



CareLink  
Mobile Practice Manager

# CareLink Mobile Practice Manager

TRAINING FOR ADMINISTRATORS AND PRACTITIONERS V1.6

# 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
- Data Integration
- CareLink Reports

# What is CareLink

- CareLink is a system that was developed by to manage a mobile practice and ease interactions with group facilities and other medical providers. CareLink is not an EMR and does not have medical billing capabilities
- Specifically CareLink:
  - Allows your practice and care facilities to track, record, and monitor interactions between care personal and our physicians
  - Has powerful back office patient scheduling and workflow tools
  - Is a link between patient's assisted living homes, group homes, doctors offices, etc who are managing patient care within our practice
  - Allows care facilities to add new patients, add patient inquiries, and transmit patient forms via a facility portal
- 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

# 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/>

# 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

Workbooks Reports Leads Patients Inquiries Documents Orders Maps Facilities Messages Practitioners Specialists Insurances Diagnosis

Different Roles have different access rights

Currently there are 5 Roles:

**Sysadmin:** Access to all functions and reports. Cannot create orders. Can create, edit, and delete users

**Practitioner:** Access to patient functions, scheduling, mobile site and creating order

**MA:** Access to all patient functions and creating orders

**Office:** Access to all patient functions

**Marketing:** Access to marketing contacts lists only

# Patient Scheduling in CareLink



# Patient Scheduling

## FEATURE SET

CareLink has the following patient scheduling features

- Map driven patient scheduling
- Minimize driving distance with schedule optimizer
- One click bulk patient scheduling
- Set patient visit frequency
- View reports of patients overdue or soon overdue for visit
- Confirm scheduled visits and notify facility or patients electronically about an upcoming visit
- Add visits to your Outlook calendar
- Mark visits as "no shows"
- Monthly visits report by provider

# Patient Scheduling

## SCHEDULING BASICS

- To view schedule or add patient to schedule go to Schedule Tab
  - View and print practitioners daily schedule
  - Bulk Schedule patients
  - View patients overdue for a visit based on patient visit frequency

The screenshot displays the 'Patient Scheduling' interface. At the top, there is a 'Patient Map' showing a geographical area with several red location pins. Below the map is a calendar for December 2013, with the 25th highlighted. To the right of the calendar is a table titled 'Schedule for Wednesday December 25, 2013'. The table has columns for Time, Patient, Phone, City, Notes, and Edit. Below the table is a form to 'Add Patient to Schedule' with fields for Patient (Tyler Adams), Practitioner (Newest Practitioner), Date (12/25/2013), Time (6:00 am), and Note. There are also checkboxes for 'Visit Confirmed', 'Notify Facility', and 'Notify Practitioner'.

Time	Patient	Phone	City	Notes	Edit
6:00am	Confirmed	Bill Anderson	928-813-1984	Peoria	[Edit] [Delete] [Print]
6:00am	Confirmed	Denise Boy	623-487-4041	Peoria	[Edit] [Delete] [Print]
6:00am	Confirmed	Denise Dickinson	623-328-8086	Peoria	[Edit] [Delete] [Print]
6:00am	Confirmed	Denise Greenwald	623-116-0208	Peoria	[Edit] [Delete] [Print]
6:00am	Unconfirmed	Jane Inrig	8112712090	Peoria	[Edit] [Delete] [Print] [Check]
6:00am	Unconfirmed	Bob Keeffe	623-933-1617	Peoria	[Edit] [Delete] [Print] [Check]
6:00am	Unconfirmed	Lady Oshaughnessy	480-186-1179	Peoria	[Edit] [Delete] [Print] [Check]
6:00am	Unconfirmed	Jane Macdougall	602-176-0772	Chandler	[Edit] [Delete] [Print] [Check]
6:00am	Confirmed	Man Olyvas	480-238-0916	Chandler	[Edit] [Delete] [Print]
6:00am	Confirmed	Man Perret Jr	480-217-2970	Chandler	[Edit] [Delete] [Print]
6:00am	Confirmed	One Spears		Chandler	[Edit] [Delete] [Print]

# Patient Scheduling


## HOW TO SCHEDULE A PATIENT

- Schedule includes practitioner, patient, date, time
- Scheduled visits can be confirmed or downloaded to a providers Outlook calendar
- You can also include notes related to a visit
- Notify Facility or Practitioner of visit

**Add Patient to Schedule**

Patient

Practitioner

Date  

Time

Note

Visit Confirmed

Notify Facility

Notify Practitioner

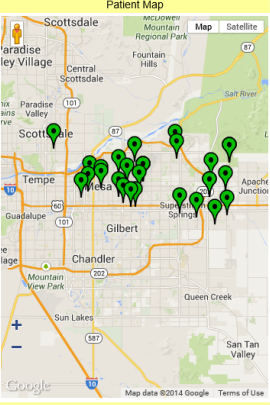
# Patient Bulk Scheduling

SCHEDULE MANY PATIENTS AT ONCE FOR THE SAME DAY

- Schedule more than 1 patient at a time for a practitioner using the 'Bulk Scheduler'
- Click patients you wish to schedule and date
- Can use filters to view patients by city, practitioner, etc..

**Bulk Schedule** Old Practitioner City Mesa Type Active Patients Last Name All Exclude Scheduled Frequency All Select

**Patient Map**



**Patients to Schedule**

Patient	Phone	City	Zip	Frequency	Last	Next	Time	Conf	Notes
<input type="checkbox"/> Man Adrian	602-908-7174	Mesa	85204	Monthly	01/2/2014		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Lady Aros	480-907-1188	Mesa	85205	As Needed	01/2/2014		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Lady Attwood	480-271-2382	Mesa	85215	Monthly	01/2/2014		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Bill Behne	480-833-7671	Mesa	85201	Monthly	01/3/2014		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Bob Coffey	480-964-8444	Mesa	85213	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Bob Cubas	480-924-7777	Mesa	85204	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Bob Curvin Jr	480-612-6419	Mesa	85210	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Denise Foster	480-238-1814	Mesa	85201	As Needed	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Lady Gleave	480-264-8640	Mesa	85205	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Bill Harms	480-907-1188	Mesa	85209	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Lady Homeier	480-139-0819	Mesa	85204	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Denise Jones	602-761-9499	Mesa	85202	Monthly	01/3/2014		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Lady Journey	480-474-4713	Mesa	85212	As Needed	12/19/2013		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Jane Lee	480-907-1188	Mesa	85209	Monthly	12/22/2013		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Man Levine	480-317-1939	Mesa	85208	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Denise Limb	480-834-0684	Mesa	85201	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Denise McClin	480-807-4700	Mesa	85208	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Lady McMiller	480-981-0129	Mesa	85215	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Man Moody	480-208-0123	Mesa	85204	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Denise Munoz	480-373-9823	Mesa	85209	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Bill Obermiller	4803610129	Mesa	85206	Monthly	12/22/2012		6:00 am	<input type="checkbox"/>	
<input type="checkbox"/> Man Palke	480-641-9767	Mesa	85215	Monthly	01/3/2014		6:00 am	<input type="checkbox"/>	

**Add Selected Patients to Schedule**

Practitioner Old Practitioner


Date 01/09/2014

Notify Facility

Notify Practitioner

Bulk Schedule

# Recurring Scheduling

- You can set patients up for recurring scheduling if you wish and schedule them up to 52 weeks out
- Click on the  icon on the patient page or schedule-> recurring
- Fill in details of recurring scheduling event

### Add Recurring Schedule

Patient

Practitioner

Visit Start Time

Visit Duration

Start Date

Recur Frequency

Recur Number of Weeks

Recurring Days

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

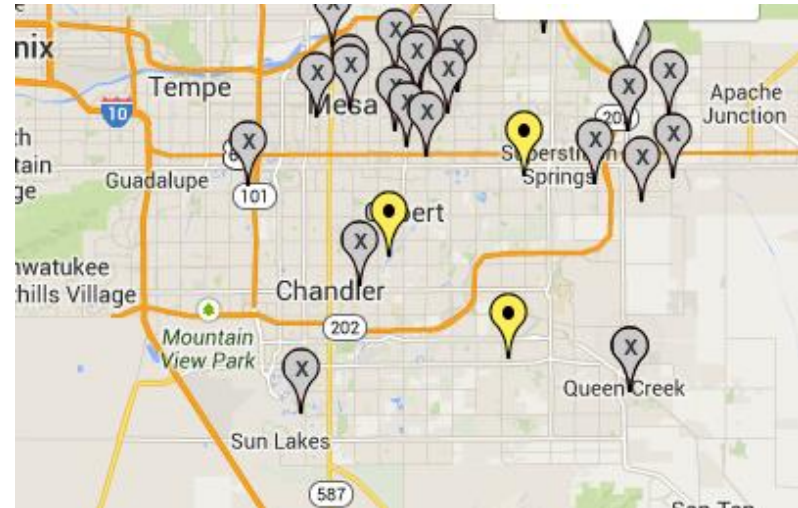
Schedule Note

Visit Confirmed

# Using the Schedule Optimizer

## MINIMIZE DRIVING DISTANCE WITH SCHEDULE OPTIMIZER

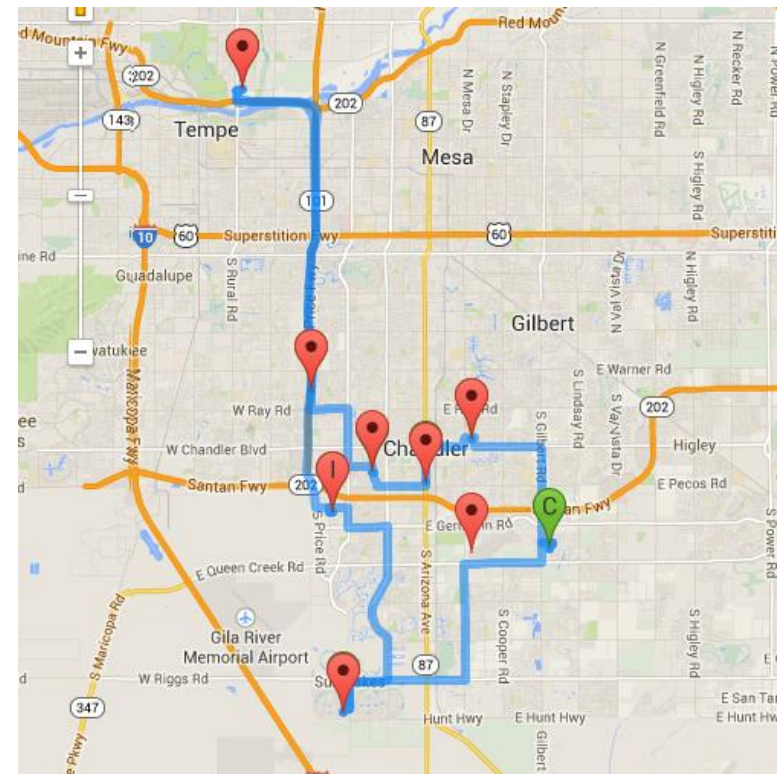
- In schedule page select a date and practitioner with 1 or more patients scheduled
- Schedule Optimizer button will show current schedule and other potential patients to schedule sorted by closest driving distance
- Click and send them to bulk scheduler to complete the scheduling process



# Using the Driving Optimizer

## MINIMIZE DRIVING DISTANCE WITH DRIVING OPTIMIZER

- The Driving Optimizer will show the optimal driving directions for the day's schedule
- Select start and end location and patient stops
- Add practitioners home address to show as start and end point

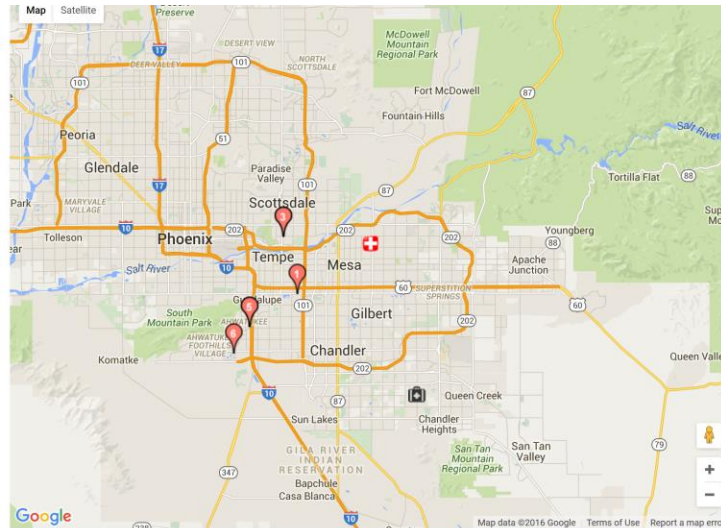




# Appointment Optimizer

## SCHEDULE PATIENT APPOINTMENT TIMES BASED ON DRIVING ROUTE

- The Appointment optimizer is found from the driving optimizer page
- Shows optimal order to view patients
- Can update appointment times in one click



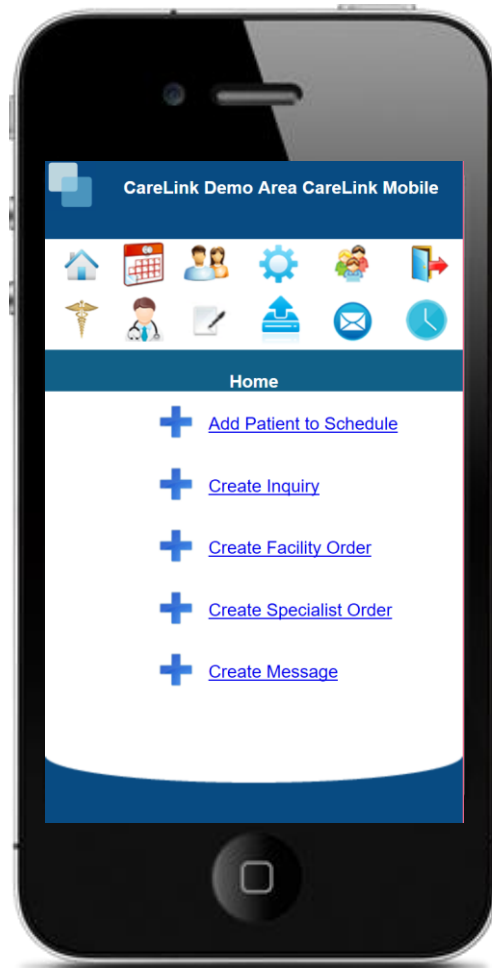
Order	Patient	Address	Schedule Note	Current Appointment Time	Duration	Edit Appointment Time
1	<a href="#">D. Thicklín</a>	1958 East Duke Drive Tempe	Monthly visit//left message, patient in hospital. will call first thing Tuesday to see if patient home RB	6:00am	1 Hour	6:00 am <input type="button" value="Update"/>
2	<a href="#">B. Oetjen</a>	1002 E. Bluebell Ln. Tempe	Monthly visit//confirmed RB	6:00am	1 Hour	6:00 am <input type="button" value="Update"/>
3	<a href="#">S. Thammasak</a>	1002 E Bluebell Ln. Tempe	Monthly visit//confirmed RB	6:00am	1 Hour	6:00 am <input type="button" value="Update"/>
4	<a href="#">A. Corbett</a>	5135 E. Halfmoon Dr Phoenix	Incomplete emptying of bladder due to benign prostatic hypertrophy	6:00am	1 Hour	6:00 am <input type="button" value="Update"/>
5	<a href="#">S. Packard</a>	5135 E. Halfmoon Dr. Phoenix	Monthly visit//confirmed RB	6:00am	1 Hour	6:00 am <input type="button" value="Update"/>
6	<a href="#">P. Watson</a>	3830 E Lakewood Pkwy Phoenix	Monthly visit//confirmed RB	6:00am	1 Hour	6:00 am <input type="button" value="Update"/>



# Practitioner Mobile Site

# Practitioner Mobile Site

MOBILE SITE FOR PRACTITIONERS ONLY



## Mobile Site Features:

### Scheduling Module

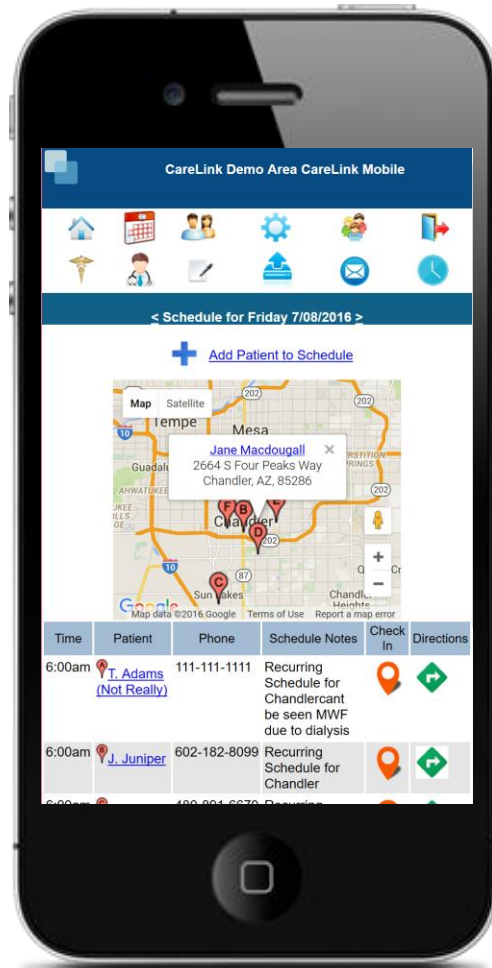
- View Today Schedule
- Add Patients to Schedule
- Turn by Turn Driving
- “Check In” to Appointment

### Collaboration Module

- Send Patient Inquiry
- Create Orders
- Send Message to Facility

# Practitioner Mobile Site

SEE TODAY'S SCHEDULE



## Mobile Scheduling Page

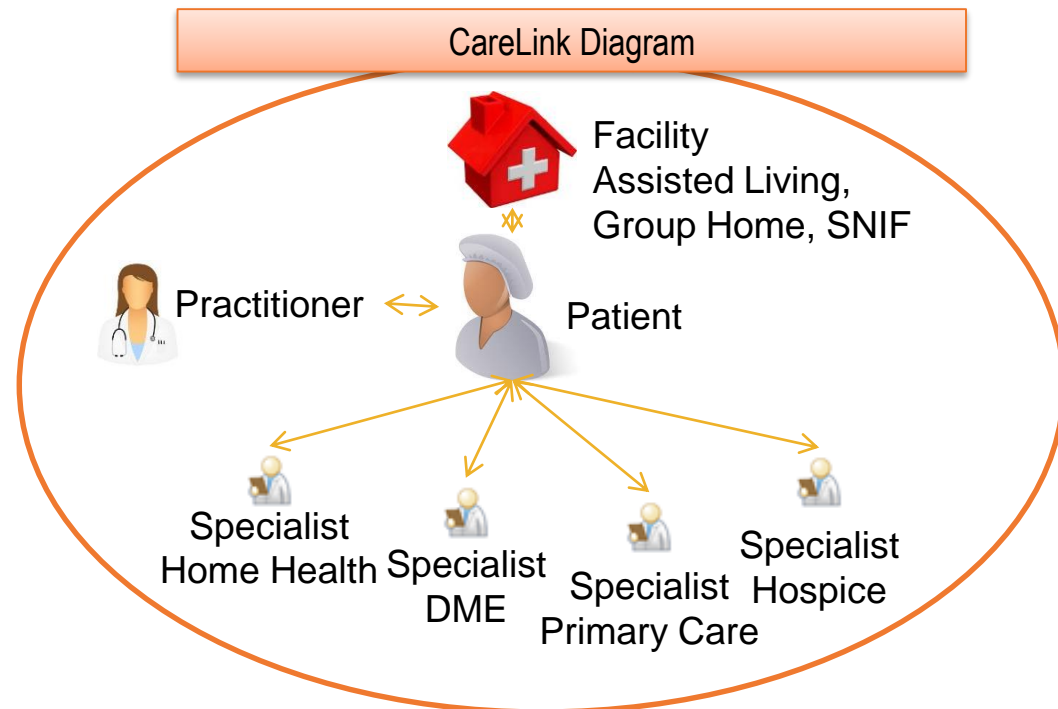
- View Today's schedule ordered by patient appointment time
- See Today's schedule on a map
- "Check in" to an appointment lets office staff know you have arrived
- Get Driving Directions from your current location

# Care Collaboration in CareLink

# 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



# 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 Facilities -> Add New
- 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

**Add Facility**

Name\*

Address\*

City\*

State\* AZ

Zip\*

Phone\*

Fax\*

Email\*

Username\*

Password\*  \* facility will be p

Facility Affiliation none ▼

Transitional Facility










\*required

# Patient Management

## ADDING NEW PATIENTS AND LINKING THEM TO FACILITIES AND SPECIALISTS

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

**Patient Actions**

								
<b>Edit Patient Data</b>	<b>Edit in Patient Worksheet</b>	<b>Add Patient Inquiry</b>	<b>Create Order</b>	<b>Add Specialist Order</b>	<b>Add Document</b>	<b>New Patient Form</b>	<b>View on Map</b>	<b>Transition Care Data</b>



# Patient Management

## PATIENT ACTIONS AVAILABLE IN CARELINK

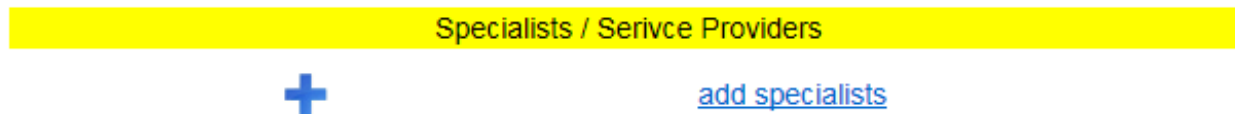
- **Edit Patient:** Edit patient demographic information
- **Edit in Worksheet:** Edit patient referral data
- **Add Inquiry:** Send an inquiry to patient's facility
- **Add Order:** Send an order to patient's facility
- **Add Specialist Order:** Send an order to a patient's specialist
- **Add Document:** 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

**Add Specialist**

Patient

Specialist

Create Order and Send Fax Notification

Notification Message

---

Add Referral to Worksheet

Referral Title

Referral Urgency

Referral Notes

# 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

The screenshot shows the 'Add Order' form with the following fields and options:

- Patient:** Mike Aldaco (dropdown menu)
- Practitioner:** Megan Spears (dropdown menu)
- Diagnosis:** (empty text input field)
- Order:** (empty text area with a vertical scrollbar)
- Order Header Company Logo:** Arizona House Calls (dropdown menu)
- Add Signature:**
- Fax Copy to Facility:**
- Buttons:** Create Order (highlighted in blue), Cancel

# 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

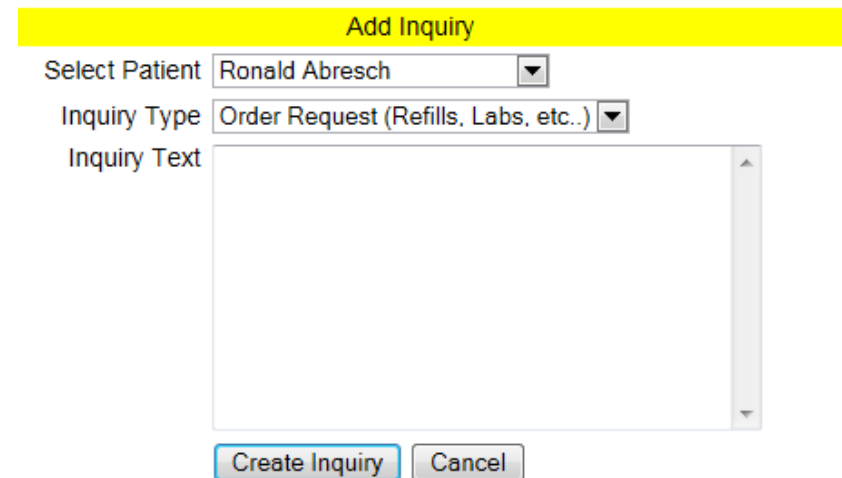
The screenshot shows a web form titled "Add Specialist Order" with a yellow header bar. The form contains the following fields and options:

- Patient:** A dropdown menu with "Joseph Absher" selected.
- Add Patient Contact Information:** A checked checkbox.
- Add Patient Insurance Information:** A checked checkbox.
- Specialist:** A dropdown menu with "AAMCO DME" selected.
- Practitioner:** A dropdown menu with "Megan Spears" selected.
- Order Title:** An empty text input field.
- Order Detail:** A large, empty text area with a vertical scrollbar.
- Clinical History / Recent Patient Notes:** A text area with a vertical scrollbar, containing the text: "This will appear as 2nd page on faxes order form".

# Orders, Inquiries, Messages and Documents

## CREATING INQUIRIES

- 2 Ways to Create an Inquiry
  - From the view patient page
  - Select 'Inquiries' -> Add Inquiry from menu bar
- Select Patient
- Inquiry Types
  - Order Request
  - Patient Comment
  - Practitioner Private Note
  - Question for Facility
  - Request for Visit
  - Visit Scheduled Notification



**Add Inquiry**

Select Patient: Ronald Abresch

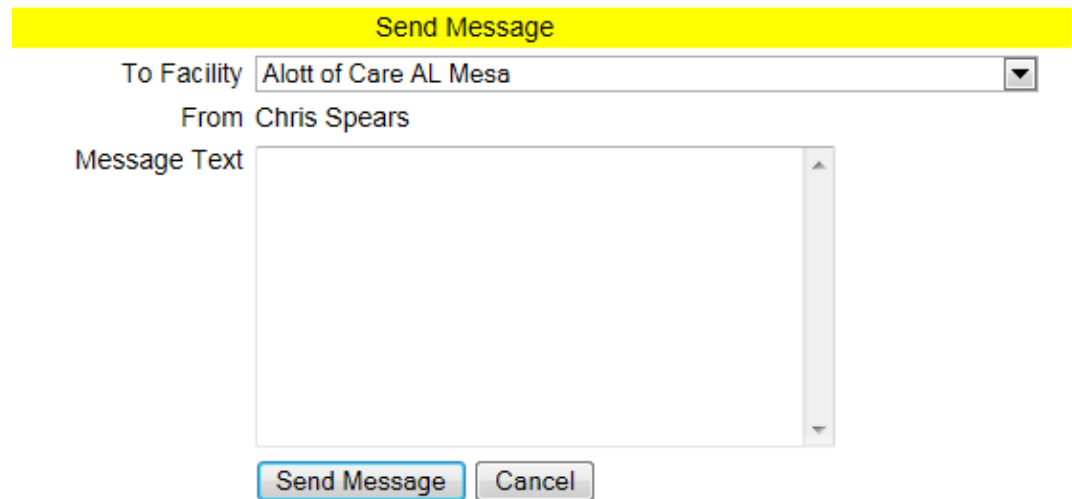
Inquiry Type: Order Request (Refills, Labs, etc..)

Inquiry Text:

# Orders, Inquiries, Messages and Documents

## CREATING MESSAGES

- 1 Ways to Create a Message
  - Message -> Send Message
- Select Facility and enter in Message Text



The screenshot shows a dialog box titled "Send Message" with a yellow header bar. Below the header, there is a "To Facility" dropdown menu with "Alott of Care AL Mesa" selected. Below that, it says "From Chris Spears". There is a large text area labeled "Message Text" which is currently empty. At the bottom of the dialog, there are two buttons: "Send Message" and "Cancel".



# Orders, Inquiries, Messages and Documents

## ADDING DOCUMENTS

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

The screenshot shows a form titled "Add Document" with a yellow header. The form contains the following fields and controls:

- Patient:** A dropdown menu with "Ronald Abresch" selected.
- Document Title:** An empty text input field.
- Document Type:** A dropdown menu with "Discharge Notes" selected.
- Upload Document:** A greyed-out text input field next to a "Browse..." button.
- Buttons:** "Add Document" (highlighted in blue) and "Cancel" (greyed out).

# 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
  - Inquiries -> View Inquiries
  - Message -> View Messages
- Click on ID number to see details
- Inquiries and Messages with Status 'Sent By Facility' is waiting to be acknowledged



- 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

<b>F2F Encounter</b> <b>Patient:</b> Tyler Adams <b>Patient DOB:</b> 01/1/1950 <b>Date:</b> 01/08/14	<b>Test Home Health</b> test address test city, az 85249 Fax: 480-219-2975
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I certify that this patient is under my care and that I, or a nurse practitioner working in collaboration with me, had a face to face encounter that meets the face to face encounter requirements with this patient on 12/14/2013.

**Medical Condition**  
The encounter with the patient was directly related to the following medical conditions, which is the primary reason for home health care:

*Iron deficiency anemia.*

---

**Clinical Findings in Support of Patient's Eligibility**  
Provide a summary of clinical findings taht support a patient's eligibility for home health services including specific need for intermittent skilled nursing and / or therapy services. The face to face visit findings must be related to the primary reason for home health admission. My clinical findings support the need for the above services because:

*IV fluids for Hydration IV fluids for Hydration*

---

**Statement of Homebound Status**  
I certify that my clinical findings support that this patient is homebound (i.e. absences from home require

# 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



# Transitional Care Module



# Transitional Patients †

## CAPTURING TRANSITIONAL PATIENT DATA

Only Available for Patients tied to a transitional facility

Click on Patient

Click on Transitional Care Data Icon



**Transition  
Care Data**

Chart Transitional Care Data

Check Box to set Transitional Care Reminders

View Reminders in Transitional Care Follow Up  
Workbook

# 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 Follow Up 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

**Add Reminder†**

Patient

Days from Now

Reminder

†This reminder will appear in the reminder workbook

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# Data Integration



# 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

# 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

# Questions?

