

Affinity Provider Portal - PRISM

User Guide



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Accessing the Affinity Provider Portal - PRISM

The Affinity Provider Portal - PRISM is accessed via Internet Explorer at:

<https://prism.stanfordhealthcare.org/affinityproviderportal>

Browser Requirements

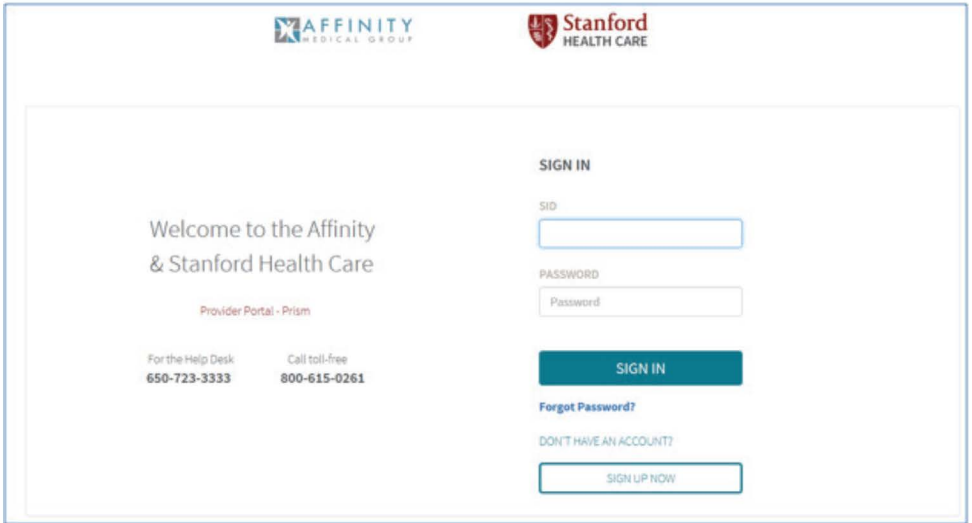
The applications can be accessed using Internet Explorer 11, Firefox 45 or later, or Chrome 50 or later, on the Windows operating system. Users of the Macintosh operating system can use Firefox 45 or later, Chrome 50 or later, or Safari 9 or later to access the applications.

The Affinity Provider Portal - PRISM can also be accessed by iPads running iOS 9 using the Safari browser and Android tablets using the Chrome browser. The native Android browser and other third-party browsers are not supported. The Chrome browser on iOS is also not supported.

To function properly with your web application, a browser must be able to accept cookies, and it must be able to run JavaScript. These capabilities are enabled by default when you install the supported browsers, so they are supported unless you have explicitly disabled them.

Enter your User ID and Password to Login

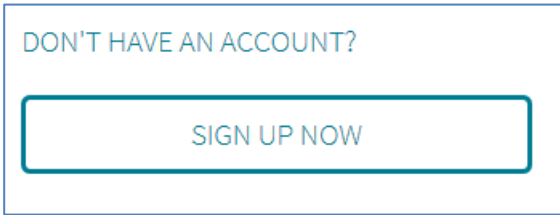
- Call (650) 723-3333 for login or technical issues
- Call (800) 615-0261 for eligibility, claims or Referral questions



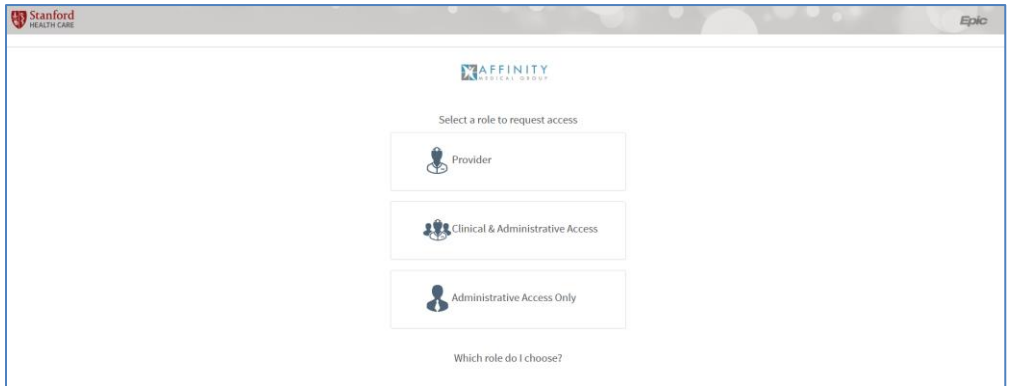
The screenshot shows the login page for the Affinity & Stanford Health Care Provider Portal. At the top, there are logos for Affinity Medical Group and Stanford Health Care. The main heading reads "Welcome to the Affinity & Stanford Health Care" followed by "Provider Portal - Prism". Below this, there are two phone numbers: "For the Help Desk 650-723-3333" and "Call toll-free 800-615-0261". On the right side, there is a "SIGN IN" section with a "SID" input field, a "PASSWORD" input field, and a "SIGN IN" button. Below the button are links for "Forgot Password?" and "DON'T HAVE AN ACCOUNT?" with a "SIGN UP NOW" button.

Register for a New Account

If you do not have an account, click Sign Up Now to request access.



You will be directed here where you will make a selection from the list.



- Choose Provider if you are a physician, or other medical professional, contracted with Affinity Medical Group.
- Choose Clinical & Administrative Access if you are an authorized operations/billing manager of a medical practice who is approved to delegate access to other staff members.
- Choose Administrative Access Only if you are an authorized operations/billing manager of an ancillary practice or facility.

Once you make your selection, you will be directed to an online application. Complete the application filling in all required fields.

- This is an example of a Provider’s application

New Account Request ▶ PlanLink Provider

Fields marked * are required. All remaining fields are recommended to help expedite your request.

Name (Last,First):

Organization/Clinic Name:

Organization/Clinic Tax ID:

Address:

City:

State: ZIP:

Country:

Country:

Email (this will be your username): Work phone:


Individual NPI: License Number:

License State:

Specialty:

Terms and Conditions: **The Affinity Provider Portal and PRISM Terms & Conditions of Use**
 Welcome to Stanford Health Care and Affinity's Provider Portal - PRISM (the "Sites"). Please read the following Terms and Conditions of Use (the "Terms") carefully before using The Affinity Provider Portal

I agree to the Terms and Conditions above.

Verification: I'm not a robot 

Requested by:

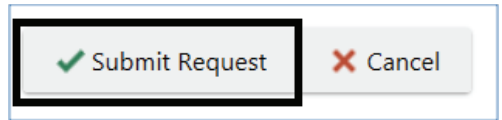
Note: You must check the box stating that you are an administrator if you are responsible for managing user accounts for your other office staff.

Are you an Administrator?

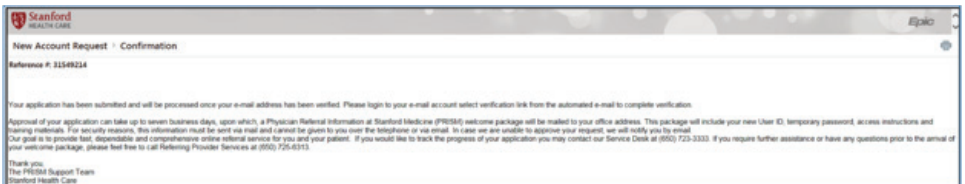
An administrator is the person responsible for maintaining an Organization's/Clinic's accounts for this Stanford Portal. These responsibilities include verifying that user accounts are current, deactivating the accounts of users who are no longer working at the Organization / Clinic, and submitting requests to activate new user accounts. Every Organization / Clinic must have at least one administrator.

Yes, I'm an administrator

Once you complete the application, click Submit Request.

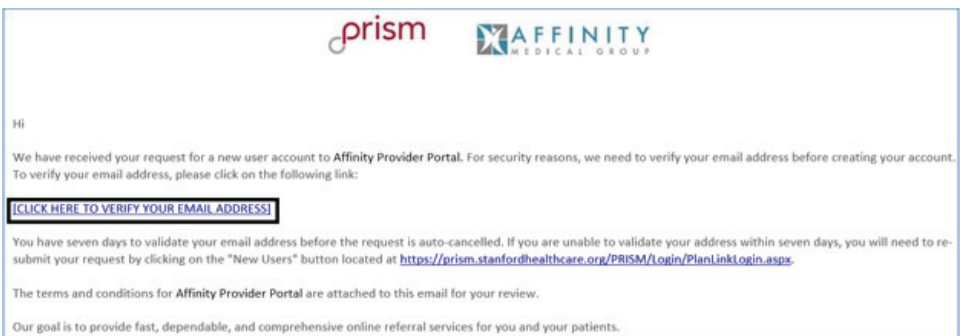


Once your application has been submitted, you will receive a confirmation message with a Reference number.



You will also receive a verification email to the email address provided in the application.

- You must click on the link to verify your email address

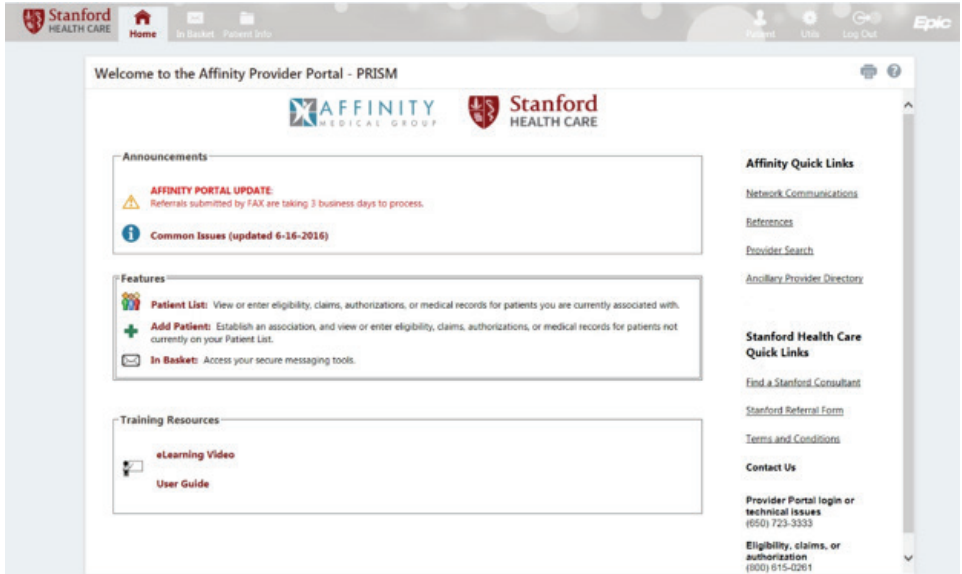


Lastly, you will receive a confirmation message stating that the application was submitted successfully.

- A confirmation email will be sent to the email address provided in the application
 - Applications typically take 7 business days to process
- Once your application has been processed, you will receive another email which will have your
 - User name
 - Temporary password

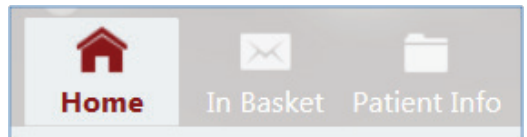
If you have questions concerning your application, you can call Stanford Digital Solutions at (650) 723-3333 with the reference number given with your confirmation.

Upon successful log-in, Providers will see the Affinity Provider Portal - PRISM home page.



Shortcuts in the page header

- Home
- In Basket
- Patient Lists



Announcements

Announcements

**AFFINITY PORTAL UPDATE:**

Referrals submitted by FAX are taking 3 business days to process.



Common Issues (updated 6-16-2016)

Features

- Patient List
- Add Patient
- In Basket

Features



Patient List: View or enter eligibility, claims, authorizations, or medical records for patients you are currently associated with.



Add Patient: Establish an association, and view or enter eligibility, claims, authorizations, or medical records for patients not currently on your Patient List.



In Basket: Access your secure messaging tools.

Affinity Quick Links

- Network Communications
- References
- Provider Search
- Ancillary Provider Directory

Affinity Quick Links

[Network Communications](#)

[References](#)

[Provider Search](#)

[Ancillary Provider Directory](#)

Stanford Health Care Quick Links

- Find a Stanford Consultant
- Stanford Referral Form
- Terms and Conditions

Stanford Health Care Quick Links

[Find a Stanford Consultant](#)

[Stanford Referral Form](#)

[Terms and Conditions](#)

Upon your first login to the Affinity Provider Portal – PRISM, it is highly recommended that you personalize your password and create challenge questions.

To do so, click on the Utils icon.



Then click on the red Change Password and Challenge Questions links.

Utilities

<p>User Settings</p> <p>Change Password Change the password that you use to log in.</p> <p>User Demographics Update your user demographics.</p> <p>Manage My Clinic View and update your clinic's users.</p>	<p>Patient Selection Preferences Specify the patient selection method that you would like to use by default.</p> <p>Set Default Page Choose the page that appears by default when you log in or select a patient.</p> <p>Challenge Questions Set challenge questions so that if you forget your password, you can reset it by answering the questions correctly.</p>
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Follow the on-screen prompts to complete these tasks.

- Best practice is to choose a strong password with a combination of uppercase letters, lowercase letters, numbers and special characters.
- If you forget your password, you will be required to answer all Challenge Questions before your password can be reset.

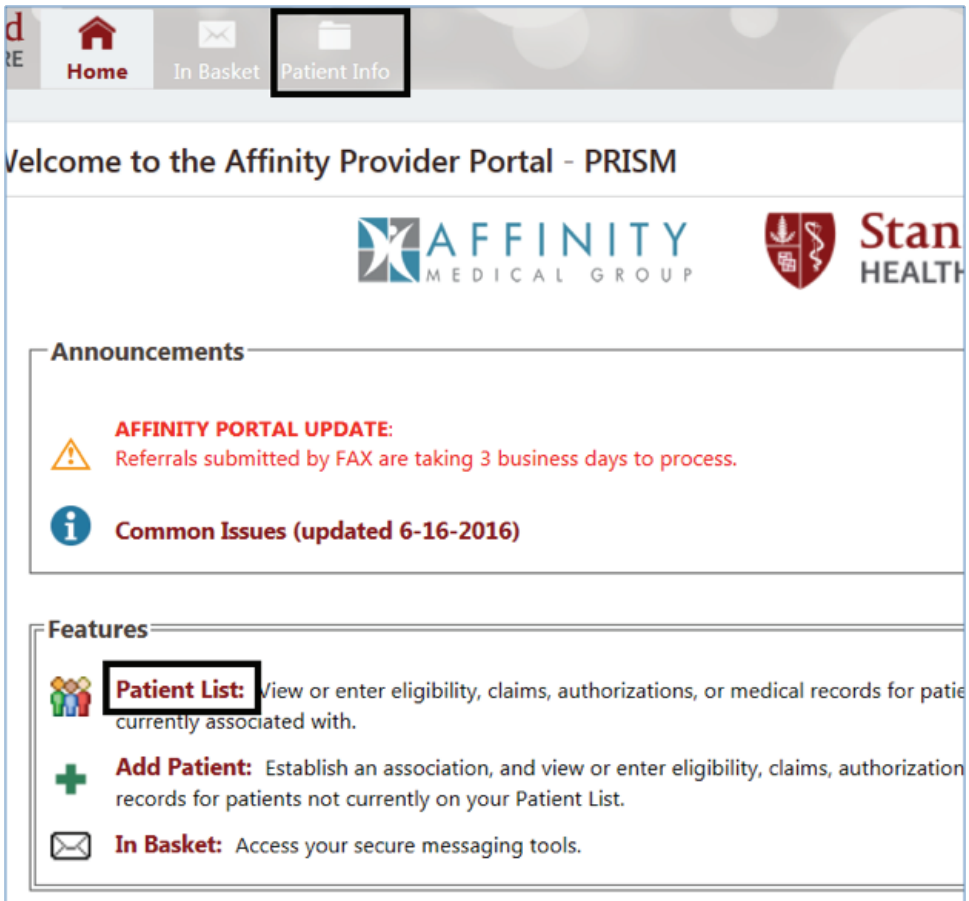
Patient Lookup

Once you have been logged-into the Affinity Provider Portal - PRISM, you will be able to view your patient list.

In the Affinity Provider Portal - PRISM, you have automatic access to patient records with which you have a PCP, claim or Referral relationship. This is called Grant Access.

To access your current Patient List:

- Click the Patient Info shortcut
 - Or click Patient List



Home In Basket **Patient Info**

Welcome to the Affinity Provider Portal - PRISM

AFFINITY MEDICAL GROUP **Stanford** HEALTH CARE

Announcements

AFFINITY PORTAL UPDATE:
 Referrals submitted by FAX are taking 3 business days to process.

Common Issues (updated 6-16-2016)

Features

Patient List: View or enter eligibility, claims, authorizations, or medical records for patients currently associated with.

Add Patient: Establish an association, and view or enter eligibility, claims, authorization records for patients not currently on your Patient List.

In Basket: Access your secure messaging tools.

- Search by Patient Name or MRN (Medical Record Number)
 - Or scroll and click the patient name (red link)

Patient Search

Search My Patients

Name or MRN: Search

Additional search criteria

My Patients Recent

AGFA,STEPH Page 1 of 2 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z TPS,TEST

Patient Name	MRN	Sex	Birth Date	Age	Street Address
TAPESTRYOCT.DONATELLO	10004091	M	2/19/1947	71 Y	1234 GALAXY WAY

- If searching by name, click Additional search criteria to add more specific search terms

Patient Search

Search My Patients

Name or MRN: Search

Additional search criteria

- Once you have provided search criteria, click the Search button

Patient Search

Search My Patients

Name or MRN: Search

All fields are optional.

Sex: Birthdate:

SSN:


Your search may return multiple results. To select the intended patient:

- Click the radio button in the patient row you would like to select, then click the Select button in the lower right corner
 - Or, click the red patient name hyperlink


Name or MRN: **tapestryoct**
 Sex: **Male**

1 patient matches the search criteria above.


%	Patient Name	MRN	Sex	Birth Date
<input checked="" type="radio"/> 88.8	TAPESTRYOCT.DONATELLO	10004091	M	2/19/1947



Search All Patients
Find a patient who is not on my list



Select
Select the highlighted patient



Cancel
Go back and modify search criteria

After the patient record is selected you will land on the Coverages & Benefits screen for this patient.

Select an encounter: No encounter selected

Tapestryoct, Donatello Age: **71 Y** DOB: **2/19/1947** PCP: **CARPER, JOHN KIRKENDAL*** Access From: **IT CLINIC - PATIENTS** Close patient record
 Sex: **M** MRN: **10004091** Payor: **MC STANFORD ADVANTAGE SENIOR AFMG** Access Ends: **7/29/2020**

Coverages & Benefits Print ?

Coverages on File View available coverages as of 8/1/2018 View all coverages on file

Payor/Plan	Eff. Date	Term. Date	Member ID	Employer Group	Filing Order
<input checked="" type="radio"/> MC STANFORD ADVANTAGE SENIOR AFMG / MC MA SA001 AFMG PLATINUM SANTA CLARA	10/1/2017		12345678	MC MA SA001 AFMG PLATINUM SANTA CLARA	1

Member Profile
Coverages & Benefits
 Demographics
 Referrals
 Claims
 Affinity Help Form

- Click Close patient record to return to the home page




Close patient record

Add Patient

First Access is the term used when you wish to Add Patient records to your patient list for which you don't already have an established relationship in our system.

- Click Add Patient in the Features section

Features



-  **Patient List:** View or enter eligibility, claims, authorizations, or medical records for patients you are currently associated with.
-  **Add Patient:** Establish an association, and view or enter eligibility, claims, authorizations, or medical records for patients not currently on your Patient List.
-  **In Basket:** Access your secure messaging tools.

Note: Selecting a patient record with First Access will allow you to view the new patient record for 2 years.

- Required fields are indicated with a red exclamation icon
- Recommended fields are indicated with a yellow yield sign
 - Enter all required information and at least one of the recommended items
- Click Search to view results

Patient Select

Name (Last, First):  DOB (MM/DD/YYYY): 

Stanford MRN:  Zip Code: 

Click Select to add this patient to your patient list

- Or click Cancel to go back and modify your search criteria


Name (Last, First): tapestryoct, donatello

DOB (MM/DD/... 2/19/1947 Stanford MRN 10004091

1 patient matches the search criteria above.


Patient Name ▾	MRN	Sex	Birth Date	Age	Street Address	City	State	Zip	PCP
<input checked="" type="radio"/> TAPESTRYOCT.DONATELLO	10004091	M	2/19/1947	71 yrs	1234 GALAXY WAY	NEWARK	CA	94560	Powell, Anthony Michael, MD

If you need help finding your patient, please contact your site administrator.



Select

Select the patient and add to my list



Cancel

Go back and modify search criteria

On the Patient Select Confirmation screen, click Accept to confirm this patient will be added to your list for 2 years.

Please review the demographic information listed below and click the "Accept" button to gain access to this patient.

Patient Information

Patient Name	Sex	DOB	SSN
Tapestryoct, Donatello	Male	2/19/1947	XXX-XX-XXXX

Patient Demographics

Address	Phone
1234 GALAXY WAY NEWARK CA 94560	650-555-8888 (Home) 456-898-9888 (Work)

Patient Employment

Status	Employer
Full Time	stanford

Once Accept is clicked, the Coverages and Benefits screen will appear.

Select an encounter: No encounter selected

Tapestryoct, Donatello Age: 71 Y Sex: M DOB: 2/19/1947 MRN: 10004091 PCP: CARPER, JOHN KIRKENDAL* Payor: MC STANFORD ADVANTAGE SENIOR AFMG Access From: IT CLINIC - PATIENTS Access Ends: 7/29/2020 [Close patient record](#)

Coverages & Benefits

Coverages on File [View available coverages as of 8/1/2018](#) [View all coverages on file](#)

[Benefits Summary](#) [Coverage Detail Report](#)

Payor/Plan	Eff. Date	Term. Date	Member ID	Employer Group	Filing Order
MC STANFORD ADVANTAGE SENIOR AFMG / MC MA SA001 AFMG PLATINUM SANTA CLARA	10/1/2017		12345678	MC MA SA001 AFMG PLATINUM SANTA CLARA	1

[Clinical Review](#)

Member Profile

- Coverages & Benefits**
- Demographics
- Referrals
- Claims
- Affinity Help Form

- Click Close Patient Record to return to the Home screen

[Close patient record](#)

Patient Records

Once the patient is selected, you have several options to navigate within the patient record.

Header

- Name
- Age
- Gender
- DOB
- PCP*
- Patient Photo (optional)

<small>Select an encounter: No encounter selected</small>		
Tapestrymar, Leo	Male, 52 Y (1/1/1965)	PCP: CARPER, JOHN KIRKENDAL* MRN: 65000242

Navigator

Located on the left side of the page, the navigator allows you to view managed care content related to:

- Clinical Review
- Coverages & Benefits
- Demographics
- Referrals
- Claims
- Affinity Help Form

Clinical Review
Member Profile
Coverages & Benefits
Demographics
Referrals
Claims
Affinity Help Form

*PCP indicated in the Header may not be correct. Refer to Coverage Detail Report for actual assigned PCP.

Member Profile

The member profile section of the navigator allows you to navigate to the patient’s Coverage & Benefits, as well as Demographic information.

Member Profile

Coverages & Benefits



Demographics

Eligibility, Coverages and Benefits

One method of coverage verification is by viewing the Coverages & Benefits section of the navigator.

Coverages & Benefits

Coverages on File View available

 Benefits Summary
 Coverage Detail Report

Payor/Plan	Eff. Date	Term. Date
<input checked="" type="radio"/> MC STANFORD ADVANTAGE SENIOR AFMG / MC MA SA001 AFMG PLATINUM	3/1/2017	

The Coverages on File area includes:

- Date filters to display specific information from a specific time
 - Or View all coverages on file

View available coverages as of 
 View all coverages on file

- Payor/Plan name
- Plan Eff. Date
- Member ID
- Filing Order



Payor/Plan	Eff. Date	Term. Date	Member ID	Employer Group	Filing Order
MC STANFORD ADVANTAGE SENIOR AFMG / MC MA SA001 AFMG PLATINUM	3/1/2017		12345678	MC MA SA001 AFMG PLATINUM	1

To view the Benefits Summary for this patient:

- Click the Payor/Plan red link
 - Or click the Benefits Summary button

Coverages & Benefits



Coverages on File ● View all

 [Benefits Summary](#)
 [Coverage Detail Report](#)

Payor/Plan	Eff. Date	Term. Date
MC STANFORD ADVANTAGE SENIOR AFMG / MC MA SA001 AFMG PLATINUM	3/1/2017	

Within the Benefit Summary, you can view:

- Referral Requirements
- Type of Service
- Patient Portion

Coverages & Benefits > **Benefits Summary** Ask A Question  

MC MA SA001 AFMG PLATINUM

Deductibles/Maximum Out-of-Pocket

MC MA SA001 AFMG PLATINUM

MOOPs - MC INDIVIDUAL MOOP

Family Total	Paid	Remaining	Individual Total	Paid	Remaining
N/A	N/A	N/A	\$4,400.00	\$60.00	\$4,340.00

Services

Expand All **Collapse All**

Ambulatory Surgical Center

Type of Service	Network	Referral Required?	Level	Applies to	Patient Portion	Limit	Remaining*	Bucket	Admission Group
AMBULATORY SURGICAL CENTERS	N/A	Yes-Internal	1	MOOP/DED	100% coins	\$200.00	\$200.00	MC COPAY PER DAY	
			2	No Payment					

Complex Radiology - Facility Services

Type of Service	Network	Referral Required?	Level	Applies to	Patient Portion	Limit	Remaining*	Bucket	Admission Group
COMPLEX RADIOLOGY FACILITY CHARGE	N/A	Yes-Internal	1	MOOP/DED	100% coins	\$150.00	\$150.00	MC COPAY PER DAY	
			2	No Payment					

Click the Ask a Question icon in the upper right corner to submit an Affinity Help form (See page 46) if you have questions about:


- Benefits
- Eligibility/Coverage




Click the Coverage Detail Report to see detailed Eligibility Information.

Coverages & Benefits

Coverages on File



Benefits Summary



Coverage Detail Report

Within the Coverage Detail Report, you can view:

- Eligibility details
- Coverage Information
- Subscriber Level Information

Coverages & Benefits > Coverage Detail Report 📱 ?

Eligibility Information as of 05/08/2017 TAPESTRYMAR,LEO [65000242]

Eligibility

Employer Group MC MA SA001 AFMG PLATINUM [38000001]	Benefit Plan MC MA SA001 AFMG PLATINUM [38000001]	Carrier SA [108]	Payor MC STANFORD ADVANTAGE SENIOR AFMG [38000000]
Service Area	Networks SA NETWORK	Primary Location	PCP CARPER, JOHN KIRKENDALL

Coverage Information

Covered Flag Yes	Type Managed Care	Effective From 03/01/2017	Effective To
Relationship to Subscriber Self - Self	Member Number 12345678	Patient Application Date	Patient Late Enrollment No

Subscriber Level Information

Subscriber ID 12345678	Subscriber Name TAPESTRYMAR,LEO	Employment Date	COBRA Status	COBRA Date
---------------------------	------------------------------------	-----------------	--------------	------------

Demographics

In the navigator, click the Demographics tab to see detailed information about the member.

- Basic Demographics
- Contact Information
- PCP and Center
- Pharmacy
- Employment Information
- Emergency Contacts

Member Profile

Coverages & Benefits

Demographics

Demographics 🖨️ ?

Basic Demographics

Name	MRN	SSN	Sex	Date of Birth
Tapestrymar, Leo	65000242	xxx-xx-xxxx	Male	1/1/1965 (52 yrs)
Ethnic Group	Marital Status	Patient Status		
Non-Hispanic/Non-Latino	Married	Alive		

Contact Information

Address	Phone
1840 Embarcadero Street Palo Alto CA 94331	650-555-5555 (Home) 650-656-6655 (Work)

Additional Info

Patient Type
Stanford Health Care Employee

PCP and Center

Primary Care Provider	Phone	Center
John Kirkendall Carper, MD	(510)521-2300	AFFINITY MEDICAL GROUP BUSINESS SEGMENT

Employment Information

Status	Employer
Full Time	Stanford

Administrative

Signature on File	Date Filed
Yes	None on file
Power of Attorney	Date Asked
No	None on file
Advance Directive	Date Asked
No	None on file

Emergency Contacts

Name	Relation	Home	Work	Mobile
------	----------	------	------	--------

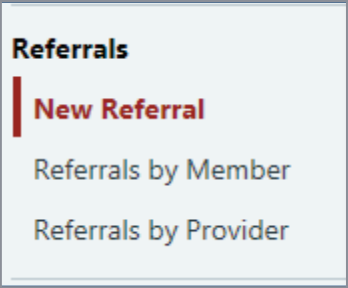
Referral Entry

The Affinity Provider Portal - PRISM also offers the ability to create and view Referrals for your practice.

- From within a patient record, click Referrals in the navigator

There are three Referral options:

- New Referral
- Referral by Member
- Referral by Provider



The screenshot shows a light blue rectangular menu box with a thin border. At the top, the word "Referrals" is written in bold black text. Below it, there is a vertical red bar on the left side of the menu items. The first item, "New Referral", is highlighted in red text. The other two items, "Referrals by Member" and "Referrals by Provider", are in grey text.

Referrals

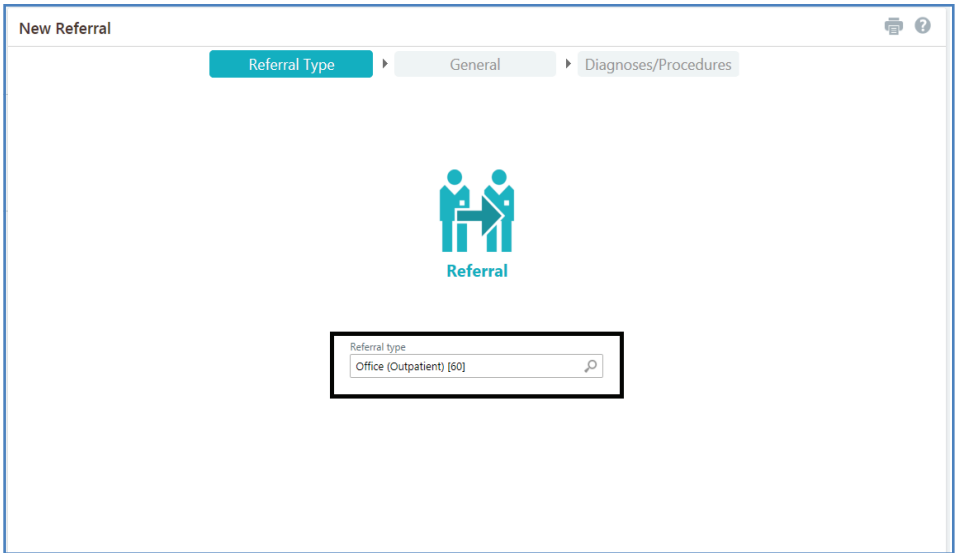
New Referral

Referrals by Member

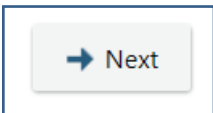
Referrals by Provider

Click New Referral in the navigator.

- First enter a Referral Type, or choose one by clicking on the magnifying glass in the Referral Type field and selecting one from the list.



Once the Referral Type has been selected, click the Next button to proceed.



Complete the General Information

- Priority
- Number of visits
- Start Date

Note: If the Expiration Date field is left blank, the referral will default to a 180 day time span from the Start Date.

General Information

<p>Priority</p> <input type="text" value="Routine [1]"/>	<p>Type</p> <input type="text" value="Office (Outpatient) [60]"/>	
<p>Number of visits</p> <input type="text" value="1"/>	<p>Start date</p> <input type="text" value=""/>	<p>Expiration date</p> <input type="text" value=""/>

In the Referred By section, type the Doctor's name, or click the magnifying glass in the field to select the Referral By Provider which is a list of providers specific to your Tax ID.

Referral By

<p>Provider</p> <input type="text" value=""/>	<p>Location/POS</p> <input type="text" value=""/>
---	---

Referral To

<p>Provider</p> <input type="text" value=""/>	<p>Location/POS</p> <input type="text" value=""/>
---	---

In the Referral To section:

- Enter the Provider name to which you are referring

Referral By
Provider Location/POS
Referral To
Provider Location/POS

If needed, click the magnifying glass in the Provider field to expand search options.

- Click Search once additional search information has been provided

Provider Search
Name: Language:
Provider Specialty: Gender:
Location/Place of Service: City:
ZIP:
Search Clear Cancel

Once you have located the correct provider:

- Click the red provider name link to select this provider

Provider Search

Search Criteria

Name: Language:

Provider Specialty: Gender:

Location/Place of Service: City:

ZIP:

Search Results: 6 providers found (Next Level) (All In-Net Levels) (All Providers)

<input type="radio"/>	Richard Marc Sankary, MD	In_Network	AMG - PINOLE					Pulmonary Disease, Pulmonary Medicine, Sleep Medicine	Male
<input checked="" type="radio"/>	Richard Marc Sankary, MD	In_Network	AMG - PINOLE	2160 Appian Way Suite 200	Pinole	CA	94564-2524	Pulmonary Disease, Pulmonary Medicine, Sleep Medicine	Male
<input type="radio"/>	Richard Marc Sankary, MD	In_Network	AMG - SAN PABLO	100A San Pablo Towne Center	San Pablo	CA	94806-3847	Pulmonary Disease, Pulmonary Medicine, Sleep Medicine	Male

In the Location/POS field, enter the Place of Service for the Referred To provider:

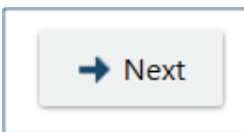
Referral By

Provider: Location/POS:

Referral To

Provider: Location/POS:

On the Referral, click the Next button to proceed.



Next, the Diagnoses/Procedures will open.

- Required fields
 - Diagnoses
 - Procedures

Note: You may enter the ICD-10 code or begin the search by entering the name of the Diagnosis.

The example below shows a diagnosis related to hypertension.

- Type “hypertension”
- Click the magnifying glass to search for terms related to “hypertension”

Diagnoses

Diagnoses (coded)

+ Add

Procedures

Procedures (coded)

+ Add

All matches to the search term will display based on how closely the term matches a diagnosis.

- Click the red diagnosis link to select for the Referral

%	Name	ICD-10 Codes
87.41%	Asymptomatic hypertensive urgency	I16.0
87.41%	Benign hypertensive cardiomyopathy with heart failure (CMS-HCC)	I11.0
87.41%	Benign hypertensive cardiomyopathy, without heart failure	I11.9
87.41%	Benign hypertensive heart and kidney disease	I13.10, N18.9
87.41%	Benign hypertensive heart and kidney disease with CHF and stage 1 chronic kidney disease (CMS-HCC)	I13.0, N18.1, I50.9

The selected diagnosis is now attached to the Referral.

- To add additional diagnoses, click Add to bring up another diagnosis field and repeat the search.

Diagnoses

Diagnoses (coded)

Hypertension as manifestation of blood transfusion reaction, sequela [2120658]

+ Add

Similar to the Diagnoses field, you can enter the Procedure by name or by code, if known.

- Enter the code or Procedure name and click the magnifying glass

Procedures

Procedures (coded)

Procedure Revenue code Modifiers Qty

+ Add

When searching by name, multiple results may be returned based on your search. In this example, the procedure is “EKG.”

- Click the red procedure link to select

Please make a selection

Procedure:

Search Matches:

%	ID	Name	Group	Type	Code	Code
88.8%	93010.1	EKG CCMG		PR Charge	93010	Custom
88.8%	G0403	EKG FOR INITIAL PREVENT EXAM		PR Charge	G0403	HCPCS
88.8%	2309G0403	EKG INITIAL PREVENT EXAM MMC/MEDICARE		ECG	G0403	Custom
88.8%	G0405	EKG INTERPRET & REPORT PREVE		PR Charge	G0405	HCPCS
88.8%	EKG31	EKG STRESS		ECG	EKG31	Custom
88.8%	CC2983	EKG STUDY - 93010	OTHER	PR Charge	93010	CPT®
88.8%	G0404	EKG TRACING FOR INITIAL PREV		PR Charge	G0404	HCPCS

If appropriate, include modifiers and quantity for the procedures.

Procedures

Procedures (coded)

G0403 - EKG FOR INITIAL PREVENT EXAM	Revenue code	Modifiers	Qty
--------------------------------------	--------------	-----------	-----

+ Add

Note: If more than one modifier is being entered, they must be separated by a comma.

Once completed, the Procedure is now attached to the referral request.

- To add additional procedure codes, click Add to bring up another diagnosis field and repeat the search

Procedures

Procedures (coded)

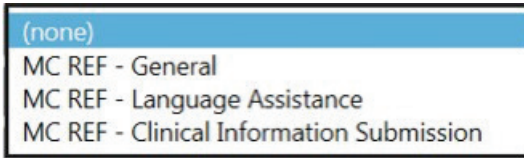
G0403 - EKG FOR INITIAL PREVENT EXAM	Revenue code	Modifiers	Qty	Unit type
--------------------------------------	--------------	-----------	-----	-----------

+ Add

Note: The Revenue Code field is only applicable to current ancillary providers.

Some Referral types, like Inpatient may require a Note to be included with the Referral. The screen below shows a required Note.

- Select Note type from the drop-down menu
 - General
 - Language Assistance
 - Clinical Information Submission



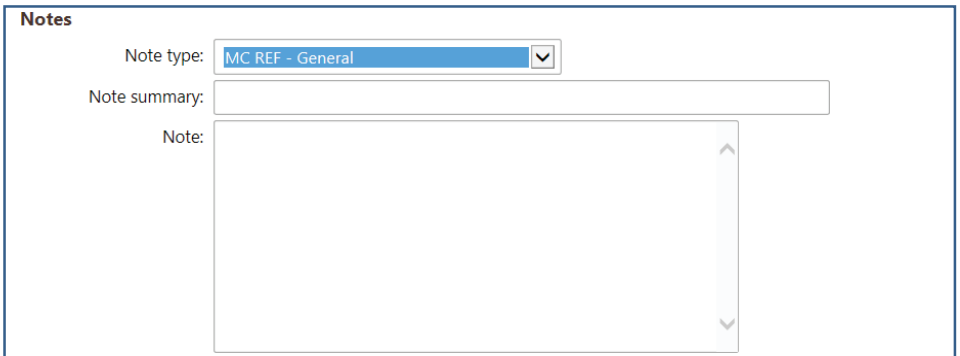
- Note summary
- Note type

Notes

Note type:

Note summary:

Note:



A screenshot of a web form titled "Notes". It contains three main input fields: a dropdown menu for "Note type" with "MC REF - General" selected, a text field for "Note summary", and a large text area for "Note".

If needed, you can also attach a file to this message.

- Click Add File

Attachment: **Add File**

20.0 MB total allowed

Allowed file types: DOC, DOCX, GIF, JPEG, JPG, MPG, PDF, PNG, TIF, TIFF, TXT, XLS, XLSX, WAV

- Select a file that you would like to attach to this message



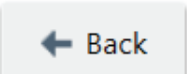
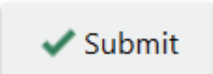
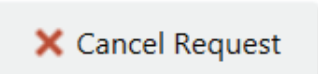
Libraries
System Folder

Computer
System Folder

Home (User)
System Folder

Network
System Folder

To complete the Referral request, click the Submit button in the lower right corner of the page.

Upon completion of the request you will see the Referral Details screen.

- Click the Add Note/Attachment button if additional notes or attachments are needed

Referrals by Member ▸ Referral Details 🖨️ ⓘ

[Add Note/Attachment](#)

Referral # 6563559

Authorization

Patient Information

Patient Name	Sex	DOB	SSN
Tapestryoct, Donatello	Male	2/19/1947	xxx-xx-xxxx

Referral Status Info

Referral Status

Status	Decision Date	Expiration Date
Incomplete	8/01/18	1/28/19

Basic Referral Info

Referral Info

Patient	Referral #	Referral Date	Priority	Type
TAPESTRYOCT,DONATELLO	6563559	08/01/2018	Routine	Office (Outpatient)

Referred By

Referred By	Source Loc/POS
Sharp, Christopher Demuth	none

Referred To

To Provider	To Loc/POS	Specialty	Reason
Sankary, Richard Marc	ALAMEDA HOSPITAL	none	PlanLink Referral (DO NOT REMOVE)

Procedure Information

Procedure	Modifiers	Revenue Code	Provider	Requested	Approved
G0403 - EKG FOR INITIAL PREVENT EXAM				1	1

Diagnosis Information

Diagnosis

T80.89XA, I10 (ICD-10-CM) - Hypertension as manifestation of blood transfusion reaction

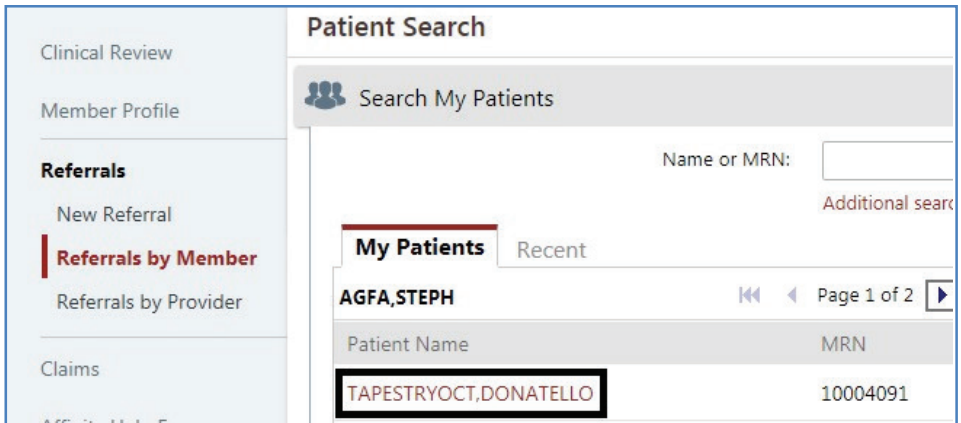
Click Close patient record to close the Referral Details page.

Close patient record

Referral Review

To view Referrals for a member, click the Referral by Member option in the navigator.

- Click the red Patient Name link to select the patient



Patient Search

Search My Patients

Name or MRN:

Additional search

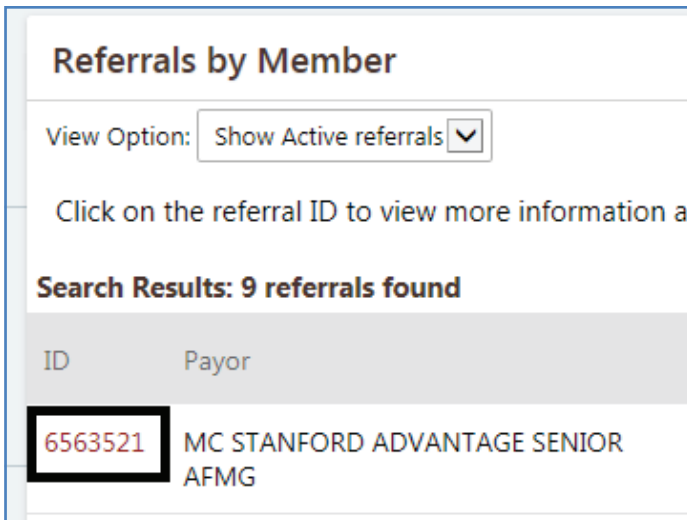
My Patients Recent

AGFA,STEPH Page 1 of 2

Patient Name	MRN
TAPESTRYOCT,DONATELLO	10004091

Use the View Option drop down to view Active or All Referrals related to this patient within your organization's tax ID.

- Click the red Referral ID to open the Referral Detail page



Referrals by Member

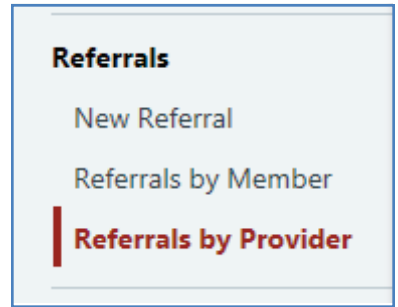
View Option: Show Active referrals

Click on the referral ID to view more information at

Search Results: 9 referrals found

ID	Payor
6563521	MC STANFORD ADVANTAGE SENIOR AFMG

To view a Referral by Provider, click the Referrals by Provider option in the Navigator.



Based on your Tax ID, select the Refer To Provider. You may also search by date range, referral status and scheduling status.

Referrals by Provider

Enter a date range and press **Search** to display effective referrals.

Incoming
 Outgoing

Provider

- Four, Testprovider
- Hodgkins, Provider
- Infusion, Provider
- One, Testprovider
- Provider, Testlauren
- Sharp, Christopher Demuth, MD
- Smith, David
- Tapestry, General External Provi...

Select all 1/8

Referral Status

- Aetna Denied
- Authorized Pending IV
- Authorized Pending LOA
- Authorized
- Canceled
- Select all 60/60

Creation Dates

From:

To:

Scheduling Status

- Additional Info/Records Rec...
- Auth/Referral Expired
- Called 1x
- Called 2x
- Canceled - Created in Error
- Canceled - Duplicate
- Select all 28/28

Results will display based on search criteria used.

- Click the red Referral ID number to view Referral detail

Referrals by Provider

+ Edit search criteria

Click on the referral ID to view more information about that referral.

Search Results: 137 referrals found

Referral ID	Patient Name	Status	Sched Status
6563550	TEST,PAT	Incomplete	New Request

Click the Ask a Question icon in the upper right corner to submit an Affinity Help form (See page 46) if you have questions about:

- Member Referrals

Ask A Question





Claims

After a claim is submitted, use the portal to view:

- Claims by Member
- Claims by Provider

Claims

Claims by Member

Claim by Provider

To view Claims by Member, click the Patient name in the My Patients tab or use the search bar to narrow your results.

Claims

Claims by Member

Claim by Provider

Affinity Help Form

My Patients

Recent

SEREDA, CARL E	<div style="display: flex; justify-content: flex-end; gap: 5px;"> ⏪ ⏩ </div>
Patient Name	MRN
TAPESTRYMAR, LEO	65000242

Claims by Member is used to view claims specific to your tax ID.

- Select Provider
- Claim #
- Svc Dates
- Status

Claims Inquiry			
Select a Provider: <input type="text" value="Jung, Jesse Jen, MD [S0195466]"/>			
Claim #	Svc Frm Dt	Clm Rcv Dt	Status
2756537	03/06/2017	05/09/2017	Received - Processing

You can also view important claim detail by clicking the red Claim# link.

Claim #2756537						
Member						
Name	Member ID	SSN				
Tapestrymar, Leo	12345678	xxx-xx-xxxx				
Claim Dates						
Date Received					Service From Date	
05/09/2017					03/06/2017	
Coverage						
Coverage Used					Method Used	
MC STANFORD ADVANTAGE SENIOR AFMG, MC MA SA001 AFMG PLATINUM					Primary Coverage	
Status						
Claim Status						
Received - Processing						
Physician						
Jung, Jesse Jen0						
Vendor						
EAST BAY RETINA CONSULTANTS						
Place of Service						
Diagnoses						
R01.1 (ICD-10-CM) - Cardiac murmur, unspecified						
H43.812 (ICD-10-CM) - Vitreous degeneration, left eye						
H43.391 (ICD-10-CM) - Other vitreous opacities, right eye						
H52.13 (ICD-10-CM) - Myopia, bilateral						
Procedures, Medications						
Procedure/Medication	From Date	To Date	Quantity	Billed Amt	Net Payable	
99213 - EVAL/MGMT OF EST PATIENT LEVEL 3 CPT(R)	03/06/2017	03/06/2017	1	219.62	0.00	
Claim Totals						
Total Billed	Patient Total	Net Payable	Interest	Penalty	Date Received	Service Date
219.62	85.61	0.00	0.00	0.00	05/09/2017	03/06/2017
Check						
Number						Date
None						

To view claims specific to your tax ID, click Claims by Provider in the Navigator.

- View claims by Providers, Vendors or Claim ID
- Filter results by Service Dates
- Click the red Claim # link to view claim detail

Clinical Review

Member Profile

Authorizations

Claims

Claims by Member

Claim by Provider

Claim Search

Providers
Vendors
Search By Claim ID

Claims for Jung, Jesse Jen, MD

Service Dates: 1/1/2017
To date
Search

Claim #	Member Name	Vendor
2756537	TAPESTRYMAR,LEO	EAST BAY RETINA COUNSULTANTS
2756536	TAPESTRYMAR,LEO	EAST BAY RETINA COUNSULTANTS

Click the Ask a Question icon in the upper right corner to submit an Affinity Help form (See page 46) if you have questions about:

- Claim

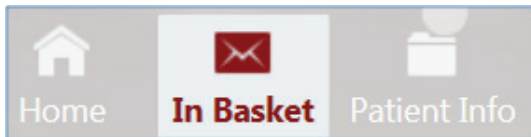


In Basket

Similar to an email account, In Basket allows you to communicate with other providers and Affinity Provider Services.




There are two primary methods to access the In Basket.

- Use the In Basket shortcut at the top of the home page



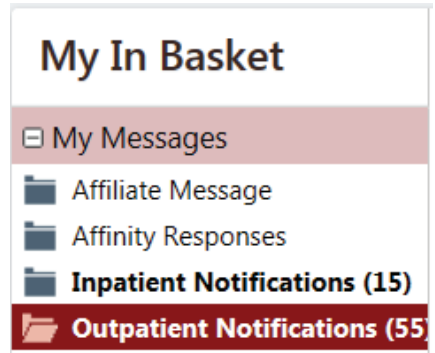
- Or, click the In Basket link in the Features section of your home page

Features

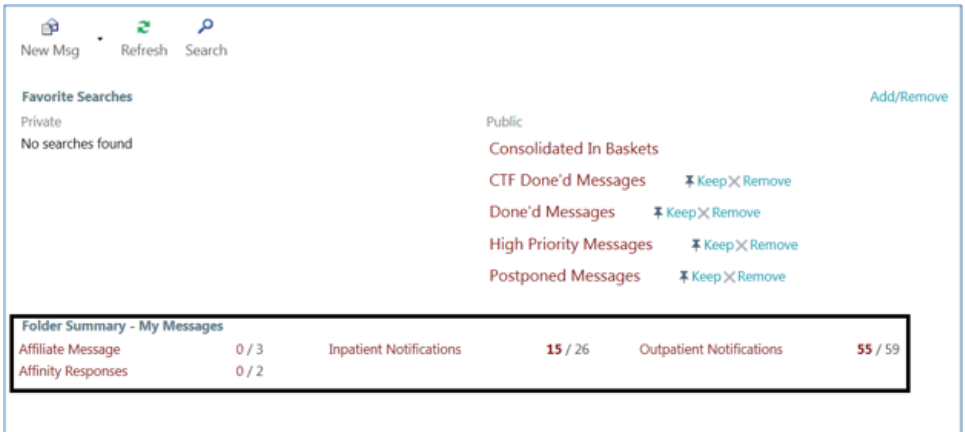
- 
Patient List: View or enter eligibility, claims, authorizations, or medical records for patients you are currently associated with.
- 
Add Patient: Establish an association, and view or enter eligibility, claims, authorizations, or medical records for patients not currently on your Patient List.
- 
In Basket: Access your secure messaging tools.

There are two navigational options when viewing messages by type:

- Click a message type on the left side of the screen



- Or click the corresponding folder as pictured below



New messages are indicated in bold next to the message folder.

In this example, there are 15 new messages and 26 total messages within Inpatient Notifications folder.



My Messages	New Msg	Refresh	Reply	Forward	Done	Select Patient	Search	Properties
Affiliate Message								
Affinity Responses	Priority	Status	Msg Date	Msg	Sent By	Subject	Patient	Action Phone Pl
Inpatient Notifications (14)	<input type="checkbox"/>	Read	10/02/2015	8:44 AM	TEST, PAUL	sfsj		
Outpatient Notifications (52)	<input type="checkbox"/>							

Affiliate Message allows you to view messages from other providers.

Affinity Responses allows you to view messages from Affinity Provider Services.

In Basket can also provide automatic notifications to keep you informed about your patients. These are called Events. Each automatic notification is given an Event Type.

Affinity Responses (32)	<input type="checkbox"/>	Priority	Status	Patient	Event Type	Admission Date	Discharge Date	Enc Department
Community File Uploads	<input type="checkbox"/>		Read	Test, Lauren	ADT Admission	12/20/2016	12/20/2016	B2
Inpatient Notifications	<input type="checkbox"/>		Read	Test, Lauren	ADT Admission	12/20/2016	12/20/2016	B2
Outpatient Notifications (7)	<input type="checkbox"/>		Read	Test, Lauren	ADT Admission	12/20/2016	12/20/2016	B2
Referral Notifications (3)	<input type="checkbox"/>		Read	Test, Lauren	ADT Admission	12/20/2016	12/20/2016	B2

Inpatient Notifications provide automatic alerts when one of your patients is admitted to Stanford Emergency Department.

- This Event Type is called ADT ED Arrival.

Or if one of your patients is admitted to a Stanford Inpatient Unit

- This Event Type is called ADT Admission

Outpatient Notifications provide automatic alerts when one of your patients has been seen at a Stanford outpatient clinic.

- This Event Type is called a Close Encounter.

Referral Notifications provides automatic alerts when a referral/ Referral request that you submitted has been approved.

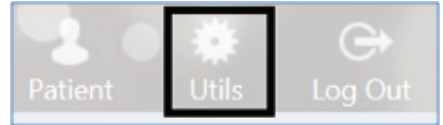
- This Event Type is called Referral Authorized.

Or if a referral/Referral that you submitted has been denied

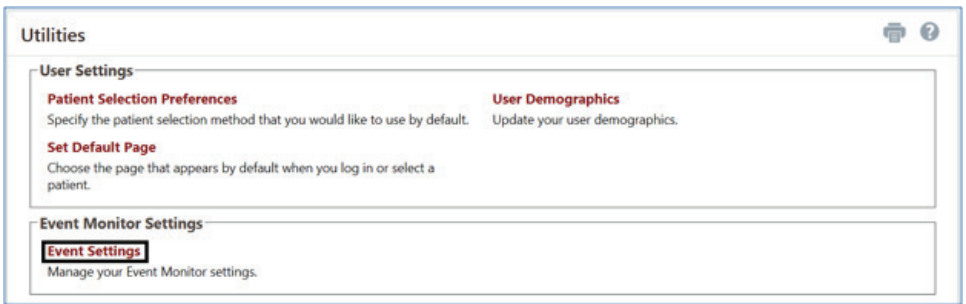
- This Event Type is called Referral Denied.

You can choose the types of automatic alerts you want to receive.

Click on the Utils icon.



Then click on the red Event Settings link

A screenshot of the 'Utilities' settings page. The page title is 'Utilities' with a printer and help icon. Under 'User Settings', there are two sections: 'Patient Selection Preferences' (Specify the patient selection method that you would like to use by default.) and 'Set Default Page' (Choose the page that appears by default when you log in or select a patient.). To the right is 'User Demographics' (Update your user demographics.). Under 'Event Monitor Settings', there is a link for 'Event Settings' (Manage your Event Monitor settings.) which is highlighted with a red border.

In Event Settings, you have several options to customize the automatic notifications you receive:

- Event Filter
- Relationship Filtering
- In Basket Settings

Utilities > **Event Settings**

Customize when and how you are notified when an event is triggered for one of your patients. Existing notifications will not be affected.

Note: Due to privacy concerns, you may not be notified of sensitive events.

Event Filter ?

- Events I Will Receive
- ADT Admission
- ADT ED Arrival
- Close Encounter
- Referral Authorized
- Referral Denied

Relationship Filtering ?

Notify me for:

- All events for patients in my group
- Only events associated with a provider, department, or vendor in my group (recommended)
- Only events associated with certain providers, departments, or vendors

In Basket Settings ?

Allow my messages to be handled by:

- Any user in my group
- Only me

Once you have made your choice, click Accept to complete the process.

✓
Accept

✗
Cancel

To view a message, click the corresponding check box.

<input type="checkbox"/>	Priority ▲	Status	Msg Date	Msg Time	Sent By	Subject
<input type="checkbox"/>		Read	10/02/2015	8:44 AM	TEST, PAUL	sfsgf
<input checked="" type="checkbox"/>		Pend	04/21/2016	9:29 AM	SHAIKH, SARFRAZ	Pt Seen Today
<input type="checkbox"/>		Read	08/31/2016	4:20 AM	WOODBURY, SAM	RE: Test Message for Epic SU 5.0

- The message displays in the lower half of the screen

Pt Seen Today

Shaikh, Sarfraz → Three, Testprovider

Hello,

Dr Three

Once you've read the message, click the Done button to remove it from your In Basket.

- By clicking the down arrow, you may also choose to Pend the message for later viewing or mark it as Read to indicate that this is no longer a new message.

<input type="checkbox"/>	Priority ▲	Status	Msg Date	Msg Time	Sent By	Subject
<input type="checkbox"/>		Read	10/02/2015	8:44 AM	TEST, PAUL	sfsgf
<input checked="" type="checkbox"/>		Pend	04/21/2016	9:29 AM	SHAIKH, SARFRAZ	Pt Seen Today
<input type="checkbox"/>		Read	08/31/2016	4:20 AM	WOODBURY, SAM	RE: Test Message for Epic SU 5.0

Done

Done

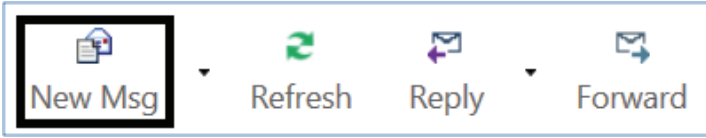
Pend

Mark as Read

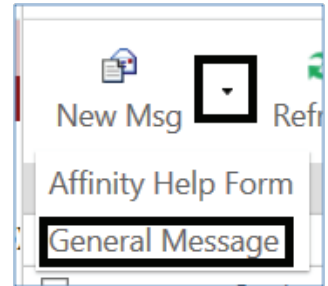
Mark as Unread

AutoAdvance

To send a new message, click the New Msg button in the toolbar.



You may also select the message type by clicking the downward arrow next to the New Msg button.



General Message is the standard form of messaging with Affiliate network providers. When clicked, you will see the New General Message form.

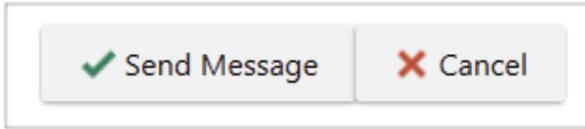
- Required fields must be completed to send the message
 - To
 - Note
 - Priority (optional)

In Basket > **New General Message**

This message will not be saved to the patient's chart.

To: <small>ⓘ</small>	<input type="text"/>	Priority
Subject:	<input type="text"/>	<input type="radio"/> High
Patient:	<input type="text"/> <small>Use Abelgas, Virgilio</small>	<input checked="" type="radio"/> Routine
Phone:	<input type="text"/> <input type="checkbox"/> Call Me	<input type="radio"/> Low
Note: <small>ⓘ</small>	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>	

Once you have entered all required information, click the Send Message button in the lower right corner of the screen.

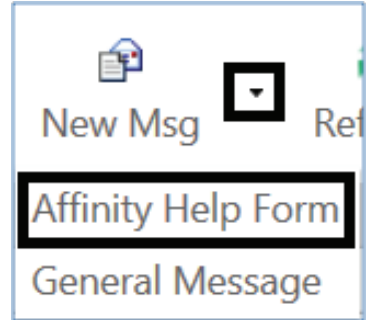


Affinity Help Form

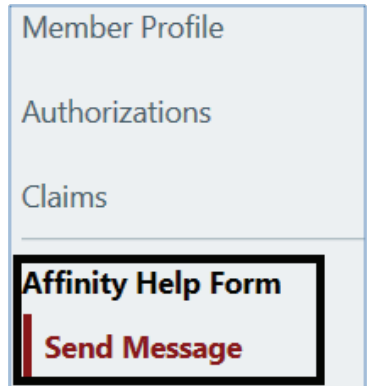
Affinity Help Form is another type of messaging within the portal. Help Forms can be sent from the home page, but can also be sent from within the patient record and are directed to Affinity Provider Services.

From the In Basket, click the down arrow next to the New Msg button.

- Select Affinity Help Form



Or, from within a patient record, click Affinity Help Form in the navigator.



Or click the Ask A Question icon found on the upper right hand corner of various screens.



Next, select a Topic to best describe the reason for contacting Provider Services.

- Each topic also determines where your message is routed

In Basket ▶ **Affinity Help Form**

Topic:

Summary:

Priority

High

Routine

Low

Each Topic may require different information to be provided before the message is sent.

Topic:

Summary:

Claims Appeals (Web)

Referrals/Authorizations (Web)

Eligibility/Coverage (Web)

Benefits (Web)

Provider Information Issues (Web)

Other (Web)

For example, by choosing Other (Web) you can see that several options become available.

- Summary
- Select Patient

Topic: Other (Web) ▼

Summary:

Priority

High

Routine

Low

Patient

Patient: Abelgas, Virgilio [31393267] Change Clear

Details

Details: !

Additional Documents

Documents: Add File

20.0 MB total allowed

Allowed file types: DOC, DOCX, GIF, JPEG, JPG, MPG, PDF, PNG, TIF, TIFF, TXT, WAV, XLS, XLSX

Note: As previously mentioned, you can also send Affinity Help Forms from within a patient record. Otherwise, use the Select Patient option to document patient information.

An Additional Document can also be attached to the message.

- Click Add File





Additional Documents

Documents: Add File


20.0 MB total allowed

Allowed file types: DOC, DOCX, GIF, JPEG, JPG, MPG, PDF, PNG, TIF, TIFF, TXT, WAV, XLS, XLSX

- Select the file you would like to attach to this message

 <p>Libraries System Folder</p>	 <p>Home Folder System Folder</p>
 <p>Computer System Folder</p>	 <p>Network System Folder</p>

- Choose the Type of attachment



test.docx

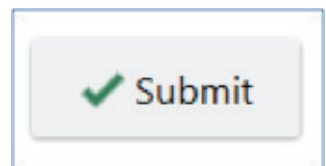
* Type

- Other
- Coverage Attachment
- AP Claim Attachment
- Benefit Plan Attachment
- Referral Attachment

✕

By clicking Submit, the message will now be routed to Affinity Provider Services. You will receive an automatic reply in your In Basket confirming that your Affinity Help Form was successfully submitted.

Click Submit to send the Affinity Help Form.



Manage My Clinic

Located in the Utilities section of your home page, Manage My Clinic allows you to register delegates, such as office and clerical staff.

Click on the Utils icon.



Then click on Manage My Clinic.

User Settings

Patient Selection Preferences
Specify the patient selection method that you would like to use by default.

Set Default Page
Choose the page that appears by default when you log in or select a patient.

Challenge Questions
Set challenge questions so that if you forget your password, you can reset it by answering the questions correctly.

User Demographics
Update your user demographics.

Manage My Clinic
View and update your clinic's users.

Within the Manage My Clinic you are able to:

- Create and Edit Users
- Deactivate Users

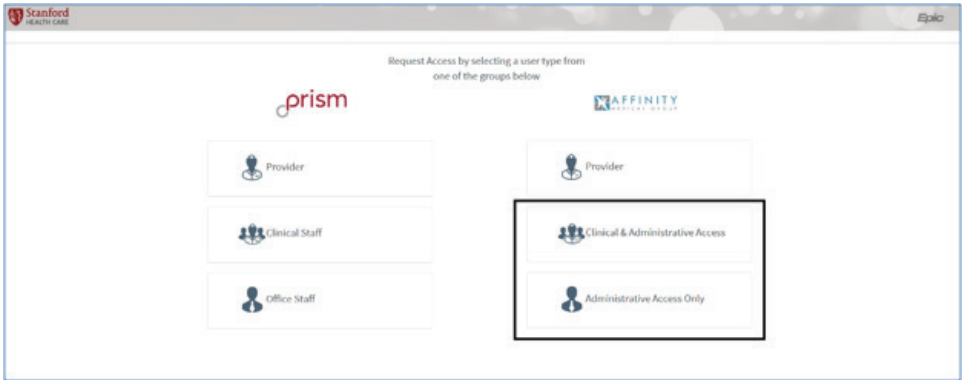
To add a new user, first click on the Requests tab, then Request New Account.

Utilities > **Manage My Clinic** 🖨️ ?

My Clinic **Requests**

+ Request New Account 📄 View Request

You will be directed here where you will make a selection from the right side of the screen based on the new user's role (Refer to page 3).

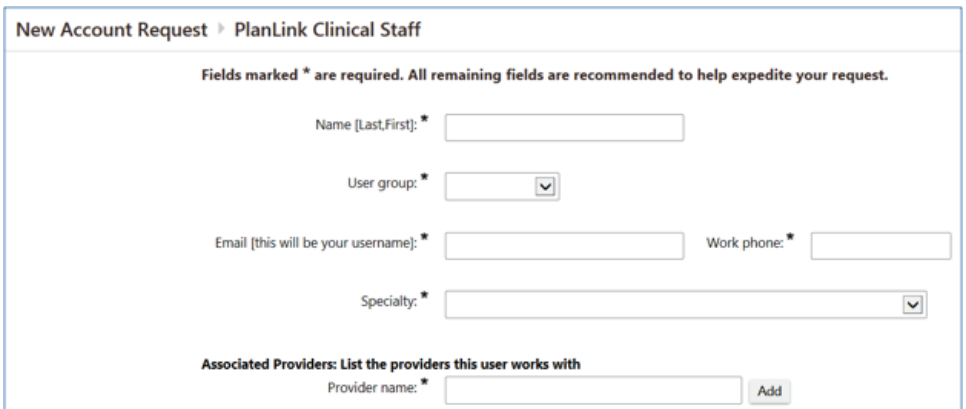


Choose Clinical & Administrative Access if the new user has a clinical job role such as physician assistant, medical assistant, registered nurse, etc.

Choose Administrative Access Only if the new user has a non-clinical job role such as billing manager or receptionist.

- All users associated with ancillary providers or facilities such as home health, DME, skilled nursing, ancillary surgery centers and diagnostic facilities must choose Administrative Access Only.

Once you make your selection, you will be directed to an online application. Complete the application with the new user's information filling in all required fields.



New Account Request > PlanLink Clinical Staff

Fields marked * are required. All remaining fields are recommended to help expedite your request.

Name [Last,First]: *

User group: *

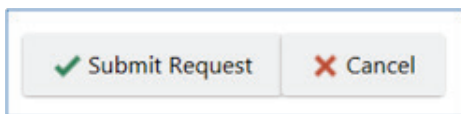
Email [this will be your username]: * Work phone: *

Specialty: *

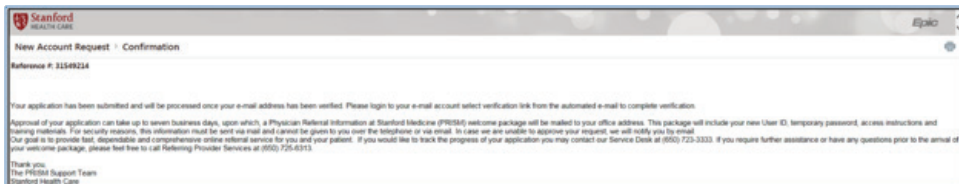
Associated Providers: List the providers this user works with

Provider name: *

Once all required fields are completed, click Submit Request to complete this task.

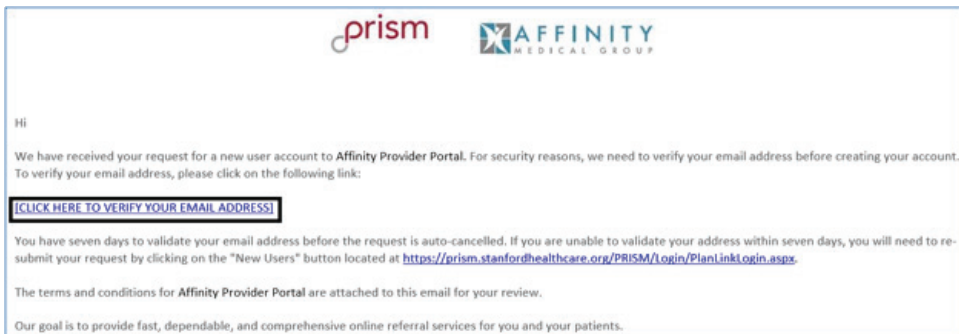


Once the new user application has been submitted, you will receive a confirmation message with a Reference number.



The new user will also receive a verification email to the email address provided in the application.

- The new user must click on the link to verify the email address



Lastly, the new user will receive a confirmation message stating that the application was submitted successfully.

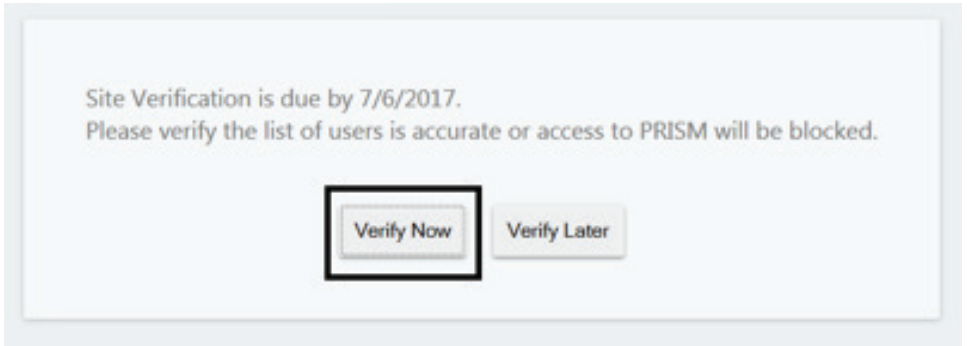
- A confirmation email will be sent to the email address provided in the application.

Once your application has been processed, the new user will receive another email which will have his/her:

- User name
- Temporary password

Site Verification

If you are an administrator, you will be required to periodically verify your office's users. Upon login, you will see this message:



Once you click Verify Now, you'll see a list of your office's current users.

Utilities > Manage My Clinic

My Clinic Requests **Site Verification**

User Group: All Groups

Active?	Name	Login ID	Provider?	Last Login
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Nurse, Susie	s0060739	Yes	2/3/2014 9:35 AM
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Billar, Fred	s0025459	Yes	

Yes and No will appear under the Active? column. All users will be marked "Yes" by default.

- If anyone has left your office, click the No box next to that person's name. That person's account will then be deactivated.

Once you have reviewed the list, check the Acknowledgment box then click Verify.

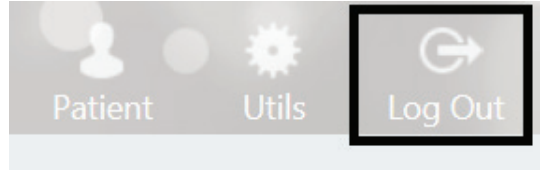
Acknowledgement

I hereby acknowledge, affirm, and agree that the user information stated here is true, correct, and complete to the best of my knowledge and belief and is furnished in good faith.

Verify Cancel

Logging Out

At the end of your session, always click the Log Out button to ensure your workspace is secure.



Help

For Affinity Provider Portal - PRISM login or technical issues, call:

(650) 723-3333

For eligibility, claims or Referral issues, call:

(800) 615-0261

Notes:

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Last Update 20180813 Version 3