

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

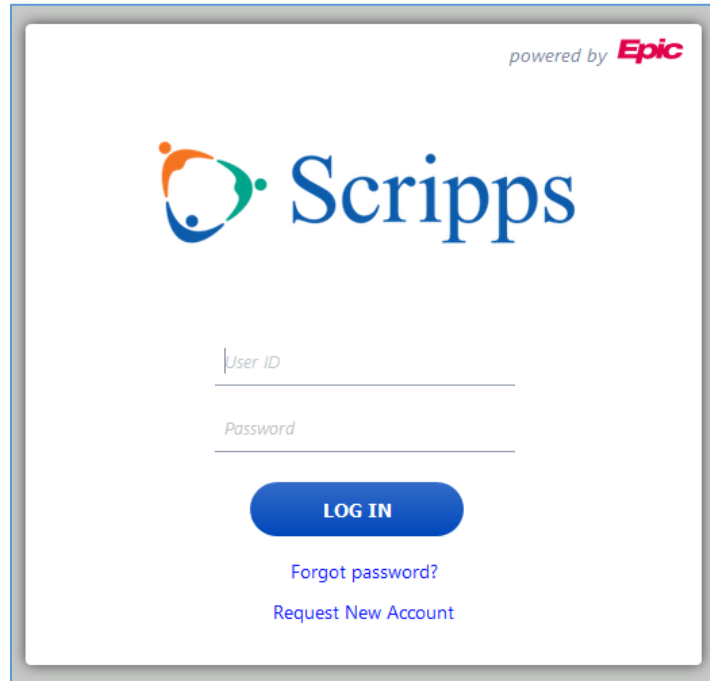
Both PCs and Macs support Scripps Care Link. The user's system requirements are minimal: In Epic, PC users must have Internet Explorer 9, 10, or 11, Firefox 24 or later. Mac users must have Firefox 24 or later, Chrome, or Safari. **First time users should attempt to log in using Internet Explorer.** 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.



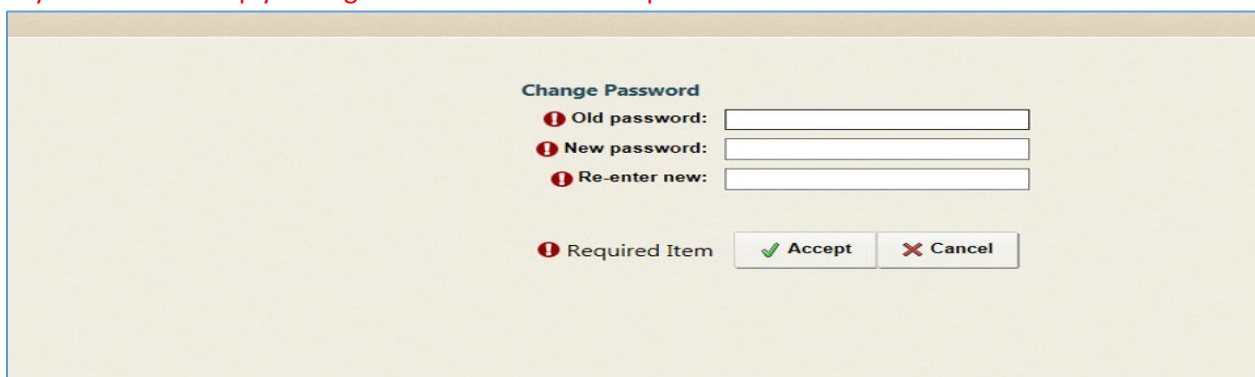
The image shows the Scripps Care Link login page. At the top right, it says "powered by Epic". The Scripps logo is in the center. Below the logo are two input fields: "User ID" and "Password". A blue "LOG IN" button is below the fields. Underneath the button are two links: "Forgot password?" and "Request New Account".

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#**

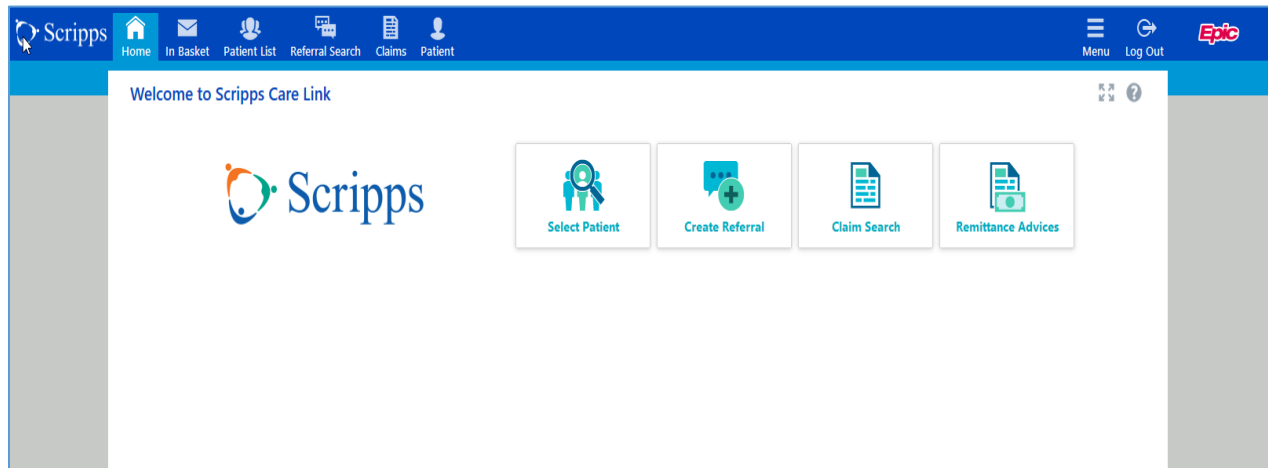
IMPORTANT: PLEASE DO NOT COPY AND PASTE USERNAME NOR PASSWORD. THEY MUST BE ENTERED MANUALLY.

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.



The image shows a "Change Password" dialog box. It has three input fields: "Old password:", "New password:", and "Re-enter new:". Each field has a red exclamation mark icon to its left. Below the fields is a "Required Item" label with a red exclamation mark icon. To the right of this label are two buttons: "Accept" with a green checkmark icon and "Cancel" with a red X icon.

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:

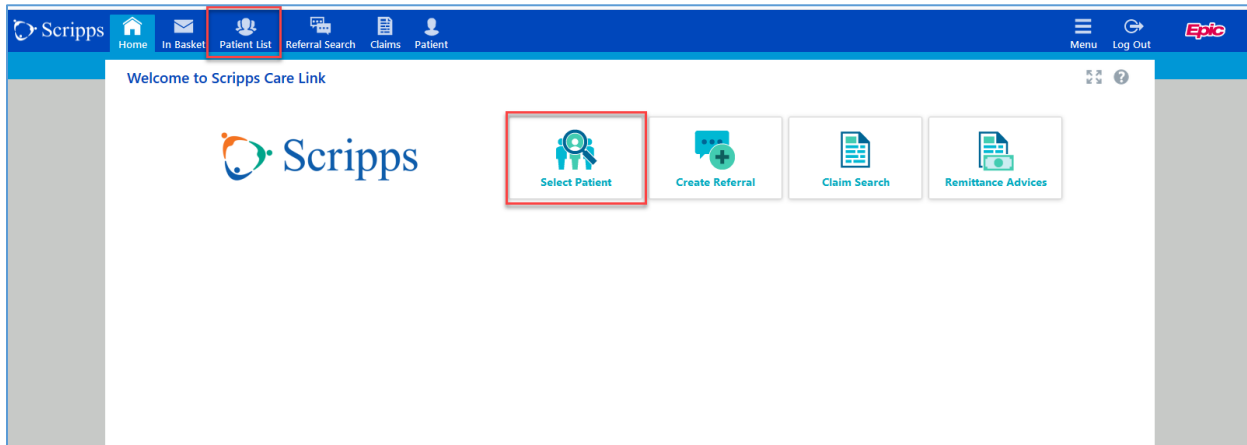
- By selecting the patient from a list of your current patients
- By searching for the patient based on name, date of birth, and gender

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.

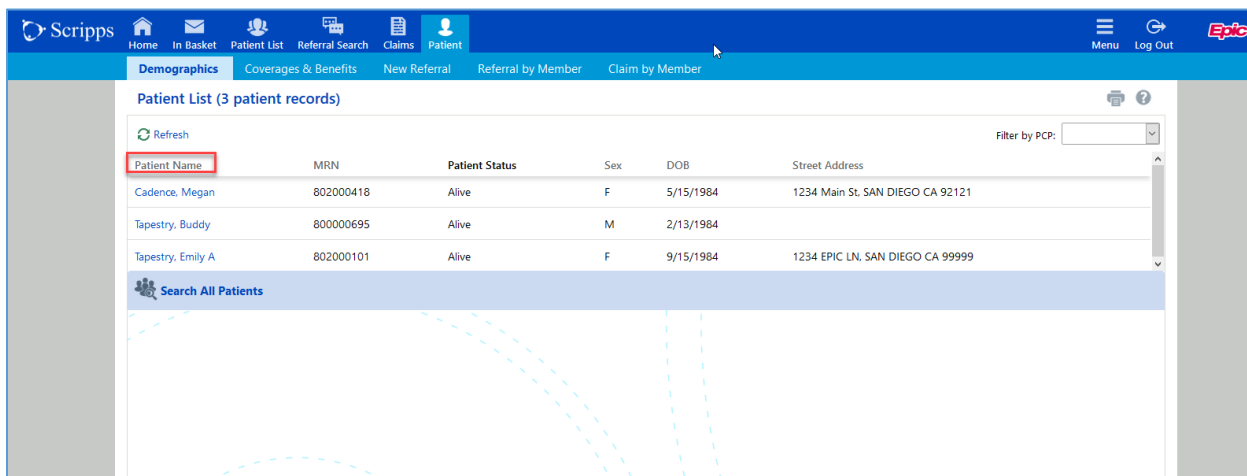
Select the patient's record from the list of current patients linked to your Vendor(s)

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.

The screenshot displays the Scripps Epic patient record interface. The top navigation bar includes icons for Home, In Basket, Patient List, Referral Search, Claims, and a patient tab for "Tapestry, Emily A". A red callout box points to this tab with the text: "Patient Tab *This shows name of patient record you've opened".

The left sidebar contains the following information:

- Emily A. Tapestry**
Female, 34 y.o., 9/15/1984
MRN: <E1136>
- Raul Gener, MD**
PCP
- ALLERGIES**
Not on File
- ACCESS ENDS**
8/26/2019

The main content area is titled "Demographics" and contains the following sections:

- Basic Demographics**

Name	MRN	SSN	Sex	Date of Birth
Tapestry, Emily A	<E1136>	xxx-xx-5543	Female	9/15/1984 (34 yrs)
Ethnic Group	Marital Status	Patient Status		
N/A	N/A	Alive		
- Contact Information**

Address (Permanent)
1234 EPIC LN
SAN DIEGO CA 99999
- Active Insurance as of 7/8/2019**

Patient has no active insurance coverage on file for 7/8/2019.
- PCP and Center**

Primary Care Provider	Phone	Center
Raul Gener, MD	619-427-3361	SC Coronado Loc
- Administrative**

Signature on File	Date Filed
No	None on file
Power of Attorney	Date Asked
No	None on file
Advance Directive	Date Asked
No	None on file
- Patient Contacts**

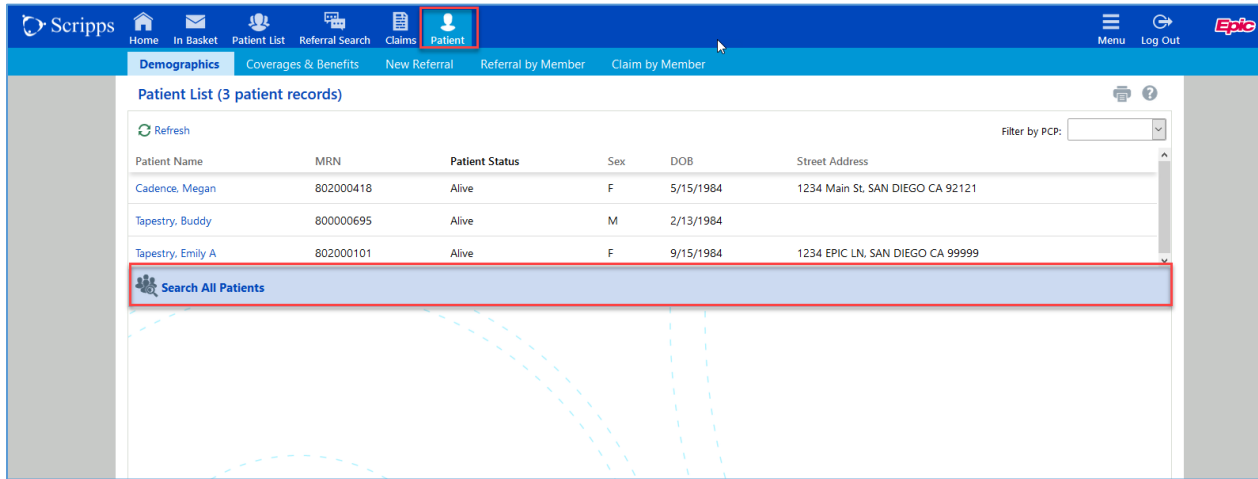
None on File

At the bottom left, there is a "Change patient" button.

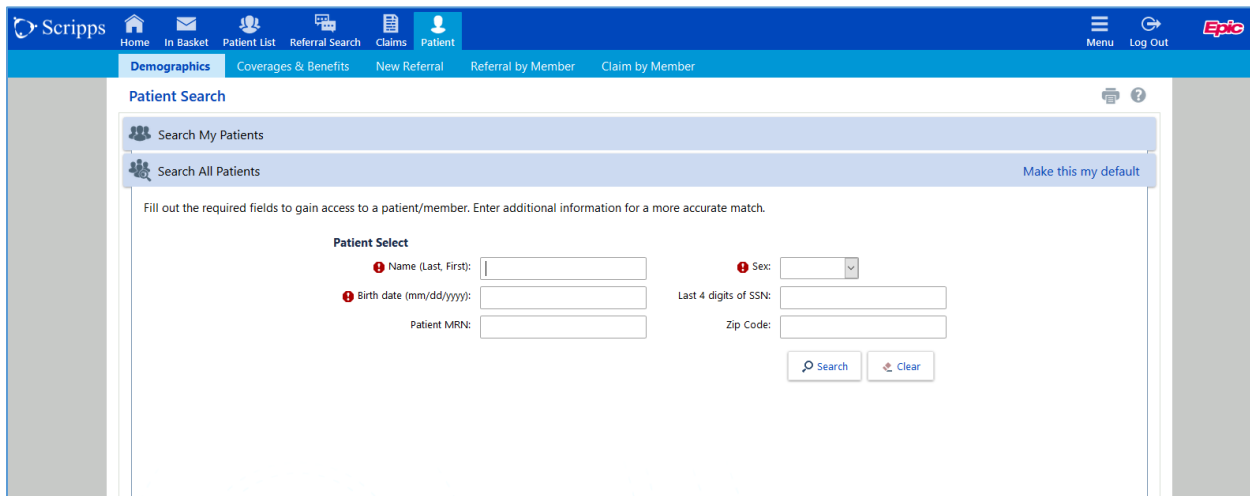
Search for a patient's record based on name, date of birth, and gender

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

The screenshot shows the Epic Demographics page for patient Emily A. Tapestry. The page is divided into several sections: Basic Demographics, Contact Information, Active Insurance, PCP and Center, Administrative, and Patient Contacts. The patient's information is as follows:

Basic Demographics				
Name	MRN	SSN	Sex	Date of Birth
Tapestry, Emily A	<E1136>	xxx-xx-5543	Female	9/15/1984 (34 yrs)
Contact Information				
Address (Permanent) 1234 EPIC LN SAN DIEGO CA 95999				
Active Insurance as of 7/8/2019				
Patient has no active insurance coverage on file for 7/8/2019.				
PCP and Center				
Primary Care Provider	Phone	Center		
Raul Gener, MD	619-427-3361	SC Coronado Loc		
Administrative				
Signature on File			Date Filed	
No			None on file	
Power of Attorney			Date Asked	
No			None on file	
Advance Directive			Date Asked	
No			None on file	
Patient Contacts				
None on file				

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

The screenshot shows the Epic EHR interface for patient Emily A. Tapestry. The 'Coverages & Benefits' section is active, displaying a table of coverages on file. The table has columns for Payor/Plan, Eff. Date, Term. Date, Member ID, Employer Group, and Filing Order. One coverage is listed: MC SCRIPPS HEALTH / MC SH PLAN 2019, effective 04/01/2019, with Member ID E113701 and Employer Group SH SCRIPPS CLINIC MEDICAL GROUP COBRA.

Payor/Plan	Eff. Date	Term. Date	Member ID	Employer Group	Filing Order
MC SCRIPPS HEALTH / MC SH PLAN 2019	04/01/2019		E113701	SH SCRIPPS CLINIC MEDICAL GROUP COBRA	1

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 screenshot shows the Scripps EHR interface for a patient named Emily A. Tapestry. The navigation bar includes 'Home', 'In Basket', 'Patient List', 'Referral Search', 'Claims', and 'Tapestry, Emily A'. The main menu has 'Demographics', 'Coverages & Benefits', 'New Referral', 'Referral by Member', and 'Claim by Member'. The 'Coverages & Benefits' section is active, showing a list of coverages on file. A table lists the following coverage:

Payor/Plan	Eff. Date	Term. Date	Member ID	Employer Group	Filing Order
MC SCRIPPS HEALTH / MC SH PLAN 2019	04/01/2019		E113701	SH SCRIPPS CLINIC MEDICAL GROUP COBRA	1

The 'Coverage Detail Report' link is highlighted with a red box. Other details on the left include the patient's name, gender, age, date of birth, MRN, and primary care physician (Raul Gener, MD).

The screenshot shows the 'Coverage Detail Report' for Emily A. Tapestry. The report is titled 'Eligibility Information as of 07/08/2019'. It contains the following sections:

Eligibility

Employer Group	Benefit Plan	Carrier	Payor
SH SCRIPPS CLINIC MEDICAL GROUP COBRA [1641007084]	MC SH PLAN 2019 [900000009]	SCRIPPS HEALTH PLAN [164000000]	MC SCRIPPS HEALTH [900]
Service Area	Networks	Primary Location	PCP
SCRIPPS HEALTH	SCRIPPS CLINIC MEDICAL G*	SC Coronado Loc	SIEFERT, ANN MURRAY

Coverage Information

Covered Flag	Type	Effective From	Effective To
Yes	Managed Care	04/01/2019	
Relationship to Subscriber	Member Number	Patient Application Date	Patient Late Enrollment
Self - Self	E113701		No

Subscriber Level Information

Subscriber ID	Subscriber Name	Employment Date	COBRA Status	COBRA Date
E113701	Tapestry, Emily A			

Coverage

Subscriber	Line of business
Unknown	Unknown
Product type	Employer group
Unknown	Unknown
Payor	Carrier
Unknown	Unknown

The 'Historical Information' link is also visible at the bottom of the report.

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.

The screenshot shows the Scripps patient portal interface. The top navigation bar includes 'Home', 'In Basket', 'Patient List', 'Referral Search', 'Claims', and 'Tapestry, Emily A'. The main header is 'Coverages & Benefits'. On the left, there is a patient profile for Emily A. Tapestry, Female, 34 y.o., 9/15/1984, with MRN: <E1136>. Her primary care physician is Raul Gener, MD, PCP. The main content area is titled 'Coverages on File' and shows a table with one entry: 'MC SCRIPPS HEALTH / MC SH PLAN 2019' with an effective date of 04/01/2019, member ID E113701, and employer group SH SCRIPPS CLINIC MEDICAL GROUP COBRA. A red box highlights the 'Benefits Summary' link in the sub-navigation bar.

The screenshot shows the 'Benefits Summary' page for MC SH PLAN 2019. The page is titled 'MC SH PLAN 2019' and includes a sub-section for 'Deductibles/Maximum Out-of-Pocket'. Below this, there is a table for 'MOOPs - Out of Pocket' with columns for Family Total, Paid, Remaining, Individual Total, and another Paid/Remaining pair. The Family Total is \$3,000.00, with \$0.00 paid and \$3,000.00 remaining. The Individual Total is \$1,500.00, with \$0.00 paid and \$1,500.00 remaining. The 'Services' section is expanded to show details for Acupuncture, Allergy, and Ambulance. A red box highlights the 'Benefits Summary' link in the navigation bar.

MOOPs - Out of Pocket						
Family Total	Paid	Remaining	Individual Total	Paid	Remaining	
\$3,000.00	\$0.00	\$3,000.00	\$1,500.00	\$0.00	\$1,500.00	

Type of Service	Network	Referral Required?	Level	Applies to	Patient Portion	Limit	Remaining*	Bucket	Admission Group
Acupuncture			1	MOOP	\$15.00 copay	20 Visit	20 Visit	MCBE ACUPUNCTURE/CHIRO COMBO VISITS PER MONTH	
			2	MOOP	Not Covered				

Type of Service	Network	Referral Required?	Level	Applies to	Patient Portion	Limit	Remaining*	Bucket	Admission Group
Allergy Injections			1	MOOP	\$10.00 copay				
Allergy Serum			1	MOOP	\$10.00 copay				
Allergy Testing and Treatment			1	MOOP	\$15.00 copay				

*The counts in the Remaining column do not include unprocessed services.

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.

Scripps Home In Basket Patient List Referral Search Claims Tapestry, Emily A. Demographics Coverages & Benefits **New Referral** Referral by Member Claim by Member Menu Log Out Epic

Emily A. Tapestry
 Female, 34 y.o., 9/15/1984
 MRN: <E1136>

Raul Gener, MD
 PCP

ALLERGIES
 Not on File

ACCESS ENDS
 8/26/2019

Change patient

New Referral

General Information Diagnostics/Services

General Information

Priority: Routine [1] Type: Specialty Services Required [5] Reason: Specialty Services Required [5]

Class: Outgoing Incoming

Number of visits: 1 Start date: Expiration date:

Precertification #: Authorization #:

Referral By

Provider: Location/POS:

Referral To

Provider: Location/POS: Department:

Provider specialty: Department specialty:

Geographic area:

Change patient

Next

Scripps Home In Basket Patient List Referral Search Claims Tapestry, Emily A. Demographics Coverages & Benefits **New Referral** Referral by Member Claim by Member Menu Log Out Epic

Emily A. Tapestry
 Female, 34 y.o., 9/15/1984
 MRN: <E1136>

Raul Gener, MD
 PCP

ALLERGIES
 Not on File

ACCESS ENDS
 8/26/2019

Change patient

New Referral

General Information Diagnostics/Services

Diagnoses

Diagnoses (free text):

Diagnoses (coded):

+ Add

Services

Services (free text):

Services (coded):

Procedure: Revenue code: Modifiers: Qty: Unit type:

+ Add

Questionnaire

Please enter your name: Comment:

Please enter the best phone number to reach you: Comment:

Notes

Note type:

Provider Comments [6]:

Note summary:

Change patient

Back Request Referral Cancel Request

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

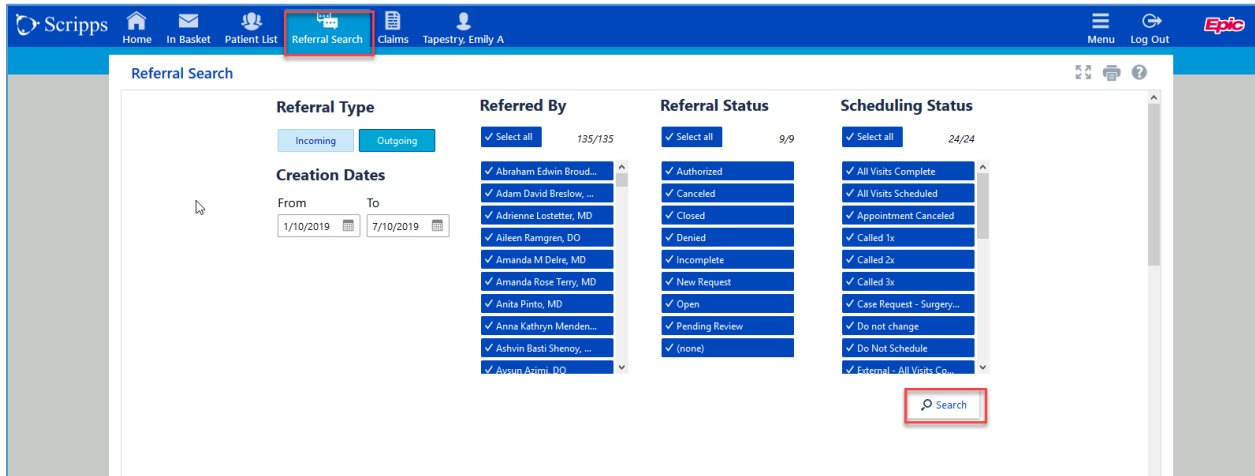
You can check the status of a referral by reviewing the referral in **Referral by Member** or **Referral Search activities**

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.

The screenshot displays the 'Referral by Member' interface in the Scripps EHR system. The top navigation bar includes 'Home', 'In Basket', 'Patient List', 'Referral Search', 'Claims', 'Tapestry, Emily A', 'Menu', and 'Log Out'. The 'Referral by Member' tab is highlighted. The patient profile for Emily A. Tapestry (Female, 34 y.o., 9/15/1984, MRN: <E1136>) is shown on the left, along with her primary care physician, Raul Gener, MD. The main content area shows a search for referrals, with 8 results found. The table below lists these referrals with their IDs, payors, referred by, referred to, status, start and expiration dates, and creation dates.

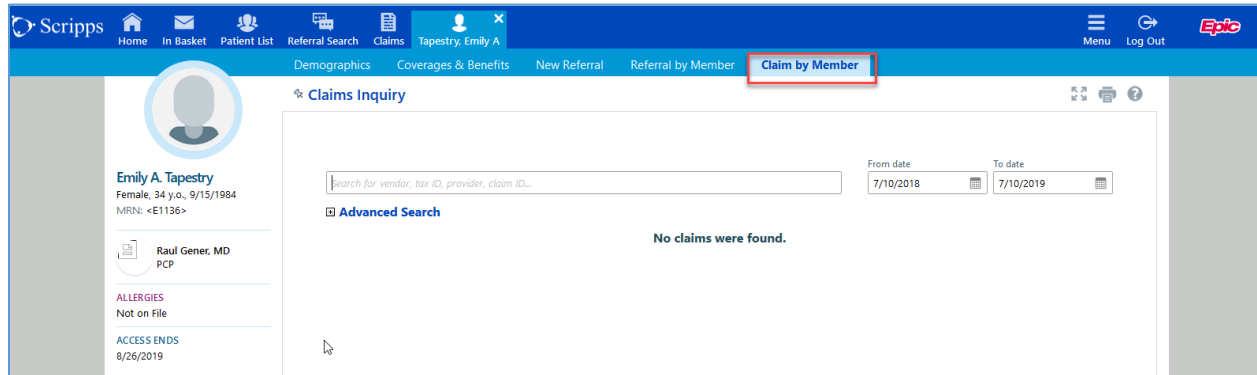
ID	Payor	Referred By	Referred To	Status	Start Date	Expiration Date	Creation Date
1416	MC SCRIPPS HEALTH	BOB JONES	ROSEN, ADAM SCOTT	INCOMPLETE	07/08/2019	01/04/2020	07/08/2019
1346	MC SCRIPPS HEALTH	GENER, RAUL	ALPINE PHYSICAL THERAPY & WELLNESS CENTER INC	PEND	06/25/2019	12/22/2019	06/25/2019
1345	MC SCRIPPS HEALTH	GENER, RAUL	PT IN MOTION CARLSBAD	PEND	06/25/2019	12/22/2019	06/25/2019
1344	MC SCRIPPS HEALTH	GENER, RAUL	INTERIM HEALTHCARE THE GIFT OF HOSPICE	PEND	06/25/2019	12/22/2019	06/25/2019
1343	MC SCRIPPS HEALTH	GENER, RAUL	ASPIRE HOME HEALTHCARE	PEND	06/25/2019	12/22/2019	06/25/2019
1008	MC SCRIPPS HEALTH	LIEBERMAN, RONALD E	SUPERCARE HEALTH	AUTH	05/17/2019	11/13/2019	05/17/2019
1007	MC SCRIPPS HEALTH	BRUFFEY, JAMES DOUGLAS	SUPERCARE HEALTH	AUTH	05/17/2019	11/13/2019	05/17/2019
673	MC SCRIPPS HEALTH	SMITH, ANGELA NICOLE	SMITH, ANGELA NICOLE	AUTH	04/29/2019	10/26/2019	04/29/2019

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

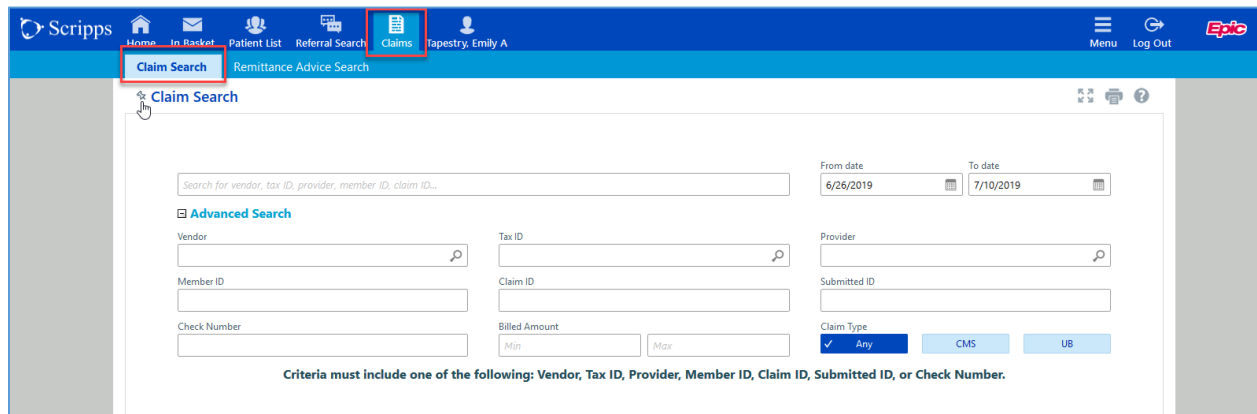
Claim information for patients with SHPS managed care plans are viewable by navigating to **Patient Profile > Claim by Member**.



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

The screenshot shows the 'Claims Inquiry' page for Emily A. Tapestry. The left sidebar contains patient information: Emily A. Tapestry, Female, 34 y.o., 9/15/1984, MRN: <E1136>, and her primary care physician, Raul Gener, MD. The main content area displays a table of claims. One claim, ID 62, is highlighted with a red box. The table columns are Claim #, CRR #, Svc Frm Dt, Clm Rcv Dt, and Status. The claim 62 has a status of 'Processing'.

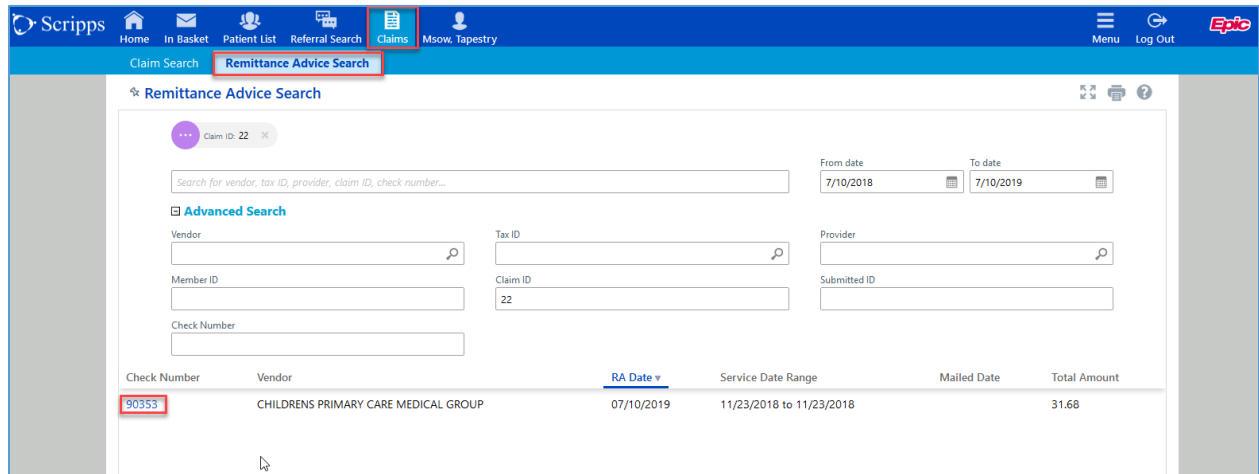
Claim #	CRR #	Svc Frm Dt	Clm Rcv Dt	Status
62		07/09/2019	07/09/2019	Processing

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

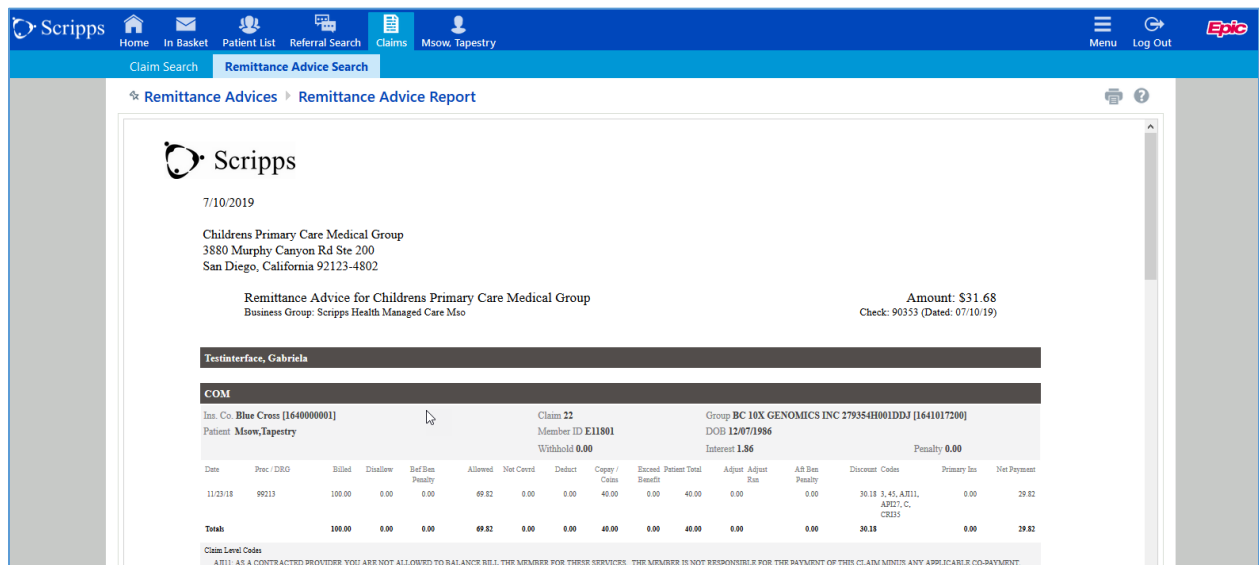
The screenshot shows the 'Claim Details' page for CMS Claim #62. The page is divided into several sections:

- Adjudication:** Billed for \$250.00. Allowed: \$71.06, Patient Total: -\$25.00. Net Payable: \$46.06. Interest: + TBD, Penalty: + TBD. Total Payment: \$46.06. Status: Pending. A 'Not sent to AP' icon is visible.
- Coverage:** SH SCRIPPS CLINIC MEDICAL GROUP COBRA, MC SCRIPPS HEALTH - MC SH PLAN 2019 [9000000009]. Subscriber: Self. Member: Emily A Tapestry, Member ID: E113701, Effective from: 4/1/2019. Line of Business: COM, Payment Method: Primary Coverage, Paid As: Primary.
- Billing Info:** Vendor: CHILDRENS PRIMARY CARE MEDICAL GROUP [1640001697], 3880 MURPHY CANYON RD STE 200 SAN DIEGO CA 92123-4802. Place of Service: CHILDREN'S PRIMARY CARE MEDICAL GROUP INC [1640000091], 3860 CALLE FORTUNADA STE 200 SAN DIEGO CA 92123-4800. Provider: CHILDREN'S PRIMARY CARE MEDICAL GROUP INC [10165906], Specialty: Pediatrics. Contract: CPCMG COM [1640000653], Account with Vendor: —, Network: OUT OF NETWORK.
- Referrals:** No referral information is available.
- Claim Details:** Member Group: MC AP CLAIMS SCRIPPS HEALTH HMO [1644000001], Risk Panel: —, Business Segment: SHPS Health Plan Svcs [164]. Traits: CON, NCS.

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.

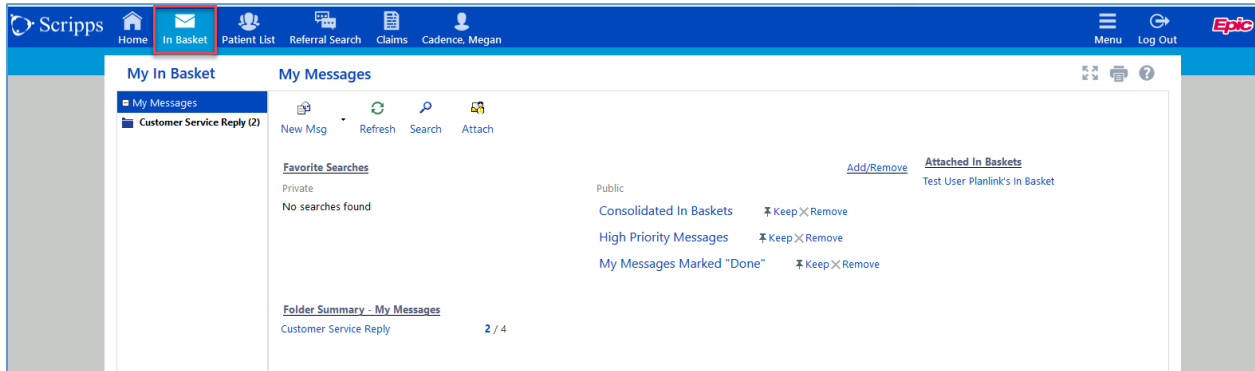


Select the ID of the Remittance Advices you would like to review to see a view-only report of the information on the Remittance Advices.



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.

The screenshot displays the Scripps Epic In Basket interface. The top navigation bar includes Home, In Basket (highlighted with a red circle), Patient List, Referral Search, Claims, and Patient. The main content area is titled "My In Basket" and "My Messages > Customer Service Reply". A list of messages is shown with columns for Priority, Msg Date, Msg Time, Sent By, Subject, Patient, Action, Phone, PI, and Msg. The first message is selected, and its details are displayed below. The message content includes a subject line "RE: Scripps Care Link User Inquiry", a body with a date-stamped link, and a "CRM # 153" section. A "Letters" section is also visible, containing a table with columns for Finalized, Type, Template, and Created By. A "Notes" section follows, and a "Primary Information" section is at the bottom.

1. Customer Service Reply (1)

Priority	Msg Date	Msg Time	Sent By	Subject	Patient	Action	Phone	PI	Msg
<input checked="" type="checkbox"/>	06/26/2019	3:46 PM	PLANLINK, AFFILIATE STAFF	RE: Scripps Care Link User Inquiry					
<input type="checkbox"/>	06/27/2019	11:21 AM	PLANLINK, AFFILIATE STAFF	RE: Scripps Care Link User Inquiry					
<input type="checkbox"/>	06/28/2019	12:26 PM	PLANLINK, AFFILIATE STAFF	RE: Scripps Care Link User Inquiry					
<input type="checkbox"/>	06/28/2019	12:29 PM	PLANLINK, AFFILIATE STAFF	RE: Scripps Care Link User Inquiry					
<input type="checkbox"/>	07/10/2019	2:39 PM	PLANLINK, AFFILIATE STAFF	RE: Scripps Care Link User Inquiry					



Message content

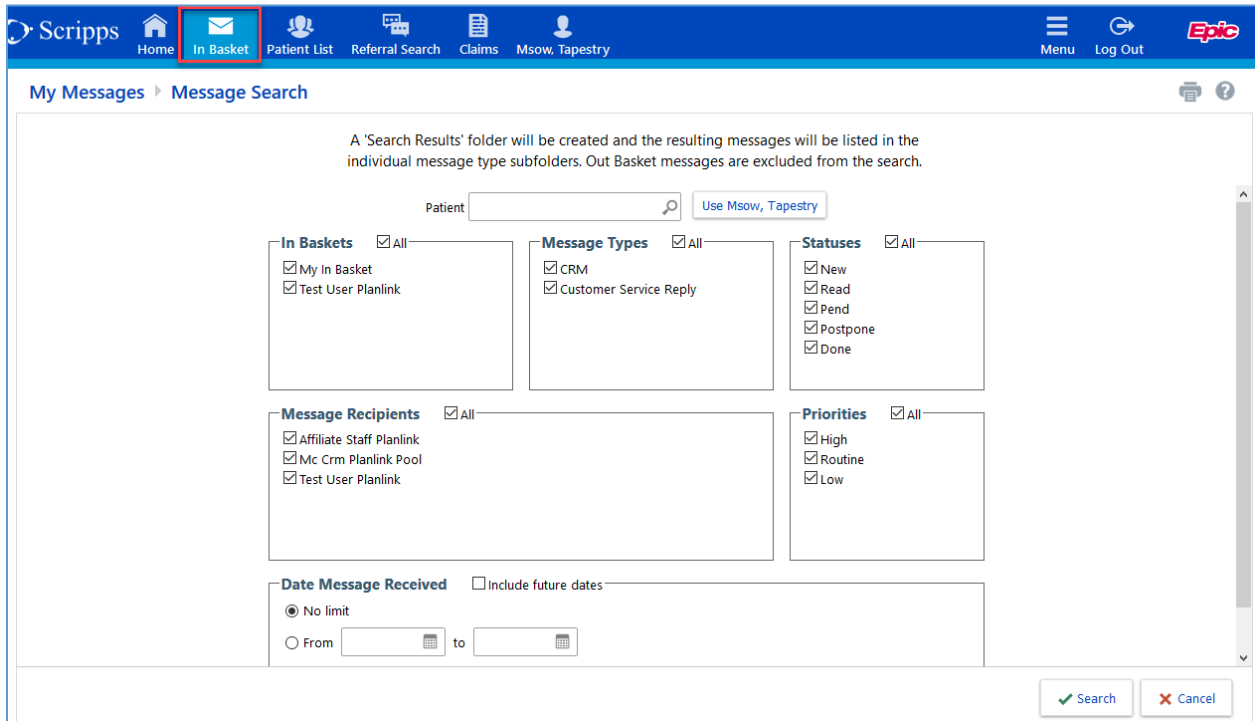
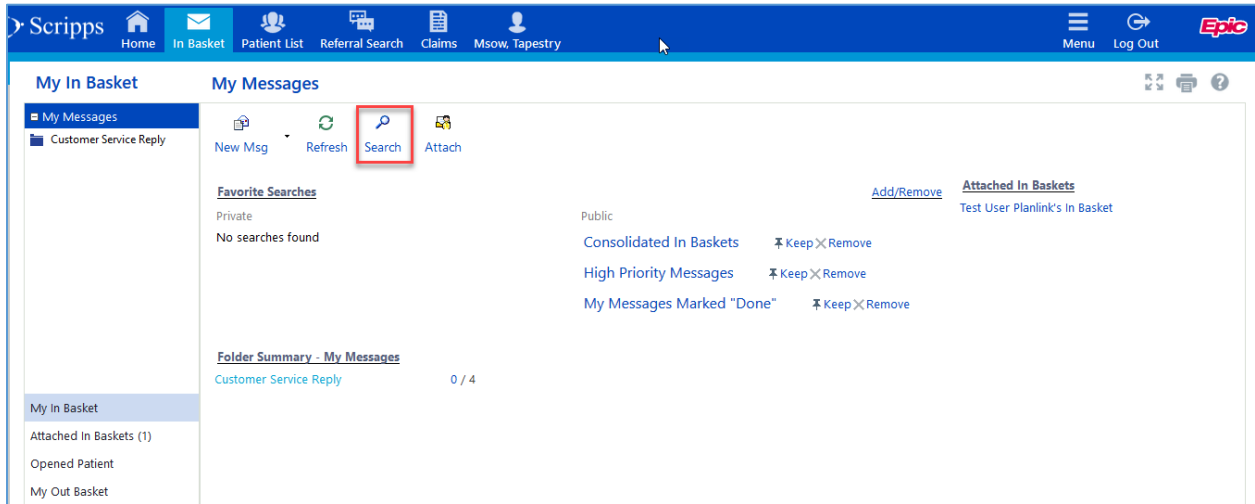
3. CRM # 153

4. Click blue hyperlink to open letter

Finalized	Type	Template	Created By
06/26/2019 03:46 PM	Letter	MC PL PR REPLY	Affiliate Staff Planlink

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.

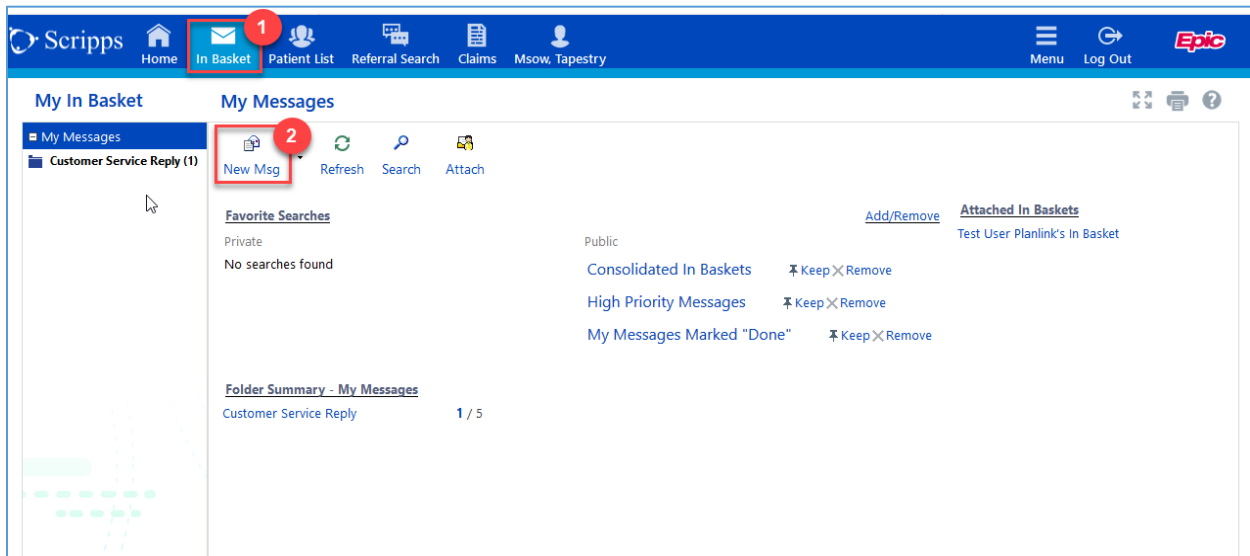



Send an In Basket Message / CRM

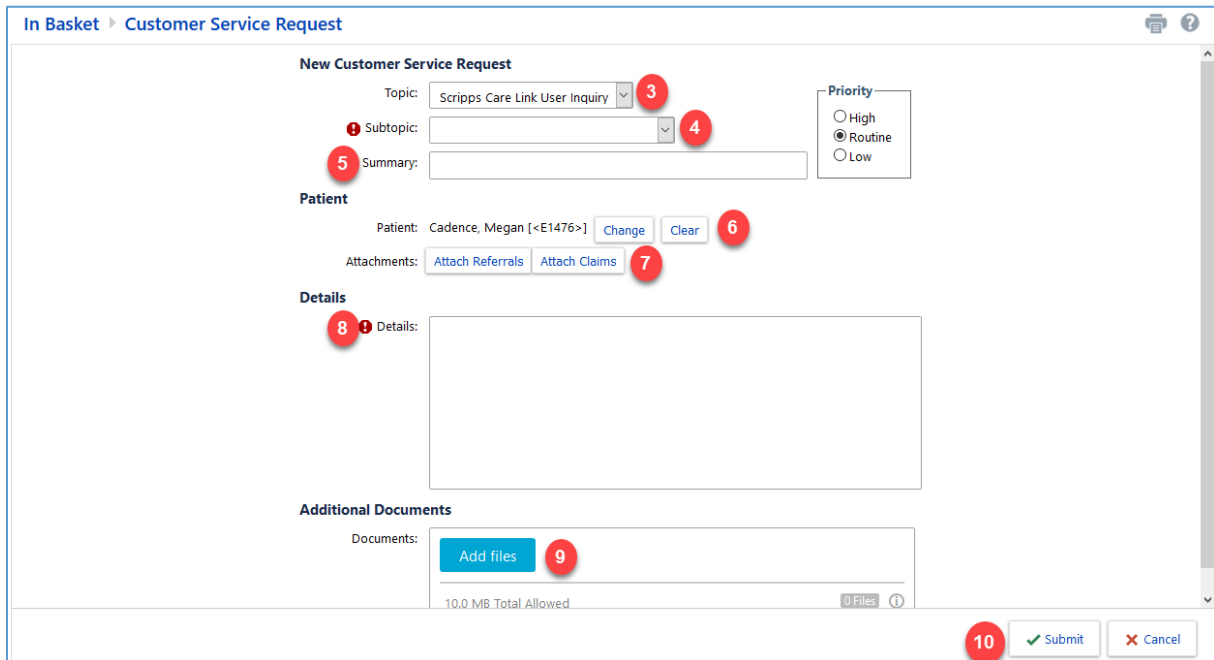
The In Basket activity is a communication hub, similar to email, where you can send and receive messages / CRM's. Messages are sent to individual recipients or to a number of recipients grouped in a class or a pool. You can also associate a patient with the message using the **Patient** field on the 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**.



The screenshot shows a web form titled "New Customer Service Request" within a "Customer Service Request" section. The form includes the following fields and controls:

- Topic:** A dropdown menu with "Scripps Care Link User Inquiry" selected. A red circle with the number 3 is next to it.
- Subtopic:** A dropdown menu. A red circle with the number 4 is next to it.
- Summary:** A text input field. A red circle with the number 5 is next to it.
- Priority:** Radio buttons for "High", "Routine" (selected), and "Low".
- Patient:** A field showing "Cadence, Megan [<E1476>]" with "Change" and "Clear" buttons. A red circle with the number 6 is next to the "Clear" button.
- Attachments:** "Attach Referrals" and "Attach Claims" buttons. A red circle with the number 7 is next to "Attach Claims".
- Details:** A large text area for the message. A red circle with the number 8 is next to the "Details:" label.
- Additional Documents:** An "Add files" button. A red circle with the number 9 is next to it.
- Footer:** "10.0 MB Total Allowed" and "0 Files" with an info icon. A red circle with the number 10 is next to the "Submit" button.

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.

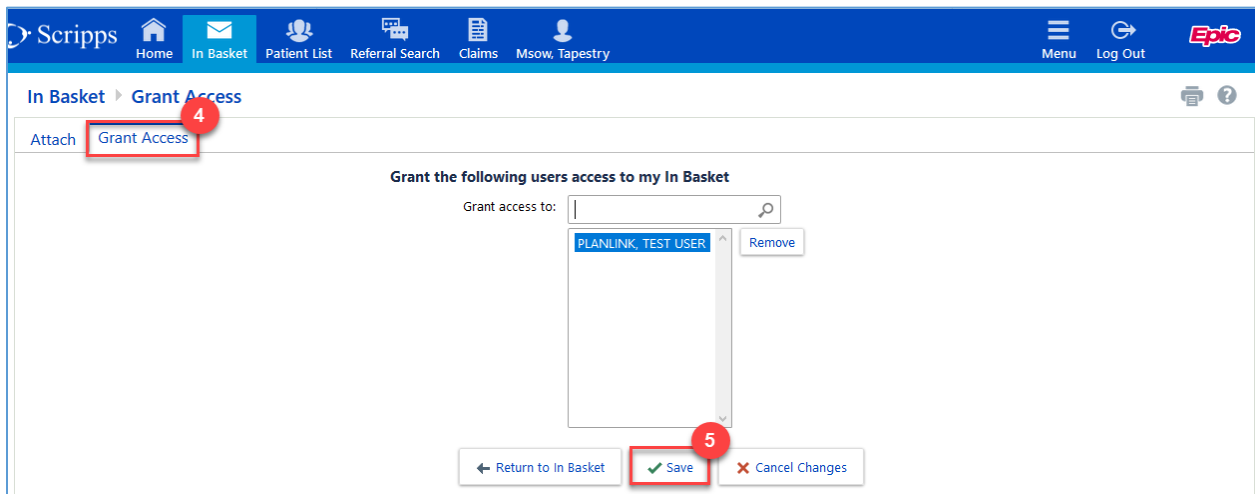
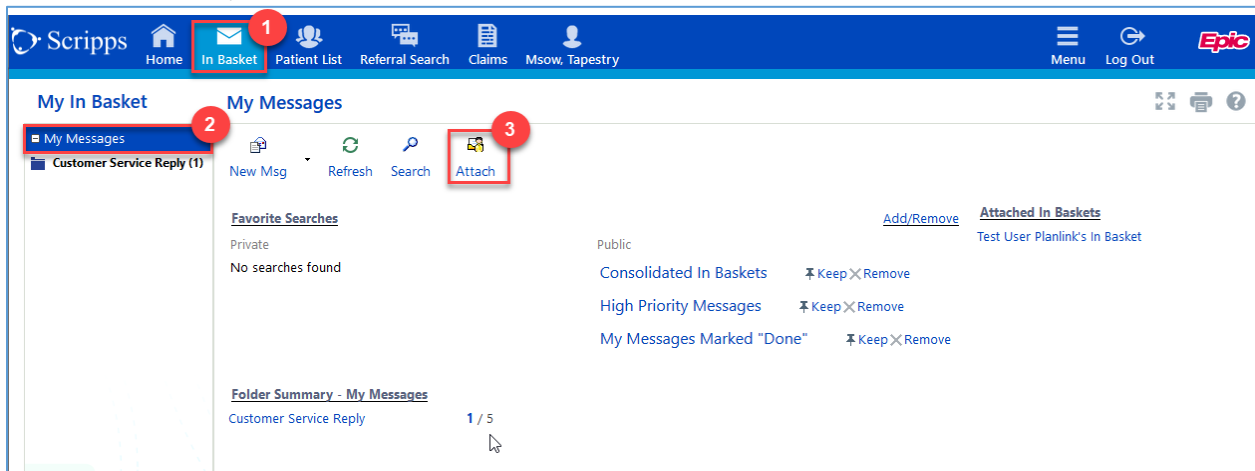
Share and Attach In Basket

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**.

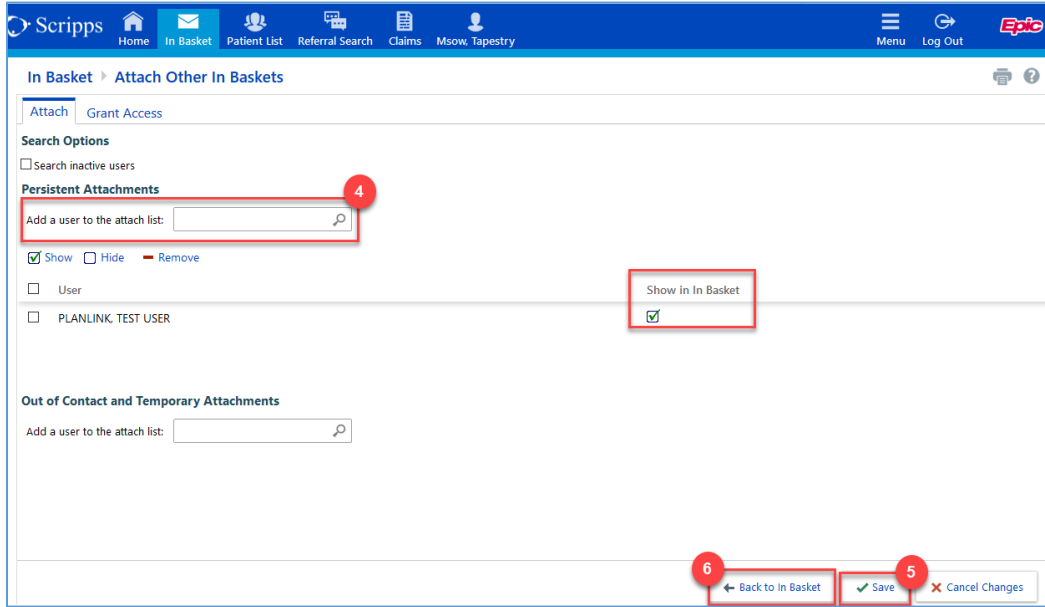


The user now has access to view your In Basket. You can see who you have granted this access to and revoke access by returning to the Grant Access activity.

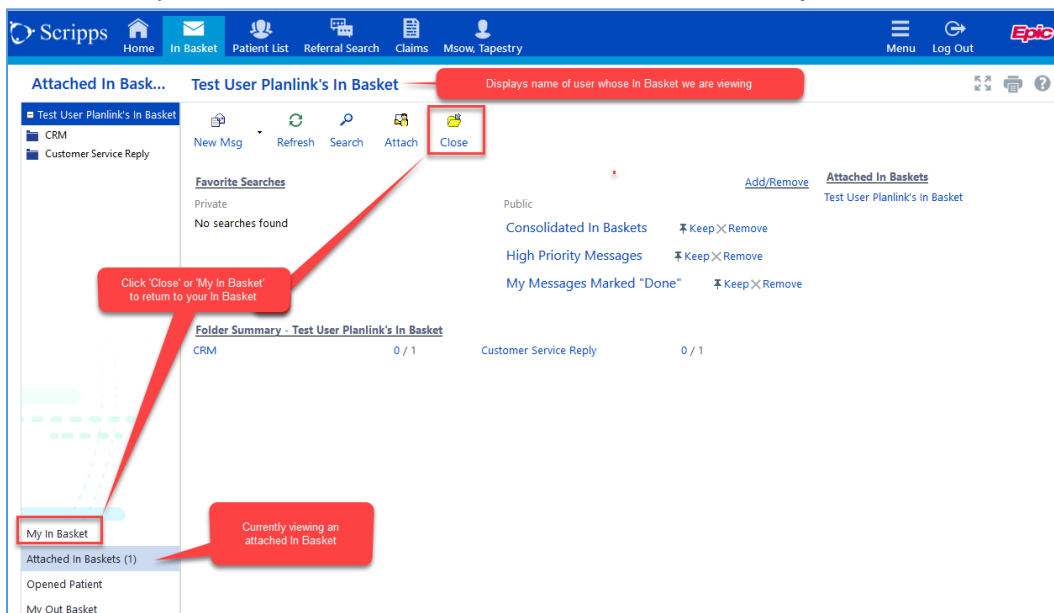
Attach other users In Basket

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**.



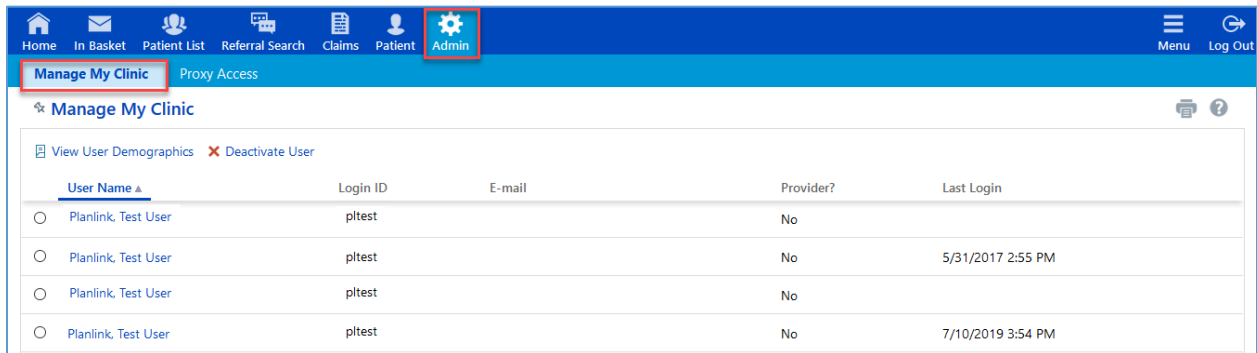
Site Administrator

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.




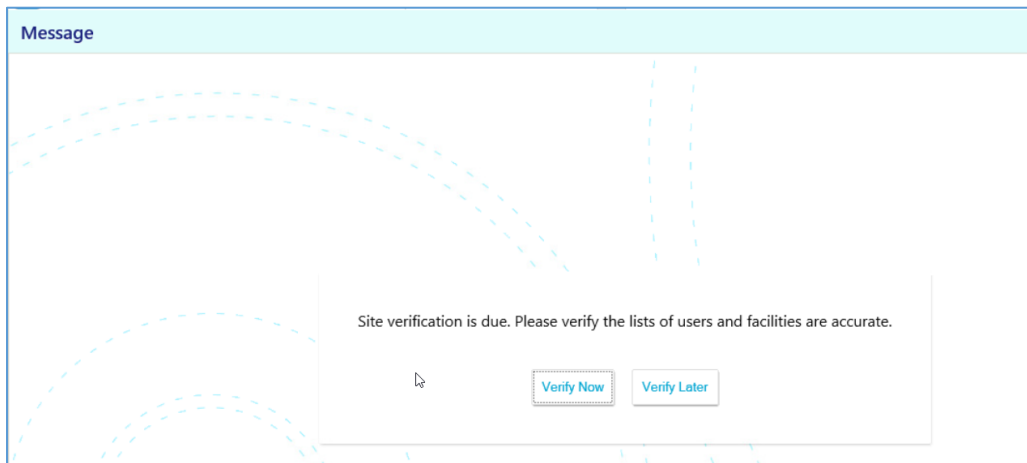
The screenshot shows the 'Manage My Clinic' interface. At the top, there is a navigation bar with icons for Home, In Basket, Patient List, Referral Search, Claims, Patient, and Admin (highlighted with a red box). Below the navigation bar, there is a 'Manage My Clinic' tab and a 'Proxy Access' link. The main content area shows a table with the following columns: User Name, Login ID, E-mail, Provider?, and Last Login. The table contains four rows of test users.

User Name	Login ID	E-mail	Provider?	Last Login
<input type="radio"/> Planlink, Test User	pltest		No	
<input type="radio"/> Planlink, Test User	pltest		No	5/31/2017 2:55 PM
<input type="radio"/> Planlink, Test User	pltest		No	
<input type="radio"/> Planlink, Test User	pltest		No	7/10/2019 3:54 PM

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.



The screenshot shows a 'Message' box with a light blue header. The message text reads: 'Site verification is due. Please verify the lists of users and facilities are accurate.' Below the message, there are two buttons: 'Verify Now' and 'Verify Later'.

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.