

# Affinity Provider Portal - PRISM

## User Guide



Affinity Medical Group  
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Oakland, California 94612

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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

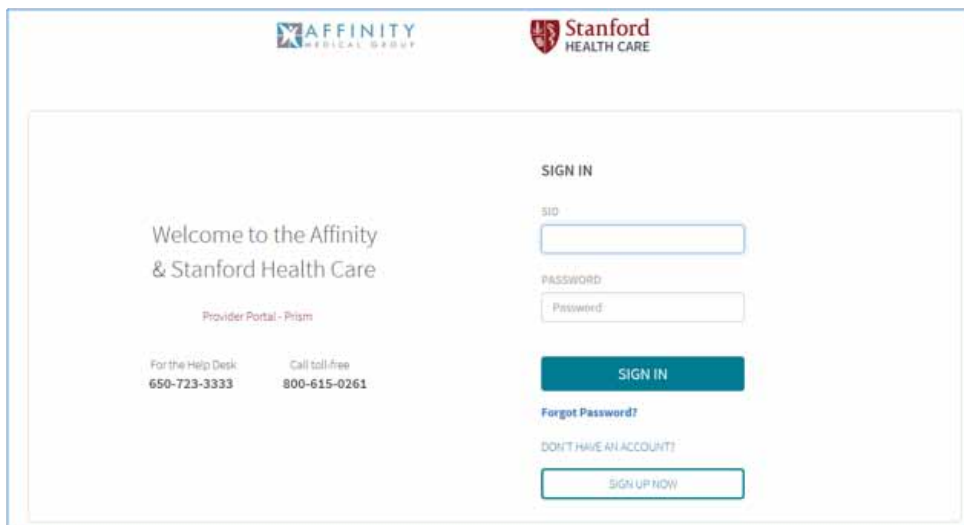
The applications can be accessed using Internet Explorer 11, Firefox 45 or later, or Chrome 50 or later, on the Windows operating system. Users of the Macintosh operating system can use Firefox 45 or later, Chrome 50 or later, or Safari 9 or later to access the applications.

The Affinity Provider Portal - PRISM can also be accessed by iPads running iOS9 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 authorization questions



The screenshot shows the login interface for the Affinity & Stanford Health Care Provider Portal. At the top, the Affinity Medical Group and Stanford Health Care logos are displayed. The main heading reads "Welcome to the Affinity & Stanford Health Care". Below this, it specifies "Provider Portal - Prism". On the left, contact information for the Help Desk (650-723-3333) and a toll-free number (800-615-0261) is provided. On the right, the "SIGN IN" section includes input fields for "SID" and "PASSWORD", a "SIGN IN" button, a "Forgot Password?" link, and a "DON'T HAVE AN ACCOUNT?" section with a "SIGN UP NOW" button.

**AFFINITY**  
MEDICAL GROUP

**Stanford**  
HEALTH CARE

Welcome to the Affinity  
& Stanford Health Care

Provider Portal - Prism

For the Help Desk: 650-723-3333  
Call toll-free: 800-615-0261

**SIGN IN**

SID

PASSWORD

**SIGN IN**

[Forgot Password?](#)

DON'T HAVE AN ACCOUNT?

[SIGN UP NOW](#)

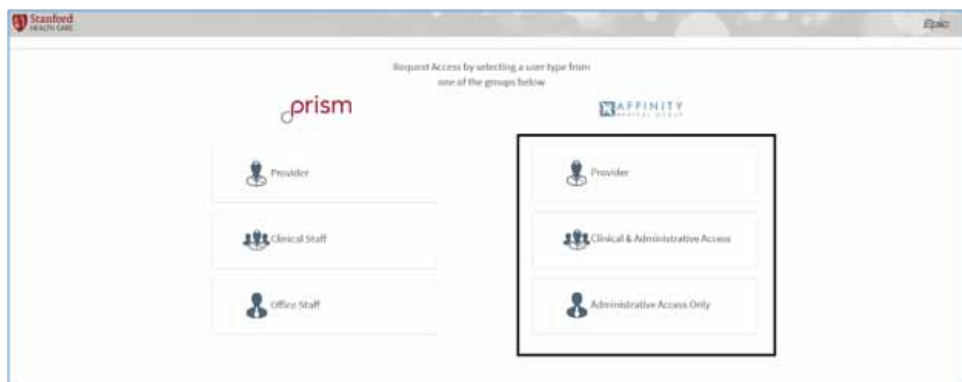
## Register for a New Account

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

DON'T HAVE AN ACCOUNT?

SIGN UP NOW

You will be directed here where you will make a selection from the right side of the screen.



- 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.

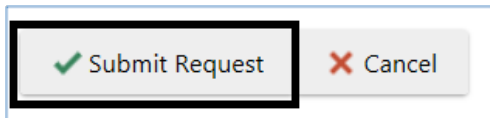
#### Are you an Administrator?

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.

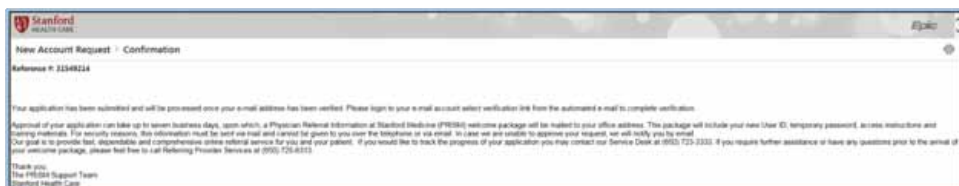
☒ Yes, I'm an administrator



Once you complete the application, click Submit Request.

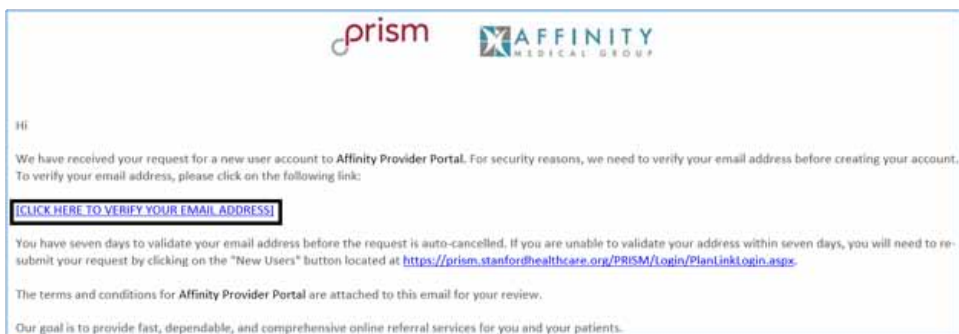


Once your application has been submitted, you will receive a confirmation message with a Reference number.



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



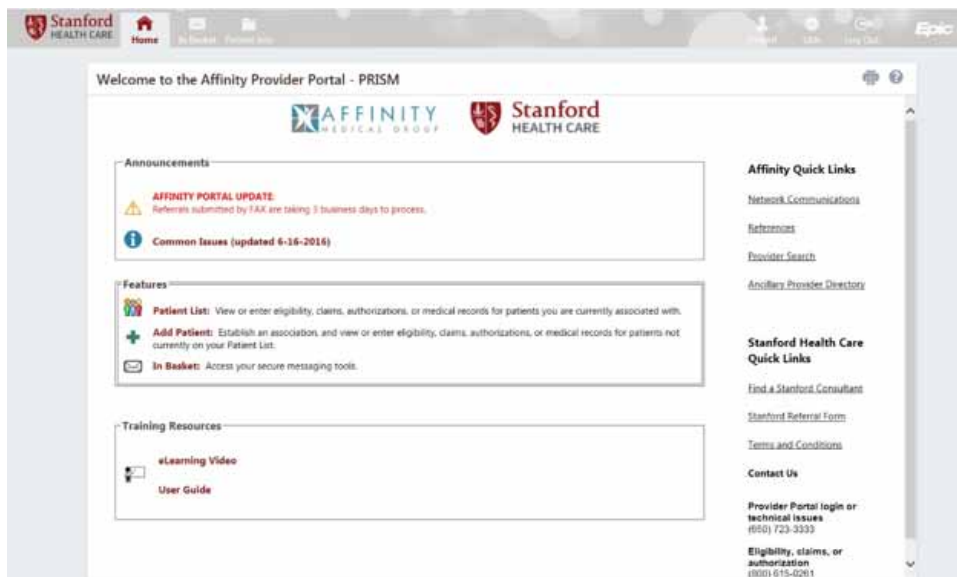
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Lastly, you will receive a confirmation message stating that the application was submitted successfully.

- 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](#)

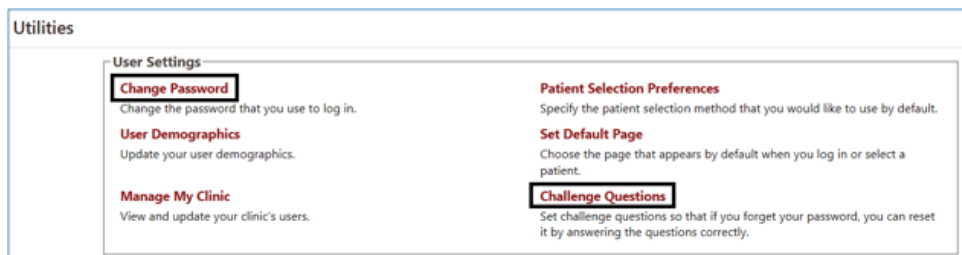
[Terms and Conditions](#)

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.



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.

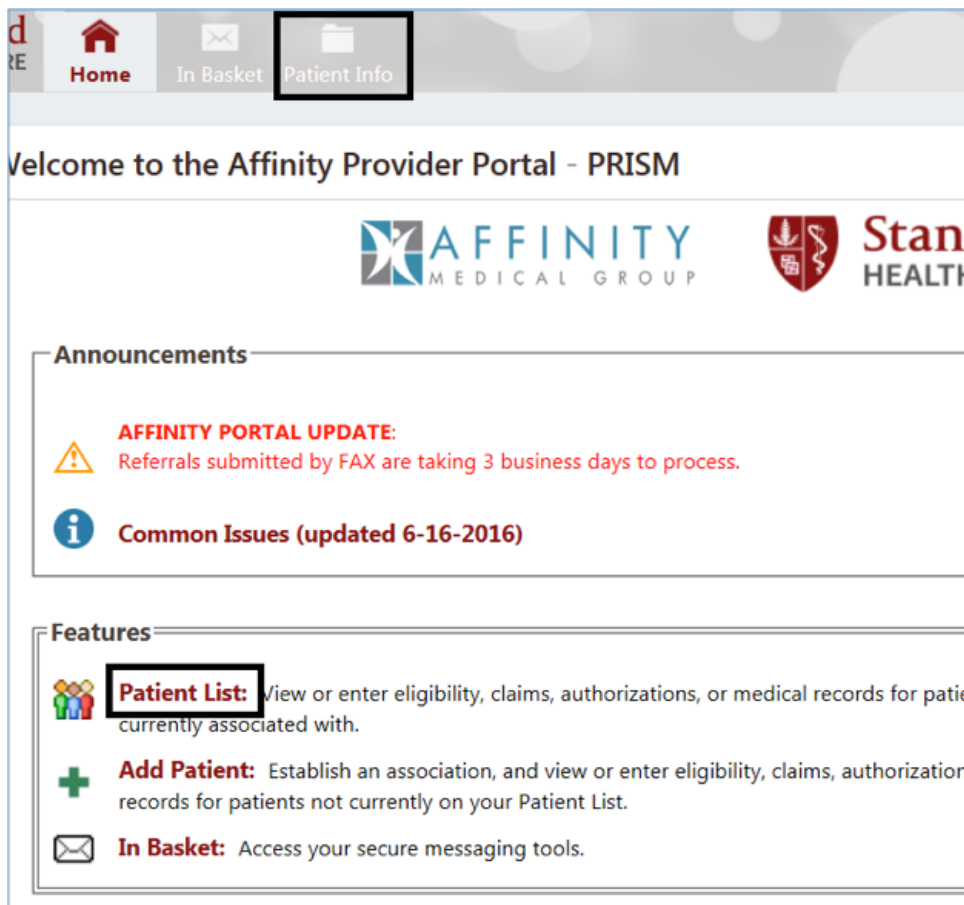
## Patient Lookup

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 authorization 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:  [Additional search criteria](#)

**My Patients** Recent

RODRIGUEZ, JOSE    **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** **YOUNG, MAY Y**

Patient Name	MRN	Sex	Birth Date	Age	Street Address
<b>TAPESTRYMAR, LEO</b>	65000242	M	1/1/1965	52 Y	1840 Embarcadero Street

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

**Patient Search**

Search My Patients

Name or MRN:  [Additional search criteria](#)

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

**Patient Search**

Search My Patients

Name or MRN:

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


Search Results

Name or MRN: **tape**  
 1 patient matches the search criteria above.

%	Patient Name	MRN	Sex	Birth Date
<input checked="" type="radio"/> 99	<a href="#">TAPESTRYMAR, LEO</a>	65000242	M	1/1/1965


**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  
**Tapestrymar, Leo**  
 Male 52 Y (1/1/1965)  
 PCP: CARPER, JOHN KORKENDAL \*  
 MRN: 65000242  
 Access From: EAST BAY RETINA CONSULTANTS  
 Access Ends: 4/27/2018  
 Close patient record

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

**Coverages & Benefits**  
 Coverages on File  
 \* View available coverages as of 5/8/2017 View all coverages on file  

Payor/Plan	Eff. Date	Term. Date	Member ID	Employer Group	Filing
MC STANFORD ADVANTAGE SENIOR AFMG / MC MA S4001 AFMG PLATINUM	3/1/2017		12345678	MC MA S4001 AFMG PLATINUM	1

- 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


**Search Results**

Name (Last, First): tapestrymar, leo  
 DOB (MM/DD/... 1/1/1965      Stanford MRN 65000242  
 1 patient matches the search criteria above.

Patient Name ▼	MRN	Sex	Birth Date	Age	Street Address	City	State	Zip	PCP	Multiple Birth?
<input checked="" type="radio"/> TAPESTRYMAR,LEO	65000242	M	1/1/1965	52 yrs	1840 Embarcadero Street	Palo Alto	CA	94331	Carper, John Kirkendall, 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.

Patient Select Confirmation

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
Tapestry, Leo	Male	1/1/1965	XXX-XX-XXXX

Patient Demographics

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

Patient Employment

Status	Employer
Full Time	Stanford

Accept

Cancel

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

Select an encounter: No encounter selected

Male, 52 Y (1/1/1965)

PCP: CARPER, JOHN KORKENDAL\*  
MIDN: 65000242

Access From: EAST BAY RETINA CONSULTANTS  
Access Ends: 4/2/2019

Close patient record

Tapestry, Leo

Clinical Review

Member Profile

Coverages & Benefits

Demographics

Authorizations

Claims

Affinity Help Form

Coverages & Benefits

Coverages on File

Benefits Summary

Coverage Detail Report

View available coverages as of 5/8/2017

View all coverages on file

Payer/Plan	Eff. Date	Term. Date	Member ID	Employer Group	Filing
MC STANFORD ADVANTAGE SENIOR AFMG / MC MA SA003 AFMG PLATINUM	3/1/2017		12345678	MC MA SA001 AFMG PLATINUM	1

- Click Close Patient Record to return to the Home screen

Close patient record

Affinity Provider Portal - PRISM User Guide

Page 15

## 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)

Select an encounter: No encounter selected		
<b>Tapestrymar, Leo</b>	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
- Authorizations
- Claims
- Affinity Help Form

Clinical Review
<b>Member Profile</b> <b>Coverages &amp; Benefits</b> Demographics
Authorizations
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			<input checked="" type="radio"/> 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
<input checked="" type="radio"/> 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 ava

 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	

Within the Benefit Summary, you can view:

- Authorization 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
 TAFESTRYMAR,LEO [65000342]

<b>Eligibility</b>			
Employer Group	Benefit Plan	Carrier	Payor
MAC MA SA001 AFMG PLATINUM [38000001]	MAC MA SA001 AFMG PLATINUM [38000001]	SA [108]	MC STANFORD ADVANTAGE SENIOR AFMG [38000000]
Service Area	Networks	Primary Location	PCP
	SA NETWORK		CARPER, JOHN KIRKENDALL
<b>Coverage Information</b>			
Covered Flag	Type	Effective From	Effective To
Yes	Managed Care	05/01/2017	
Relationship to Subscriber	Member Number	Patient Application Date	Patient Late Enrollment
Self - Self	12345678		No
<b>Subscriber Level Information</b>			
Subscriber ID	Subscriber Name	Employment Date	COBRA Status
12345678	TAFESTRYMAR,LEO		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	MIDN	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	650-555-5555 (Home)
Palo Alto CA 94331	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
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## Authorization Entry

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

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

There are three Authorization options:

- New Authorization
- Auths by Member
- Auths by Provider

### Authorizations

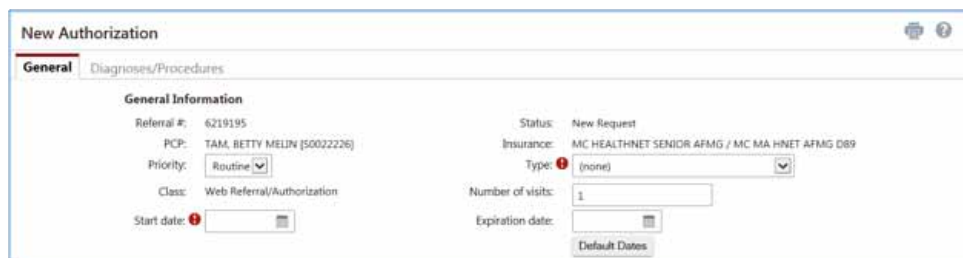
#### New Authorization

Auths by Member

Auths by Provider

Click New Authorization in the navigator.

- Enter a Priority for this Authorization
- Required fields
  - Type
  - Start Date
    - Click the Default Dates button to automatically insert a 120 day time range, beginning with today's date



**New Authorization**

**General** | Diagnoses/Procedures

**General Information**

Referral #: 6219195

PCP: TAM, BETTY MELIN (50022226)

Priority: Routine

Class: Web Referral/Authorization

Start date: [Calendar Icon]

Status: New Request

Insurance: MC HEALTHNET SENIOR AFMG / MC MA HNET AFMG DB9

Type: (none)

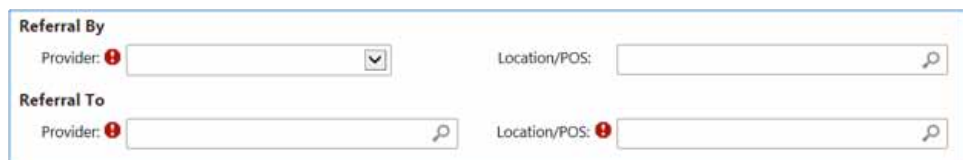
Number of visits: 1

Expiration date: [Calendar Icon]

Default Dates

**Note:** If an Inpatient type is selected, a required Admission Date field will appear on the Diagnoses/Procedures tab

In the Referred By section, use the drop down arrow to select the Referral By Provider which is a list of providers specific to your Tax ID.



**Referral By**

Provider: [Dropdown Menu]

Location/POS: [Search Field]



**Referral To**



Provider: [Search Field]

Location/POS: [Search Field]

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:   
 Provider Specialty:    
 Location/Place of Service:    
 ZIP:



Language:    
 Gender:    
 City:

Once you have located the correct provider:

- Click the red provider name link to select this provider

**Provider Search**  

**Search Criteria**  
 Name:    
 Provider Specialty:    
 Location/Place of Service:    
 ZIP:





Language:    
 Gender:    
 City:

**Search Results: 6 providers found**

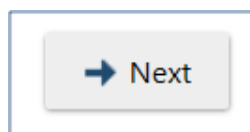
(Next Level) (All In-Net Levels) (All Providers)

<input type="radio"/>	Richard Marc Sankary, MD	In_Network	AMG - PINOLE						Male
								Sleep Medicine	
								Pulmonary Disease, Pulmonary Medicine, Sleep Medicine	
<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:

<b>Referral By</b>	
Provider: One, Testprovider [50089786] 	Location/POS: <input type="text"/> 
<b>Referral To</b>	
Provider: SANKARY, RICHARD MARC [50029825] 	Location/POS: ALLIANCE MEDICAL GROUP - PINOLE (AMP) 

On the Authorization, 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”

General

**Diagnoses/Procedures**

**Diagnoses**

Diagnoses (coded):  

**Procedures**

Procedures (coded):  

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 Authorization

Referral by diagnoses: <input type="text" value="hypertension"/> <input type="button" value="Search"/>		
<b>Search Matches:</b>		
%	Name	ICD-10 Codes
87.41%	<a href="#">Asymptomatic hypertensive urgency</a>	I16.0
87.41%	<a href="#">Benign hypertensive cardiomyopathy with heart failure (CMS-HCC)</a>	I11.0
87.41%	<a href="#">Benign hypertensive cardiomyopathy, without heart failure</a>	I11.9
87.41%	<a href="#">Benign hypertensive heart and kidney disease</a>	I13.10, N18.9
87.41%	<a href="#">Benign hypertensive heart and kidney disease with CHF and stage 1 chronic kidney disease (CMS-HCC)</a>	I13.0, N18.1, I50.9

The selected diagnosis is now attached to the Authorization.

- To enter additional diagnoses, repeat the search process.

General
**Diagnoses/Procedures**

**Diagnoses**  
 Diagnoses (coded):    

Diagnoses  
Benign hypertensive cardiomyopathy with heart failure (CMS-HCC) [1937354] Remove

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):   

Multiple results may be returned based on your search.

- Click the red name link to select

Referral by procedures:  Search

**Search Matches:**

%	ID	Name	Group	Type
87.41%	NUR30	<a href="#">CARDIAC EVENT MONITOR PLACEMENT (RN COMMUNICATION) (aka EKG)</a>		Nursing
87.41%	EKG29	<a href="#">CARDIAC PATCH RHYTHM MONITOR (aka EKG)</a>		ECG
87.41%	DEVIWR	<a href="#">DEVICE INTERROGATION W/ REPORT (aka EKG)</a>		ECG
87.41%	EKG5	<a href="#">ECG 12-LEAD (aka EKG)</a>		ECG
87.41%	EKG8	<a href="#">ECG 24HR BP MONITOR (aka EKG)</a>		ECG

Once the Procedure has been selected, you will be able to select the quantity for that procedure or equipment.

**Procedures**  
 Procedures (coded):    


Procedures	Quantity	
CARDIAC PATCH RHYTHM MONITOR [EKG29]	<input type="text" value="1"/>	<input type="button" value="Remove"/>

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

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

(none)  
 MC REF - General  
 MC REF - Language Assistance  
 MC REF - Clinical Information Submission

- Note summary
- Note type

**Notes**  
 Note type:    
 Note summary:   
 Note:



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

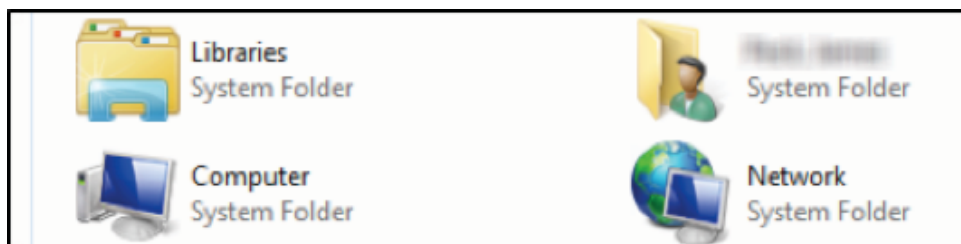
- Click Add File

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




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

 Back     Submit     Cancel Request

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

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

**Authorizations by Member** > **Authorization Details**

 Add Note/Attachment

### Authorization

Referral # 8891

#### Patient Information

Patient Name Mercury, Jane	Sex Female	DOB 6/25/1990	SSN
-------------------------------	---------------	------------------	-----

#### Referral Status Info

##### Referral Status

Status Pending Review	Decision Date 5/24/17	Expiration Date 9/21/17
--------------------------	--------------------------	----------------------------

#### Basic Referral Info

##### Referral Info

Patient	Referral #	Referral Date	Priority	Type
MERCURY, JANE	8891	05/24/2017	Routine	Office (Outpatient)

##### Referred By

Referred By One, Testprovider	Source Loc/POS none
----------------------------------	------------------------

##### Referred To

To Provider Sankary, Richard Marc	To Loc/POS ALLIANCE MEDICAL GROUP - PINOLE (AMP)	Specialty none	Reason PlantLink Referral (DO NOT REMOVE)
--------------------------------------	---	-------------------	--

Click Close patient record to close the Authorization Details page.

**Close patient record**

## Authorization Review

To view Authorizations for a member, click the Authorization by Member option in the navigator.

- Click the red Patient Name link to select the patient

Clinical Review  
Member Profile  
**Authorizations**  
New Authorization  
**Auths by Member**  
Auths by Provider

### Patient Search

 Search My Patients

Name or MRN:   
Additional search criteria

My Patients **Recent**

Patient Name	MRN
<b>TAPESTRYMAR,LEO</b>	65000242

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

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

## Authorizations by Member

View Option: Show Active authorizations

Click on the authorization ID to view more information

**Search Results: 4 authorizations found**

ID	Payor	Au
<b>5759351</b>	MC STANFORD ADVANTAGE SENIOR AFMG	BR A

To view an Authorization by Provider, click the Auths by Provider option in the Navigator.

## Authorizations

New Authorization

Auths by Member

**Auths by Provider**

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

### Authorizations by Provider

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

☐ Incoming
 ☒ Outgoing

**Provider**

- ☒ Alper, Michael Robert, MD
- ☐ Apte, Nikhil Manohar, MD
- ☐ Balasubramanian, Sangeetha,...
- ☐ Boparai, Vandana, MD
- ☐ Broad, William Gowing, MD
- ☐ Chee, David Zaw Lin, MD
- ☐ Chirugi, Valerie Ann, MD
- ☐ Clutter, Dana, MD
- ☐ Dham, Shefali, MD
- ☐ Eaton, Scott David, MD
- ☐ Entwisle, Christopher Robert, MD
- ☐ Estakhri, Mary Elizabeth, MD
- ☐ Hu, Charlene, MD
- ☐ Joshi, Nitin Dilip, MD
- ☐ Select all

1/49

**Referral Status**

- ☒ Aetna Denied
- ☒ Authorized Pending IV
- ☒ Authorized Pending LOA
- ☒ Authorized
- ☒ Canceled
- ☒ Select all

59/59

**Creation Dates**

From: 11/8/2016

To: 5/8/2017

**Scheduling Status**

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

25/25

Results will display based on search criteria used.

- Click the red Referral ID number to view Authorization detail

## Authorizations by Provider

 **Edit search criteria**

Click on the authorization ID to view more information about that

### Search Results: 37 authorizations found

Referral ID	Patient Name	Status	Sched Status
<b>5759351</b>	TAPESTRYMAR,LEO	Authorized	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 Authorization



## 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	⏮ ⏪	Pag
Patient Name	MRN	
<b>TAPESTRYMAR,LEO</b>	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: <span>Juno, Jesse Jeno, MD [50195466]</span>			
Claim #	Svc Frm Dt	Clin 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 Jenio
-------------------

### 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 Jenó, MD

Service Dates: 1/1/2017 To date Search

Claim #	Member Name	Vendor
<a href="#">2756537</a>	TAPESTRYMAR,LEO	EAST BAY RETINA CONSULTANTS
<a href="#">2756536</a>	TAPESTRYMAR,LEO	EAST BAY RETINA CONSULTANTS

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



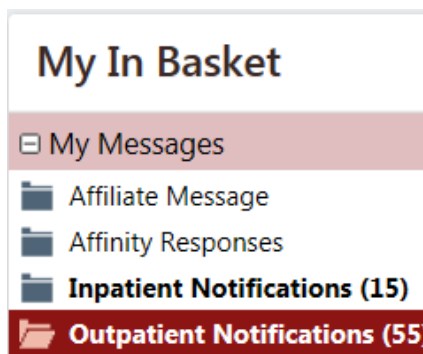
- Or, click the In Basket link in the Features section of your home page

**Features**

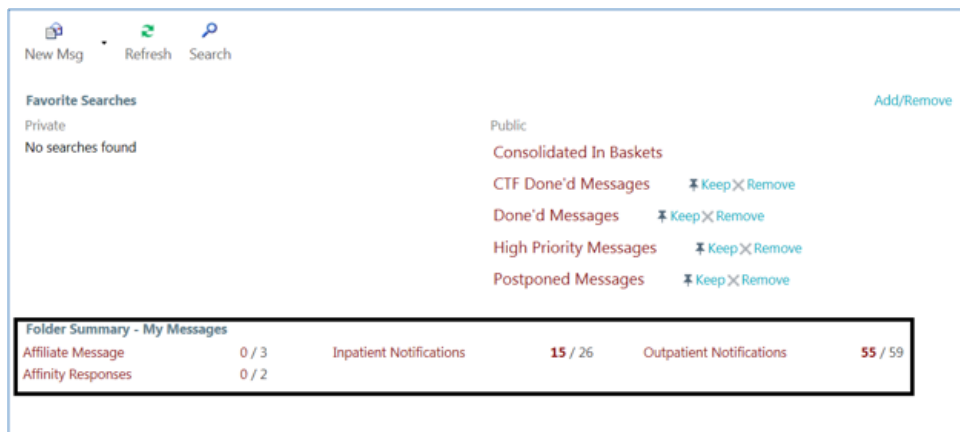
- 
**Patient List:** View or enter eligibility, claims, authorizations, or medical records for patients you are currently associated with.
- 
**Add Patient:** Establish an association, and view or enter eligibility, claims, authorizations, or medical records for patients not currently on your Patient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

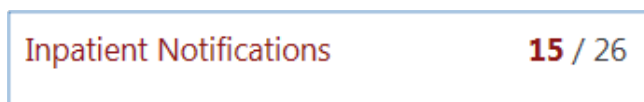


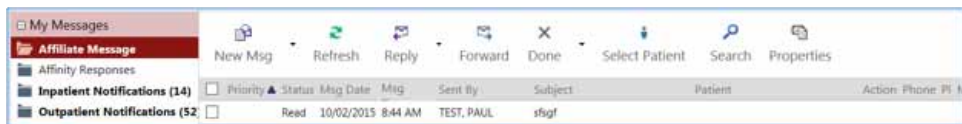
- Or click the corresponding folder as pictured below



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.





**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.

	<input type="checkbox"/>	Priority ▲	Status	Patient	Event Type	Admission Date	Discharge Date	Enc Department
Affinity Responses (32)	<input type="checkbox"/>		Read	Test, Lauren	ADT Admission	12/20/2016	12/20/2016	B2
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/authorization request that you submitted has been approved.

- This Event Type is called Referral Authorized.

Or if a referral/authorization 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



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

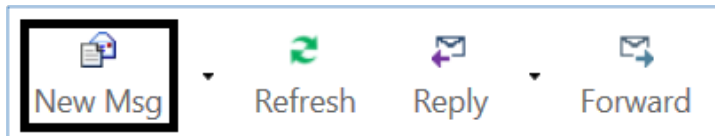
Once you've read the message, click the Done button to remove it from your In Basket.

- 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.

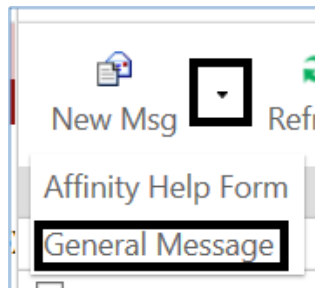
<input type="checkbox"/>	Priority ▲	Status	Msg Date	Msg Time	Sent By	Subject
<input type="checkbox"/>		Read	10/02/2015	8:44 AM	TEST, PAUL	sfsgf
<input checked="" type="checkbox"/>		Pend	04/21/2016	9:29 AM	SHAIKH, SARFRAZ	Pt Seen Today
<input type="checkbox"/>		Read	08/31/2016	4:20 AM	WOODBURY, SAM	RE: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

Subject:

Patient:  Use Abelgas, Virgilio

Phone:  ☐ Call Me

Note: ⓘ

**Priority**

☐ High

☒ Routine

☐ Low



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



Send Message



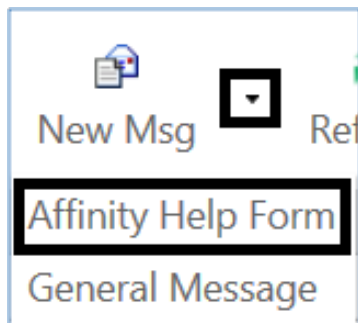
Cancel

## Affinity Help Form

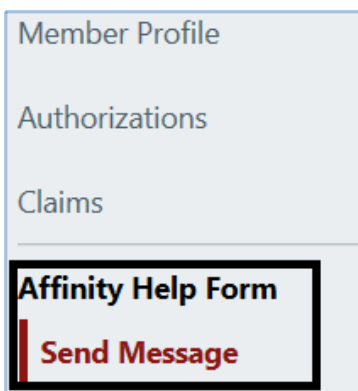
Affinity Help Form is another type of messaging within the portal. Help Forms can be sent from the home page, but can also be sent from within the patient record and are directed to Affinity Provider Services.

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:

**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

**Priority**

☐ High
 ☒ Routine
 ☐ Low

**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

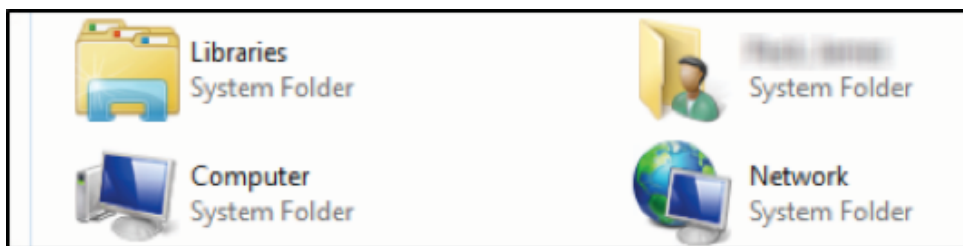
Documents:

**Add File**

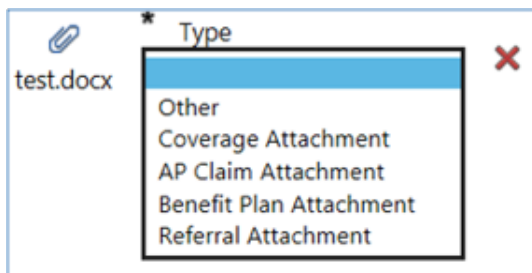
20.0 MB total allowed

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

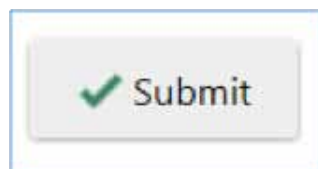


- Choose the Type of attachment



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.

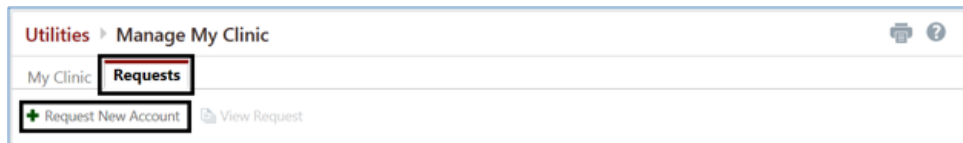
**User Demographics**  
 Update your user demographics.

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

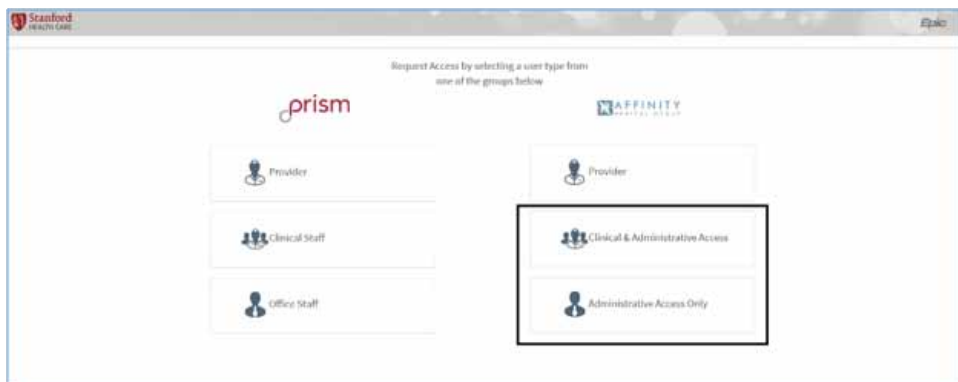
Within the Manage My Clinic you are able to:

- Create and Edit Users
- Deactivate Users

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



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



Request Access by selecting a user type from one of the groups below

**prism**

**AFFINITY**  
MEDICAL GROUP

**Provider**

**Clinical Staff**

**Office Staff**

**Provider**

**Clinical & Administrative Access**

**Administrative Access Only**

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: \*

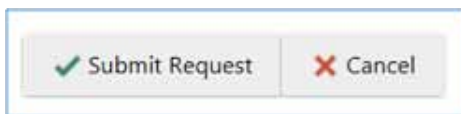
Email [this will be your username]: \*  Work phone: \*

Specialty: \*

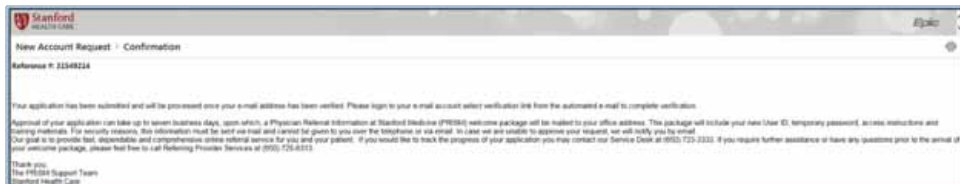
**Associated Providers: List the providers this user works with**

Provider name: \*

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

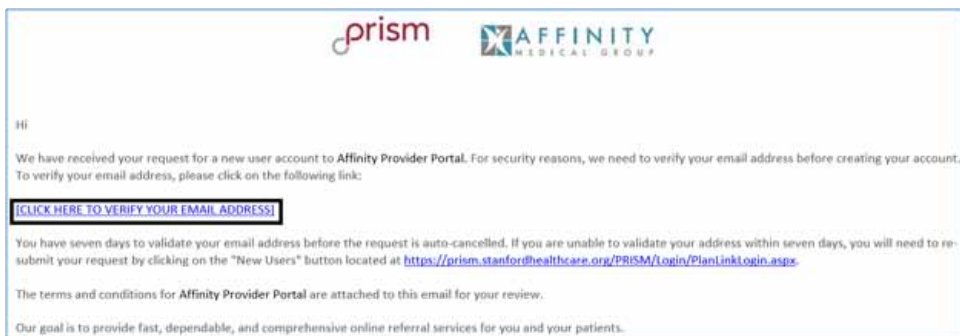


Once the new user application has been submitted, you will receive a confirmation message with a Reference number.



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 <b>Site Verification</b>				
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**

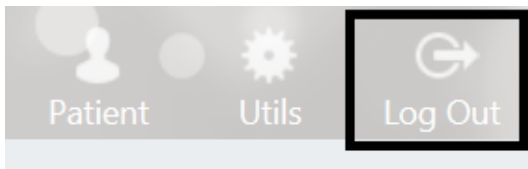
☐ I hereby acknowledge, affirm, and agree that the user information stated here is true, correct, and complete to the best of my knowledge and belief and is furnished in good faith.

**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 authorization issues, call:**

(800) 615-0261

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# Notes:



Last Update 20170614