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Reviewed

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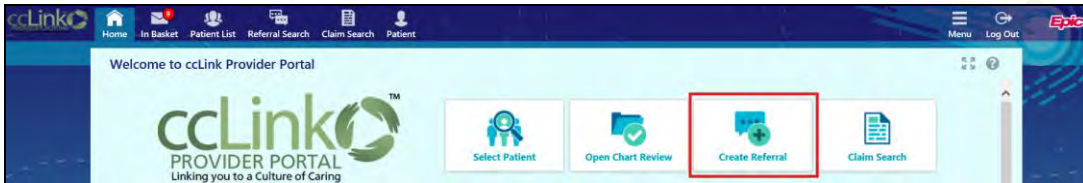
## Steps & Skills – ccLink Provider Portal



### Section One: Referral Entry Steps

1. Select **Create Referral**, then select or search for appropriate patient.

Please review [referrals by member](#) to make sure existing referral for admission dates does not exist. If referral exists, please attach inpatient face sheet and/or notes to the existing referral-do not create a new one



2. On the **General Information** tab, enter all red required fields below.

For a specific location, enter the name or address and select the one with an asterisk (\*).

This program is for patients with **Medi-Cal coverage** only.

- Select appropriate CalAim/ECM Referral Type by typing **CalAim or ECM**. Questionnaire's will populate based on referral type.
- For Retro Requests: Select the Retroactive referral check box and enter the start and expiration dates.
  - a. Referral Reason: **Portal Request –Outpatient-507** is the default.
  - b. Select the Referral By Provider.
  - c. Select the Referral By Location/POS (Place of Service), enter your address or the name of your organization that you are referring from.
  - d. Select the Referral To Provider Specialty of Community Supports or **ECM**, this must be entered first.
  - e. Select the Referral To Location/POS (Place of Service) and click on the Vendor field to auto populate.

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### General Information Continued....

f. Click Next.

3. On the **Diagnosis/Services** tab, enter all red required fields below.

**New Referral** | Snapshot | Chart Review | Results Review | Flowsheets | Medications | Histories | Search Chart

**TM**  
Tapgeorge McValidate  
Male, 4 y.o., 11/1/2017  
MRN: 800000040

CCHP / HP COMM/PLAN A  
COMM/HP ATD AB/RMC  
Effective: 9/1/2021  
Rel to Sub: Self  
Member ID: 100000401

PCP: None  
ACCESS ENDS  
2/14/2022  
Other Health Coverage: None

**Diagnosis/Services**

**Diagnoses**  
Diagnoses (free text)  
Diagnoses (coded) **A** ⓘ  
+ Add

**Services**  
Services (free text)  
Services (coded)  
Procedure **B** ⓘ Revenue code: Modifiers: Qty **C** ⓘ Unit type

**Questionnaire**  
For MEDI-CAL ONLY. If patient does not have Medi-Cal please cancel this referral  
Use Dx code of Z59.0 and Z59.1 (Add to DIAGNOSIS (coded) field above)  
Use Px code of H2016, Modifier U6 (Add to SERVICES (coded) field above)  
Is this a renewal Request? (If Yes, provide original authorized referral number in comments) ⓘ  
Housing Status (EXPLAIN CHOSEN OPTION IN COMMENTS) ⓘ  
Case Management Program member is enrolled In? ⓘ  
Please specify ECM provider ⓘ  
Please specify Case Management Program ⓘ

← Back | ✓ Request Referral | ✗ Cancel Request

Total requested number of visits in timeframe? (total #) (Enter this number in the QTY field of the SERVICES section above)

ⓘ

Questionnaire fields are required based on certain referral types.

## Steps & Skills – ccLink Provider Portal

### Diagnosis/Services Continued.....

- a. Diagnosis (coded). Some questions prompt you to enter a specific diagnosis that needs to be entered. Click the **Add** button to add additional codes.
- b. Services Procedure (coded). Some questions prompt you to enter a specific procedure (service) and modifier that needs to be entered. Click **Add** to add additional codes.
- c. Some questions have a total # requested. Please enter that total in the **QTY** field of the **Services** section.
- d. Call Back Phone Number: enter your direct call back phone number with area code.
- e. Attachments: Attach required information  
Files of the following type may be attached if needed:  
PDF, WAV, MPG, DOC, TIFF, TF, JPEG, TXT. If submitting pictures, please make sure the picture is clear.
- f. Click **Request Referral** to complete and send to CCHP.

**Note:** Attaching a signed order (step d) is not necessary for doctors. It is necessary for staff creating referrals on their behalf.

**Note:** To view submitted referral (s) and attachment(s) from the patient's record, click on **Referral by Member**.

**Referrals**

- New Referral
- Referral by Member

1. Attaching additional documents after the referral has been submitted:
  - a. Open the referral record from the patient's record.
  - b. Click on **Add Note/Attachment** in the upper left corner of the referral details.

## Steps & Skills – ccLink Provider Portal

The screenshot displays the ccLink Provider Portal interface. At the top, there is a navigation bar with tabs for SnapShot, Chart Review, Results Review, Flowsheets, Allergies, Medications, Histories, and Referral by Member. The 'Referral by Member' tab is active. Below the navigation bar, the page title is 'Referral by Member' and 'Referral Details'. On the left side, there is a patient information panel for Tapminnie McValidate, including her name, gender (Female), age (40 y.o.), date of birth (1/9/1980), MRN, and a search chart field. Below this, there is information about her insurance (CCHP / HP COMM/PLAN B COMM/CPN) and effective date (1/15/2015). The main content area is titled 'McValidate, Tapminnie' and shows a 'Referral' section with a 'Patient-Friendly Report' link and a 'Member Information' section with a 'Demographics' link. A red box highlights the 'Add Note/Attachment' button in the top left corner of the main content area.

2. On the Referral Note/Attachment form:
  - a. Fill in all fields: Note Type, Note Summary and Note.
  - b. To add an Attachment, click **Add file**. If submitting pictures, please make sure the picture is clear.
  - c. Click **Add Note**.

At this time attachments can only be added one at a time.

## Steps & Skills – ccLink Provider Portal



### Section 2: Referral Status Updates via In basket Event Monitor

You will receive In Basket notifications when referrals are authorized or denied. Go to the In Basket tab and click Referral Notifications to view notifications. Or hover over the Hyperlink on the Homepage.

- Status will indicate if the message has been Read or New.
- Event Type will indicate if the referral is Denied or Authorized.

Status	Patient	RFL #	Event Type	Msg Date
New	McCchp, Tapminnie	541258	CCRMC REFERRAL AUTHORIZED	10/23/2020
New	McCchp, Tapminnie	541259	CCRMC REFERRAL AUTHORIZED	10/23/2020
New	McCchp, Tapminnie	541258	CCRMC REFERRAL AUTHORIZED	10/23/2020

When you click on a referral notification, the referral summary will display below the notifications.

Status	Patient	RFL #	Event Type	Msg Date	Msg Time
<input checked="" type="checkbox"/>	McCchp, Tapminnie	541258	CCRMC REFERRAL AUTHORIZED	10/23/2020	4:22 PM
<input type="checkbox"/>	McCchp, Tapminnie	541259	CCRMC REFERRAL AUTHORIZED	10/23/2020	4:32 PM
<input type="checkbox"/>	McCchp, Tapminnie	541258	CCRMC REFERRAL AUTHORIZED	10/23/2020	4:40 PM
<input type="checkbox"/>	Bhstest, Km	541245	CCRMC REFERRAL AUTHORIZED	10/22/2020	1:13 PM
<input type="checkbox"/>	Bhstest, Km	541244	CCRMC REFERRAL AUTHORIZED	10/22/2020	1:12 PM
<input type="checkbox"/>	Bhstest, Km	541247	CCRMC REFERRAL AUTHORIZED	10/22/2020	1:12 PM

<p><b>Tapminnie McCchp</b>                  Female, 40 y.o., 4/10/1980                  MRN:                  Phone: 925-000-0000 (H)</p> <p>PCP: None                  Primary Cvg: None</p>				<p>This message will expire on Sunday November 22, 2020 at 4:22 PM.</p>			
<p><b>General Info</b></p> <p>Referral ID: 541258                  Class: Outgoing Referral                  Priority: Routine</p>		<p>Received on: 10/23/2020                  Type: Consultation</p>					
<p><b>Referring Info</b></p> <p>Referred By                  Provider:                  Location:</p>		<p>Referred To                  Location: STANFORD MEDICAL CENTER</p>					

## Steps & Skills – ccLink Provider Portal

### Section 2: Referral Status Updates via In basket Event Monitor (Continued)

- c. When you are finished reviewing the referral notification, click the selection checkbox next to Status, and then click the **Done** button. The referral notification will be removed from your In Basket.

	Status	Patient	RFL #	Event Type	Msg Date	Msg Time
<input checked="" type="checkbox"/>	Done	McCchp, Tapminnie	541258	CCRCM REFERRAL AUTHORIZED	10/23/2020	4:22 PM
<input type="checkbox"/>	New	McCchp, Tapminnie	541259	CCRCM REFERRAL AUTHORIZED	10/23/2020	4:32 PM
<input type="checkbox"/>	New	McCchp, Tapminnie	541258	CCRCM REFERRAL AUTHORIZED	10/23/2020	4:40 PM
<input type="checkbox"/>	New	Bhstest, Km	541245	CCRCM REFERRAL AUTHORIZED	10/22/2020	1:13 PM
<input type="checkbox"/>	New	Bhstest, Km	541244	CCRCM REFERRAL AUTHORIZED	10/22/2020	1:12 PM

The Select Patient button takes you to the Referral By Member activity where you can see all of the patient's active referrals. The most current referrals will be at the top of the list.

ID	Payor	Referred By	Referred To	Status	Start Date	Expiration Date	Creation Date
541259			Urology	AUTH	10/23/2020	12/22/2020	10/23/2020
541258			Orthopedic Surgery	AUTH	10/23/2020	12/22/2020	10/23/2020

**Note:** If a notification is not read within 24 hours; a notification alert will be sent to the user's E-mail address. A link for the ccLink Provider Portal will be available for you to log in and view the referral events.

donotreply You have a new message from ccLink Provider Portal

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You have a new message from ccLink Provider Portal  
 donotreply to: jennifer.wood  
 Please respond to donotreply

**You have new information at ccLink Provider Portal !**

You have new notification in ccLink Provider Portal

Click the link below to access your new info  
<https://hscdvpn.cccounty.us/cclink>

Sincerely,  
 The ccLink Provider Portal Team  
 Contra Costa Health Services

## Steps & Skills – ccLink Provider Portal


### Section 3: Important Guidelines & Information

#### Remember:

- Before creating a new referral, make sure that one doesn't already exist. View referrals for the same service and service dates (by checking **Referral by Member**). Select Show All Referrals in View options.
 

**Note:** If all visits have not been used, but the referral has expired, contact the CCHP Auth UM department at: (925) 957- 7260 option 3 (This number is a back line for staff use only. **Do not** share with members/patients).
- When completing the referral, provide a direct contact person's phone (back line) and fax (no main numbers or phone trees if possible).
- Attach any clinical notes, imaging reports, or pertinent information to the referral. \*\*Refer to Section 1 for step by step instructions.
- Requests with Urgent priority should only be submitted in cases involving life, limb, or sight. Circumstances that are **not** considered urgent include:
  - Late requests for scheduled visit or service (e.g. appointment scheduled for the next day).
  - Routine follow-up/annual appointment.
  - Ongoing continued care of an existing member.
  - Retro auth request.

#### Other Important Information:

- A patient copy of the referral can be printed. Click on this hyperlink icon located on the referral details and print by clicking on the printer icon  in the upper right corner:



- PCP: Once referral is approved; a copy will be auto faxed to the referred to specialist.
- PCP: Fax medical information (including clinic summaries, test results, imaging, labs) DIRECTLY to the Specialist.