



firstCPO Agency User's Guide, June 2013 Edition

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Additional information about firstCPO and HEALTHCAREfirst, Inc. can be obtained by contacting HEALTHCAREfirst Sales at 800-841-6095.

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Overview

firstCPO is the industry's leading Home Health Care management software improving efficiency, reimbursement and outcomes for agencies nationwide by creating a direct, electronic connection between physicians and caregivers. By bringing key processes online, *firstCPO* strengthens the physician/agency relationship by streamlining communications, giving physicians access to common treatment, eliminating paper, reducing errors, and substantially reducing administration costs of these communications.

firstCPO is a web service provided to physicians and agencies with no additional software or hardware to purchase. It allows physicians and agencies to:

- Quickly and easily capture Care Plan Oversight activity for billing.
- Receive, send, sign, and track secure documents electronically to and from agencies completely online in one centralized location.
- Reduce time and resources spent delivering and managing paper documents.
- Shorten turnaround times for patient care activities, orders, and care plans while integrating Medicare paperless mandates and creating an efficient office environment.

Easy to Use

Our web based, HIPAA compliant system provides the ability to email, send documents, and access important patient information quickly and securely. *firstCPO* can be accessed from any internet computer, iPhone, or iPad. *firstCPO* does not require download or installation of any software, making it easy to use.

Focus on Patients

firstCPO allows agencies and physician's to put patients before paperwork. *firstCPO*'s technology provides the means for physician's to respond to messages or sign documents with just a few simple clicks, and takes the hassle out of billing Care Plan Oversight as entries are automatically captured when documents are signed. The reports allow billers to quickly see which patients are eligible, ensuring accurate and successful reimbursements every time.

Requirements

In addition to Internet access, *firstCPO* requires a workstation with a current Web browser. Supported browsers include:

- Internet Explorer
- Safari
- Google Chrome
- Mozilla
- Firefox

Timing Out

After 20 minutes of inactivity on the Web site the user will have to log back in to continue working. When the system times out the user will be directed to the log in screen and will need to type in the **Username** and **Password**.

Account Setup

The *firstCPO* website is located at <https://www.firstcpo.com/portal>. Agencies can register for a new account by accessing the web page. HEALTHCARE*first* will not need to set up a new account for the agency.

Registration

- 1 Access the *firstCPO* website at <https://www.firstcpo.com/portal> shown below.



- 2 Click the **Agency Registration** button. The following screen will appear.

Organization Information

Organization Name

Organization Type

Default Timezone

Administrative Contact Information

Name

Phone Number

Email Address

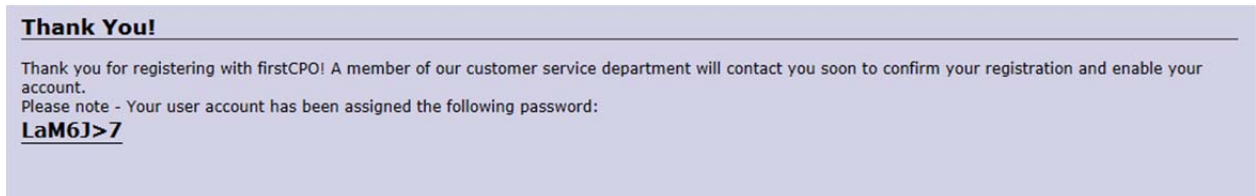
Technical Contact Information

Name

Phone Number

Email Address

- 3 Enter information in all fields in the Organization Information, First Location Information, and Primary User Account sections. *firstCPO* will not register an account if all fields are not filled out. (Note: the Location information will contain information of the physician, Location Name should be the physician's name.)
- 4 Click **Save**.
- 5 The following message will appear including a temporary password to be used for the first login.



- 6 After registration the user will receive an email message similar to the following.

From: noreply@firstcpo.com [<mailto:noreply@firstcpo.com>]
Sent: Tuesday, March 13, 2012 11:04 AM
To: Support-firstCPO; Implementation Group
Subject: firstCPO: New organization

This is a system-generated message to notify you that a new organization has been added to the firstCPO portal. This organization **has not** been automatically activated.

Name: Health Department of Northwest Michigan.
Type: Agency.
Admin Email: w.smith@nwhealth.org.

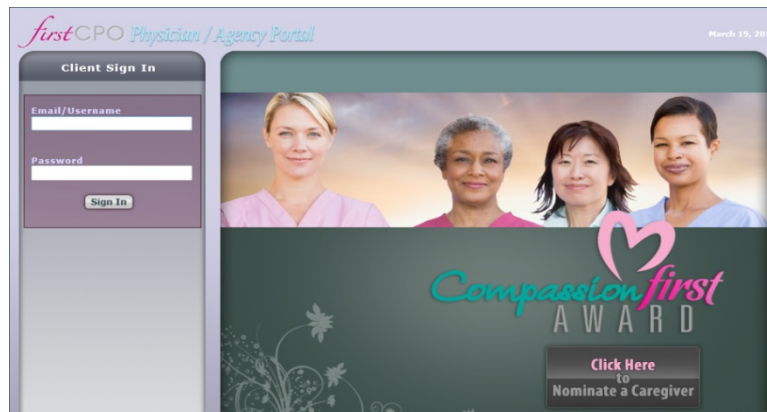
firstCPO Login Information

After registration:

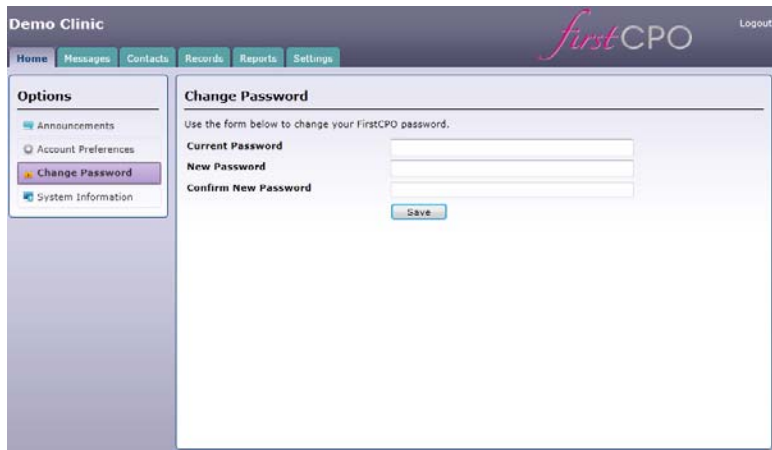
- 1 Copy the temporary **Password** from the message that appeared on the screen after registration.
- 2 Hit the **Back Arrow** on the internet browser to connect to the main *firstCPO* page shown below.



- 3 Click **Client Login**. The following login screen will appear.



- 4 Enter the **Email/Username** that you registered or were registered with.
- 5 Paste the temporary **Password** that was assigned after registration.
- 6 Click **Sign In**.
- 7 After signing in click the **HOME** tab and **Change Password** option.



- 8 Enter the **Current Password**, which will be the temporary password that was assigned by *firstCPO* upon registration.
- 9 Enter a **New Password**. The new password must be 8 characters minimum and include a capital letter, lower case letter, numeric value, and a special character. Example: Corey10\$

Home Tab

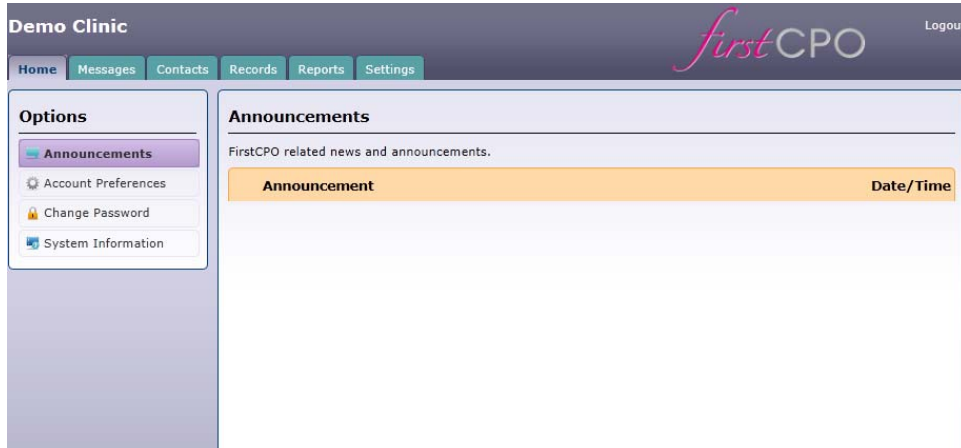
The **Home** tab contains four options:

- Announcements
- Account Preferences
- Change Password
- System Information

Click on the applicable **Option** on the Home tab to access each function.

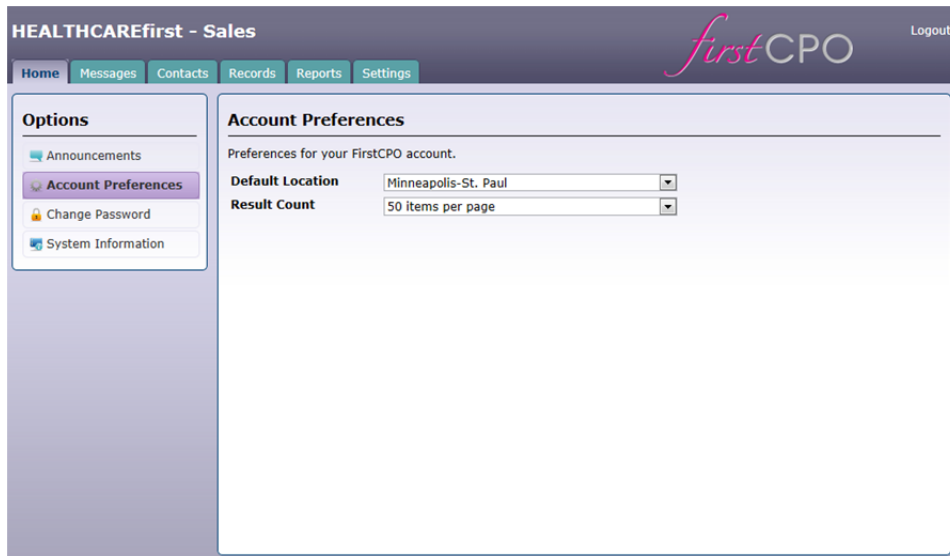
Announcements

The **Announcements** option will contain any *firstCPO* related news and announcements. Click each announcement to view detailed information.



Account Preferences

The **Account Preferences** option allows the user to change the **Default Location** if the agency utilizes more than one office, and the **Result Count** which determines how many items are displayed per page. To change the account preferences click on the drop-down menu and select the applicable option.



Change Password

The **Change Password** option allows the user to change the password. To change the password:

- 1 Enter the **Current Password**.
- 2 Enter a **New Password**.
- 3 Enter the new password again in **Confirm New Password**.
- 4 Click **Save**.

The screenshot shows the 'Change Password' form in the HEALTHCAREfirst - Sales client portal. The page has a dark header with the 'firstCPO' logo and a 'Logout' link. Below the header is a navigation bar with tabs for Home, Messages, Contacts, Records, Reports, and Settings. On the left, there is an 'Options' sidebar with links for Announcements, Account Preferences, Change Password (highlighted), and System Information. The main content area is titled 'Change Password' and contains the following text: 'Use the form below to change your FirstCPO password.' Below this text are three input fields: 'Current Password', 'New Password', and 'Confirm New Password'. A 'Save' button is located below the 'Confirm New Password' field.

System Information

The **System Information** option contains technical information about the system that may be requested during a Support call.

The screenshot shows the 'System Information' page in the HEALTHCAREfirst - Sales client portal. The page has the same header and navigation as the previous screenshot. The 'Options' sidebar on the left has 'System Information' highlighted. The main content area is titled 'System Information' and contains the following text: 'Technical information that may be requested / used during a support call with HEALTHCAREfirst.' Below this text is a table of system information:

Username	hcfsales@healthcarefirst.com
Organization	HEALTHCAREfirst - Sales
Host Address	10.15.3.88
User Agent	Mozilla/5.0 (compatible; MSIE 9.0; Windows NT 6.1; WOW64; Trident/5.0; MAAU)
firstCPO Version	3.0.4216.28913

Messages Tab

firstCPO includes an email system in the **Messages** tab which works like most other email systems. New messages will default to the **Inbox**. After a message has been viewed it can be archived for future reference or left it in the Inbox.

Compose Message

There are two types of messages that can be composed.

- **Secure Mail Message** — Use if there is no document attached to the message.
- **Secure Record Message** — Use if a document is attached to the message.

The screenshot shows the 'Compose a New Message' interface in the firstCPO system. The form is titled 'Compose a New Message' and includes a 'Send' and 'Cancel' button at the top. The form fields are as follows:

- Priority:** Normal Priority (dropdown menu)
- Request Read Receipt
- Type:** Secure Record Message (dropdown menu)
- From:** Derek Ross (dropdown menu)
- To:** Contacts (selected), Locations (radio button)
- Subject:** HEALTHCAREfirst - Baton Rouge (dropdown menu)
- Body:** Dr. Sales Team MD
Demo Clinic
Electronically signed by Dr. Sales Team MD 3/19/
- Patient Number:** (text field)
- Patient Name:** (text field)
- Date of Birth:** (text field) SSN: (text field)
- Admission:** New Admission (dropdown menu)
- Admission Number:** (text field)
- Admission Date:** (text field) Discharge Date: (text field)
- Primary Diagnosis:** (text field)
- Document:** From Queue (selected), Existing (radio button)
- Task:** For Approval / Signature (dropdown menu)

A callout box points to the Patient Number field with the text: "Patient information only has to be entered one time in firstCPO. The next time you send a message regarding a patient only the Patient Number will need to be entered. firstCPO will populate the rest of the fields except for Admission Number."



To compose a new message:

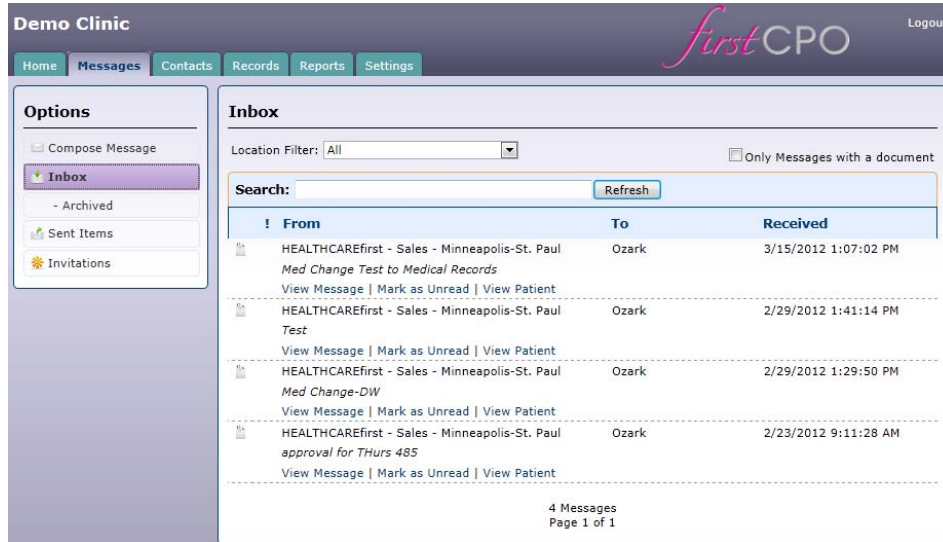
- 1 Click the **Messages** tab and the **Compose Message** option.
- 2 Select **Priority** from the drop-down menu.
- 3 Check **Request Read Receipt** if you need notification that the message was read.
- 4 Select **Type** from the drop-down menu (Secure Mail Message or Secure Record Message).
- 5 Click **Contacts** or **Locations** and select the correct option from the drop-down menu.
- 6 Enter a **Subject**.
- 7 Enter the **Body** of the message. (If you are composing a Secure Mail Message without an attached document, skip to step 15. If you are composing a Secure Record Message with an attached document continue with steps 8-15)
- 8 Enter the **Patient Number**.
- 9 If this is the first time you have entered a patient enter the **Patient Name** and **Date of Birth**.
- 10 Select the **Admission** type from the drop-down menu.

- 11 Enter the **Admission Date** and **Discharge Date**.
- 12 Enter the **Primary Diagnosis**.
- 13 Select if the **Document** is **From Queue** or **Existing**.
- 14 Select **Task** option from the drop-down menu. Task options include send for approval/signature or review only. Review only will allow the physician to view the document but will not allow the physician to approve or reject the attachment.
- 15 Click **Send**.

Inbox

An icon will appear to the left of each message:

-  — Denotes there is no document attached to the message.
-  — Denotes there is a document attached to the message.



Demo Clinic firstCPO Logout

Home Messages **Contacts** Records Reports Settings





Options

- Compose Message
- Inbox**
- Archived
- Sent Items
- Invitations

Inbox

Location Filter: All Only Messages with a document

Search: Refresh

From	To	Received
 HEALTHCAREfirst - Sales - Minneapolis-St. Paul <i>Med Change Test to Medical Records</i> View Message Mark as Unread View Patient	Ozark	3/15/2012 1:07:02 PM
 HEALTHCAREfirst - Sales - Minneapolis-St. Paul <i>Test</i> View Message Mark as Unread View Patient	Ozark	2/29/2012 1:41:14 PM
 HEALTHCAREfirst - Sales - Minneapolis-St. Paul <i>Med Change-DW</i> View Message Mark as Unread View Patient	Ozark	2/29/2012 1:29:50 PM
 HEALTHCAREfirst - Sales - Minneapolis-St. Paul <i>approval for THurs 485</i> View Message Mark as Unread View Patient	Ozark	2/23/2012 9:11:28 AM

4 Messages
Page 1 of 1

Location Filter

Messages can be filtered by location so that only messages from that location appear on the screen.

Search Feature

The Search feature allows the user to type in a keyword to search documents by. Enter the keyword in the Search box and click Refresh. All messages containing the keyword in the subject of the message will appear in the Inbox.

Only Messages With a Document Check Box

To view only messages that contain an attached document, check the **Only Messages with a document** box. Only messages that contain an attached document will appear in the Inbox.

View Message

The message will appear containing the message information, the attached document, and the applicable patient information. When you **View Message** you will have the option to **Reply**, **Reply and Approve**,

HEALTHCAREfirst - Sales *firstCPO* Logout

Home Messages Contacts Records Reports Settings

Options

- Compose Message
- Inbox**
- Archived
- Sent Items
- Invitations

Subject: RE: Paul Bunyan-Med Change

Reply Reply and Approve Reply and Reject Archive

Sent: 6/4/2013 2:09 PM

From Demo Clinic - Ozark
By Dr. Sales Team MD
To Minneapolis-St. Paul
Subject RE: Paul Bunyan-Med Change
Priority Normal
Attachment Hide Attachment

Physician Order

Patient Information

MRN	123456789
DOB	01/01/1950
MRN	123456789
DOB	01/01/1950

Physician Information

MRN	987654321
DOB	01/01/1950
MRN	987654321
DOB	01/01/1950

Order Details

Order ID	123456789
Order Date	6/4/2013
Order Time	10:09:08 AM

Reply and Reject, or **Archive** the message, as shown below.

The following screen will appear when you click **Reply**:

Options

- Compose Message
- Inbox**
- Archived
- Sent Items
- Invitations

Subject: RE: 485 GF Test

Send Cancel

To HEALTHCAREfirst - Sales - Minneapolis-St. Paul
Subject RE: 485 GF Test

Dr. Sales Team MD
Demo Clinic

Electronically signed by Dr. Sales Team MD 4/10/2012 10:09:08 AM

Please review.

Anne Wilde, RN
HEALTHCAREfirst - Sales

Send Cancel

To **Reply** to the message:

- 1 Type a message.
- 2 Click **Send**.

The following screen will appear when you click **Reply and Approve**:

Options

- Compose Message
- Inbox**
- Archived
- Sent Items
- Invitations

Subject: RE: Word to PDF Test

Send Cancel

To HEALTHCAREfirst - Sales - Minneapolis-St. Paul
Subject RE: Word to PDF Test

Dr. Sales Team MD
Demo Clinic
Electronically signed by Dr. Sales Team MD 4/10/2012 9:46:19 AM

Activity Type: Certification of Home Health Services

Start Time (UTC): 04/10/2012 09:45:11 AM

End Time (UTC): 04/10/2012 09:46:19 AM

Notes:

Anne Wilde, RN
HEALTHCAREfirst - Sales

Send Cancel

To **Reply and Approve** the message:

- 1 Type a message.
- 2 Select the appropriate **Activity Type**.
- 3 Select the appropriate **Start Time**.
- 4 Select the appropriate **End Time**.
- 5 Type any **Notes**.
- 6 Click **Send**.

The following screen will appear when you click **Reply and Reject**:

Options

- Compose Message
- Inbox**
- Archived
- Sent Items
- Invitations

Subject: RE: Word to PDF Test

Send Cancel

To HEALTHCAREfirst - Sales - Minneapolis-St. Paul
Subject RE: Word to PDF Test

Dr. Sales Team MD
Demo Clinic
Electronically signed by Dr. Sales Team MD 4/10/2012 9:47:26 AM

Rejection Type: Because I said so

Activity Type: Certification of Home Health Services

Start Time (UTC): 04/10/2012 09:47:23 AM

End Time (UTC): 04/10/2012 09:47:26 AM

Notes:

Anne Wilde, RN
HEALTHCAREfirst - Sales

Send Cancel

To **Reply and Reject** the message:

- 1 Type a message.
- 2 Select the appropriate Rejection Type.
- 3 Select the appropriate Activity Type.
- 4 Select the appropriate Start Time.
- 5 Select the appropriate End Time.
- 6 Type any Notes.
- 7 Click Send.

To save and archive the message click **Archive** on the message screen. The message will move to the Archived folder.

Mark As Unread

If a message in the Inbox has been viewed and the user desires for the message to appear as unread, click **Mark as Unread** under the applicable message. The message will appear with the first line in bold text as it originally appeared before the message was viewed.

View Patient

Information regarding the patient the message applies to can be viewed by clicking **View Patient** under the message. (See the Records section for detailed information.)

Archived

The Archived folder contains all messages that the user has selected to save and archive.

Sent Items

The Sent Items folder contains all messages that have been sent from the account the user is logged in as.

Invitations

The Invitations folder contains all messages inviting the user as a Contact.

Contacts

The **Contacts** tab is used to manage and view Physicians that are linked to your agency's *firstCPO* account.

Invite a New Contact

To verify if a physician is already registered for *firstCPO*:

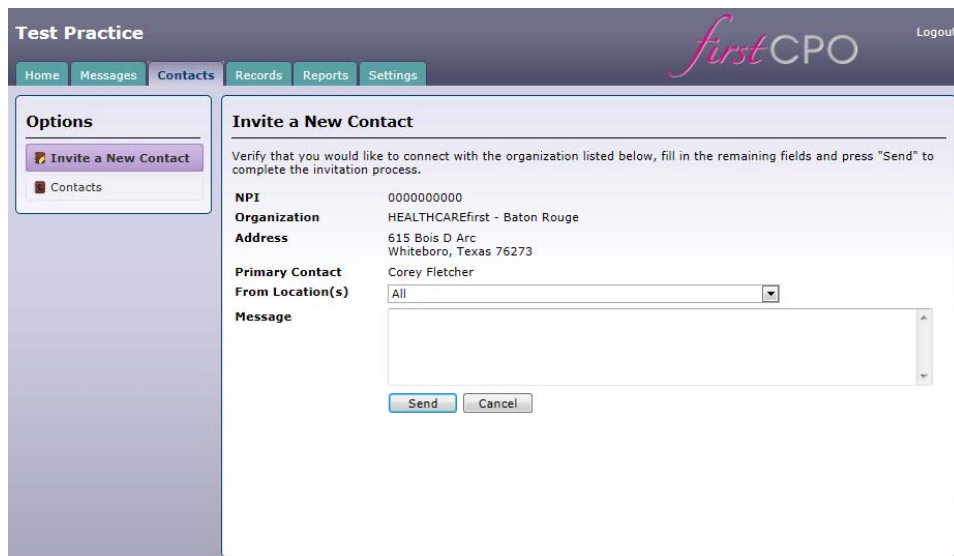
- 1 Click **Invite a New Contact**.
- 2 Enter the **NPI** number.
- 3 Click **Search**.

If the physician is already in the system they will appear on the screen as shown below.



From the above screen you can send an invitation. To send an invitation:

- 1 Click **Start Invitation**. The following screen will appear.



- 2 Select the office **From Location** to invite the contact from.
- 3 Enter the body of the **Message**.
- 4 Click **Send**.
- 5 After the physician accepts the invitation they will receive a link to register for *firstCPO*. Once the invitation has been accepted messages and documents can be sent to the physician.

If the physician is not in the system the following screen will appear.

The screenshot shows the 'Invite a New Contact' interface in the firstCPO system. The top navigation bar includes 'Demo Clinic', 'firstCPO', and 'Logout'. The main menu has 'Home', 'Messages', 'Contacts', 'Records', 'Reports', and 'Settings'. On the left, the 'Options' sidebar has 'Invite a New Contact' selected. The main form area has a title 'Invite a New Contact' and a sub-header 'Enter a National Provider ID in the form field below to search for new contacts.' The 'NPI' field contains '256312' and a 'Search' button is below it. A message below the search field reads: 'We were unable to locate an organization with the specified NPI. If you would like for firstCPO to send an invitation on your behalf, please specify a valid email address.' Below this message are fields for 'Email Address' and 'Message', and a 'Send' button. A callout box on the right points to the search field with the text: 'Message received if there is no existing match to the NPI'.

After searching for a provider number, if the physician is not already in the system an invitation to register can be sent.

To send an invitation:

- 1 Enter the physicians **Email Address** and the body of a **Message**.
- 2 Click **Send**.

After the physician accepts the invitation they will receive a link to register for *firstCPO*. Once they accept the invitation messages and documents can be sent to the physician.

Contacts

Contacts contains a list of all of the agency contacts, sorted by location. To change the location to view contacts click the drop-down arrow on the top right of the screen. Select the applicable location.

The screenshot shows the 'HEALTHCAREfirst - Sales' interface. The top navigation bar includes 'Home', 'Messages', 'Contacts', 'Records', 'Reports', and 'Settings'. The 'firstCPO' logo is on the right, and a 'Logout' link is in the top right corner. On the left, there is an 'Options' sidebar with 'Invite a New Contact' and 'Contacts' buttons. The main content area is titled 'Contacts - All' and displays a table of contacts. A dropdown menu is set to 'All'. The table has three columns: 'Organization / Location', 'Contact Name', and 'Location'. The data rows are as follows:

Organization / Location	Contact Name	Location
Demo Clinic - Ozark	Corey Fletcher	Baton Rouge
Demo Clinic - Ozark	Corey Fletcher	Minneapolis-St. Paul
Demo Clinic - Ozark	Corey Fletcher	Ozark
HEALTHCAREfirst - Corporate	Corey Fletcher	Baton Rouge

Below the table, it indicates 'Page 1 of 1' and '4 Contacts'.

To view detailed information for the contact click the **Organization/Location**. Detailed information will appear. Notes can be entered on the detail screen for the contact.

The screenshot shows the 'HEALTHCAREfirst - Sales' interface with the 'Contacts' tab selected. The main content area is titled 'HEALTHCAREfirst - Corporate' and displays details for a specific contact. The details include:

- NPI:** 0000000000
- Address:** 5340 N. Towne Centre Drive, Ozark, MO 65721
- Primary Contact:** Corey Fletcher
- Primary Contact Phone:** (800) 841-6095
- Primary Contact Email:** corey.fletcher@healthcarefirst.com
- Notes:** A large text area for entering notes.

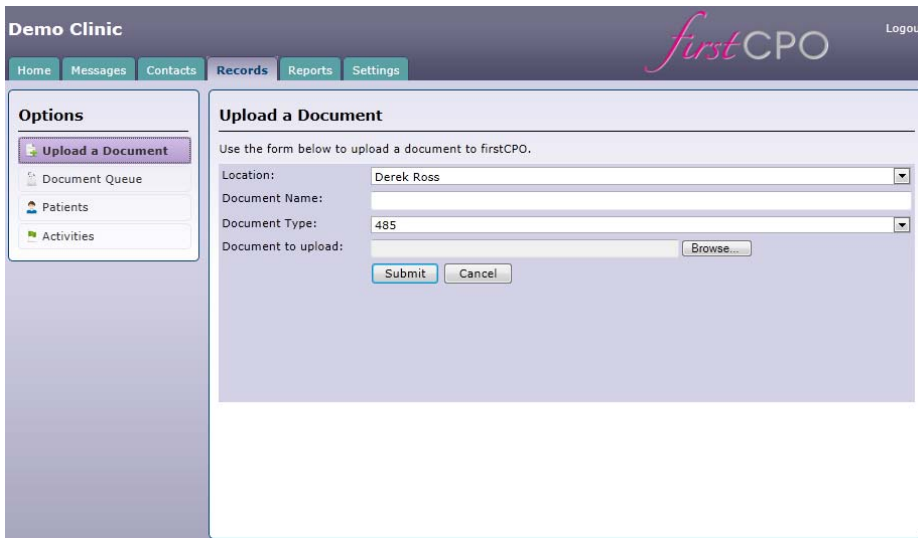
At the bottom of the details section, there are 'Save' and 'Cancel' buttons.

Records

In the Records tab there are three functions that pertain to the agency.

- Upload a Document
- Document Queue
- Patients

Upload a Document



The screenshot shows the 'Upload a Document' form in the firstCPO client portal. The interface includes a navigation bar with 'Home', 'Messages', 'Contacts', 'Records', 'Reports', and 'Settings'. The 'Records' tab is active. On the left, there is an 'Options' sidebar with 'Upload a Document' selected. The main form area is titled 'Upload a Document' and contains the following fields and buttons:

- Location:** A drop-down menu with 'Derek Ross' selected.
- Document Name:** A text input field.
- Document Type:** A drop-down menu with '485' selected.
- Document to upload:** A text input field with a 'Browse...' button next to it.
- Submit** and **Cancel** buttons at the bottom.

To upload a document:

- 1 Identify the **Location** the document is coming from by selecting the correct **Location** from the drop-down menu.
- 2 Enter a name for the document in **Document Name**.
- 3 Select the **Document Type** (Document types are pre-defined by the agency) from the drop-down menu.
- 4 Click **Browse** to locate the document.
- 5 Click **Submit**.
- 6 The document will be uploaded to the **Document Queue**.

Document Queue

The screenshot shows the 'Document Queue' page in the firstCPO system. The page title is 'Document Queue' and it contains the text: 'Documents that have been uploaded but not yet associated to a patient.' Below this is a table with the following data:

Name	Location	Created
test document 1 [485]	Ozark	1/4/2012

Below the table, it says 'Page 1 of 1' and '1 Document'. The interface includes a navigation menu with 'Home', 'Messages', 'Contacts', 'Records', 'Reports', and 'Settings'. The 'Records' tab is selected. On the left, there is an 'Options' sidebar with 'Upload a Document', 'Document Queue', 'Patients', and 'Activities'. The 'firstCPO' logo and 'Logout' link are in the top right corner.

When a document is uploaded to the **Document Queue** it is initially unassigned.

To assign a document to a physician:

- 1 Compose a **Record Message**.
- 2 Attach the document to a patient.
- 3 Send the message to the physician.

In the document queue click the **Document** link to change information and preview the document. The **Location**, **Document Name** and **Document Type** can be changed.

Patients

When the **Patients** tab is clicked the following screen will appear.

The screenshot shows the 'Patients' page in the firstCPO system. The page title is 'Patients' and it contains the text: 'Patient records that belong to or have been shared with your organization.' Below this is a search form with 'Last Name:' and 'First Name:' fields, a 'Refresh' button, and a 'Location Filter' dropdown set to 'All'. Below the search form is a table with the following data:

Patient #	Name	Birth Date	Location
100-130	Bunyan, Paul	10/24/1940	HEALTHCAREfirst - Sales - Minneapolis-St. Paul
8096	Armstrong, Naomi	10/25/1950	HEALTHCAREfirst - Sales - Minneapolis-St. Paul
8091	Benson, Bill	7/5/1951	HEALTHCAREfirst - Sales - Minneapolis-St. Paul
2123	Bill, Hickcock	1/18/1934	HEALTHCAREfirst - Sales - Minneapolis-St. Paul
8101	Bunyan, Paul	12/15/1942	HEALTHCAREfirst - Sales - Minneapolis-St. Paul
100-130	Bunyan, Paul	12/28/2011	Demo Clinic - Firstat
4444	Fletcher, Nicole	11/14/1973	HEALTHCAREfirst - Corporate
Test22	Fletcher, Mark	4/7/2011	HEALTHCAREfirst - Corporate
8094	Hiltner, Alex	10/14/1997	HEALTHCAREfirst - Sales - Minneapolis-St. Paul
8092	Homecare, Hannah	12/11/1934	HEALTHCAREfirst - Sales - Minneapolis-St. Paul

An arrow points to the 'Patient #' column header in the table, with a callout box containing the text 'Patient # link'. The interface includes a navigation menu with 'Home', 'Messages', 'Contacts', 'Records', 'Reports', and 'Settings'. The 'Records' tab is selected. On the left, there is an 'Options' sidebar with 'Upload a Document', 'Document Queue', 'Patients', and 'Activities'. The 'firstCPO' logo and 'Logout' link are in the top right corner.

The patient list can be filtered in the following ways:

- Filter the patient list by **Location**.
- Perform a search by **First** and **Last Name**.
- Click on the column headers to sort by column.

When the **Patient #** link is clicked the following screen will appear.

Demo Clinic *firstCPO* Logout

Home Messages Contacts **Records** Reports Settings

Options

- Upload a Document
- Document Queue
- Patients**
- Activities

Bunyan, Paul

Patient, admission and document information.

Location: HEALTHCAREfirst - Sales - Minneapolis-St. Paul
Patient Name: Paul Bunyan
Patient Number: 100-130
Date of Birth: 10/24/1940
SSN: 465-55-1234
Created: 10/24/2011 6:37:31 PM
Last Change: 10/24/2011 7:04:25 PM

Admissions

Admission #	Admit Date	Discharge Date	Primary Diagnosis
1	4/11/2011	-	428.0 CHF

Page 1 of 1
1 Admission(s)

Documents (All Admissions)

Document Name	Status	Admission #	Document Date
General Correspondence	Pending	1	10/24/2011
Verbal Order	Approved	1	10/24/2011
Verbal Order	Approved	1	10/24/2011

Page 1 of 1
3 Document(s)

Number of admissions

On this screen basic patient information will appear, as well as all documents that have been sent and the status of those documents. Multiple admissions for a patient will be noted in the **Admissions** section of the patient record. If the **Admission Number** link is clicked the system will only show documents and status for that admission. If the **Documents** link is clicked the system will display information on the document as well as the document itself.

Documents that are attached to the specific patient.

All documents attached to the patient will appear below the Admissions grid in Documents. To view documents pertaining just to a particular Admission, click the applicable Admission # in the Admissions grid. All documents pertaining to this admission will appear at the bottom of the screen in the Documents grid. To view the document click on the applicable document in the **Document Name** column. The patient document will appear. To return to the patient record click **Return to Patient**.

HEALTHCAREfirst - Sales firstCPO Logout

Home Messages Contacts **Records** Reports Settings

Options

- Upload a Document
- Document Queue
- Patients**
- Activities

Bakery, Pixie

Certification - 485 [Return to Patient](#)

Owner HEALTHCAREfirst - Sales - Minneapolis-St. Paul

Admission Number 01

Admission Date 3/1/2013

Document Name Pixie Bakery

Document Type Certification - 485

Status Approved

Associated Tasks

Assign To:	Status:	Completed:
<input type="checkbox"/> Demo Clinic - Ozark Certification of Home Health Services	Approved	4/24/2013 9:19:37 AM

Preview

Department of Health and Human Services
Centers for Medicare & Medicaid Services

Form Approvals
OMB No. 0938-0367

Home Health Certification and Plan of Care




1. Patient's HI Claim No. 498123456	2. Start of Care Date 1/20/2013	3. Certification Period 1/20/2013 to 3/20/2013	4. Medical Record No. 101-630	5. Provider No. 000001
6. Patient's Name and Address		7. Provider's Name, Address and Telephone Number		

Reports Tab

The Reports tab contains three options:

- Activities
- Transactions
- Avg Days to Sign

All three report screens will contain the same navigation, print, and export features at the top of the report screen:

- Click  to navigate through the pages of the report.
- Click  to print or export the report.
- Click  to print the report.

Activities Report

The Activities Report contains the status of all documents that have been sent for the filters selected. To view the Activities Report:

- 1 Select the **Date** range you wish to view.
- 2 Select the **Location(s)** you wish to view.
- 3 Select the **Physician** you wish to view.
- 4 Select the **Document Status** you wish to view.
- 5 Click **Run**.



The screenshot shows the 'HEALTHCAREfirst - Sales' interface with the 'Reports' tab selected. On the left, an 'Options' sidebar lists 'Activities', 'Transactions', and 'Avg Days to Sign'. The main area is titled 'Activities Report' and contains the following filters: 'Date' (2012, All, All), 'Location' (All), 'Physician' (All), and 'Document Status' (All). A 'Run' button is located at the bottom of the filter section.

The report will appear similar to the following:

HEALTHCAREfirst - Sales firstCPO Logout

Home Messages Contacts Records **Reports** Settings

Options

- Activities
- Transactions**
- Avg Days to Sign

Activities Report

1	of 2	100%	Find Next		
Wilde, Duncan	02/29/2012	03/22/2012	Duncan Wilde	Approved	Demo Clinic - Ozark
Wilde, Duncan	02/29/2012	04/04/2012	485 GF Test	Pending	Demo Clinic - Ozark
Wilde, Duncan	02/29/2012	04/04/2012	Scanned 485	Pending	Demo Clinic - Ozark
Wilde, Duncan	02/29/2012	04/04/2012	Word to PDF Test	Pending	Demo Clinic - Ozark
Wilde, Duncan	02/29/2012	04/04/2012	Duncan Wilde	Approved	Demo Clinic - Ozark
Wilde, Duncan	02/29/2012	04/04/2012	Duncan Wilde	Approved	Demo Clinic - Ozark
Wilde, Duncan	123456789	01/30/2012	Duncan Wilde	Approved	Demo Clinic - Ozark
Wilde, Duncan	123456789	01/30/2012	BI Overview	Rejected	Demo Clinic - Ozark
Wilde, Duncan	123456789	01/30/2012	Duncan Wilde	Approved	Demo Clinic - Ozark
Wilde, Duncan	123456789	02/07/2012	Med Change-Choc. Chip Cookies	Approved	Demo Clinic - Ozark
Wilde, Duncan	123456789	02/08/2012	Advantages of Hosting	Rejected	Demo Clinic - Ozark
Wilde, Duncan	123456789	02/08/2012	Home Health Article for Review	Rejected	Demo Clinic - Ozark
Wilde, Duncan	123456789	02/08/2012	Duncan Wilde - Choc. Chip Cookies	Approved	Demo Clinic - Ozark
Wilde, Duncan	123456789	02/08/2012	Duncan Wilde	Approved	Demo Clinic - Ozark

Transactions Report

The Transactions Report will contain the transactions for documents per patient (Approved, Rejected, Pending) for the filters selected. To view the Transactions Report:

- 1 Click **Transactions**.
- 2 Select the **Date** range you wish to view.
- 3 Select the **Locations** you wish to view
- 4 Select the **Physicians** you wish to view.
- 5 Click **Run**.

HEALTHCAREfirst - Sales firstCPO Logout

Home Messages Contacts Records **Reports** Settings

Options

- Activities
- Transactions**
- Avg Days to Sign

Transactions Report

Date: 2012 | All | All

Location: All

Physician: All

The report will appear similar to the following:

HEALTHCAREfirst - Sales *firstCPO* Logout

Home Messages Contacts Records Reports Settings

Options

- Activities
- Transactions
- Avg Days to Sign

Transactions Report

1 of 1 100% Find | Next

Transactions

Dates: 1/1/2012 thru 12/31/2012
Location: All Locations
Patient: All Patients
Admission: All Admissions
Physician: All Physicians

Patient	Admission	Physician	Approved	Rejected	Pending	Total
Wayne, John	1	Demo Clinic - Ozark	0	0	1	1
Wilde, Duncan	02 29 2012	Demo Clinic - Ozark	15	0	4	19
Wilde, Duncan	123456789	Demo Clinic - Ozark	21	19	1	41
Wilde, Duncan	923487239847938	Demo Clinic - Ozark	1	0	0	1
Total			37	19	6	62

1 of 1 4/9/2012 10:58:46 AM

Avg Days to Sign Report

The Avg Days to Sign Report contains the average amount of days it has taken for a location to sign reports for the filters selected. To view the Avg Days to Sign Report:

- 1 Click **Avg Days to Sign**.
- 2 Select the **Date** range you wish to view.
- 3 Select the **Locations** you wish to view.
- 4 Select the **Physicians** you wish to view.
- 5 Click **Run**.

HEALTHCAREfirst - Sales *firstCPO* Logout

Home Messages Contacts Records Reports Settings

Options

- Activities
- Transactions
- Avg Days to Sign

Average Days to Sign Report

Date: 2012 All

Location: All

Physician: All

Run

The following report will appear:

The screenshot displays the firstCPO client portal interface. At the top, the header includes 'HEALTHCAREfirst - Sales' and the 'firstCPO' logo. A navigation bar contains links for Home, Messages, Contacts, Records, Reports, and Settings. A left sidebar titled 'Options' lists 'Activities', 'Transactions', and 'Avg Days to Sign' (which is selected). The main content area is titled 'Average Days to Sign Report' and features a search bar with '1 of 1' results, a 100% zoom level, and a 'Find | Next' button. Below the search bar, the report title 'Average Days to Sign' is centered. The report parameters are: Dates: 1/1/2012 thru 12/31/2012, Location: All Locations, and Physician: All Physicians. A table with three columns—Physician, Average Days to Sign, and Rank—contains one entry: 'Demo Clinic - Ozark' with an average of 0.0 and a rank of 1. The footer of the report area shows '1 of 1' and the timestamp '4/9/2012 10:58:29 AM'.

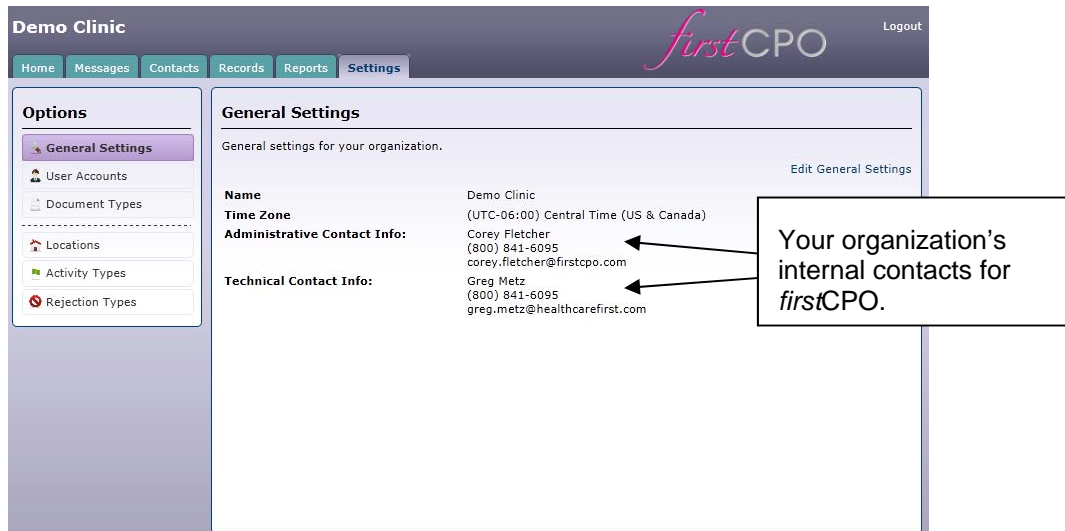
Settings

Administrative functionality is managed in the **Settings** tab. The **Settings** tab contains the following options:

- General Settings
- User Accounts
- Document Types
- Locations
- Activity Types
- Rejection Types

General Settings

The General Settings tab displays information on the settings for your account.



Demo Clinic firstCPO Logout

Home Messages Contacts Records Reports **Settings**

Options

- General Settings
- User Accounts
- Document Types
- Locations
- Activity Types
- Rejection Types

General Settings Edit General Settings

General settings for your organization.

Name Demo Clinic

Time Zone (UTC-06:00) Central Time (US & Canada)

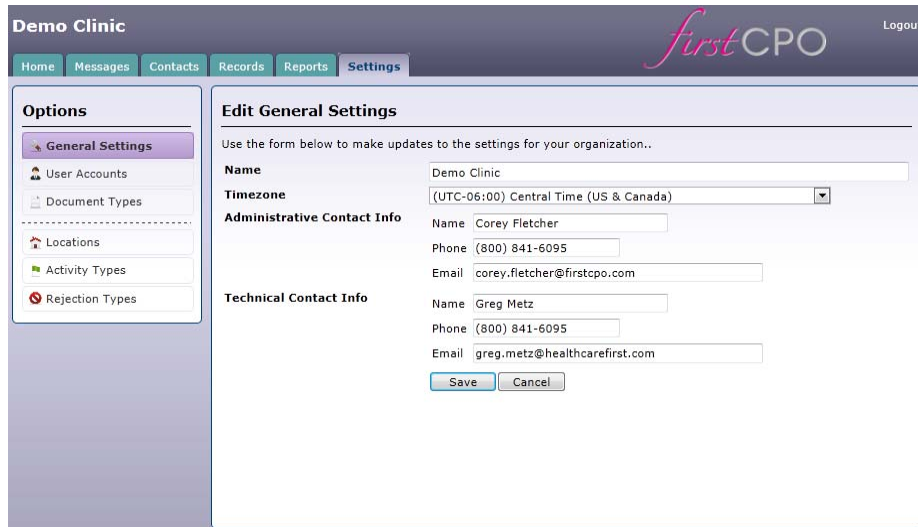
Administrative Contact Info: Corey Fletcher (800) 841-6095 corey.fletcher@firstcpo.com

Technical Contact Info: Greg Metz (800) 841-6095 greg.metz@healthcarefirst.com

Your organization's internal contacts for firstCPO.

To edit General Settings:

- 1 Click **Edit General Settings**.
- 2 Enter the information that needs to be changed.
- 3 Click **Save**.



Demo Clinic firstCPO Logout

Home Messages Contacts Records Reports **Settings**

Options

- General Settings
- User Accounts
- Document Types
- Locations
- Activity Types
- Rejection Types

Edit General Settings

Use the form below to make updates to the settings for your organization..

Name Demo Clinic

Timezone (UTC-06:00) Central Time (US & Canada)

Administrative Contact Info Name Corey Fletcher
Phone (800) 841-6095
Email corey.fletcher@firstcpo.com

Technical Contact Info Name Greg Metz
Phone (800) 841-6095
Email greg.metz@healthcarefirst.com

Save Cancel

User Accounts

User accounts will be set up individually and can be linked to the specific location (provider) that they work directly with. The user will only be able to see information and locations (providers) that they are granted access to.

The User Accounts screen will list all of the registered users for the organization as shown below.

The screenshot shows the 'User Accounts' screen in the firstCPO system. The page title is 'Demo Clinic' and the logo is 'firstCPO'. The navigation bar includes Home, Messages, Contacts, Records, Reports, and Settings. The left sidebar shows 'Options' with 'User Accounts' selected. The main content area is titled 'User Accounts' and shows a list of 5 user accounts. A callout box points to the 'Name' column header with the text 'The user's name link.'

Name	Enabled	Locked
auditor@firstcpo.com	True	False
corey.fletcher@democlinic.com	True	False
derekross686@gmail.com	True	False
firstat@firstatoflorlando.com	True	False
sales@firstcpo.com	True	False

Page 1 of 1
5 User Accounts

Add a User

To add a new user:

- 1 Click **User Accounts**.
- 2 Click **Add User Account** on the upper right hand side of the screen.
- 3 Enter the user information.
- 4 Click **Save**.

The following screen will appear.

The screenshot shows the 'Add User Account' form in the firstCPO Demo Clinic interface. The interface includes a top navigation bar with 'Home', 'Messages', 'Contacts', 'Records', 'Reports', and 'Settings' tabs. A left sidebar contains 'Options' with sub-links for 'General Settings', 'User Accounts', 'Document Types', 'Locations', 'Activity Types', and 'Rejection Types'. The main form area is titled 'Add User Account' and contains the following fields and sections:

- Username**: Text input field.
- Password**: Text input field.
- Prefix**: Text input field.
- First Name**: Text input field.
- Middle Name**: Text input field.
- Last Name**: Text input field.
- Suffix**: Text input field.
- Title**: Text input field.
- Time Zone**: Drop-down menu with '(UTC-06:00) Central Time (US & Canada)' selected.
- Enabled**: Enabled
- Locked**: Locked
- User Account can sign documents**: User Account can sign documents
- Location Access**:
 - Derek Ross
 - Firstat
 - Ozark
- Application Access**:
 - Messages and Contacts
 - Records
 - Reports
 - Settings
- Created**: Text field.
- Last Modified:**: Text field.
- Buttons**: 'Save' and 'Cancel' buttons.

- 1 Enter the email address for the user in **Username**.
- 2 Enter a temporary password in **Password**. You can use the same temporary password for all new users or create a unique password if you prefer.
- 3 **Trusted Alias** is only used if the print to *firstCPO* functionality is being utilized (this functionality is not currently available).
- 4 Enter the users **Prefix**, **First Name**, **Middle Name**, **Last Name**, **Suffix** and **Title**.
- 5 Select the **Time Zone** from the drop-down menu.
- 6 Access can be granted to **Locations** and **Applications** by checking the appropriate boxes in each section. (Typically only the administrative user will have access to **Settings**.)
- 7 Click **Save**.

Edit User Account

To edit a user account:

- 1 Click **Settings** | **User Accounts**.
- 2 Click the user's name link.
- 3 The **Edit User Account** screen will appear.
- 4 Make changes to all information that needs to be edited.
- 5 Click **Save**.

Document Types

Different document types can be created and edited to fit the needs of the agency and the types of documents utilized for various providers.

Add a New Document Type

To add a new document type:

- 1 Click the **Settings** tab and the **Document Types** option.
- 2 Click **Add Document Type**.

The screenshot shows the 'Demo Clinic' interface with the 'Settings' tab selected. The 'Document Types' option is highlighted in the left sidebar. The main content area displays a table of document types:

Name	Active
485	True
document type	True
Generic Derek Test document type	True

Below the table, it indicates 'Page 1 of 1' and '3 Document Types'. An 'Add Document Type' link is visible in the top right of the table area.

The following screen will appear.

The screenshot shows the 'Add Document Type' form in the 'Demo Clinic' interface. The form includes the following fields and controls:

- Name:** A text input field.
- Description:** A large text area.
- Signature Page:** A text input field.
- Signature X - Y:** Two text input fields separated by an 'x' character.
- Active:** A checked checkbox.
- Buttons:** 'Save' and 'Cancel' buttons.

- 1 Enter the document **Name**.
- 2 Enter the document **Description**.
- 3 Enter the **Signature Page number**.
- 4 Enter the **Signature X – Y** values (set default to 10 X 10 if using *firstCPO* print driver otherwise HEALTHCARE*first* will have to setup the signature location for the document).
- 5 Click **Save**.

Edit Document Type

To edit a document type:

- 1 Click the **Settings** tab and the **Document Type** option.
- 2 Click the document link to edit.
- 3 The **Edit Document Type** screen will appear.
- 4 Make changes to all information that needs to be edited.
- 5 Click **Save**.

Demo Clinic *firstCPO* Logout

Home Messages Contacts Records Reports Settings

Options

- General Settings
- User Accounts
- Document Types**
- Locations
- Activity Types
- Rejection Types

Edit Document Type

Use the form below to make updates to this document type.

Name: 485

Description: [Text Area]

Signature Page: 1

Signature X - Y: 2 x 2

Active

Save Cancel

HEALTHCARE *first* will assist with adding **Document Types** in the initial setup. At some point the agency will be able to easily upload sample documents, select where the signature should appear, and build logic for variable length documents.

Locations

Each separate provider will be set up as a "Location".

Demo Clinic *firstCPO* Logout

Home Messages Contacts Records Reports Settings

Options

- General Settings
- User Accounts
- Document Types
- Locations**
- Activity Types
- Rejection Types

Locations

All of the locations for your organization. Add Location

Name	NPI	Active
Derek Ross	Derek00001	True
Firstat	Marty00000	False
Ozark	000000001	True

Page 1 of 1
3 Locations

Add a New Location

To add a new location (provider):

- 1 Click **Locations**.
- 2 Click **Add Location**.

The following screen will appear.

The screenshot shows the 'Add Location' form in the firstCPO client portal. The form is titled 'Add Location' and includes a navigation menu on the left with options like 'General Settings', 'User Accounts', 'Document Types', 'Locations', 'Activity Types', and 'Rejection Types'. The main form area contains fields for 'Name', 'NPI', and 'Address'. Below these are 'Primary Contact Info' fields for 'Name', 'Phone', and 'Email'. There are also 'Message Notification' and 'Invite Notification' sections, each with a text input field and a checkbox for 'Active'. At the bottom, there are 'Created' and 'Last Modified' labels and 'Save' and 'Cancel' buttons.

- 1 Enter the **Name**, **NPI** and **Address** for the provider. Make sure to verify that the NPI is correct when adding new locations.
- 2 Enter the **Primary Contact Info Name**, **Phone** and **Email**. This will be the contact that manages the information for the provider.
- 3 Enter the email address for **Message Notification** and **Invite Notification**. The **Message** and **Invitation Notifications** should be sent to the main contact that manages *firstCPO* usage. A link is sent via email when a **Message** or **Invitation** is sent to this location in *firstCPO*. The notifications do not display any patient information it is simply a way to notify the agency that they have new information in their *firstCPO* account.
- 4 Click **Save**.

Edit a Location

To edit a location:

- 1 Click the **Settings** tab and the **Locations** option.
- 2 Click the location link.
- 3 The **Edit Location** screen will appear.
- 4 Make changes to all information that needs to be edited.
- 5 Click **Save**.

The screenshot shows the 'Edit Location' form in the firstCPO system. The form is titled 'Edit Location' and is part of the 'Demo Clinic' interface. It contains the following fields and information:

- Name:** Ozark
- NPI:** 000000001
- Address:** 123 Healthcare Way, Ozark, MO 65721
- Primary Contact Info:**
 - Name:** Corey Fletcher
 - Phone:** (800) 841-6095
 - Email:** corey.fletcher@firstcpo.com
- Message Notification:** To receive notifications when a new message is sent to your location, please specify the email address below. If you do not wish to receive notifications, leave this field blank.
- Invite Notification:** To receive notifications when a new contact invitation is sent to your location, please specify the email address below. If you do not wish to receive notifications, leave this field blank.
- Active:**
- Created:** 12/15/2010 8:39:44 PM
- Last Modified:** 10/21/2011 4:20:43 PM

Buttons: Save, Cancel

Activity Types

Activity types can be used to specify the different activities each provider uses and the specific HCPCS Codes and Modifiers that are used with the activity. Activities can be made Inactive at any time they are no longer in use. *firstCPO* comes preloaded with four activity types based on the HCPCS codes.

- Certification Home Health Services
- Recertification
- Home Health Services
- Supervision Home Health Services and Supervision Hospice Services

Add Activity Type

To add an activity type:

- 1 Click **Settings | Activity Types**.
- 2 Click **Add Activity Type**.

The following screen will appear.

- 1 Select the correct **Location** (Provider).
- 2 Type the activity **Name**, **Abbreviation**, **Description**, **HCPCS Code**, and **HCPCS Modifiers**.
- 3 Check **Active**.
- 4 Click **Save**.

Edit Activity Type

Existing Activity **Types** can be edited as needed. To edit an **Activity Type**:

The screenshot shows the 'Edit Activity Type' form in the firstCPO system. The interface includes a top navigation bar with 'Demo Clinic' and 'firstCPO' logos, and a 'Logout' link. Below the navigation bar are tabs for 'Home', 'Messages', 'Contacts', 'Records', 'Reports', and 'Settings'. A left sidebar titled 'Options' contains links for 'General Settings', 'User Accounts', 'Document Types', 'Locations', 'Activity Types' (highlighted), and 'Rejection Types'. The main content area is titled 'Edit Activity Type' and contains the following fields:

- Location:** A dropdown menu with 'Ozark' selected.
- Name:** A text input field containing 'Certification of Home Health Services'.
- Abbreviation:** A text input field containing 'Cert HH'.
- Description:** A large text area for entering a description.
- HCPCS Code:** A text input field containing 'G0180'.
- HCPCS Modifier 1:** An empty text input field.
- HCPCS Modifier 2:** An empty text input field.
- Active:** A checked checkbox.

At the bottom of the form are 'Save' and 'Cancel' buttons.

- 1 Click **Settings** | **Activity Types**.
- 2 Click the activity link.
- 3 Make changes to all fields that need to be edited.
- 4 Click **Save**.

Rejection Types

Rejection types can be added to specify why a document has been rejected by a provider.

The screenshot shows the 'Rejection Types' page in the firstCPO system. The page title is 'Rejection Types' and it contains a list of rejection types. A callout box points to the 'Because I said so' link in the Name column.

Name	Location
Because I said so	Ozark
Need MEd Profile	Ozark
Not My Patient	Ozark
Not My Patient	Firstat
Not My Patient	Derek Ross
Testing Purposes	Ozark

Add Rejection Type

To add a rejection type:

- 1 Click **Settings | Rejection Types**.
- 2 Click **Add Rejection Type**.

The following screen will appear.

The screenshot shows the 'Add Rejection Type' form in the firstCPO system. The form includes fields for Location, Name, and Description, and a checkbox for Active.

Location: Derek Ross

Name: [Empty field]

Description: [Empty text area]

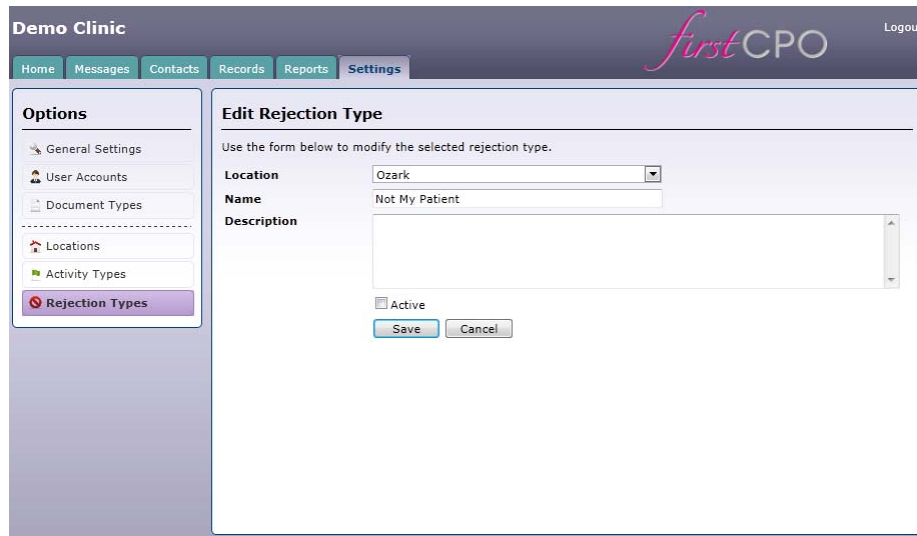
Active

Save Cancel

- 1 Select the correct **Location**.
- 2 Enter the rejection **Name** and **Description**.
- 3 Check **Active**.
- 4 Click **Save**.

Edit Rejection Type

Existing **Rejection Types** can be edited as needed. To edit a **rejection type**:



The screenshot shows the 'Edit Rejection Type' form within the firstCPO interface. The top navigation bar includes 'Demo Clinic', 'firstCPO', and 'Logout'. Below the navigation bar are tabs for 'Home', 'Messages', 'Contacts', 'Records', 'Reports', and 'Settings'. On the left, an 'Options' sidebar lists various settings, with 'Rejection Types' highlighted. The main form area is titled 'Edit Rejection Type' and contains the following fields and controls:

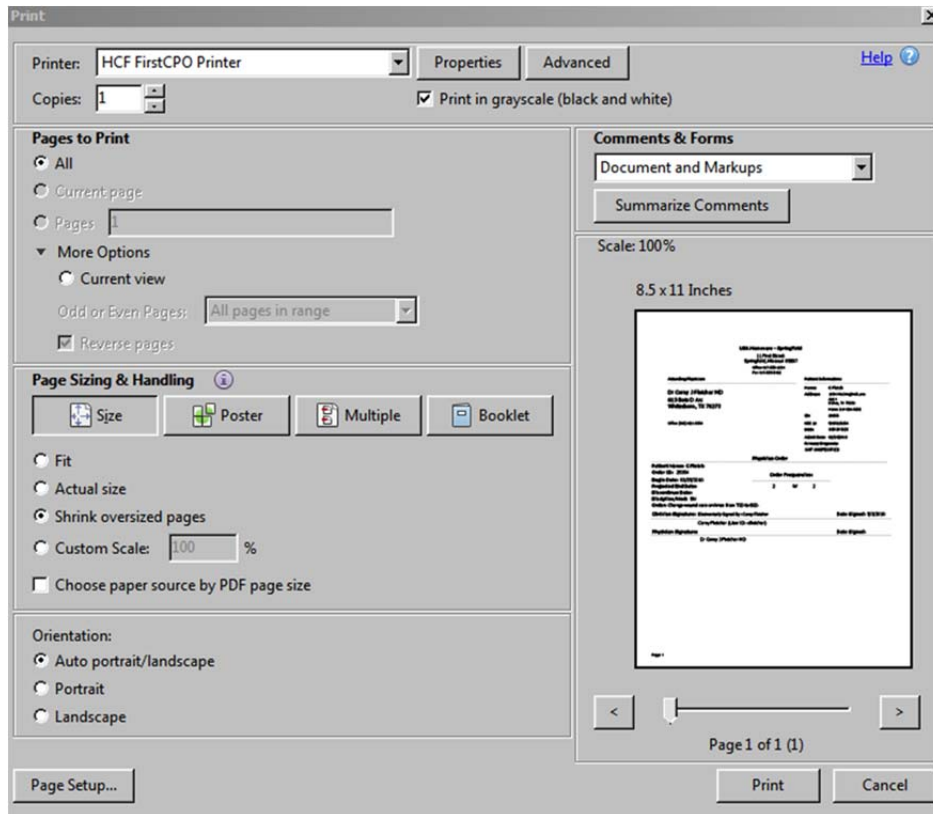
- Location:** A dropdown menu with 'Ozark' selected.
- Name:** A text input field containing 'Not My Patient'.
- Description:** A large text area for entering a description.
- Active:** A checkbox that is currently unchecked.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

- 1 Click **Settings** | **Rejection Type**.
- 2 Click the rejection type link.
- 3 Change the fields that need to be edited.
- 4 Click **Save**.

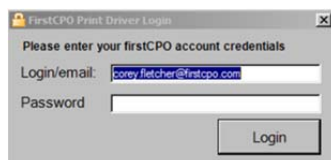
Print Wizard

The Print Wizard is another feature that can be used to submit documents for physician signature. The Print Wizard must be installed by a HEALTHCARE *first* support representative, to use this feature please contact support for installation. Once the Print Wizard has been installed, the following steps can be used to submit documents.

- 1 Select the document you wish to submit.
- 2 Click **Print**.
- 3 A Print window will appear. Select HCF FirstCPO Printer from the **Printer** drop-down menu.
- 4 Click **Print**.

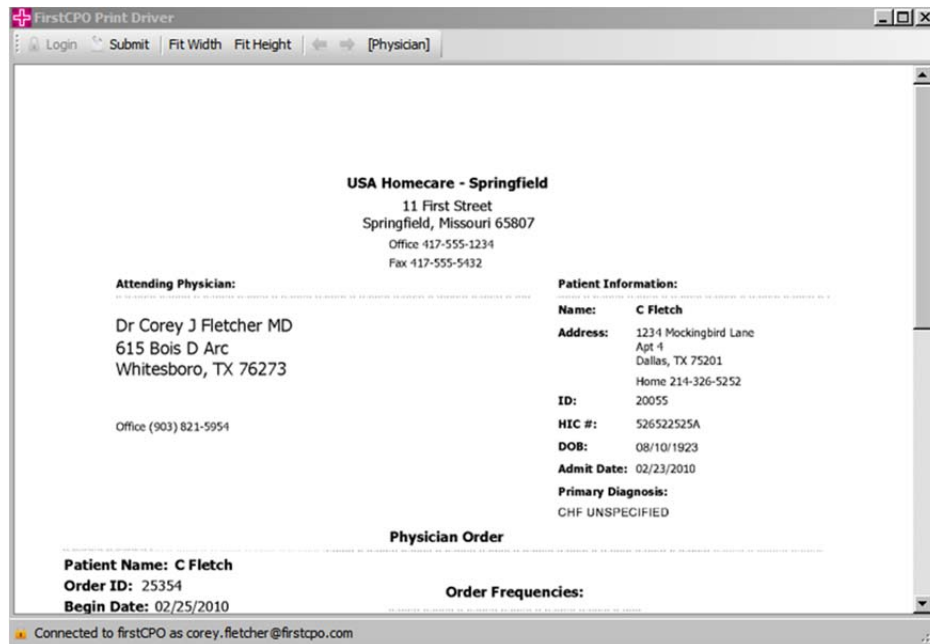


The Print Wizard will automatically check for updates when loading and prompt the user to login with your *firstCPO* username and password.

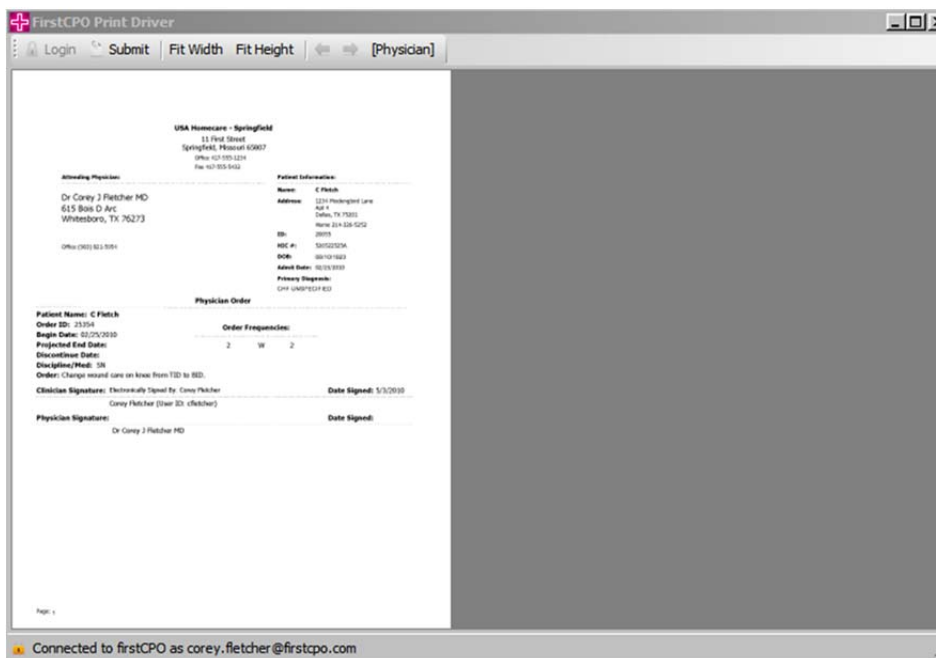


The document will appear in a Print Driver window. The view of the document on the screen can be changed by using the Fit Width or Fit Height buttons.

The **Fit Width** button will adjust the document to fit to the width of the screen, this view may cause the document to flow below the screen forcing the user to scroll down to view the full document. See the **Fit Width** view below.

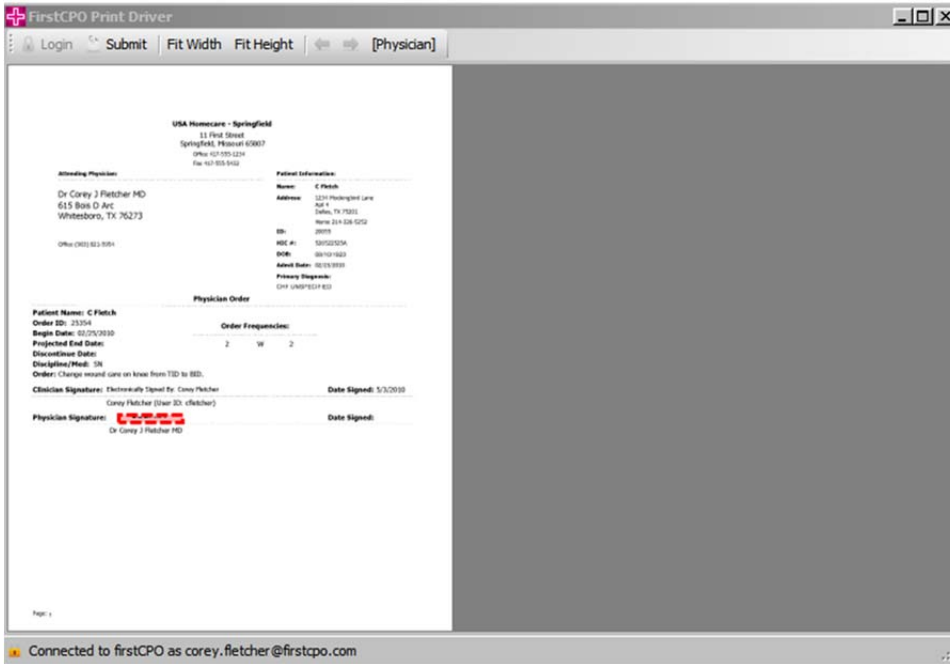


The **Fit Height** button will adjust the document to fit to the height of the screen, causing the full view of the document to appear on the screen. HEALTHCARE *first* recommends that the **Fit Height** view be used. See the **Fit Height** view below.

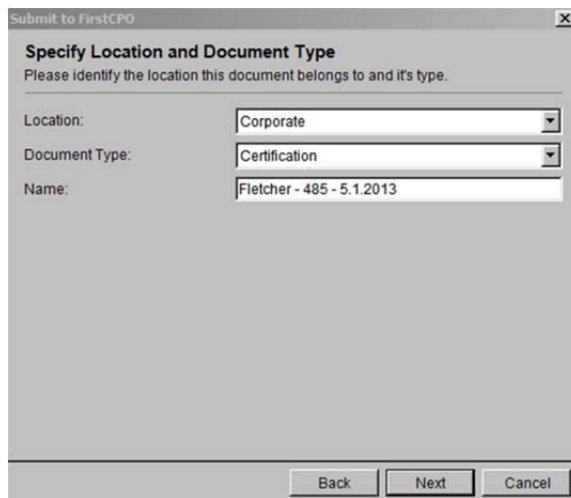


After the document view is selected, the physician signature field will need to be added to the document.

- 1 Click the physician button. A red box will appear.
- 2 Drag and drop the red box to the appropriate location on the document.



- 3 After the physician signature box is placed, click **Submit**.
- 4 The Print Wizard will prompt the user to name the document, assign the document to a patient, and select the appropriate physician.
- 5 A Submit window will appear. On the first screen select the location (office in your agency if more than one office), identify the type of document (Order, 485, IPOC, etc.) and name the document. HEALTHCARE *first* recommends that documents be named in a consistent naming convention. An example would be patient last name, document type and date: Fletcher – 485 – 5.1.2013.



- 6 Click **Next**.

- 7 A second screen, Patient and Admission, will appear. Specific patient information will be entered on this screen. This information will only need to be entered once into *firstCPO*. Once entered *firstCPO* will recall the information when the Patient No is entered.
- 8 Check the **Specify Patient/Admission Information** box. Patient information cannot be entered

Submit to FirstCPO

Patient and Admission
Optionally, you may specify a patient and admission for this document.

Specify Patient / Admission Information

Patient No: 4444

Name: Nicole Fletcher

Birth Date: 11/14/1973 SSN: 222-22-2222

Admission: 2/23/2011 [222222]

Admit No: 222222

Admit Date: 2/23/2011 Discharge Date: 5/1/2013

Primary Diag: 401 CHF

Back Next Cancel

until this box is checked.

- 9 Enter the **Patient No, Name, Birth Date,** and **SSN**. Select the **Admission** from the drop-down menu. Enter the **Admit No, Admit Date, Discharge Date,** and **Primary Diag**. (HEALTHCARE*first* recommends that the Episode or Election Period Start Date be entered in the **Admit No** field.)
- 10 Click **Next**.
- 11 A third screen, Submit to *firstCPO*, will appear. The physician that the document needs to be sent to will be assigned on this screen. Check the **Send a message** box to allow the document to be sent to the physician.

Submit to FirstCPO

FirstCPO Message
If you have supplied patient / admission information, you can also send a message.

Send a message

To: Demo Clinic - Ozark

Priority: Normal

Request Read Receipt

Subject:

Body: Corey Fletcher
HEALTHCAREfirst

Task: For Approval

Back Next Cancel

- 12 Select the physician to send the document to from the **To** drop-down menu. Select the **Priority**. Enter the **Subject** of the message, and the **Body** of the message (Optional). Select the **Task** the physician needs to perform. (There are two **Task** options, For Review and For Approval. For Review allows the physician to simply review the information but not sign or reject the document. For Approval allows the physician to sign or reject the document.)

- 13 Click **Next**.
- 14 A confirmation screen will appear to notify the user that the document has been sent.
- 15 Click **Finish**. When **Finish** is clicked the user will exit from the Print Wizard.