Scripps

# Scripps Care Link Quick Start Guide

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## Introduction

Scripps Care Link is a tool that provides real-time web access to patient information, so you can access patients' membership data and communicate with Scripps Health Plan Services to provide quality patient care. You can also use Scripps Care Link to quickly refer patients to providers.

Scripps Care Link is a collection 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 referrals, you can use the Referrals Review activity.

This guide takes you on an introductory tour of Scripps Care Link. The first pages include information to help you get started, such as how to log in. The rest of the guide contains explanations of how to use Scripps Care Link. Terms that appear in italics throughout the guide are further defined in the glossary at the end of the guide.

User Roles:

Access varies based on the User's Role.  Not all activities listed in this manual will be viewable to all Users.

- Eligibility Only– Users will have the ability to see demographic and benefit information for patients associated with their vendor.
- Eligibility, Claims View, and Referral View – Users will have the ability to see demographic and benefit information for patients associated with their vendor, as well as review the associated referrals and claims.
- Eligibility, Claims View, Referral View, and Referral Entry - Users will have the ability to see demographic, benefit, claims, and referrals information for patients associated with their vendor. They will also be able to enter referrals into the system for any provider associated with their vendor.

## Help and contact information

- For help using an activity, click  on the webpage.
- If you forget your Scripps Care Link password or can't log in, call 858-678-7500.

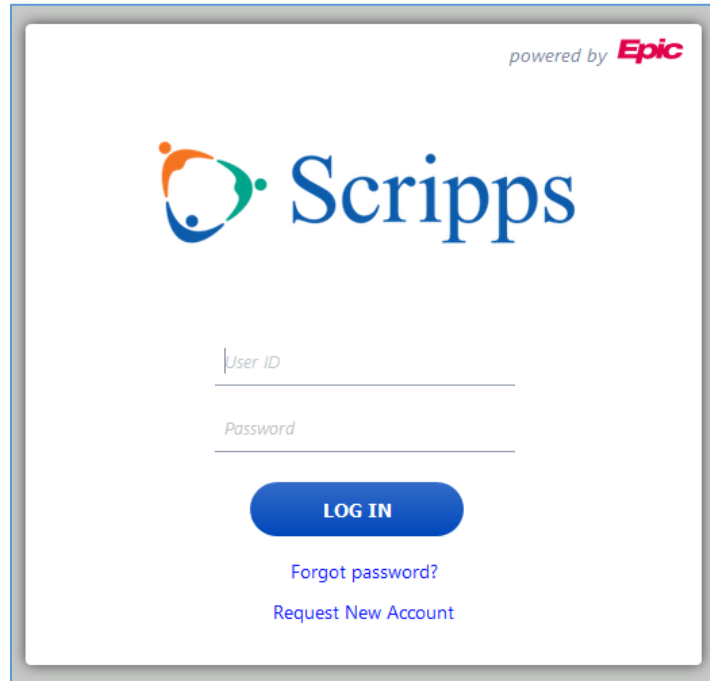## Browser, System and connection Requirements

Both PCs and Macs support Scripps Care Link. The user's system requirements are minimal: In Epic, PC users must have Internet Explorer 9, 10, or 11, Firefox 24 or later. Mac users must have Firefox 24 or later, Chrome, or Safari. First time users should attempt to log in using Internet Explorer. Scripps Care Link can also be accessed by Apple iPads running iOS 8 using the Safari browser and Android tablets using the Google Chrome browser in Epic. The native Android browser and other third-party browsers are not supported. The Google Chrome browser on iOS is also not supported.

Users might need to enable Java to view graphs and scanned images. Additionally, third-party image viewers might install Java applets and other ActiveX components on the client workstation. In this case, users need appropriate privileges on their workstations to install such components.

## Signing In

To access Scripps Care Link, first navigate to the Scripps Login Page https://scrippscarelink.org

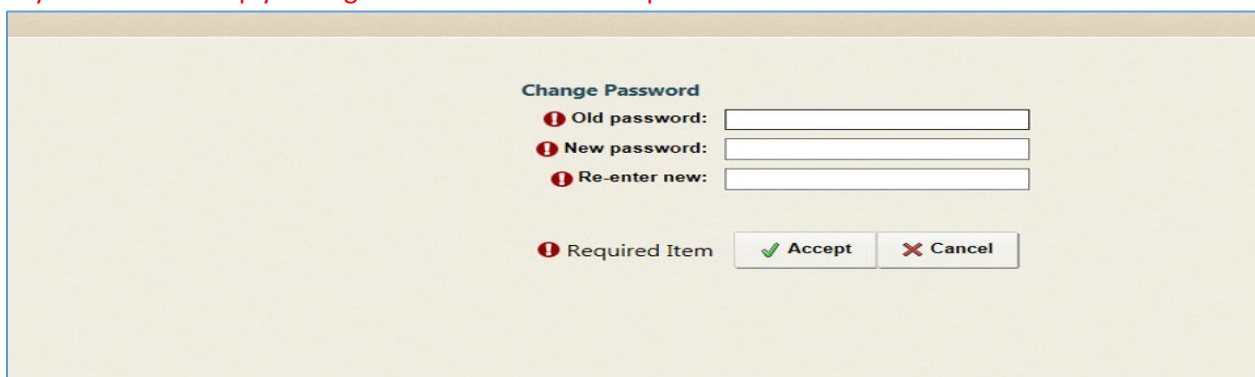- Username and password requirements will be sent to you in a customized Welcome to Scripps Care Link email.



Once you have logged in you will be prompted to change your password.

> NOTE:  Password must be a minimum of 8 characters with at least 1 Capital, 1 special character and 1 number: for example: Password1#
>
> IMPORTANT:  PLEASE DO NOT COPY AND PASTE USERNAME NOR PASSWORD.  THEY MUST BE ENTERED MANUALLY.

Passwords and log in information are strictly confidential and should not be disclosed or shared with anyone.  Please keep your log in information in a safe place.

At that point you will be prompted to accept terms, once completed you will see the screen below. Once you have successfully logged in, notice the task bar on the top of the page. There is the Home page (displayed below), In Basket, Patient List, Referral Search, Claims, and Patient.
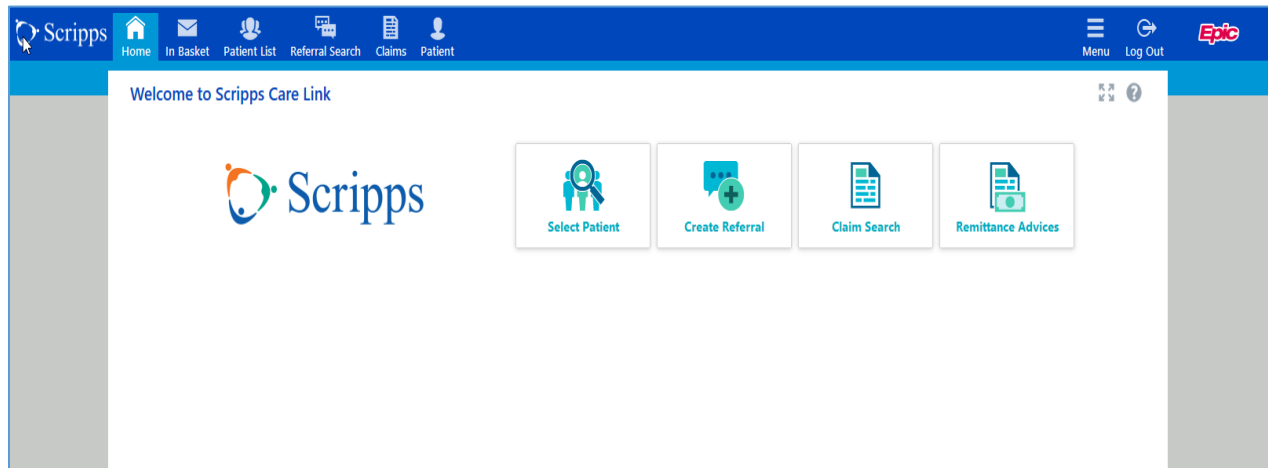


What you see or commonly referred to as 'view' depends on the security access you requested on your application. The view or roles include:
- Enrollment and Eligibility (Coverage)
- Referral Entry or Referral Entry View Only
- Claims or Claims View Only

# Patient (Member) List

You will visit this webpage frequently to access your patients' information.
There are two ways to access a patient's record:
- By selecting the patient from a list of your current patients
- By searching for the patient based on name, date of birth, and gender

Patients will be added to your patient list if you receive a referral or claim for that member, or if one of the providers at your vendor sites(s) receive a referral or claim for that member.

**Select the patient's record from the list of current patients linked to your Vendor(s)**
If you have access to only a few patients, selecting your patient from a list is quicker than searching for them.

1. Select the **Patient List tab** or click the **Search Select Patient button**.
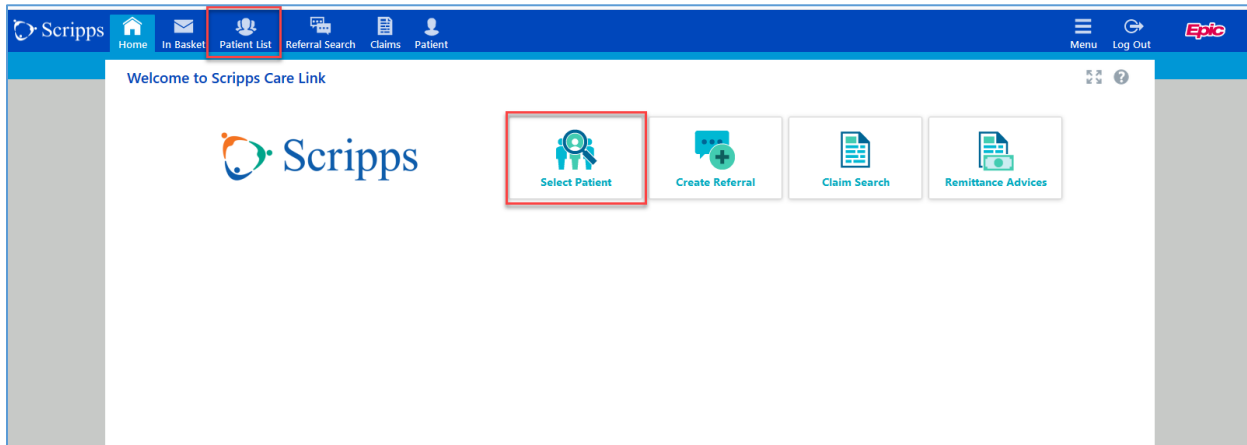


2. If you have access to many patients, your patients might appear on more than one page. Click on the **Patient Name column header** to sort patients alphabetically.
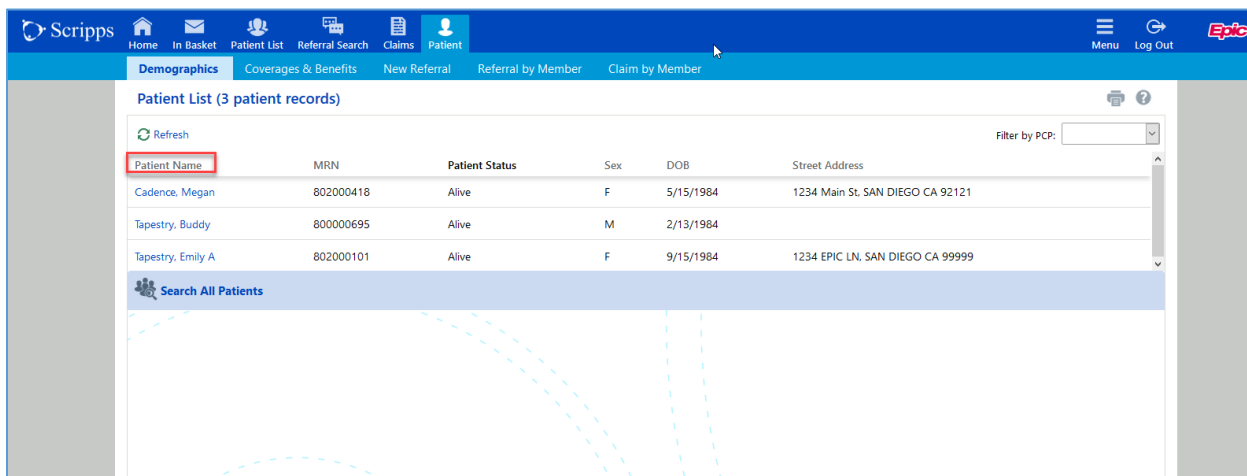
3.  Click a patient's name to open their record, patient's name now appears on the left sidebar and on the patient tab on the top toolbar.

**Search for a patient's record based on name, date of birth, and gender**

If you do not find a patient in your Patient List but you know specific information about a patient, you can use Patient Lookup to enter that information and then select the appropriate patient from the list of possible matches. This will give you interim access to a patient's record.

1. On the 'Patients' tab, select 'Search for All Patients'
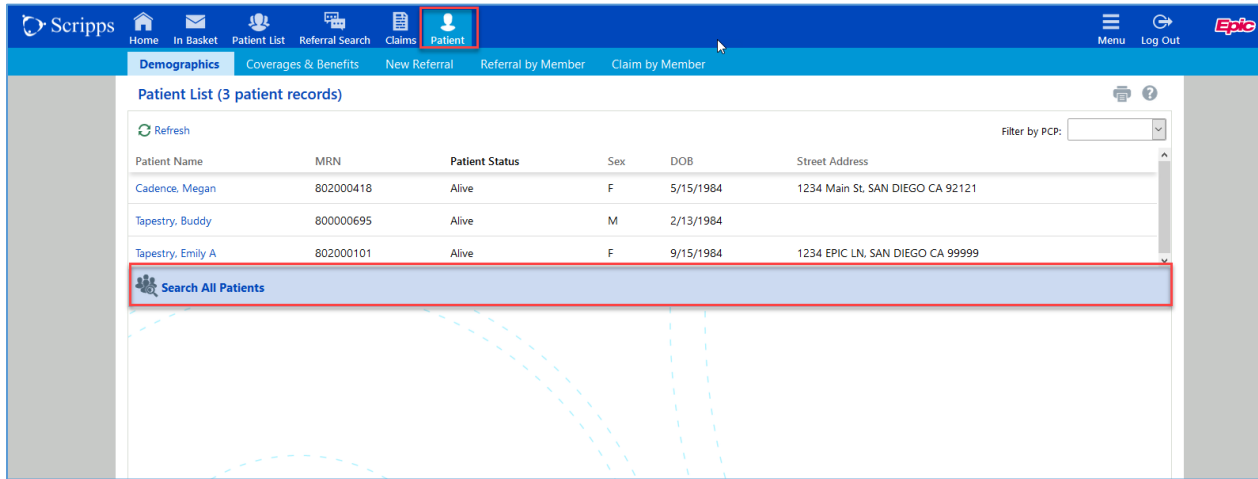


2. Enter the appropriate, required demographic information
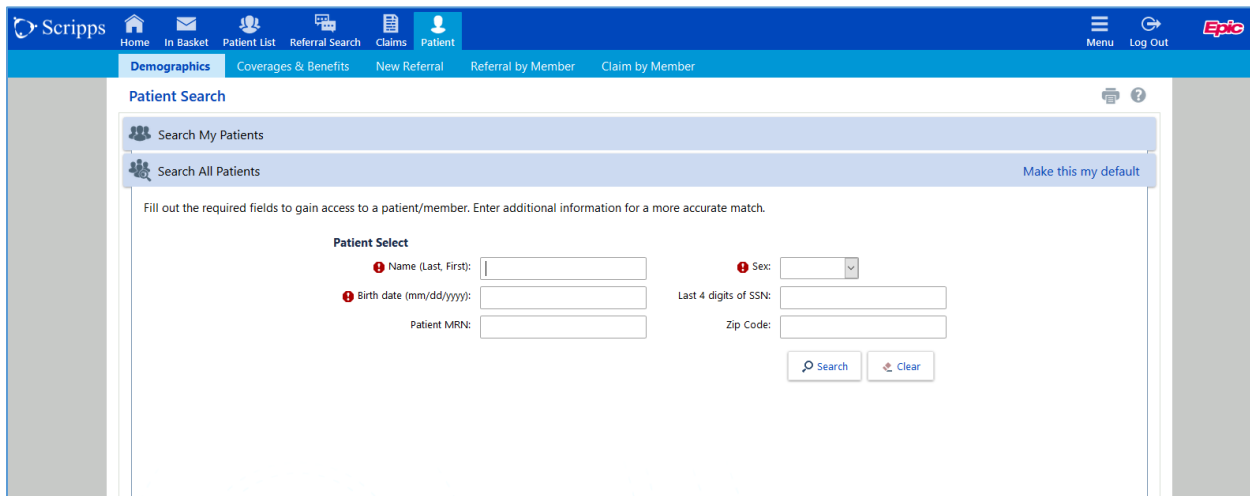


3. If the appropriate information is accurate, your patient will display after selecting 'Search'
4. You will be granted temporary access to their patient record.

# Eligibility and Benefits

**Please note: Scripps Care Link Eligibility and Benefits information** *may only be used as a source of truth for members whose coverage is Scripps Health Plan. For all other health insurers, you should verify the member's eligibility and benefits with the health plan.* Coverages prefaced with an "MC" indicate that the patient is covered under an insurance plan for which Scripps Health Plan Services (SHPS) provides management services for professional and/or institutional services.

To view the Eligibility information for a patient, including coinsurance and copay amounts, you can access the Coverage & Benefits information for that patient. With the patient selected from the patient list, navigate to **Patient Profile > Demographics**

1. From the **Demographics** activity, you can review the following patient information:
   - Demographics, Primary Care Provider (PCP), Network (Medical Group/IPA) affiliation

2. Next navigate to the **Coverages & Benefits** activity
3. From here, you can select a coverage

The **Coverage Detail Report** link will show eligibility, coverage, and subscriber information for the selected coverage. *Remember, the coverage information may only be used as a source of truth for Scripps Health Plan enrollees.*

The **Benefits Summary** may show benefits information regarding authorization requirements, copay and coinsurance amounts, maximum out of pocket (MOOP) detail, deductibles, and limits of covered services per type of service. The **Benefits Summary** for Scripps Health Plan enrollees may include all of this benefit information however MOOPs, deductible, and service limits will not display for other MC coverages.

## Referrals

Scripps Care Link, includes not just quick and easy referral and authorization entry, it also allows for electronic receipt of the determination. Referrals are sent electronically to Scripps Health Plan Services are then reviewed by the system's auto assignment table and given a status of authorized, denied or pended for medical review by the medical management staff.

To create a new referral, you will be required to enter information such as the referring and referred to providers, requested procedures, and diagnoses associated with the referral. You can enter free text notes to communicate other information about the referral, and you can attach files to the referral.

1. Select the Patient List tab
2. Click on the patient requiring a referral.
3. From the Patient record, click on the **New Referral tab**. The New Referral activity appears.
4. Required vs Recommended information
   - **Fields with a red exclamation point are required**. Referred By physician or location and Referred to Provider Specialty are required, as well as diagnosis and procedural information. You will not be able to submit the referral without filling in these fields.
   - Fields with a yellow warning sign are recommended. These are suggested fields, but will not prevent you from submitting the referral if left blank.
5. Information without a red exclamation point should also be updated appropriately: Priority, Type, Number of Visits, Start, Class and Expiration Dates
   - Select Routine or Urgent as the Priority of the referral
   - Select Class as Incoming or Outgoing
6. The referral class defines where the referral originated from and to where the patient will go to receive services.  It will also determine the required fields that must be completed.  The streamlined referral type will allow specificity for the types of services the patient will receive.
   - Incoming: Patient will receive services by a provider within Scripps
   - Outgoing: Patient will receive services by a provider outside of Scripps.
7. Click the Next button.
8. In the Diagnoses (Coded) section click search. Enter the diagnosis code or free text a description of the diagnosis.
9. In the Procedure (Coded) section click search. Enter the procedure code or free text a description of the procedure requested.
10. If necessary, select a Note Type, type a free text a summary in the Note Summary field, and enter a free text a note in the Note field.
11. If necessary, you may attach a file to the referral using the **Add File** button.
    - Allowed file types: JPEG, WAV, MPG, PDF, DOC, TIFF, TIF, JPG, TXT, HTM, HTML & PNG
12. Click the Request Referral button to submit the referral.

You are unable to put the referral in a final status. Instead, it is reviewed by Scripps and a final status will be assigned.

# Reviewing Referrals

You can check the status of a referral by reviewing the referral in **Referral by Member** or **Referral Search activities**

In the **Referral by Member** activity, you may review all referrals or only the active referrals for a member. Select the ID of the referral you would like to review to see a view-only report of the information on the referral. When reviewing the referral, you may add a note or attachment to the referral by clicking the Add Note/Attachment button.

In the **Referral Search** activity, you have many options for how to create a referral search. According to a date range, you may choose first whether or not the referral is incoming or outgoing to you as a physician or the physician you're using in your search. Next, you may select all applicable providers in your provider group and any applicable statuses for the referral(s) in your search. Once you have all of your options selected and a date range specified, click Search to find all applicable referrals. Select the ID of the referral you would like to review to see a view-only report of the information on the referral. When reviewing the referral, you may add a note or attachment to the referral by clicking the Add Note/Attachment button.
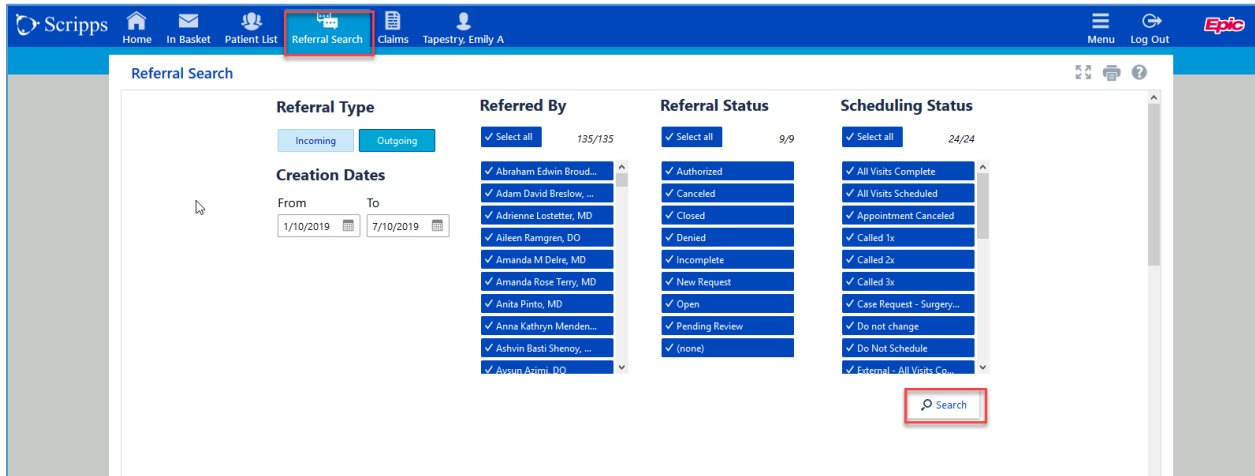
## Claims and Remittance Advices

Claim information for patients with SHPS managed care plans are viewable by navigating to **Patient Profile > Claim by Member**.
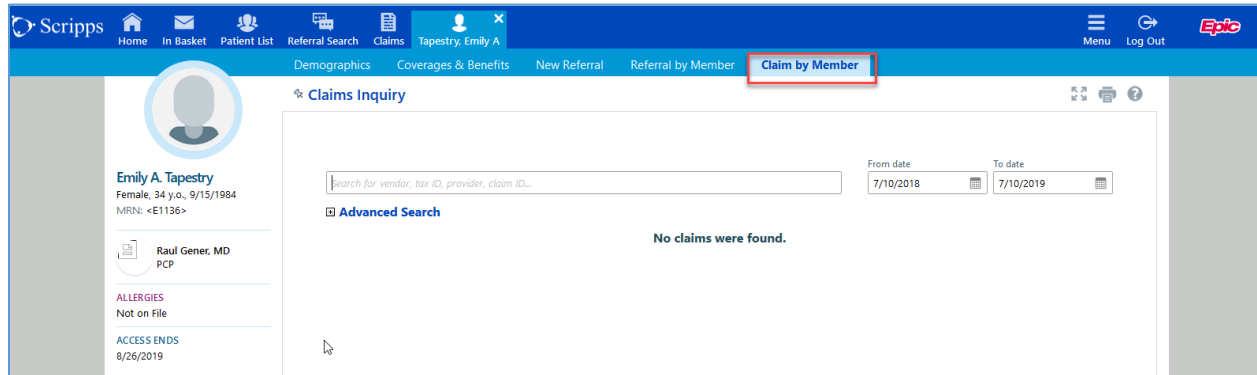


In the Claim Search activity, you can search for claim(s) using any one of the following:

- Provider: the practitioner linked to the NPI submitted on the claim
- Vendor: the "Pay-to" entity linked to the tax id submitted on the claim
- Claim ID, as assigned by SHPS during the adjudication process

In the **Claim Search** activity, you may search claims for the selected patient based on the provider listed on the claim. You will also be able to view a quick snapshot of the date the claim was received and the current status that the claim is in. The claims status will update dynamically when any updates are made to that claim.
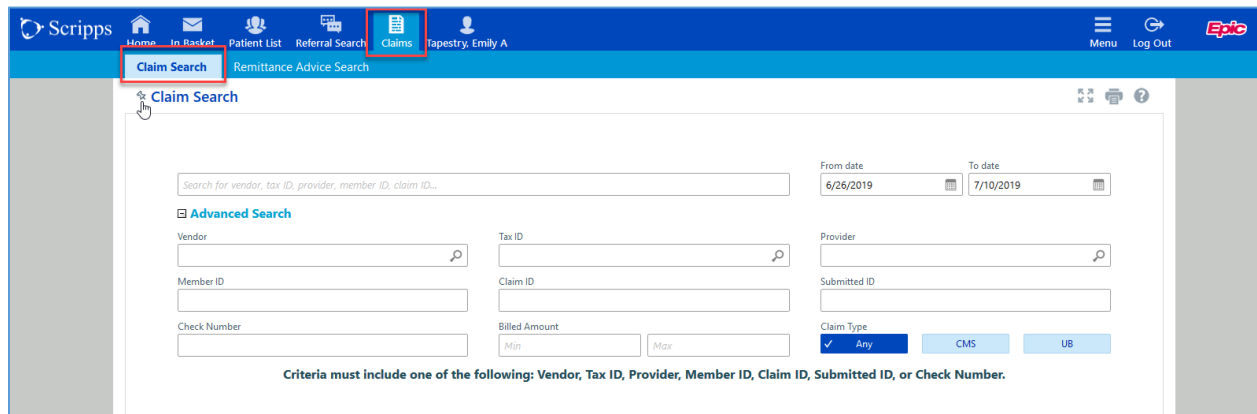


Available Claims Statuses:

- Received – Thank You!: Scripps Health Plan Services has received the claim, but the claim has not been processed
- Processing: Scripps Health Plan Services is currently reviewing and processing the claim
- Check Sent: Scripps Health Plan Services has processed the claim and sent the associated check
- Payment Processed: The payment has been disbursed
- EFT Sent: The payment has been distributed electronically
- Denied: Scripps Health Plan Services has denied the claim
- Check Stopped: Scripps Health Plan Services has stopped the payment

- Refund Requested: Scripps Health Plan Services has identified that a refund is due by your organization
- Refunded: Scripps Health Plan Services has identified that a refund is due to your organization and has refunded that amount
- Payment Returned: Scripps Health Plan Services has processed the claim and sent the associated payment, but that payment was returned
- Check expired: Scripps Health Plan Services has processed the claim and sent the associated payment, but that payment was not distributed within the given time frame



Select the ID of the claim you would like to review to see a view-only report of the information on selected claim.

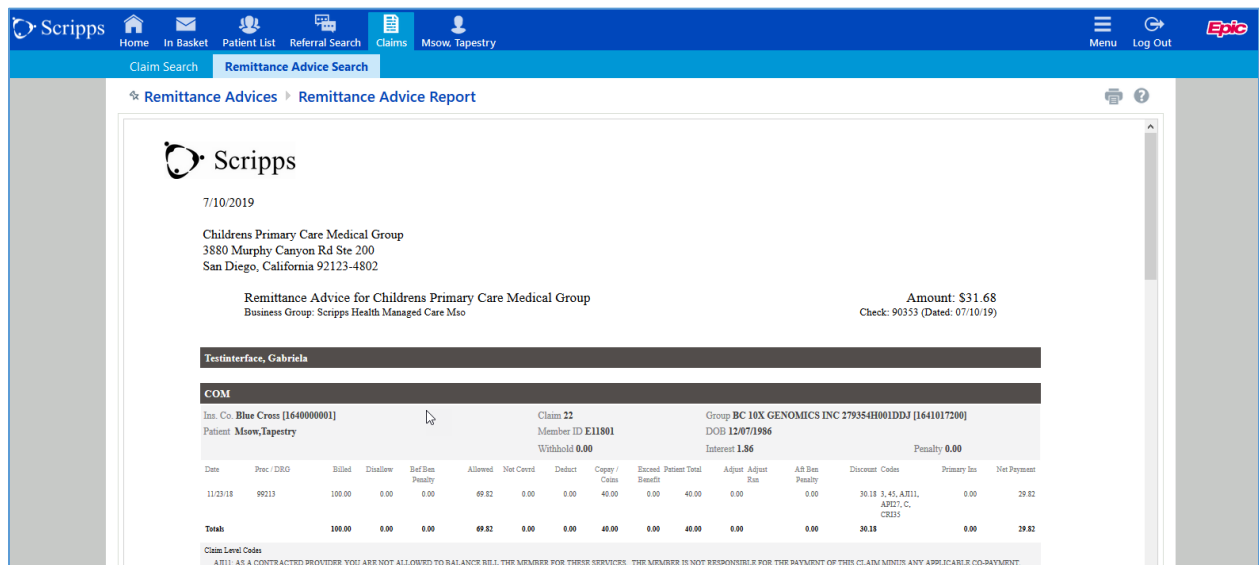To review **Remittance Advices**, you will navigate to **Claims > Remittance Advice Search**. In the Remittance Advices activity, you may search for Remittance Advices by Vendor or check number within a specific timeframe.
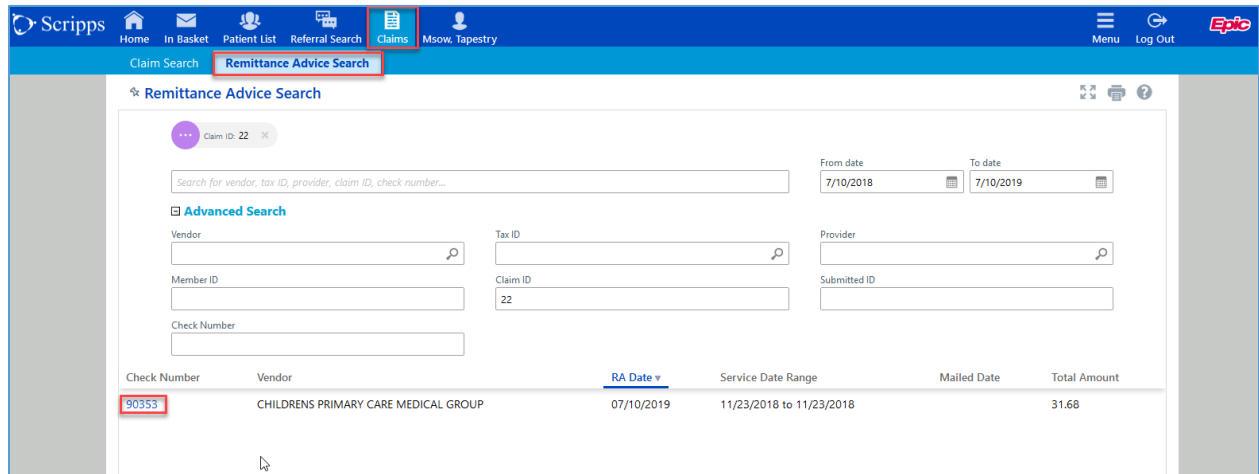


Select the ID of the Remittance Advices you would like to review to see a view-only report of the information on the Remittance Advices.

## In Basket / CRM

SHPS prioritizes the importance of a streamlined system of communication through the 'In Basket' feature.   The In Basket is a quick and easy way to communicate with SHPS via an In Basket message, which is often referred to as a CRM or as a Customer Service Request. If enabled,  In Basket is where your office/Physician will receive Referral Notification letters. From the In Basket, you can view and sort messages, search for messages based on a number of criteria, and respond to messages.
Select the In Basket tab listed on the top menu bar to access your messages.
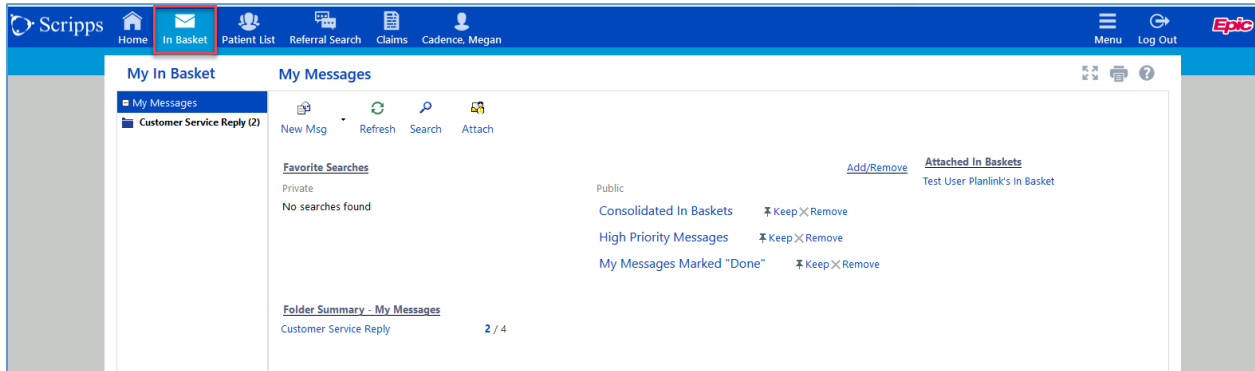


Your messages appear in the left pane. New messages will appear in bold, and the number of new messages appears in parentheses next to the folder name. A high-priority message will be identified by an exclamation point on the folder. Your Inbasket folder list will vary depending on your received message types.

**View a message / CRM**

1. Select the folder for the type of message you want to view (for example, Customer Service Reply). The messages in that folder appear in a list in to the right.
2. Select a message to read its contents in the bottom pane.
3. When communicating with SHPS, a customer service representative may ask you for, or refer to a "CRM number". This is an internal number SHPS uses to track customer service messages and you can find it the body of the In Basket message as shown in the image below.
4. If there is a letter attached to your message, you can view it by clicking the blue hyperlink.

**Search for a message**

1. Click 🔍**Search** in the toolbar.
2. Enter as many search criteria as you want. You can search by patient, message type, status, recipient, priority, date, or any combination of these.
3. Click ✔**Search**. Your search results appear.
4. To return to your normal In Basket view, click **My in Basket** at the bottom of the left pane.
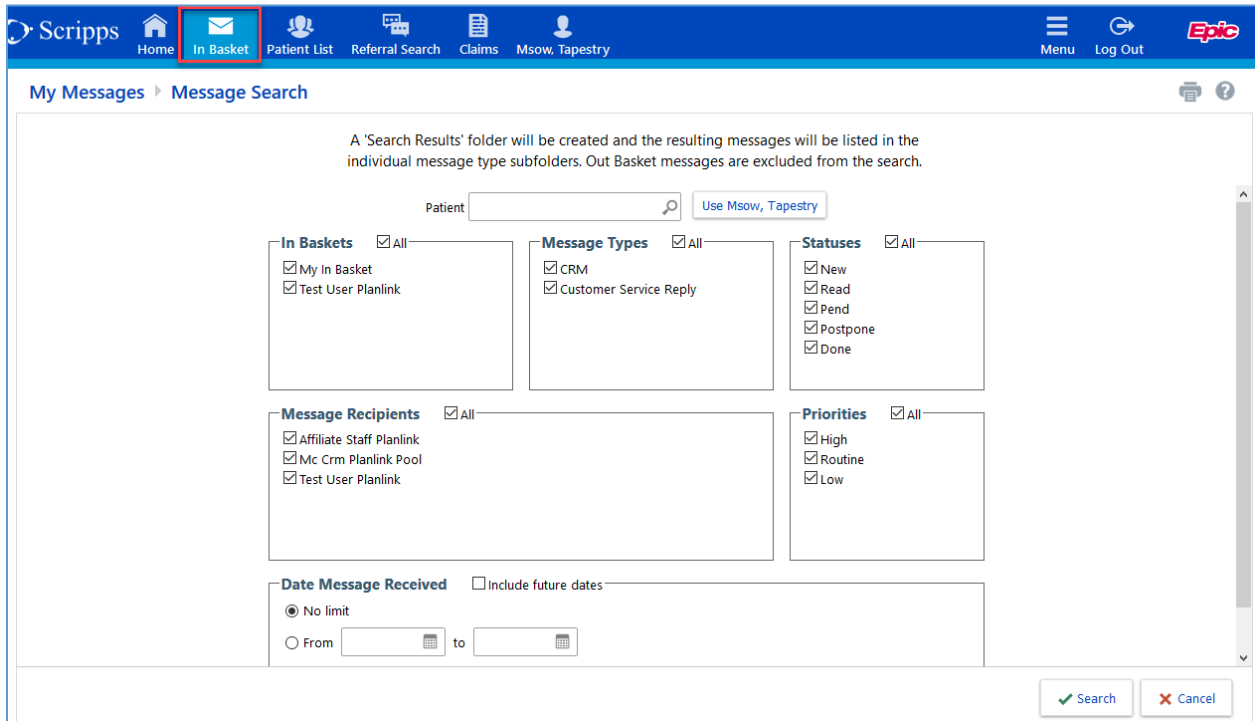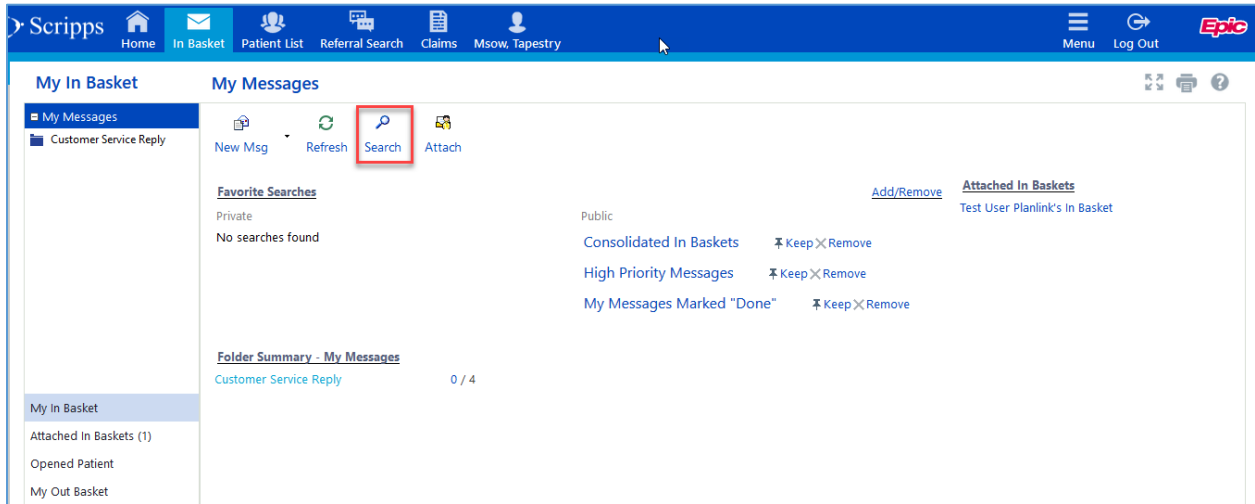
## Send an In Basket Message / CRM
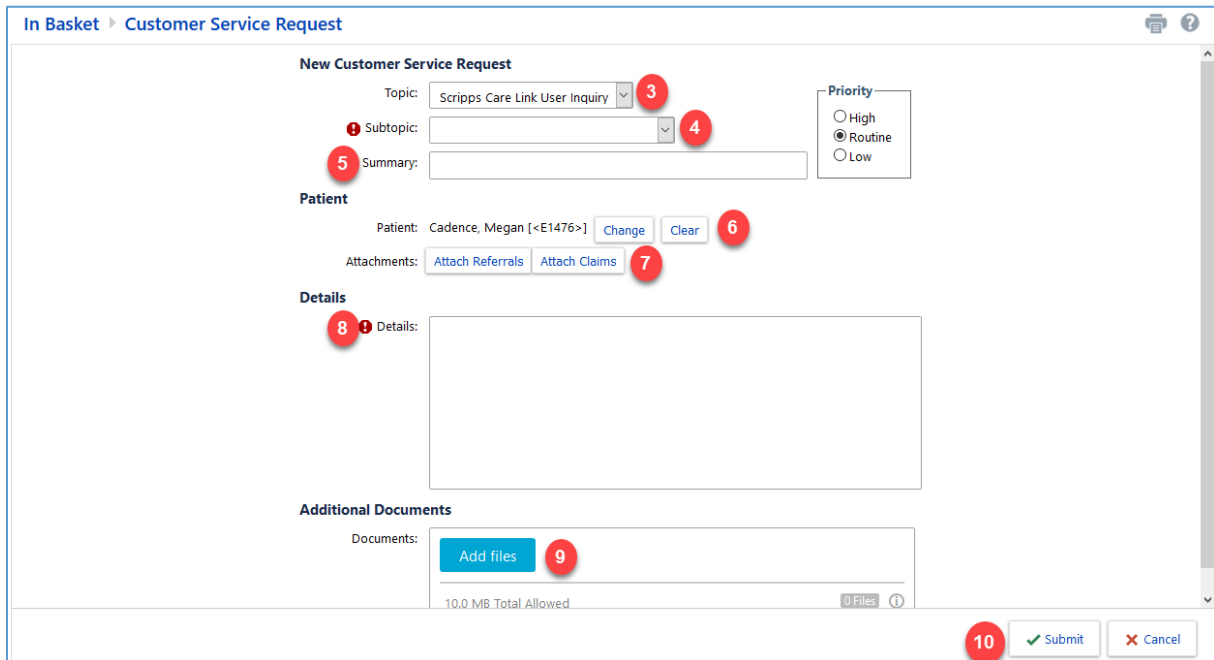
The In Basket activity is a communication hub, similar to email, where you can send and receive messages / CRM's. Messages are sent to individual recipients or to a number of recipients grouped in a class or a pool. You can also associate a patient with the message using the **Patient** field on the message entry form so that the recipient can refer to the member record. If sending a **CRM** to the SHPS Provider Relations or Provider Dispute department, it is possible to attach referrals and claims to the message.

**Send a message / CRM**

1. Select the In Basket tab.
2. Click the 📩 **New Msg.**
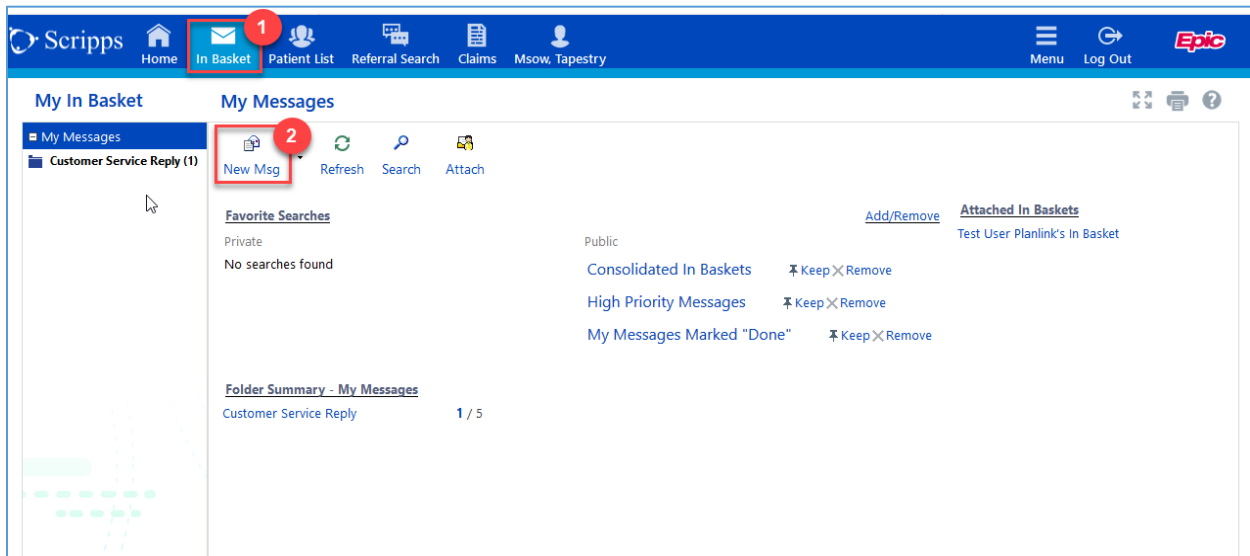
3. In the **Topic** field select 'Scripps Care Link User Inquiry'.
4. In the Subtopic, select a category based on the type of question you have. If you don't know what to select, see list of subtopic definitions below.
5. Enter a brief subject in the **Summary** field.
6. Click on **Select Patient** to find pull in the patient this message pertains to (if applicable). This attaches the patient's name to the secure message.
7. Select Attach Referral or Claim to pull in the referrals and or claim associated with the patient. **This option is only available when you attach a patient name to the message.**
8. Type your message in the **Details** field. Please include your name, and contact information.
9. Click on **Add files** to attach any additional relevant documents or images.
10. When you are finished, click ✅ **Submit**.



Available Subtopics:
- **Authorization Questions** – Referral change requests, adding codes or visits to referrals, check referral status, etc.
- **Claims Questions** – Follow up on status of claims, questions of claims payment, etc.
- **Contract Questions** – For questions on contracted rates.
- **Member Eligibility/Benefits Questions** – Verify copays, deductibles, coinsurance etc.
- **Provider Directory Questions** – Communicate updates to provider demographics.
- **Provider Portal Questions** – Use to report issues or ask questions about the portal.
- **Provider Relations** – Direct all provider related inquiries.

## Share and Attach In Basket

It is possible to share your In Basket with other users and attach In Baskets that have been shared with you. This functionality is most useful for users who review Referral Notifications for providers. Both the sharing and attaching users must have a Scripps Care Link account to use this functionality.
To share your In Basket, select the In Basket tab. To the right of the New Messages, Refresh and Search buttons, you will find the Attach button.

**Share your In Basket (Grant Access)**
1. Select the In Basket tab.
2. Select My Messages.
3. Click **Attach** and select the **Grant Access** activity.
4. Search for and select the user to whom you would like to grant access to your In Basket.
5. Click **Save**, then click **Return to In Basket.**
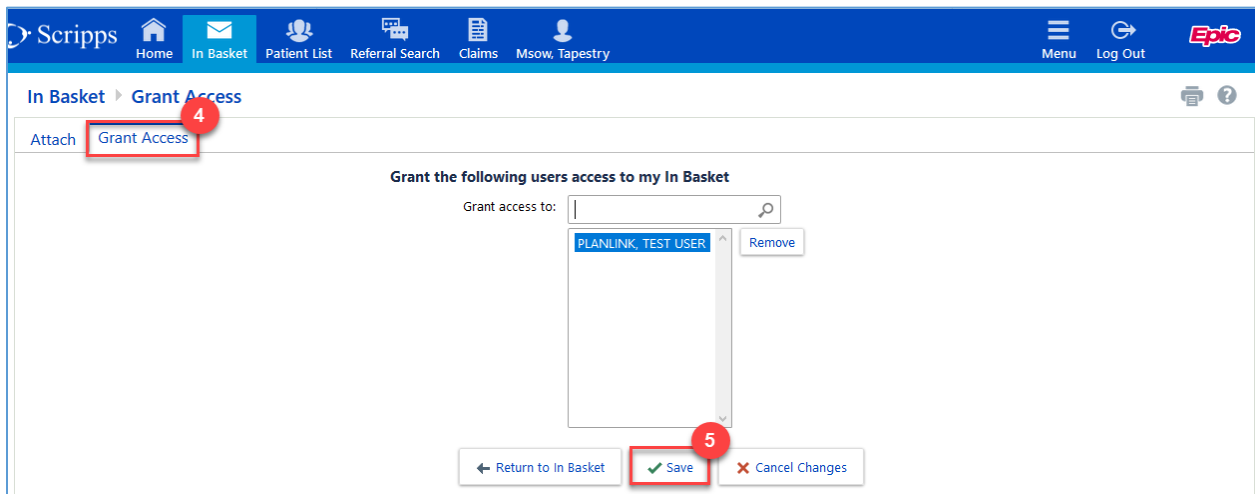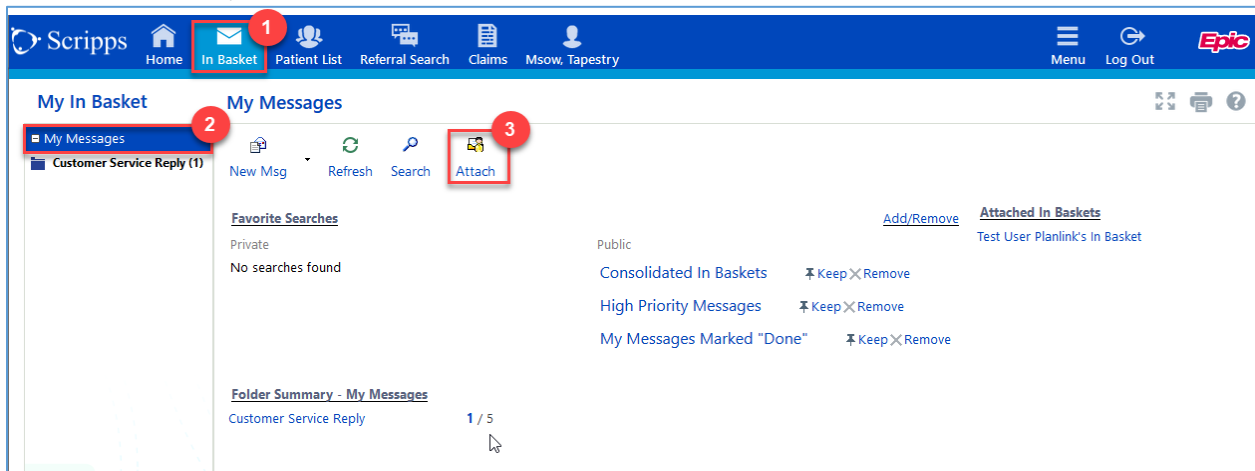




The user now has access to view your In Basket. You can see who you have granted this access to and revoke access by returning to the Grant Access activity.

**Attach other users In Basket**

After a user has shared an In Basket with you, you will be able to attach the In Basket and view messages for that user.

1. Select the In Basket tab.
2. Select My Messages.
3. Click **Attach**. The **Attach** activity will appear.
4. Search for the user that has shared an In Basket with you and check the **Show in In Basket** box.
5. Click **Save**
6. Click **Return to In Basket.**
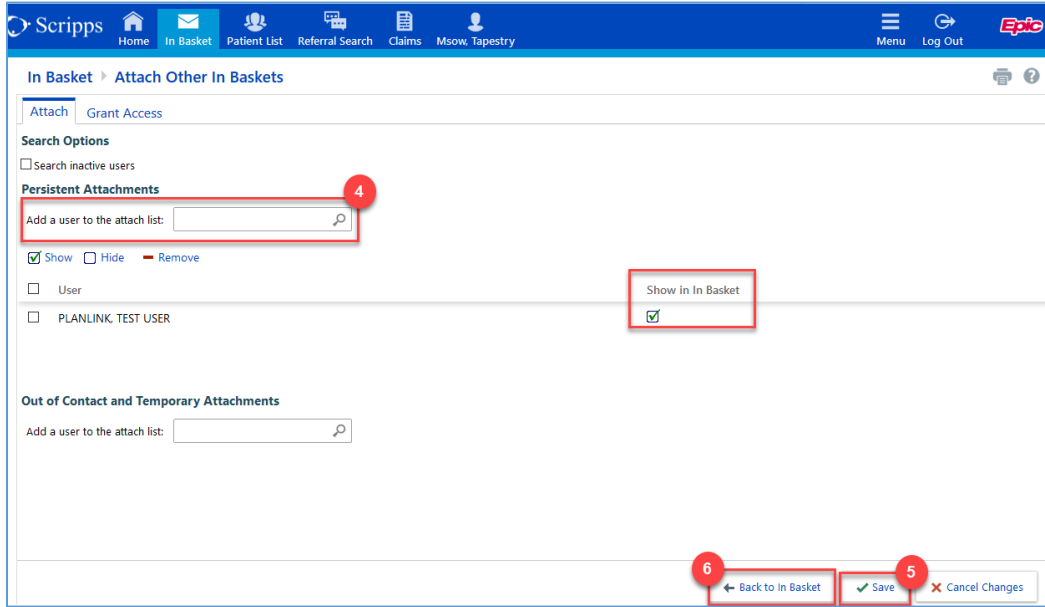


When you return to the In Basket, you will now be viewing the In Basket for the user that you attached. To return to your In Basket, either click the **Close** button or click **My In Basket**.
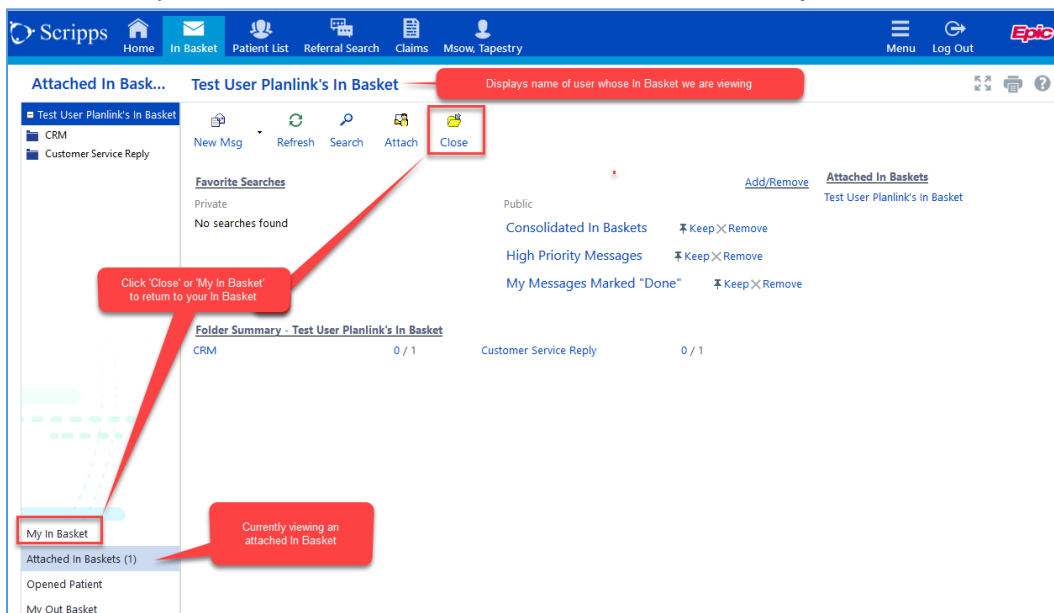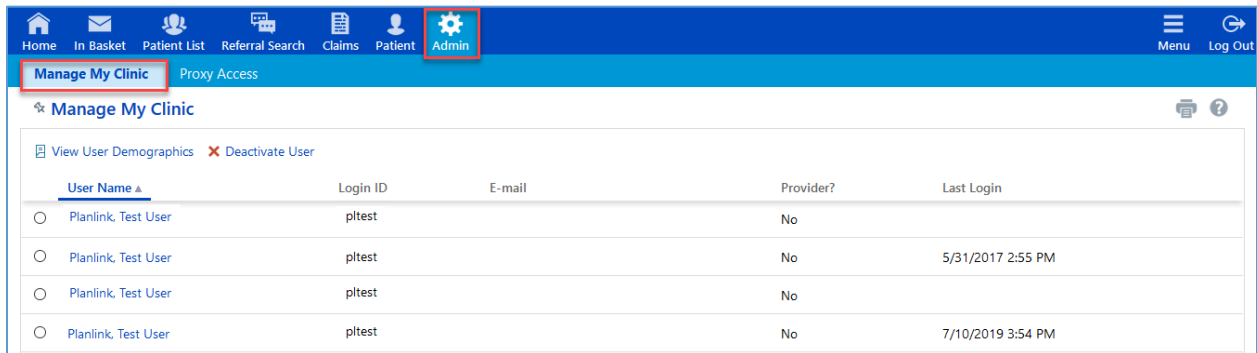
## Site Administrator

If you are the Care Link administrator for your site, you will have access to an Admin menu.

**Manage my Clinic**
**Deactivate a User**
1. From the Admin activity, select the Manage My Clinic tab.
2. Click the radio button next to the user you want to deactivate and click Deactivate User.
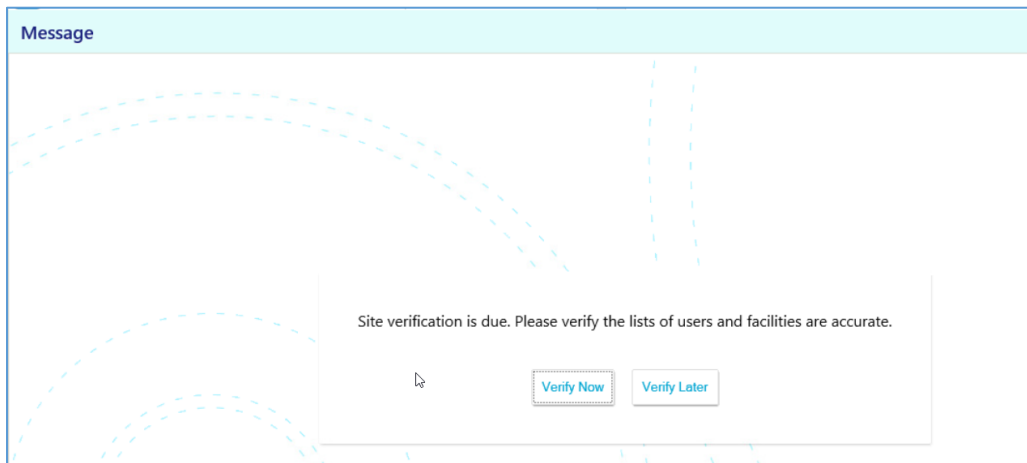3. Enter a comment indicating why you're deactivating the user and click Deactivate.



**Verify User Records**

SHPS will periodically send the Site Administrator a Site Verification message asking you to verify that all users are current and active. From the message, you can click **Verify Now** and you are brought to the **Site Verification** tab in Manage My Clinic. From the **Site Verification** tab, you can verify that all the users working at your site are current and you can deactivate user records to prevent unauthorized access by users whose accounts are outdated.

1. On the Site Verification tab, select No for all the users whose accounts you want to deactivate. You can enter a comment in the Comments field that appears.

2. Select the Acknowledgement check box to acknowledge that you have reviewed and confirmed the list of users.

3. Click ✔ Verify to verify the list of users and close the screen.

## Signing Out

To maintain patient confidentiality, you need to log out or secure your screen when you are done working or have to leave the computer for any reason. There are two ways to do this:

- Click  **Log Out** to log out of Scripps Care Link. The next time you log in, you are directed to your start page.

- Secure the computer by clicking Menu  on the top right toolbar and then click  **Secure**. When you log back in, you return to the same page that you were using before you secured the screen. This way, you don't need to navigate back to the page on which you were previously working.