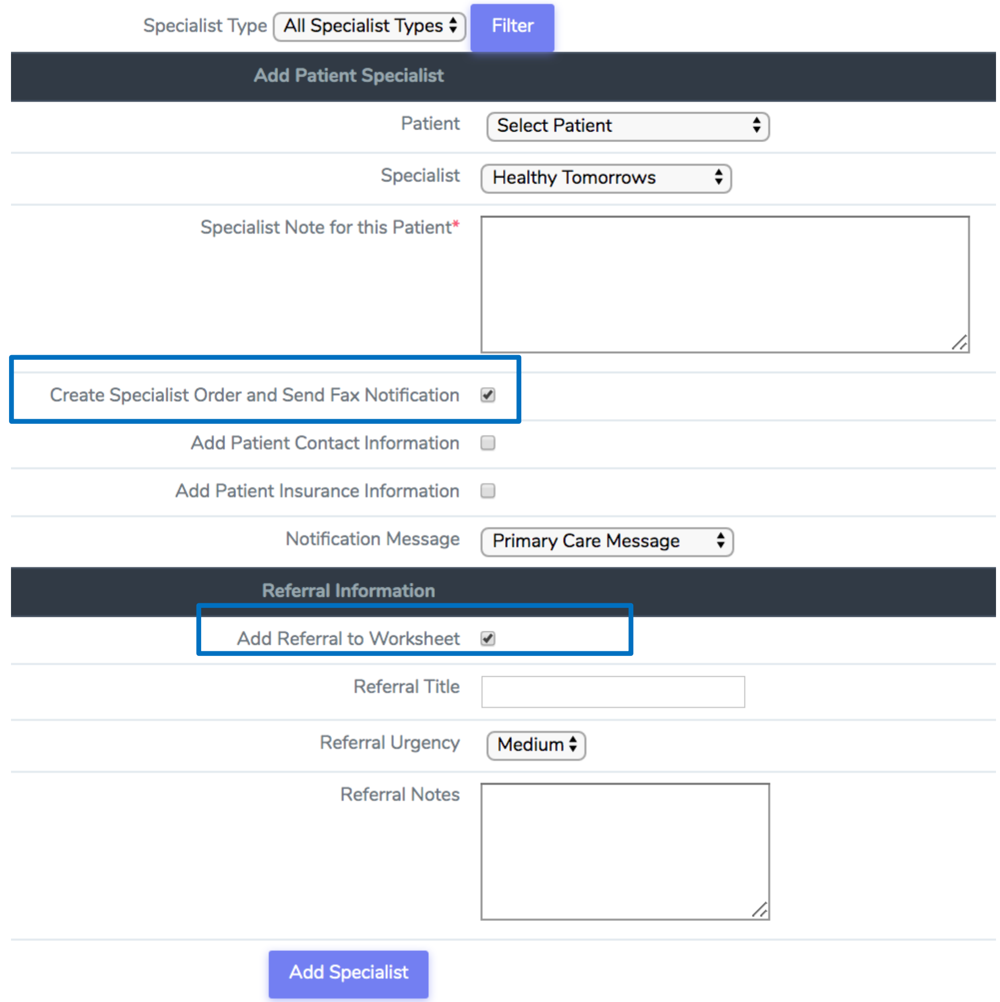


- Select Specialist
- Can Select to send a specialist a notification or create a referral in the Referral workbook

Patient Management

ADDING A PATIENT SPECIALIST

- Choose to send a fax notification
- Choose to create a Referral



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Orders, Inquiries, Messages and Documents

COMMUNICATION WITH FACILITIES

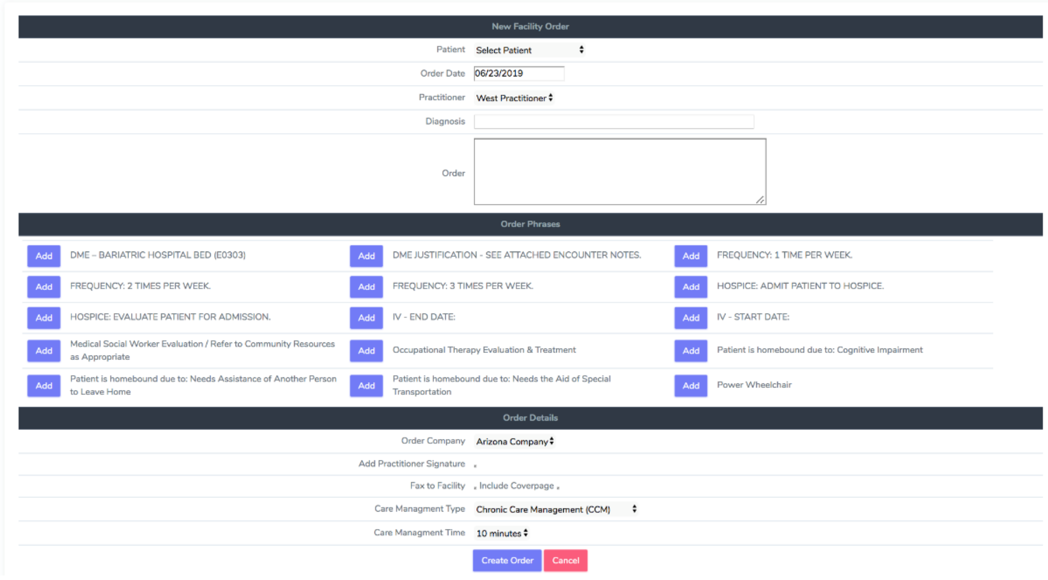
- **Orders:** Communicate a specific action facility to take with a patient.
- **Inquiries:** Communicate with a facility about a patient, usually around scheduling, refills, or patient events / comments
- **Messages:** Any other Communication not linked to directly to a patient

- When a new order, inquiry, or message is created an email will be sent to associated facility and AZ House Calls personnel

Orders, Inquiries, Messages and Documents

CREATING A STANDARD ORDER

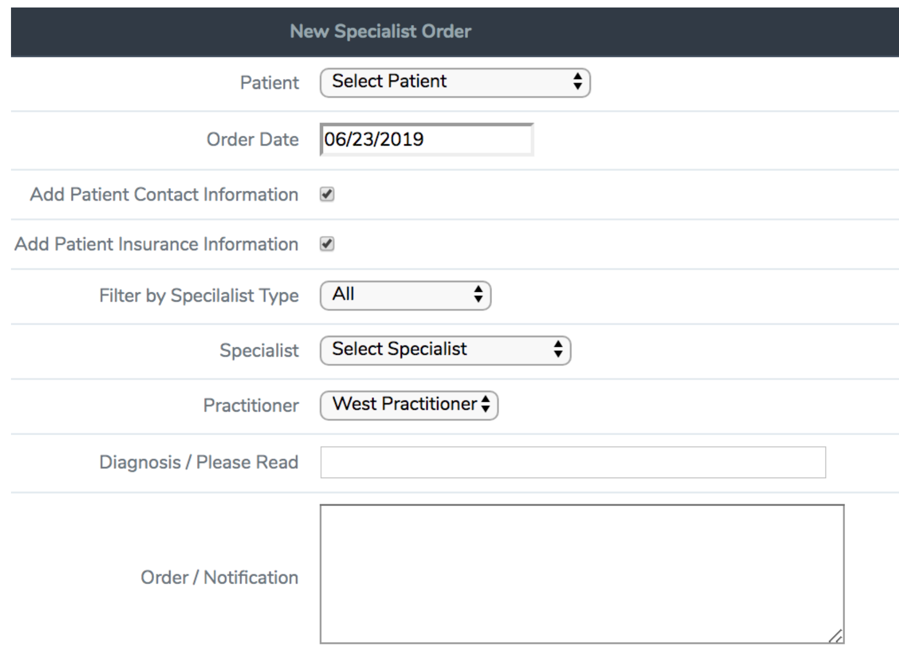
- 2 Ways to Create an Order
  - From the view patient page
  - Select ‘Orders’ -> Create New Order from menu bar
- Enter Diagnosis, Order, Select to add Electronic Signature



Orders, Inquiries, Messages and Documents

CREATING A SPECIALIST ORDER

- Specialist orders are sent to patient specialist.
  - These orders are sent via fax to specialist
  - These orders are not acknowledged
- Enter Order Title Order Detail
- Can also include patient history



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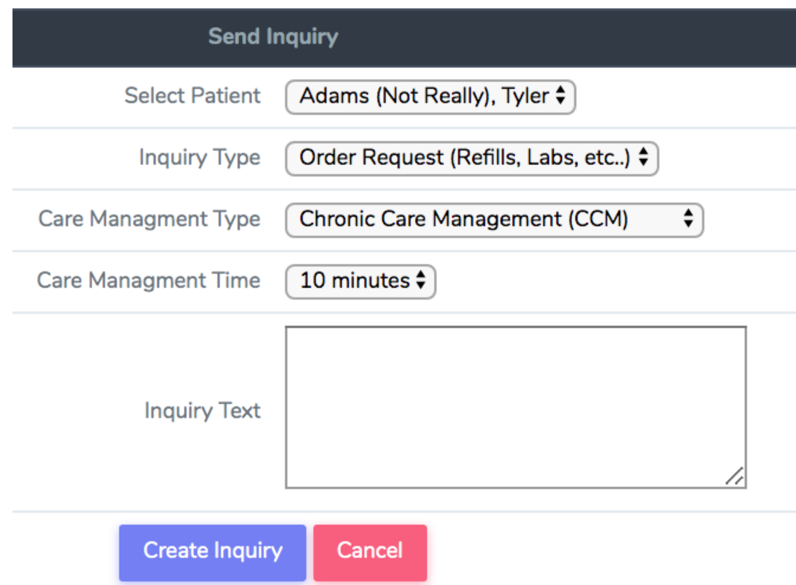
Orders, Inquiries, Messages and Documents

CREATING INQUIRIES

- 2 Ways to Create an Inquiry
  - From the view patient page
  - Select '**Collaboration**' -> Send Inquiry from menu bar

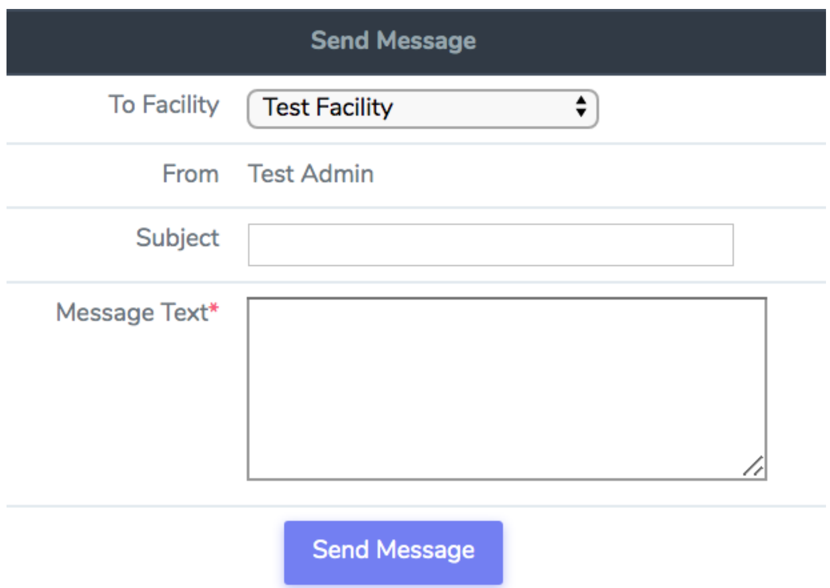


- Select Patient
- Inquiry Types
  - Order Request
  - Patient Comment
  - Practitioner Private Note
  - Question for Facility
  - Request for Visit
  - Visit Scheduled Notification

Orders, Inquiries, Messages and Documents

CREATING MESSAGES

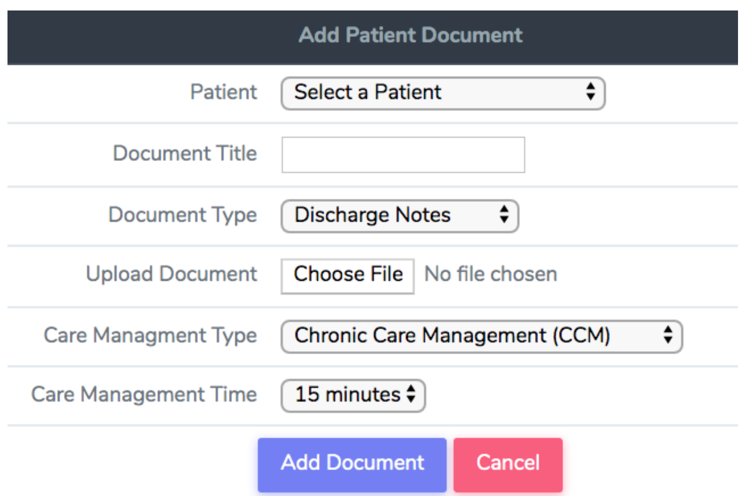
- 1 Way to Create a Message
  - Select ‘**Collaboration**’ -> Send Message from the menu bar
- Select Facility and enter in Message Text



Orders, Inquiries, Messages and Documents

ADDING DOCUMENTS

- 2 Ways to Add a Document
  - From the view patient page
  - Select '**Collaboration**' -> Upload Document from menu bar
- Select Document File and Type


Add Patient Document

Patient	Select a Patient
Document Title	
Document Type	Discharge Notes
Upload Document	Choose File No file chosen
Care Managment Type	Chronic Care Management (CCM)
Care Management Time	15 minutes

Add Document Cancel

Orders, Inquiries, Messages and Documents

ITEM STATUS FLOWS

- Orders, Inquiries, Messages have an associated status to them.
- Can be one of two status flows based on who originated the Order, Inquiry or Message

- ‘Sent by Facility’ -> ‘Acknowledged by Practitioner’
- ‘Sent by Practitioner -> ‘Acknowledged by Facility’

Orders, Inquiries, Messages and Documents

VIEWING OPEN ITEMS

- On the Menu Bar click
  - **Orders** -> View Orders
  - **Collaboration** -> View Inquiries
  - **Collaboration** -> View Messages
- Click on ID number to see details
- Inquiries and Messages with Status 'Sent By Facility' is waiting to be acknowledged

Status	EMR	Action
Sent By Practitioner	no	

- Can delete, respond, or acknowledge

Home Health Module

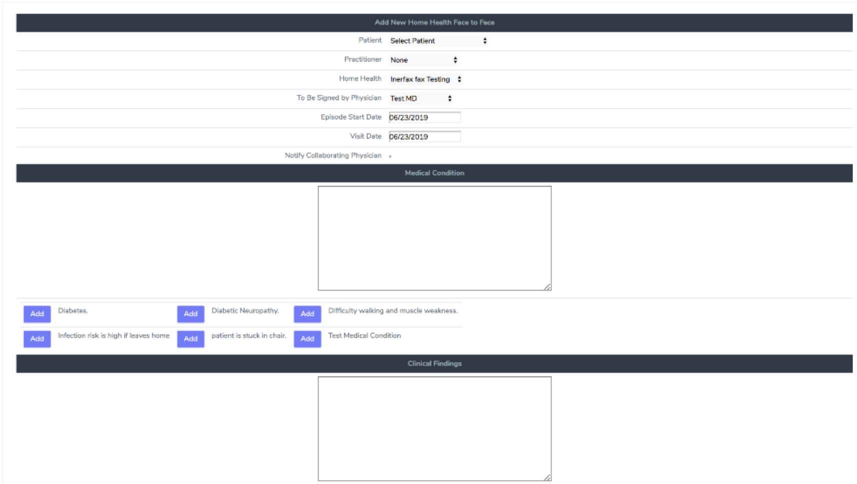
Home Health Features

CareLink has the following features for working with Home Health agencies

- Create electronic Face to Face encounters with one click button phrasing
- Manage commonly used Medicare approved phrases for Face to Face encounters
- Collaborating physician portal to electronically sign Home Health orders

Creating Face to Face Encounters

- In admin area click on **Home Health** -> Add face to face
- Add Medical condition, Clinical Findings and Homebound Status using Medicare approved phrasing
- Click Save Face to Face to send to Collaborating Physician to Sign
- Mange phrases and add new ones under **Home Health** -> Manage Face to Face phrases



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Collaborating Physician Portal

- Collaborating Physician can logon to electronically Sign Face to Face Encounters
- Once signed the Home Health agency will receive a fax
- Set up collaborating Physician in the configuration section of CareLink

HOME HEALTH FACE TO FACES

ID	Patient	Practitioner	Home Health	Episode Start Date	Visit Date	Signing Physican	Status	EMR	Action
F2F-91	Bob Arrington	West Practitioner	Inerfax fax Testing	6/22/2019	6/22/2019	Test MD	Signed	no	
F2F-90	Tyler Adams		Test Home Health	6/22/2019			Requested	no	
F2F-89	Bob Arrington	West Practitioner	Test Home Health	6/28/2019	6/29/2019	Test MD	Signed	no	
F2F-88	Tyler Adams	West Practitioner	Inerfax fax Testing	6/11/2019	6/11/2019	Test MD	Signed	no	
F2F-87	Tyler Adams	West Practitioner	Inerfax fax Testing	5/31/2019	5/31/2019	Test MD	Signed	no	
F2F-86	Tyler Adams	West Practitioner	Inerfax fax Testing	5/31/2019	5/31/2019	Test Signer	Unsigned	no	
F2F-85	Tyler Adams (Not Really)	West Practitioner	Inerfax fax Testing	5/15/2019	5/15/2019	Test MD	Signed	no	

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Transitional Care Module

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Transitional Patients †

CAPTURING TRANSITIONAL PATIENT DATA

- Only Available for Patients tied to a transitional facility
- Click on Patient
- Click on Transitional Care Data Icon

- Chart Transitional Care Data
- Check Box to set Transitional Care Reminders
- View Reminders in Transitional Care Follow Up Workbook

† optional features must be enabled to us

Using Workbooks

Using Workbooks

USING CARELINK WORKBOOKS

Schedule Module Workbooks

1. **New Patient Workbook:** Manage eligibility, referral source and scheduling of new patients
2. **Reminder Workbook :** Set reminders for future events for a given patient

Collaboration Workbooks

1. **Referral Workbook:** Manage referrals created by adding specialists or specialist orders or created by the Daily Log
2. **Transitional Care Workbook :** Manage Follow ups created by adding patient transitional notes

Using Workbooks

REFERRAL WORKBOOK

- Under **Workbooks** –> Referral Workbook
- Show all referral created when adding specialist to a patient or creating a specialist order
- Check box and click save to mark complete
- Can also add entries to the referral workbook by using the “Daily Log”
  - Under Workbooks – Daily Log

Using Workbooks

DAILY LOG ENTRIES

- Under **Workbooks** –> Daily Log
- Select Patient and Specialist and enter in Notes
- Also enter in Daily Log Type
  - Phone Call
  - Web Contact
- Enter in Title, Urgency Level and Details
- Click box to Email Practitioner or another CareLink User that new Referral has been created for them

Using Workbooks

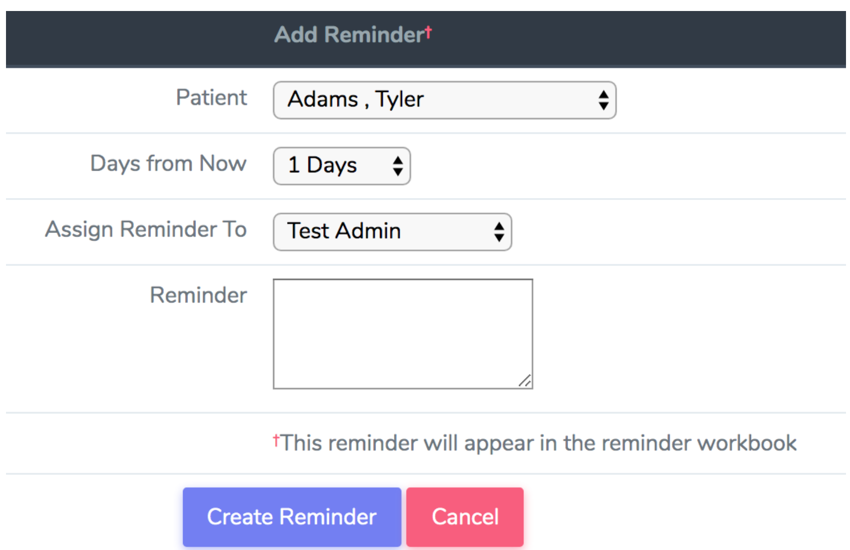
TRANSITIONAL FOLLOW UP WORKBOOK

- Under **Workbooks** –> Transitional Care Workbook
- Shows details for follow ups set during transitional data capture
  - Patient Data
  - Transitional Visit Data
- 2,7,14,21 Day referral reminders
- Can enter in Follow Up Comments and Mark Complete

Using Workbooks

REMINDER WORKBOOK

- Under **Workbooks** –> Reminder Workbook
- Shows details for reminders set for a given patient
- Can enter in up to 90 days out for a reminder
- Click on the icon on the patient page



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Data Integration

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CareLink Data Requirements

SETTING UP DATA

See Data Integration Guide for Complete Data set up Requirements

1. **Set up List of Users and Profile types**: This will allow access to the CareLink System
2. **List of Insurances you will accept**: These will appear in new patient drop down
3. **Diagnosis Codes**: These will appear in patient Diagnosis Drop Down
4. **Referral Sources**: These will appear in the new patient workbook drop down for referral source
5. **Company:** Name and address of company sending orders
6. **Collaborating Physicians:** Set up username and password to logon to physician portal
7. **Affiliations:** ACO Like organizations you wish to link patients to, patients remained linked even if patient moves in or out of a facility. Specialists and facilities can also be linked to a given affiliation

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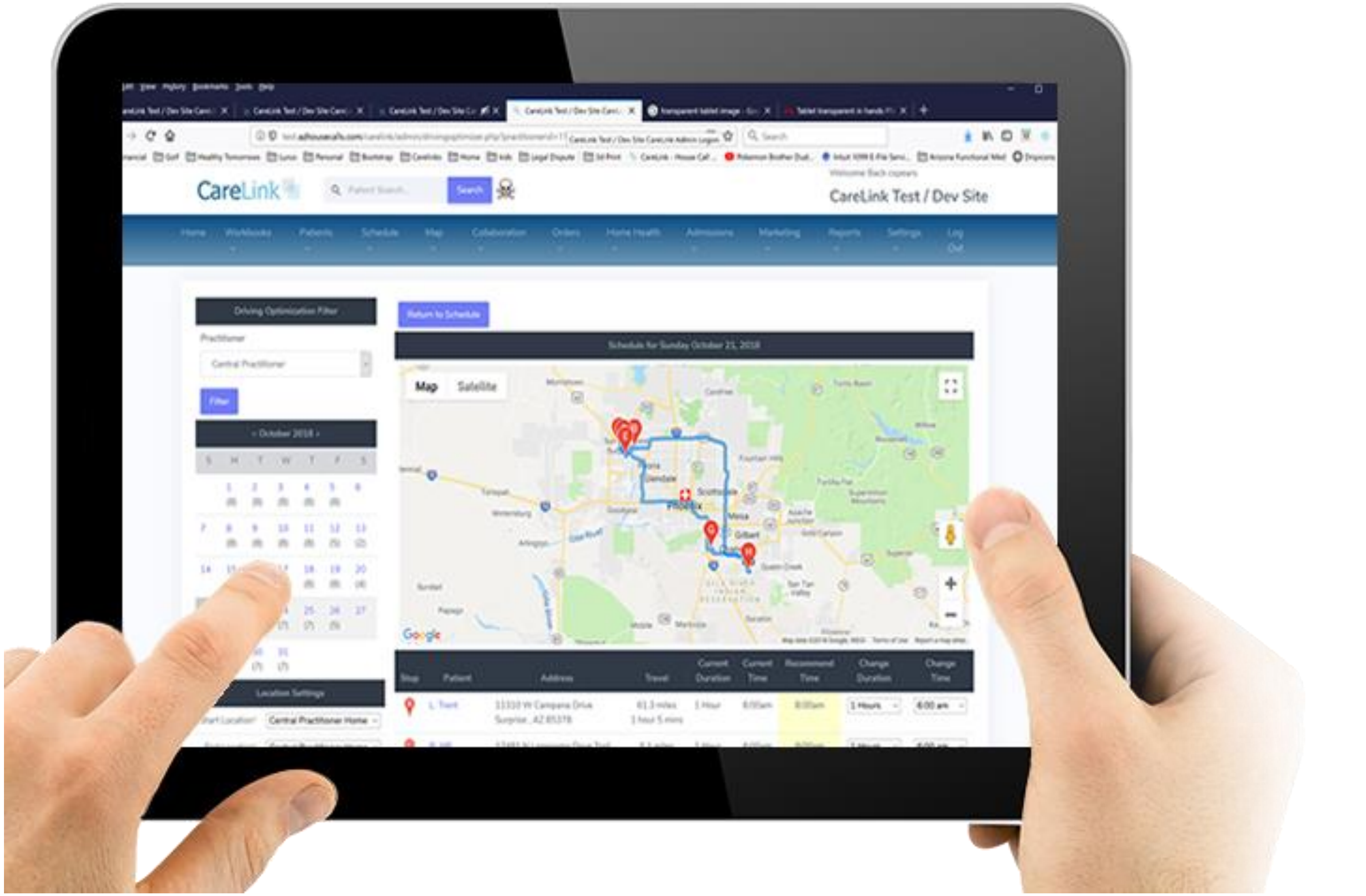
CareLink Reports

CareLink Reports

- Scheduling Reports
  - New Patient Reports / New Patient Referrals
  - Patients Overdue for a visit
  - Practitioner Visits Report
- Collaboration Reports
  - Transitional Data Report
  - Home Health Report
  - Specialist Report

† optional features must be enabled to us

Questions?



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