User Guide

cclink Provider Portal

Version 4 – effective 5.1.2017
Important Telephone Numbers

Write your Help Desk or other support numbers and other helpful information here.

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Getting Started

ccLink Provider Portal Link is a tool that provides real-time Web access to patient information, so you can access patients' clinical and eligibility data.

ccLink Provider Portal Link is comprised of different Web pages, or activities, that correspond to different tasks. The activity that you use depends on what you want to accomplish. For example, if you want to see detailed information about a patient’s lab results, you can use the Results Review activity.

This guide takes you on an introductory tour of ccLink Provider Portal Link. The first pages include information to help you get started, such as browser requirements and how to log in. The rest of the guide contains explanations of how to use ccLink Provider Portal Link.

Help and contact information

If you forget your password or can't log in, call the Contra Costa Health Services Help Desk at 925-957-7272.

- For the following other issues, you can send an In basket CRM message from the ccLink Provider Portal using one of the following topics, and it will be routed accordingly:
  - Provider Relations Inquiry
  - Credentialing questions
  - Contract questions/concerns
  - Provider general concerns
  - Member Eligibility

(Please refer to page 20-21 for more info)
Browser, system, and connection requirements

The minimum versions of web browser software required to access ccLink Provider Portal are:

- Internet Explorer: 11
- Firefox: 45+
- Chrome: 50+
- Safari: 9+
- iOS: 9+

ccLink Provider Portal Link requires a minimum screen resolution of 1024x768 pixels. In addition, you need Java enabled to display graphs and scanned images in ccLink Provider Portal Link.

How do I log in?

After appropriate server and user certificates have been installed (separate instructions) open your Web browser and access the following URL:

https://hsdvpn.cccounty.us/ccLink

1. Enter the user ID that you received with your subscription to ccLink Provider Portal Link in the User ID field.
2. Press **TAB** to move to the **Password** field. Enter the password that you received with your subscription to ccLink Provider Portal Link.

3. After you have entered your user ID and password correctly, press **ENTER**.

4. Select the certificate associated with your company and click **OK**.

5. The first time a user logs on, they will be prompted to change their password. The new password will be used to log on to the ccLink Provider Portal.

Passwords must be a minimum of 8 characters and include 3 out of the 4 following criteria:

- Lowercase letters such as a, b, c
- Uppercase letters such as A, B, C
- Numbers such as 1, 2, 3
- Special characters such as $, %, #, @
6. Log in again using the new password.

7. Successful authentication will open the ccLink Provider Portal 2nd log on screen.

Enter the same username and password you entered in Step 4.

8. Successful authentication will open the ccLink Home Page.
9. If a Terms and Conditions page appears, read the agreement and click **Accept** to acknowledge your agreement with the terms.

10. You are now logged in to ccLink Provider Portal Link.
Patient Look Up

When you log in to ccLink Provider Portal, you are on your home page. The first thing you want to do from the Home page is select a patient. Click on Select a patient.

Some organizations are set up so that they have a list of patients, for example, a Primary Care Provider (PCP) would have a list of all the patients assigned to them. If this is the case, you can access them by My Patients, or you can type in their information in the Name or MRN field in the following format: [last name, first name]. Doing this should open the patient’s record.
If the name does not come up, or you do not have a list of patients assigned or referred to you, you will have to click on Search all Patients. (in previous versions, before July 11, 2015, this was called “First Access”)

To use this Search All Patients feature you must enter all the information in the red, required fields, as well as ONE of the recommended, yellow items.

Tip: State CIN is the Medi-Cal number containing 8 numeric digits and 1 alpha.
Matching records will be presented and can be selected by clicking on the Select option with the green check mark.

You will then be required to fill in a Reason for Access (e.g. Check Eligibility/Claim Status) Once this is done, it opens the patient’s record. It will then put them on your patient list (Pt List) for 90 days, so if you need to access their record again in that time frame, they will already be on your patient list, so you do not need to look them up this way again.
You can make this search method your default, by clicking on **Make this my default**, if will always need to look up patients this way.

**Activities**

Once the patient’s record is open, all activities available to you are listed along the left side of the screen (the activities you see may vary from this screenshot depending on your security access). In this example the Demographics Tab is highlights to indicate what is displaying on the screen.
Check Eligibility

To view the eligibility, click on the **Patient Profile** activity tab. When it has been opened, you will then click on the **Coverages & Benefits** activity.

The current, available coverages will show in yellow, but you can also view any past/inactive coverages by using the dates field or the **View all coverages on file** radio button.

From the **Patient Profile** activity tab, you can also click on the **Demographics** tab to see demographic information about the patient, but please use the **Coverages & Benefits** activity for checking their eligibility.
Claim Review

To view information, click on the Referral/Claims activity.

You can then search either by (1) Claim by Member, (2) Claim Search (you can specify the provider, instead of a member), or (3) Remittance Advices (RAs) or claims associated with a specific check.

1. Claim by Member:

Open a patient’s record either by double clicking on them from your Patient List or by searching for them (using either Search My patients or Search All Patients, found at the bottom of your screen, if you do not have any patients listed).
Choose the provider’s name from the drop down to see a list of the associated claims.

Click on the Claim # hyperlink (or double click on the claim), details of the claim can be seen, including status.
Claim Review

2. Claim Search:
Click on **Claim Search** from the **Referrals/Claims** activity:

If you search for claims using claim search, you have the option to search by **Providers**, or **Vendors** [your organization(s)], or **Claim ID**.

It might be helpful to search by Vendors, because it will search for all the outstanding claims for your whole organization, regardless of an individual provider’s name. You can always click on an individual claim from the list to see more details about the claim.
3. Remittance Advices:

If you want to see all of the claims associated with a certain check number, choose **Remittance Advices**, and **Search by Check Number** (check number must be entered in field provided).

To see all of your RA’s (Remittance Advices) choose **Search by Vendor** (your organization), enter a date range if needed, and a list of all of them will appear.

Double-click on the RA to display the details:
Referral Review

To view the status of a referral, click on Referrals/Claims from the Activities menu.

You can then either search for referrals using (1) Referral by Member, or (2) Referral Search.

1. Referral by Member:
You must first bring up a patient’s record and then the system will show referrals associated with that member/patient.
You may then click on the Referral ID hyperlink (or double click on the referral) to see the details:

2. Referral Search:

Click on Referral Search.

A. Make sure Select all boxes are checked to see all of the referrals, regardless of their status.

B. You may also use the Select all for the list of providers, but individual providers can now be checked as needed.

C. To view your referrals, set your date range and make sure the radio button is checked to Outgoing.
In Basket is a communication tool where you can send messages to CCHP. Your messages are sent via CRM (Customer Relationship Management) in ccLink to either the CCHP Provider Relations Department or the CCHP Member Services Department based on the topic you choose.

After clicking on In Basket tab, choose CRM from the New Msg drop-down.

1. **Topics:**
   First choose the appropriate topic.

- CCHP CPN users will choose the topic *CCHP CPN Portal Communication*. Then choose the appropriate subtopic in order for your CRM message to be routed correctly.
- Behavioral Health users will choose the topic *Behavioral Health Portal Communication*. Then choose the appropriate subtopic in order for your CRM message to be routed correctly.
2. CCHP CPN Portal Communication Subtopics:
Once the topic is selected, the appropriate Subtopics will be
listed for users to select.

Tips:

- Choose appropriate subtopic, and if the patient record is open, you can click on it to associate with a CRM. Then you can also associate a specific referral or claim from Attachments section.
- If the patient record is not open, you can click on the Select Patient button to select a patient and link to CRM.
- Type body of message in Details and click Submit when ready to send.

**Important:** Before clicking on Submit to send, please be sure to indicate a good call back number (area code + phone number) in the Details or Additional Info field.
Clinical/Chart Activities

*Review your patient’s chart before the visit*

First, you must open the patient’s record. Refer to Patient Look-up (starting on page 9) for more info on how to look up patients.

When the patient record opens, it defaults to **Snapshot**, contains a summary of important information from the patient’s chart. Start by clicking on the **Chart Review** activity. The tabs across the top are sections of the chart you may want to access. **Encounters** is highlighted in this example. Tip: Any of the columns that are displayed can be sorted by clicking next to the column name. An arrow will appear to let you know how the column is sorted. If you would like to see the patient’s labs, you would click on **Labs** tab across the top. If you are looking for a discharge summary, it would be on the encounters tab and the **Type** would be **Discharge Summary** (in this example the types are **Nurse Triage** and **Orders Only**).

To view more details on a row of information, such as a specific patient visit, click on the date. This is a hyperlink so the **Report Viewer** page will then open to display associated information.

*The ability to view the chart will depend on your role and the security granted in accordance with that role.*
Results Review

In addition to lab flowsheets in Chart Review activity, you can view patient lab results over time in the Results Review activity. View the patient's results for labs, radiology, and more by clicking on Results Review:

View data in graph or table format

Use flowsheets in Chart Review to see how patient data such as vital signs or lab values have changed over time.

1. In Chart Review, select the data you want to view. For example, select specific visits or lab tests.
2. Select the type of flowsheet that you want to create.
   - Click **Encounter Flowsheets** to graph data such as vital signs or medications. Then select a specific flowsheet, such as Diabetes - Brief.
   - Click **Lab Flowsheets** to graph lab result data.
Find information quickly in the patient’s chart

For patients with large charts, it can be helpful to narrow down the list of visits, labs, medications or other information in Chart Review. For example, on the Encounters tab, you can filter the list so you see only the visits associated with certain providers.

1. In Chart Review, select the tab that contains the information you want to see (for example, Encounters or Labs).
2. Click Filters. The Filters page opens.
3. Select the check boxes next to the values that you want to see. For example, choose a specific anatomical region or provider.
4. Click Apply. The results of your search appear.
5. To remove the search criteria and begin a new search, click Clear All.

<table>
<thead>
<tr>
<th>Filters</th>
<th>Region ▲</th>
<th>Cnt</th>
<th>Last Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anatomical Region</td>
<td>Chest</td>
<td>1</td>
<td>10/28/2010</td>
</tr>
<tr>
<td>Hand</td>
<td>1</td>
<td>02/09/2011</td>
<td></td>
</tr>
<tr>
<td>Wrist</td>
<td>1</td>
<td>02/09/2011</td>
<td></td>
</tr>
</tbody>
</table>

24 Clinical/Chart Activities
There is also a search feature in chart review called **Search chart**. It is located at the top right section of the chart:

![Search Chart](chart_search.png)

Text can be entered here to search for specific information, and the system matches on common terms. For example, if the word **Cholesterol** is entered in this field, the **Search Chart** window opens with a list of matching clinical information from the patient’s chart, including any lipid panel results and encounters with progress notes that mention cholesterol.

Tip: You can see a list of your patients who are admitted to CCRM if you have a Patient List. Tabs will be visible when you click on Patient list.
View data in graph or table format

Use flowsheets in Chart Review to see how patient data such as vital signs or lab values have changed over time.

3. In Chart Review, select the data you want to view. For example, select specific visits or lab tests.
4. Select the type of flowsheet that you want to create.
   - Click **Encounter Flowsheets** to graph data such as vital signs or medications. Then select a specific flowsheet, such as Diabetes - Brief.
   - Click **Lab Flowsheets** to graph lab result data.

5. Select the table cells that contain data that you want to graph.
6. Click **Line Graph** or **Bar Graph** to create a graph of the selected data.
*Place a new order*

1. Select the Clinicals tab and click **Orders > Order Entry**. The Order Entry activity appears.
2. Click **Preference List** to see a list of available orders (depending on your security, you may see labs or diagnostic Imaging).
3. Select the check box next to each order that you want to place. These orders appear under Selected Orders on the right side of the page.
4. Click **Accept Orders**. A list of your orders appears.
5. Click an order's name to edit details like associated diagnoses. Click **Accept** when finished.
6. Click **Sign Orders**.
7. Enter your password if prompted and click **Accept**.

*The ability to place an order will depend on your role and the security granted in accordance with that role.*
Logging Out

To log out, choose the log out icon in the upper right corner of the header:

Challenge questions

After logging in successfully, it is a good idea to set your challenge questions so that if you ever forget your password, the system will prompt you to answer your challenge questions so that you may still access the system, and create a new password.

To set your challenge questions click on the **Utils** button located in the upper right side of the header:

Next, click on Challenge Questions and enter your password at the prompt:
Choose two challenge questions (one at a time) by clicking on the selection box next to each of the Questions field.

Type your answers in the Answers field. Click the Accept button. You are done!

If you ever forget your password you can then click here at log in page:
Activity
Any Web page that corresponds to a specific task, such as selecting a patient, reviewing a patient's results, or creating a referral. There are several different activities in ccLink Provider Portal Link, and the activities that you use depend on the tasks that you want to complete. Each activity has a name in ccLink Provider Portal Link, such as Results Review, that helps you determine the activity's purpose.

Completion matching
Entering a partial word in a field instead of a whole word to reduce the amount of time you spend typing. For example, entering "gluc" and then pressing ENTER in the New procedure field in Order Entry shows you all of the procedures beginning with "gluc." Since it is likely that few procedures have names that start with this letter combination, it is easy to find the procedure without typing the whole name. You can use this shortcut for any information that is stored in the database, such as procedures and other providers’ names.

Encounter
One visit with a provider. This might include a visit type such as an inpatient stay, an office visit, or a telephone call from a patient. Encounters appear in Chart Review. When you view an encounter, you can see all of the information associated with that specific visit, including the patient's vital signs, progress notes, procedures and medications ordered during the visit, and more. Encounters are classified by date, type, and provider.
Event
A clinically relevant business event that occurs for a patient. Events are recorded in the system at several points in a patient flow. For example, events are triggered when a patient schedules an appointment, is admitted to the hospital, cancels an appointment, has new results, etc. The urgency of events can vary. For example, a scheduled appointment for a physical might not be as urgent as an admission to the hospital.

Field
Any place in ccLink Provider Portal Link where you can enter information. Each field has a prompt to indicate the type of information you should enter, such as Name or MRN.

Search All Patients
A tool that you can use to open the record for a patient with whom you do not have an established relationship. This tool might be useful in case of emergencies or at other times when you might need to access a patient’s record before you’ve been granted access. The Search All Patients activity appears as an option after clicking on Select a Patient from the homepage. After you click . The Search All Patients (it used to be called First Access), you are prompted to enter specific pieces of information about the patient before you can gain access to the record.

Hyperlink
Text that you can click to access a different Web page. Hyperlinks appear in several places in ccLink Provider Portal Link. When your mouse pointer moves over a hyperlink, the pointer typically changes to a hand icon and the text of the hyperlink becomes underlined.

Provider
Any person involved in patient care, such as a nurse, the patient’s primary care physician, or a referring provider. Patient information in ccLink Provider Portal Link is often associated with a specific provider. For example, procedure orders are associated with the provider who
wrote the orders. Similarly, when you create a referral, you can enter a referred by and referred to provider.

**Recommended field**

Information that we recommend you enter. ⚠️ appears next to recommended fields. You can continue to save or submit information if you do not complete recommended fields.

**Required field**

Information that you are required to enter. ⚠️ appears next to required fields. You cannot save or submit a form until you complete all required fields.

**Secure screen**

A method for securely hiding patient information when you need to temporarily stop your work in ccLink Provider Portal Link. Click 🗝️ to secure your computer. Your Web browser returns to the login page for the application. When you are ready to continue your work, you can re-enter your password and click **Resume** to return to the same page that you were using before you secured the screen.

**Time mark**

Click 🕒 **Time Mark** in the Results Review activity to indicate that you have seen the patient’s new results. When you do so, the results are no longer considered new to you. The next time you access Results Review for the patient and select the **New Results View** from the View menu, only the results that have been entered since you clicked 🕒 **Time Mark** appear. New results appear in italic font, and all other results that you indicated that you’ve seen appear in normal font.
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