HHCAdvantage Quick Start Physician Practice Training Manual

Website: https://www.hhcadvantage.org/login.aspx

This manual is a quick guide to the functionality of the HHCAdvantage system for physicians and their practice's administrative staff. HHCAdvantage is a service of HHC Connectx. HHC Connectx is a program that seeks to:

- **Promote access** to services and continuity of care for patients receiving their care from both community and hospital-based providers
- **Serve as a resource** to community providers, offering value-added services that enhance the partnership between community providers and HHC networks
- **Encourage effective communication** between community and hospital-based providers

As we continually seek to improve our services we welcome any feedback you may have on any of our services. Please feel free to contact HHC Connectx through our website http://nyc.gov/hhcconnectx .

Should you have any questions about the referral process in general, contact your local HHC Hospital Referral office.

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1 – Introduction

Welcome to HHCAdvantage, HHC Connectx's premier online referral system that connects you to HHC's vast array of services. This manual can function as a both a reference and as a new user guide to understanding how to use HHCAdvantage.

Note: there are references to CHN throughout the application and this document. CHN is the old name of the system and the name has been changed to HHCAdvantage. These references are in the process of being changed (June 2008).

1.1 Group Assignments

1. All users of HHCAdvantage have specific permissions that are defined by the role (group) to which they are placed in.

System Permission Groups

Group Title	Function
Privacy Proxy	Initiates the practice—when Privacy Proxy logs in for the first time the practice status changes from "System Ready" to "System Active". By logging in, the privacy proxy becomes the authorized legally responsible party for initializing the practice. Acts as practice administrator, i.e., create additional accounts for Administrative and non-Administrative users at the practice. Sets access settings of users to create and monitor patient profiles and referrals. Has the ability to create and monitor patient profiles and referrals for all provider users within the practice. Approves outgoing and incoming requests for system access for persons from practices other than the home practice. Note: If an individual serves as a privacy proxy at one practice and an administrator or provider user at another practice, he/she will need two accounts. However, if he/she is the privacy proxy at both practices, then he/she can use the same user name and password.
Practice Administrator	Has the ability to create and monitor patient profiles and referrals for all provider users within the practice. Has the ability to create additional accounts at the practice.
Provider User/ Practice User	Has the ability to create and monitor patient profiles and referrals for providers within the practice.

Summary of Permissions

Group Title	Create Admin. Users	Manage Permissions for Multi Sites	Create non-Admin. Users	Create/ Manage Patients & Referrals
Privacy Proxy	Yes	Yes	Yes	Yes
Practice Admin.	No	Yes	Yes	Yes
Provider User	No	No	No	Yes
Practice User	No	No	No	Yes

1.2 Logging In for the First Time

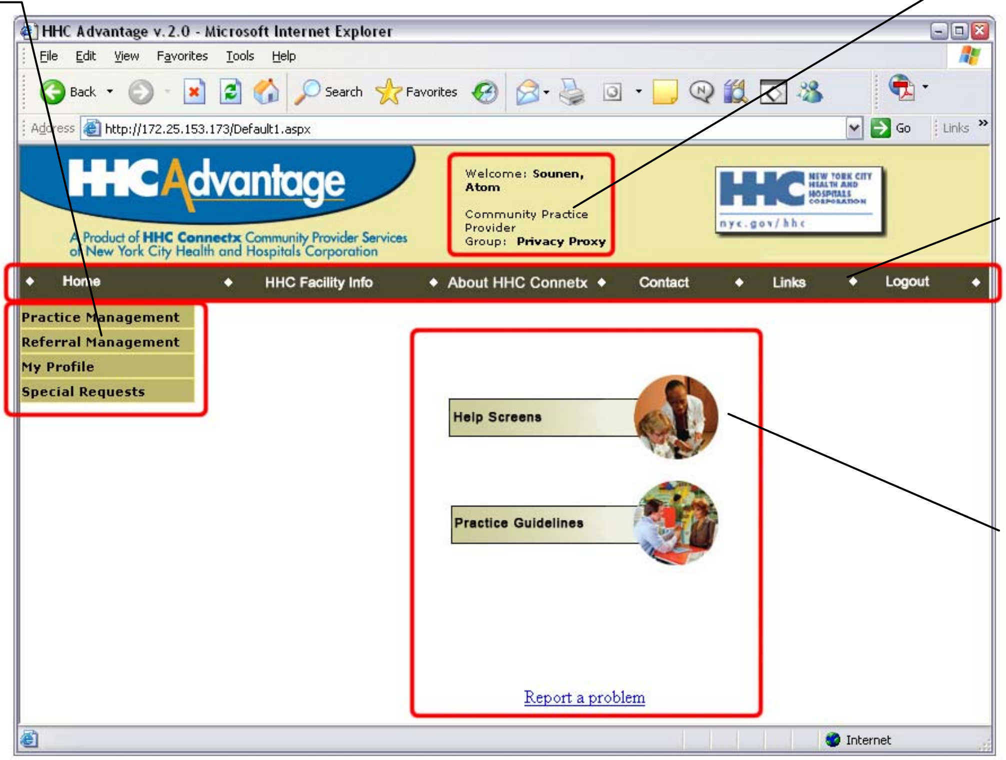
1. At your first login,
    a. Enter username and password that were given to you by the administrator (either from your facility or from an HHC facility administrator)
        i. Note: username and password are case sensitive; you need to type in the upper and lower case letters in your Username and Password in order for the system to recognize them.
    b. Accept the usage agreement.
    c. Change the password, remember to write down your password somewhere safe and remember to note the case of your letters.
    d. System will confirm that the password has been changed.
    e. For some first time users, the system may present a short survey that asks questions about your computer settings. The answers to these questions will assist us in meeting your needs.

1.3 System Orientation

HHCAdvantage uses one main home page to get you to all the screens you will need to use the system. Below is an overview of the main sections of the home page.

Left Navigation Panel – These four items (less depending on your permissions) contain all the major functionality within the system.

When clicked each menu item contains submenus that appear below.



User Information – This data is showing you what account you are logged into the system as and what permissions group you are in.

Top Navigation – The "Home" button takes you back to this screen, the "Logout" button exits the system. The other buttons take you to supporting information.

Home Screen – These buttons take you to help documentation and other services. These may change over time.

2 – System Administration (Privacy Proxy and Practice Administrators only)

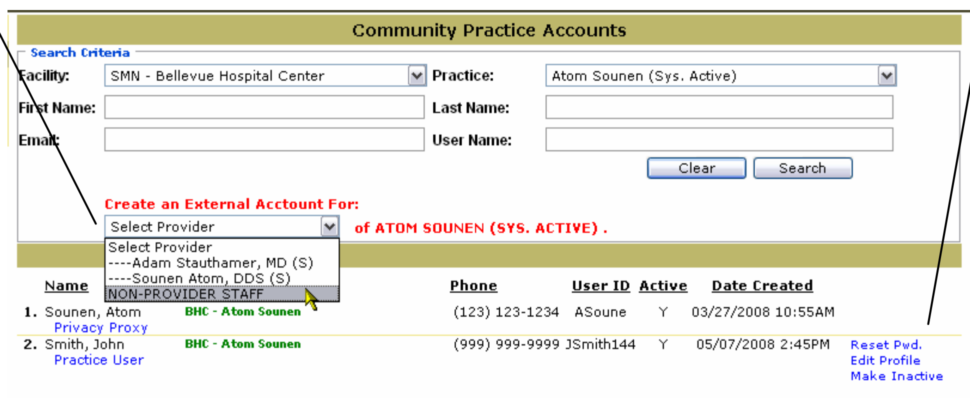
2.1 Creating Practice Accounts for HHCAdvantage

When another staff member at the practice (either a provider or non-clinician) requires access to HHCAdvantage, either the Privacy Proxy or the Practice Administrator can create the account. Only the Privacy Proxy can create accounts for Practice Administrator.

1. How to Access: Left Menu→Practice Management→Create Practice Accounts

2. Once you access the "Community Practice Accounts" form, select the facility and practice, if not already selected, and click "Search". Look at results below and see if the user who has requested access already has an account. If not, select in the drop down labeled "Create an External Account For:" and, from the drop down menu select who you want to make an account for (either a provider or non-provider staff).
   a. From this screen you can also "Reset Password", "Edit Profile", and "Make Inactive" the user by clicking the blue buttons to the right of the listed user.

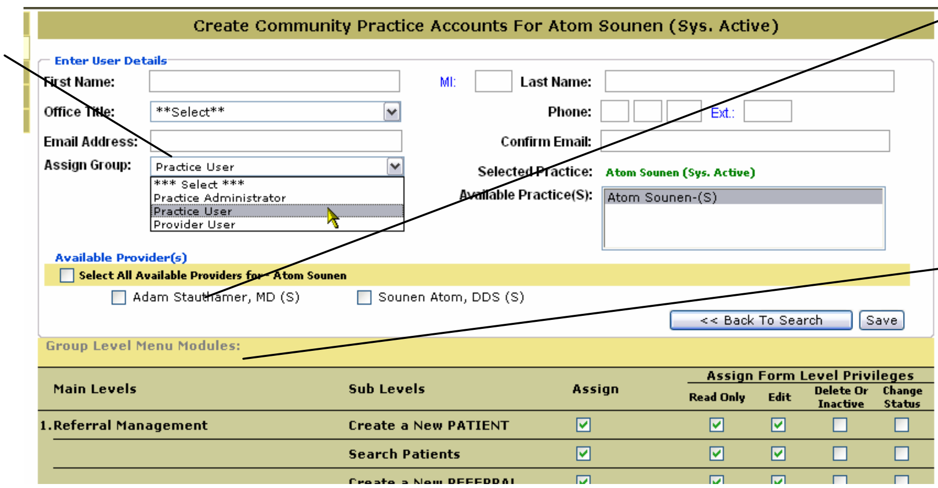
Select the provider or type of user you are making an account for here.



These two users are all the users at this practice, their information is listed. To edit or change any of the information you can click on the blue buttons listed next to the user.

3. Select the Office Title, Assign Group (see section 1 for details), confirm the e-mail address, and select the providers that user has ability to create/search referrals for, Do not change the Group Level Menu Modules, they are defaulted. Then click Save.

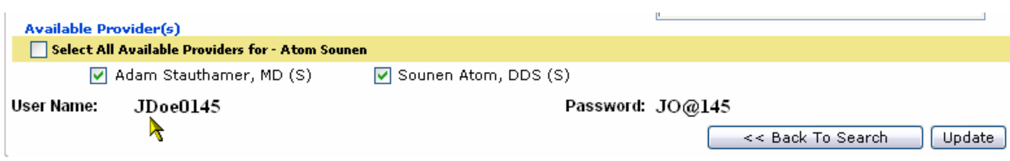
Select the role for this user; see section 1 for details.



Select the providers for which the user has permission to create/search referrals.

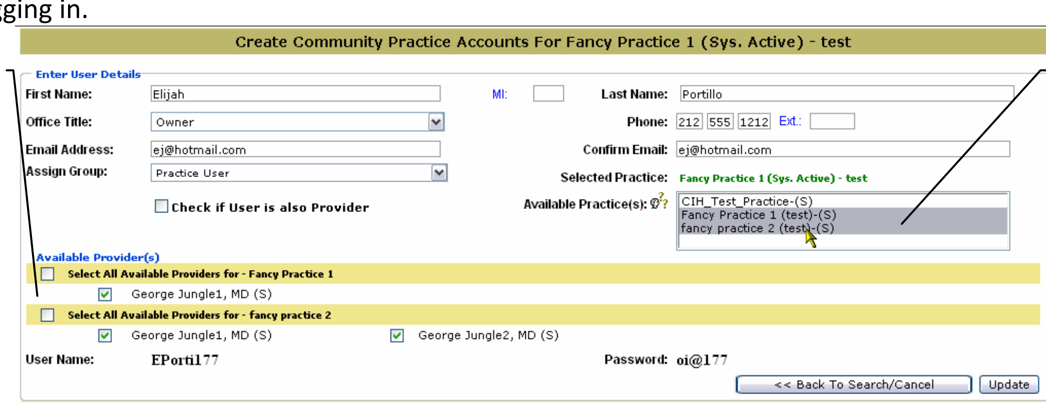
The “Group Level Menu Module” is defaulted so unless you have a reason to, do **not** change these settings.

4. A user name and a temporary password are generated by the system. The user will use these credentials for logging in to the application.



5. At the first login, the user will be prompted to change the temporary password to one of your choosing:
   a. Note: Username and Password are case sensitive; you need to type in the upper and lower case letters in your Username and Password in order for the system to recognize them.
6. If a user requires access to multiple practice sites these sites will be listed in the “Available Practice” section and by holding down Ctrl and clicking you can select which practices the user will have access. Note that you also need to click the provider user accounts that user will also have access to when logging in.

Select which doctors that user will be able to create and review referrals for. Click “Update” when done.



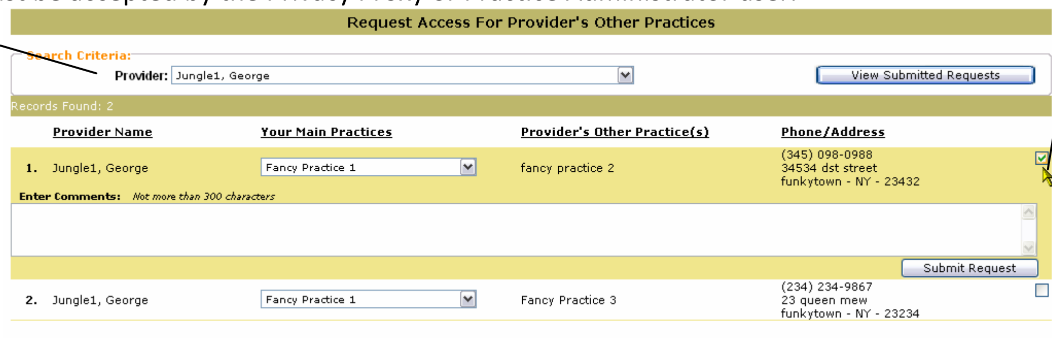
Hold down Ctrl and click to highlight which practice sites user needs access to.

2.2 Requesting/Approving Access for Provider's Other Practices

The Privacy Proxy can assign practices to users but if a user is interested in gaining access to a practice for a provider that that user has not previously had access to the user can make the request through the system to the Privacy Proxy.

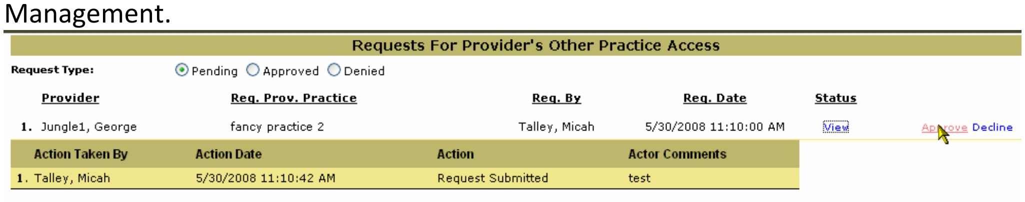
1. A user will see all the providers they have rights to create/review referrals for in the top drop down and below there is a line for each practice that the Provider works at. By selecting the box on the right the user can request access create/review that providers information at that practice. The request must be accepted by the Privacy Proxy or Practice Administrator user.

Select the provider you are interested in gaining more access to.



Select the practice you are interested in gaining access to. Click Submit Request to send the request.

2. After a user has sent the request the Privacy Proxy/ Practice Administrator can log in and go to Special Requests> Practice Access Requests and see any pending requests by users of the system. The Privacy Proxy can then approve or decline the request. When declining the request, the system requires you fill out an explanation. Note the Privacy Proxy can perform this task without a request directly in Practice Management.



<u>3 – Referral management Creating/Searching Patients & Referrals</u>

3.1 Creating a New Patient

You must create a patient profile before you can create a referral. Furthermore, there must be one patient profile for each provider with respect to that provider's practice affiliation.

As with the practice and provider functions, you need to search the database to ensure that the patient does not already exist with respect to the referring provider and practice.

The patient **may exist** in the database under a different provider but you **<u>MUST</u>** again create the patient under the referring provider because you are, in short, automating a paper chart that is unique to the individual **practice→provider→patient** relationship on a per occurrence basis. Once you have created a patient profile for a particular provider at a particular practice, you do not need to create it again for additional referrals sent by the provider at this practice.

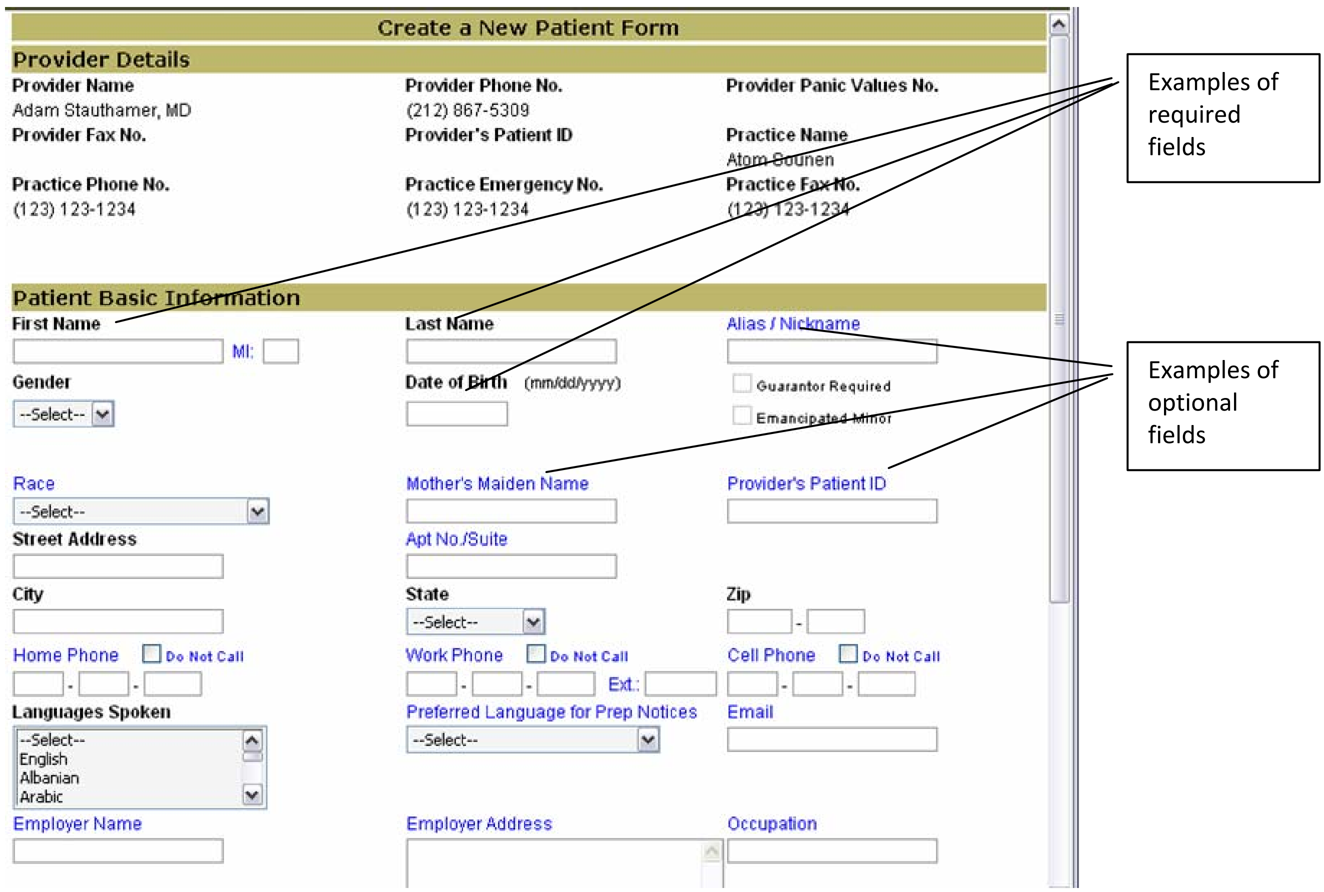
Creating a new Patient:

1. Select the practice from the dropdown box. In most cases, you will have only one practice to choose from.
2. Select the provider on whose behalf you are creating the patient. If you do not select a provider, the following message will appear: *You must enter/select a value for the following fields: Provider.*
3. Enter the patient's last name; you can also qualify the search by entering the patient's first name and date of birth.
4. Click the *Search HHCAdvantage* button to see if the patient's profile has already been entered by or on behalf of the selected provider. If the patient is not in HHC Advantage under the selected practice and provider, you will receive the following message:

5. If the patient is found in CHN Advantage and you confirm that this is in fact the correct **practice → provider → patient** record, you can (1) select the patients name; (2) create a referral directly from the profile by clicking "Create Referral"; (3) alternately you can go to "*Create a New REFERRA*L" on left navigation.
6. If the patient record is not in HHCAdvantage, use the "<u>CLICK HERE"</u> link to add the patient manually.

3.1.1 Entering the Patient's Basic Information

1. The "Create a New Patient Form" has many fields however it is important to note that only the fields with bolded black labels are required, fields in blue are optional. Once done click the "Save and Review" button at the bottom of the "Create a New Patient Form".



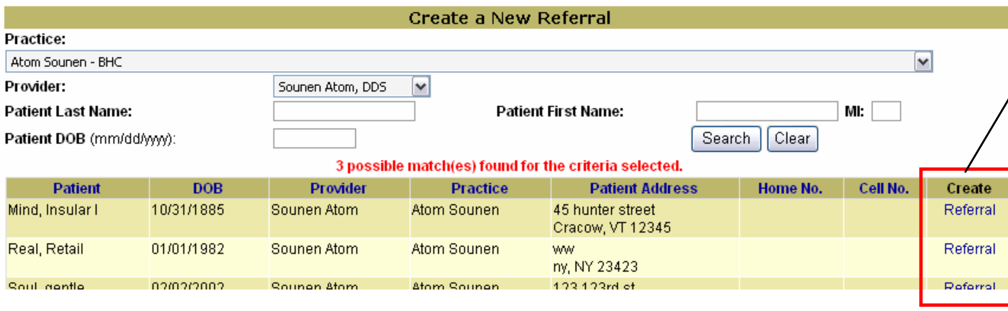
2. Once all the information has been entered you can review the record and click on "Create Referral" at bottom of the "View Patient" screen.

   a. As you can see, you have the options to Search, Print, Edit, or Create a Referral from this screen.
   b. You can get to the "View Patient" screen from the "Search Patients" button in the left navigation, Referral Management → Search Patients.

3.2 Creating a Referral

As explained in the "Creating a Patient" section a patient must be created in order to create a referral for that patient.

1. To create a referral for a patient that you know already exists in the system click in the left navigation "Referral Management" → "Create a New Referral".
2. This will bring up a search window where you should fill in the Practice, Provider, and if needed the patient last name and then click search.
   a. The search results will bring up all patients that fit the criteria select the patient you wish to make a referral for and click "Referral" under the "Create" column.

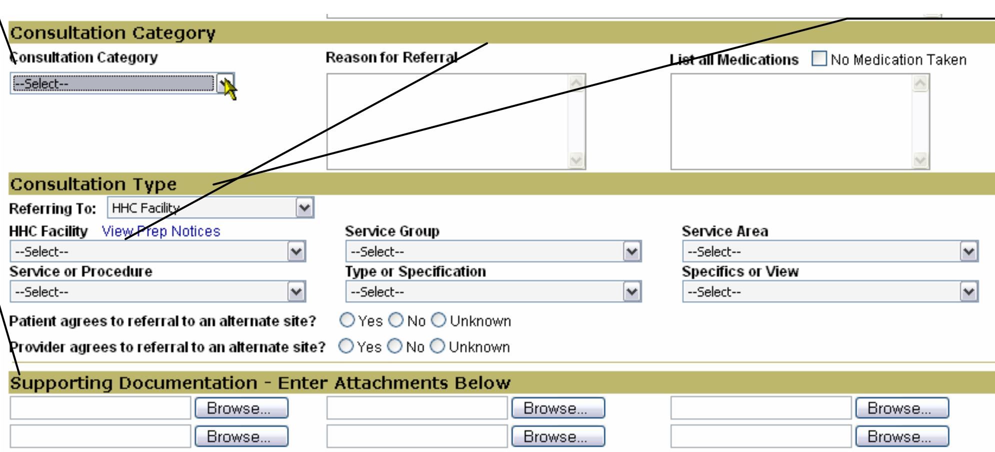


Find the patient you wish to create a referral for and click "Referral"

3. After clicking "Referral" you fill out the "Create a New Referral" form which asks for some supporting information. First review all the patients information (insurance, address, etc..) to ensure accuracy.
4. Next fill out all the required fields in the "Consultation Category" and "Consultation Type". And add any Supporting Documentation
   a. Consultation Category- this drop down gives the HHC facility a general idea what type of consultation you are requesting, if you do not know the Medications a patient is taking enter unknown in text box
   b. Consultation Type- because these fields are dynamic they need to be filled in the following order: "Referring to", "HHC Facility", "Service Group", "Service Area", "Service or Procedure", etc.
   c. Supporting Documentation- This allows you to attach any form of electronic document to the referral so the specialist can have more information (examples- xray jpgs, emr pdfs, etc.)

All the fields are required, as they are important to routing your referral efficiently

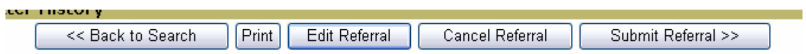
Add any documents you want here, as you would for an email attachment.



This area allows you to explore the different services available at your HHC Facility, if you cannot find the service you need, click appropriate buttons below regarding alternate sites

5. At the bottom of the form, the "Appointment Preferences" and "Notes" section allows you to enter any additional information you would like to communicate, either to the hospital referral office or to the specialist to whom the patient is being referred.

6. Once the form is complete, click on the “Post Referral” button. This allows you to perform a final review of all the information you entered for the referral.
7. Once you are certain all the information is correct, scroll to the bottom of the screen and click “Submit Referral.”



   a. Note that you can go Back to Search, Print, Edit, Cancel, or Submit Referral from this screen.
   b. Once you “Submit Referral”, you will no longer be able to edit that referral as it has been sent to the hospital to be processed by the hospital referral office. The status of the referral changes from “Provider Create” to “Intake Queue.”

3.3 Searching Referrals, Tracking Referrals, and Reviewing Consult Reports

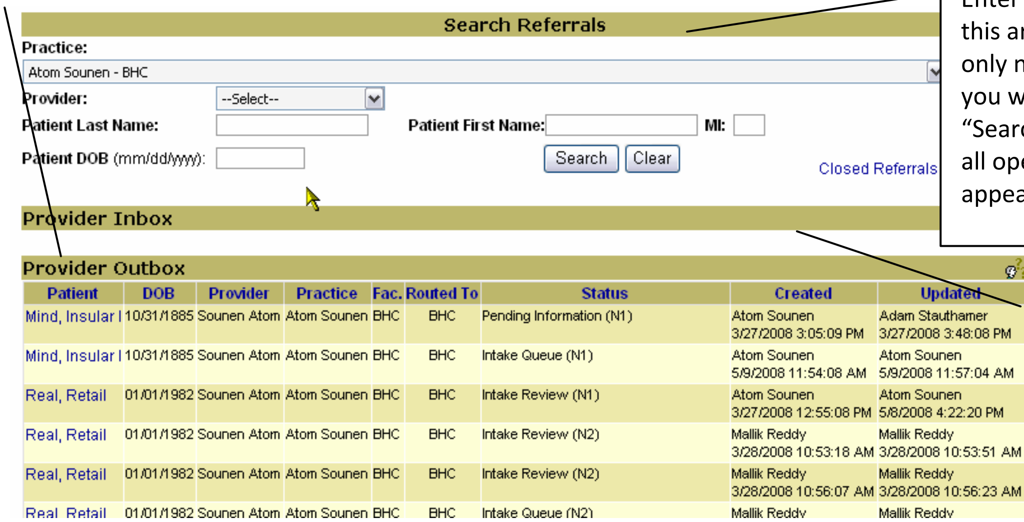
1. Referral Statuses - One benefit of HHCAdvantage is that you can keep track of patients sent for referrals at HHC facilities and see the status of their referral. The differing statuses a referral can have is a quick way to monitor a referral during the process and whether the practice needs to act on a referral.

Summary of Referral Statuses

Referral Status	Definition	Referral Sent to Hospital	Patient Sched.	Patient Seen
New	You are creating a new referral but have not yet saved it.	No	No	No
Provider Create	The person creating the referral on behalf of the provider has saved a new referral but has not yet submitted it for review. The referral can still be cancelled or edited prior to submitting for intake review	No	No	No
Intake Queue	The facility Referral Office has received the referral but has not yet acted on it	Yes	No	No
Intake Review	A referral office has reviewed the referral and has agreed to process it.	Yes	No	No
Pending Information	The Referral Office has reviewed the referral and requires additional information before scheduling	Yes	No	No
CSA Review	The particular consulting service requested requires approval by the clinical service area (CSA).	Yes	No	No
Canceled by Intake	The referral was canceled by the Hospital Referral staff either before it was scheduled or the referral was scheduled and then canceled (see explanation in details)	Yes	Possibly	No
Returned to Provider	Referral could not be scheduled at selected facility for various reasons (see details)	Yes	No	No
Scheduled or Rescheduled	The referral has been scheduled by the Referral Office.	Yes	Yes	No
Closed No-Show	The referral was scheduled but the patient did not appear for the appointment. Referral is closed in the system and notification of no-show is sent to referring provider.	Yes	Yes	No
Consult Fulfilled Other	The patient has been seen. There are various details for this status. In some cases, the referral will be closed.	Yes	Yes	Yes
Consult Fulfilled Results Pending	The patient has been seen but the Referral Office has not yet received the consult report.	Yes	Yes	Yes
Consult not Fulfilled	The patient was not seen for various reasons other than the patient not showing up for appointment; the explanation is in the details.	Yes	Possibly	No
Visit Status Pending	Patient was scheduled and whether the patient was seen or not has yet to be determined.	Yes	Yes	Possibly

2. Referral Search – The referral search function is the fastest way to get to your work queue
    a. Go to Referral Management → Search Referrals
    b. Select the practice for which you want to review referrals
    c. You have the option of narrowing your search by selecting provider, patient last and first, and DOB
    d. Click on the Search button

Provider Outbox is where all open referrals you created will appear. The status column tells you where each referral is in the process. Also from here you can click on the name to see the detailed referral information.

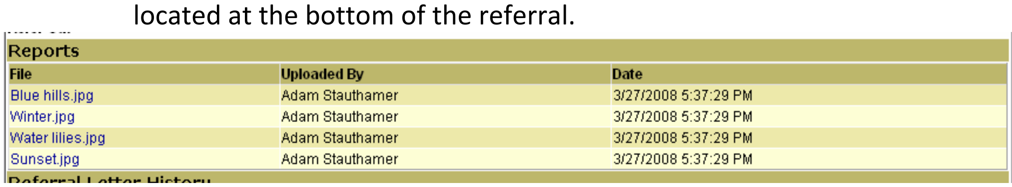


Enter any search criteria in this area; note that you only need to fill in what you want, if you just click "Search" with no criteria all open referrals will appear in results.

Provider Inbox shows any referrals created in the system that you have not yet submitted to HHC Facility.

    e. From the search window, you can click on the name to see the details of when the hospital scheduled the appointment (bottom of referral details page).

3. Getting Consult Reports – Fulfilled and Closed Referrals Search
    a. Click "Search Referrals" and, in that window, click on the "Closed Referrals" button (located on right of the "Referral Search" window).
        i. Any referrals that were not fulfilled due to Cancellation or No-Show would appear in this area as well.
    b. Status: Consult Fulfilled – this status represents patients who received their consult at the HHC facility.
        i. Once the Consult has been fulfilled, you can go into the referral and see the feedback from the consult.
        ii. Any digital consult reports will be attached as files in the "Reports" section of a referral. There may also be comments that will appear in the note fields. They are located at the bottom of the referral.


Reports

File	Uploaded By	Date
Blue hills.jpg	Adam Stauthamer	3/27/2008 5:37:29 PM
Winter.jpg	Adam Stauthamer	3/27/2008 5:37:29 PM
Water lilies.jpg	Adam Stauthamer	3/27/2008 5:37:29 PM
Sunset.jpg	Adam Stauthamer	3/27/2008 5:37:29 PM

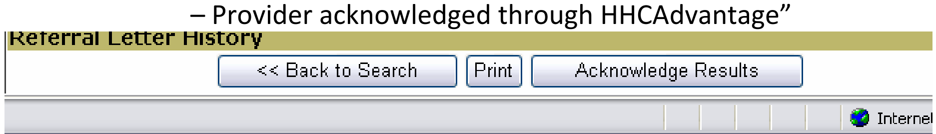
4. Responding to Hospital or Referred facility

Some referral statuses require the referring provider to respond in some manner. Such issues may pertain to difficulty delivering the requested service (i.e. patient no-show). Others pertain to a specialist wanting confirmation that the referring physician has received the consult report.

a. Responding to a request to "Acknowledge Results"

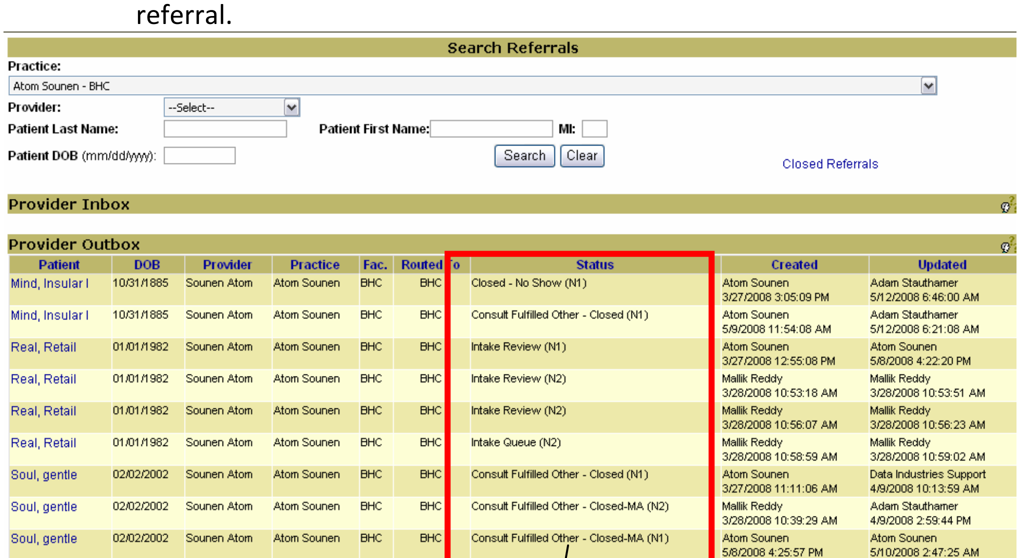
i. When this status appears on a referral, you can acknowledge receipt within HHCAdvantage by opening the referral and going to bottom of that referral and clicking the Acknowledge Results button. Note the detail is labeled "Consult fulfilled Other – Fulfilled-PPA" (PPA – Pending Provider Acknowledgement)

1. Clicking on this button changes the status to "Consult Fulfilled Other – Closed – Provider acknowledged through HHCAdvantage"



b. Responding to a hospital having difficulty fulfilling requested service

i. An HHC Facility referral office will change the status to one of the Cancelled/Closed statuses with details as to why it was cancelled/closed. If follow-up is required, either the office will contact the referring provider or they will leave instructions/details in the electronic referral that will explain why the hospital had difficulty fulfilling the referral.



Search Referrals

Practice: Atom Sounen - BHC

Provider: --Select--

Patient Last Name: Patient First Name: MI:

Patient DOB (mm/dd/yyyy): Search Clear Closed Referrals

Provider Inbox

Provider Outbox

Patient	DOB	Provider	Practice	Fac.	Routed To	Status	Created	Updated
Mind, Insular I	10/31/1885	Sounen Atom	Atom Sounen	BHC	BHC	Closed - No Show (N1)	Atom Sounen 3/27/2008 3:05:09 PM	Adam Stauthamer 5/12/2008 6:46:00 AM
Mind, Insular I	10/31/1885	Sounen Atom	Atom Sounen	BHC	BHC	Consult Fulfilled Other - Closed (N1)	Atom Sounen 5/9/2008 11:54:08 AM	Adam Stauthamer 5/12/2008 6:21:08 AM
Real, Retail	01/01/1982	Sounen Atom	Atom Sounen	BHC	BHC	Intake Review (N1)	Atom Sounen 3/27/2008 12:55:08 PM	Atom Sounen 5/8/2008 4:22:20 PM
Real, Retail	01/01/1982	Sounen Atom	Atom Sounen	BHC	BHC	Intake Review (N2)	Mallik Reddy 3/28/2008 10:53:18 AM	Mallik Reddy 3/28/2008 10:53:51 AM
Real, Retail	01/01/1982	Sounen Atom	Atom Sounen	BHC	BHC	Intake Review (N2)	Mallik Reddy 3/28/2008 10:56:07 AM	Mallik Reddy 3/28/2008 10:56:23 AM
Real, Retail	01/01/1982	Sounen Atom	Atom Sounen	BHC	BHC	Intake Queue (N2)	Mallik Reddy 3/28/2008 10:58:59 AM	Mallik Reddy 3/28/2008 10:59:02 AM
Soul, gentle	02/02/2002	Sounen Atom	Atom Sounen	BHC	BHC	Consult Fulfilled Other - Closed (N1)	Atom Sounen 3/27/2008 11:11:06 AM	Data Industries Support 4/9/2008 10:13:59 AM
Soul, gentle	02/02/2002	Sounen Atom	Atom Sounen	BHC	BHC	Consult Fulfilled Other - Closed-MA (N2)	Mallik Reddy 3/28/2008 10:39:29 AM	Adam Stauthamer 4/9/2008 2:59:44 PM
Soul, gentle	02/02/2002	Sounen Atom	Atom Sounen	BHC	BHC	Consult Fulfilled Other - Closed-MA (N1)	Atom Sounen 5/8/2008 4:25:57 PM	Atom Sounen 5/10/2008 2:47:25 AM

When searching your referrals, this is where you can look at an overview of the status of all your referrals. Note you can quickly determine which referrals need your attention (for example "Closed No Show"). As shown earlier, clicking on the patient's name will display referral details including any consult reports attached by the treating specialist.