firstCPO | Agency User's Guide

***first*CPO Agency User's Guide, June 2013 Edition**

Additional information about *first*CPO and HEALTHCARE*first*, Inc. can be obtained by contacting HEALTHCARE*first* Sales at 800-841-6095.

Table of Contents

Overview 5
Easy to Use 5
Focus on Patients 5
Requirements 6
Timing Out 6
Account Setup 7
*first*CPO Login Information 7
Home Tab 10
Announcements 10
Account Preferences 10
Change Password 11
System Information 11
Messages Tab 12
Compose Message 12
Inbox 13
Archived 16
Sent Items 16
Invitations 16
Contacts 17
Invite a New Contact 17
Contacts 19
Records 20
Upload a Document 20
Document Queue 21
Patients 21
Print Wizard 23
Reports Tab 24
Activities Report 24
Transactions Report 25
Avg Days to Sign Report 26

Settings 28
General Settings 28
User Accounts 29
Document Types 31
Locations 32
Activity Types 34
Rejection Types 37

Overview

*first*CPO 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, *first*CPO 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.

*first*CPO 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. *first*CPO can be accessed from any internet computer, iPhone, or iPad. *first*CPO does not require download or installation of any software, making it easy to use.

Focus on Patients

*first*CPO allows agencies and physician's to put patients before paperwork. *first*CPO'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, *first*CPO 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**.

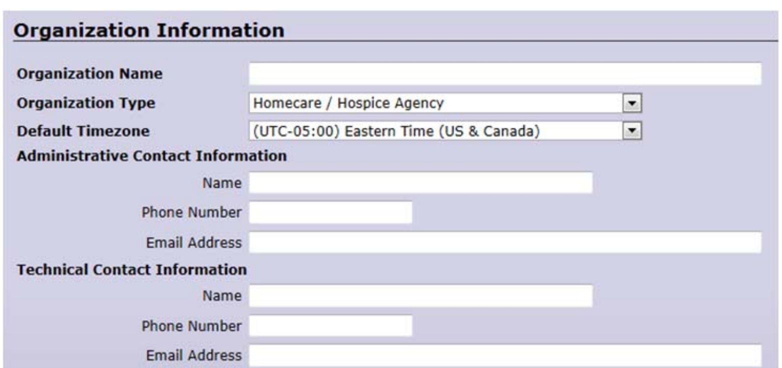
Account Setup

The *first*CPO 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 *first*CPO website at https://www.firstcpo.com/portal shown below.

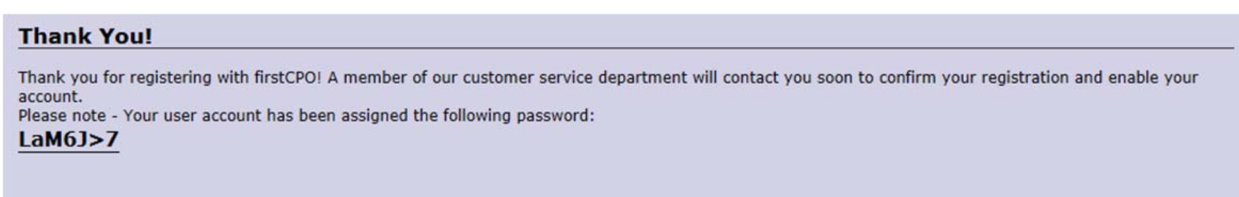
2 Click the **Agency Registration** button. The following screen will appear.



3 Enter information in all fields in the Organization Information, First Location Information, and Primary User Account sections. *first*CPO 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.

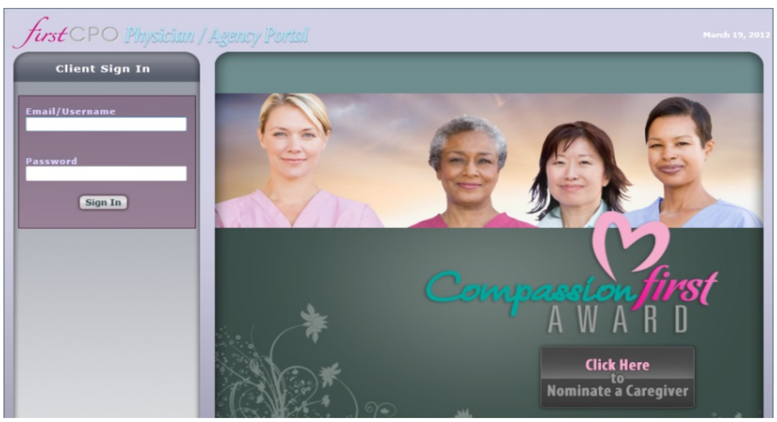
Name: Health Department of Northwest Michgan.
Type: Agency.
Admin Email: w.smith@nwhealth.org.

*first*CPO Login Information

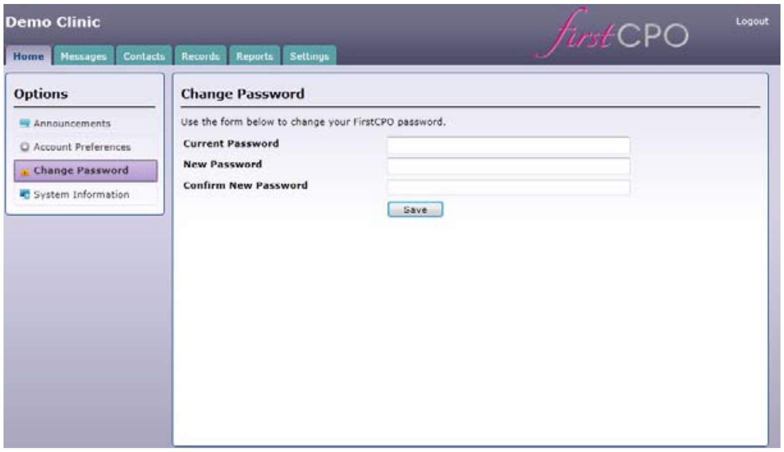
After registration:

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 *first*CPO 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 *first*CPO 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

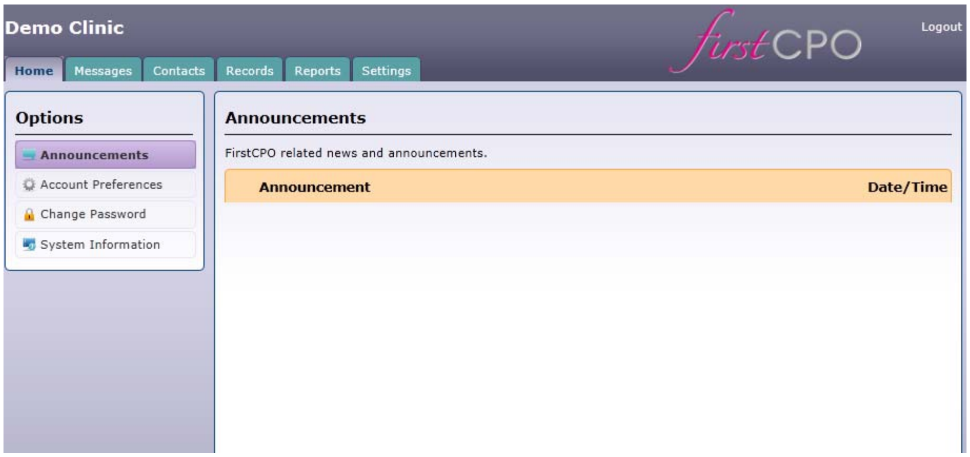
The **Home** tab contains four options:

- Announcements
- Account Preferences
- Change Password
- System Information

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

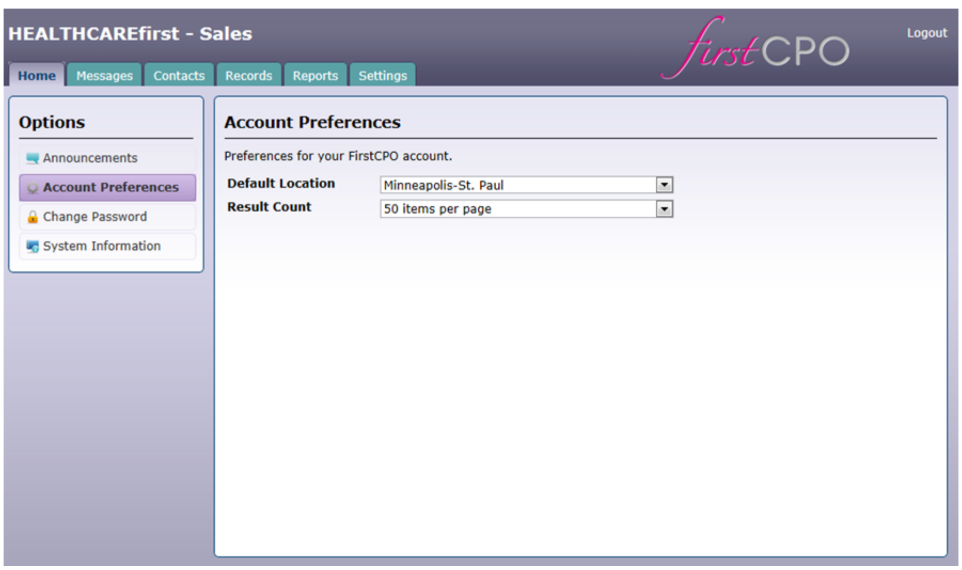
Announcements

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



Account Preferences

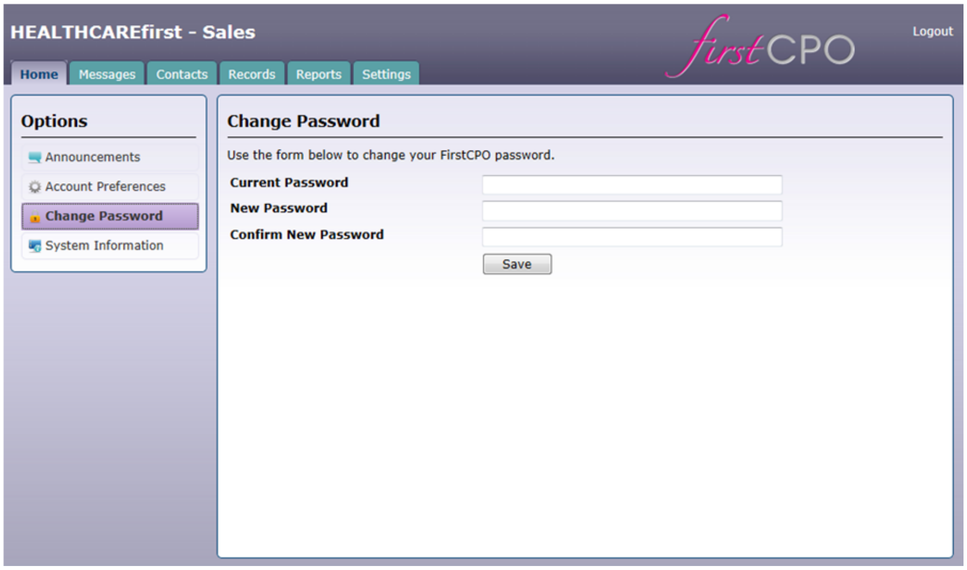
The **Account Preferences** option allows the user to change the **Default Location** if the agency utilizes more than one office, and the **Result Count** which determines how many items are displayed per page. To change the account preferences click on the drop-down menu and select the applicable option.



Change Password

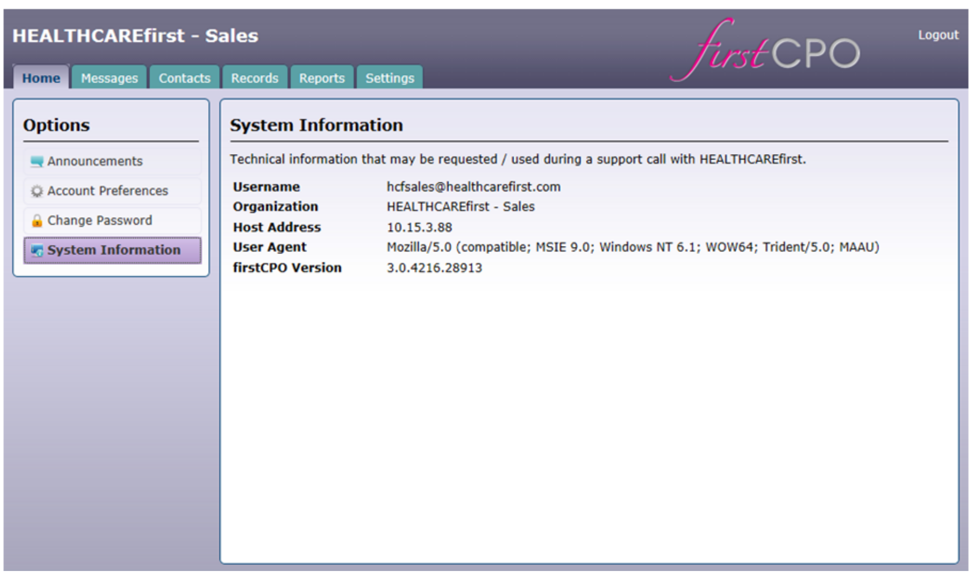
The **Change Password** option allows the user to change the password. To change the password:

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



System Information

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



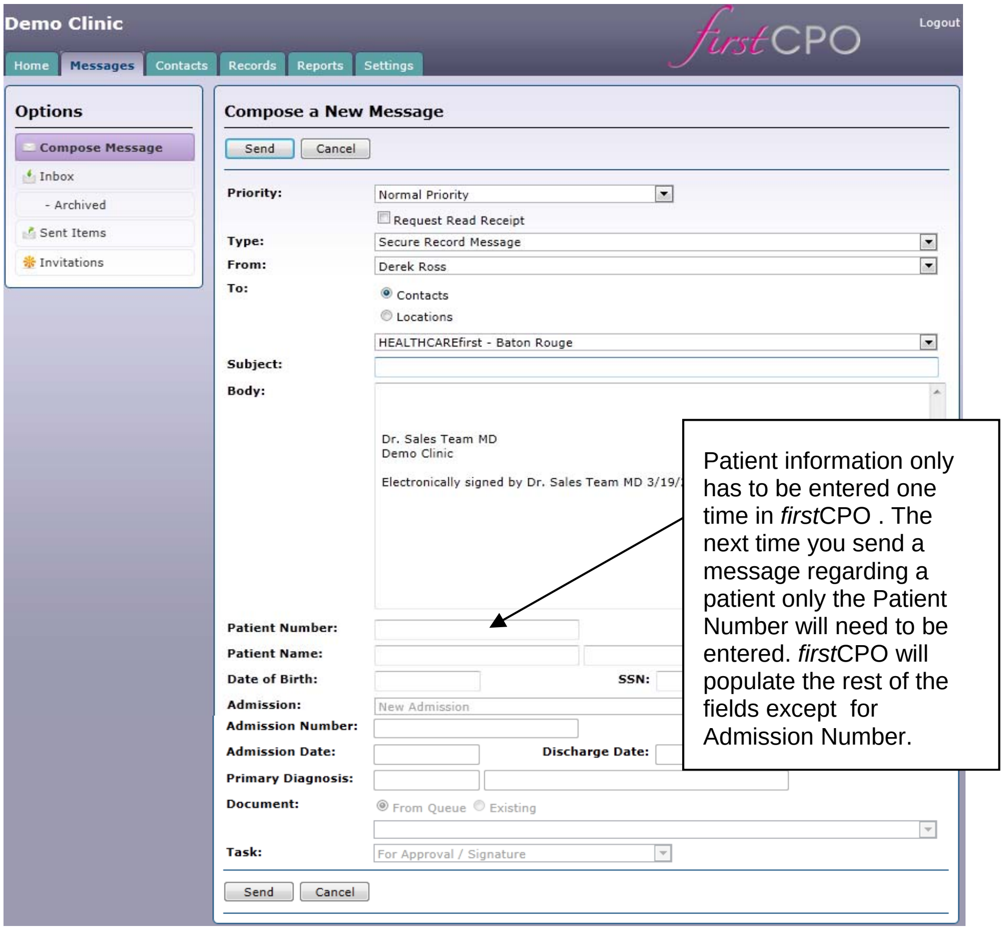
Messages Tab

*first*CPO 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.



To compose a new message:

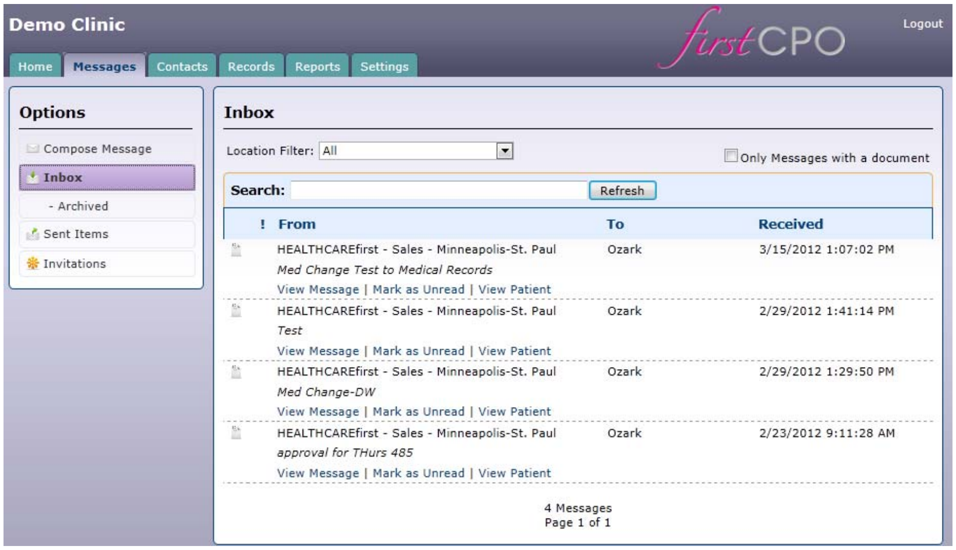
1. Click the **Messages** tab and the **Compose Message** option.
2. Select **Priority** from the drop-down menu.
3. Check **Request Read Receipt** if you need notification that the message was read.
4. Select **Type** from the drop-down menu (Secure Mail Message or Secure Record Message).
5. Click **Contacts** 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.



Location Filter

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

Search Feature

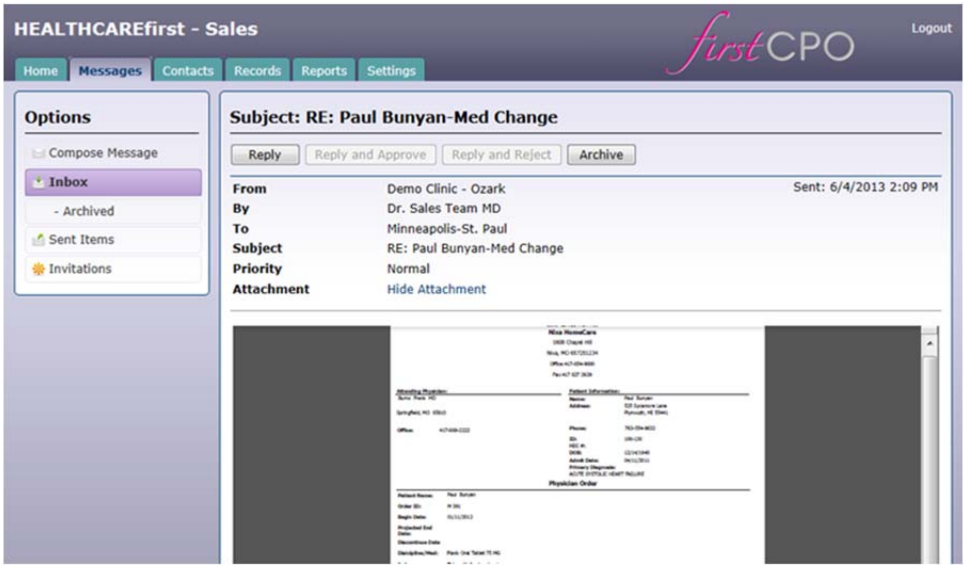
The Search feature allows the user to type in a keyword to search documents by. Enter the keyword in the Search box and click Refresh. All messages containing the keyword in the subject of the message will appear in the Inbox.

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.

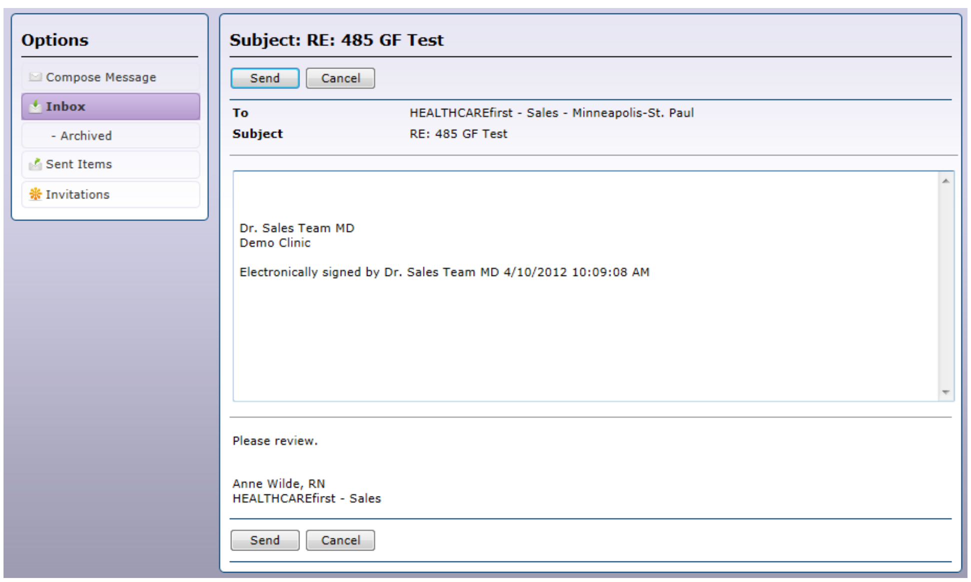
View Message

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**,



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

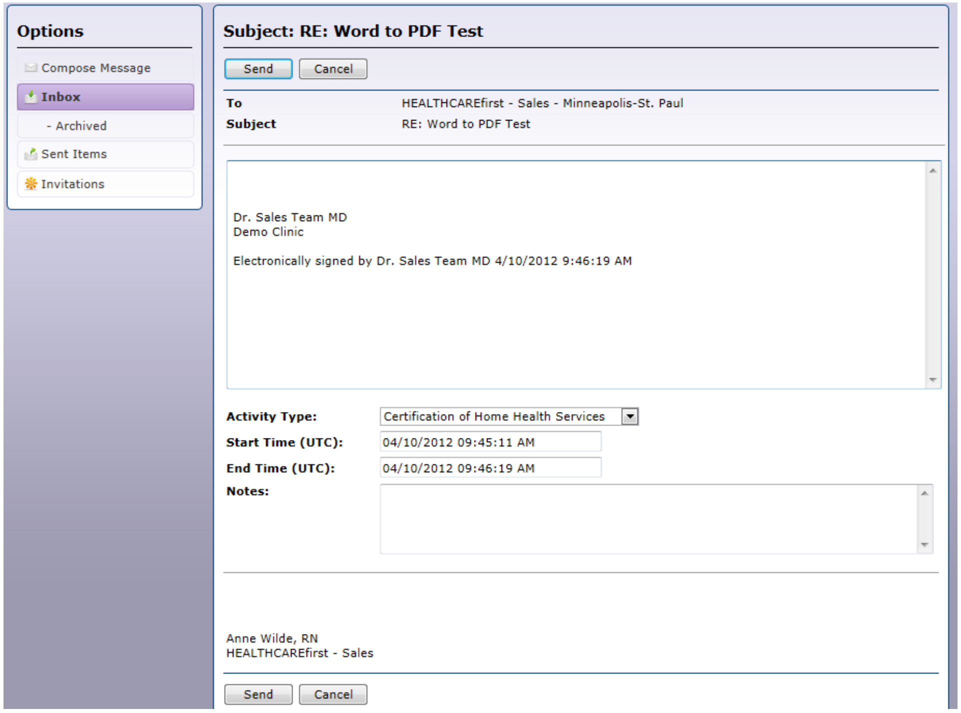
The following screen will appear when you click **Reply**:



To **Reply** to the message:

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

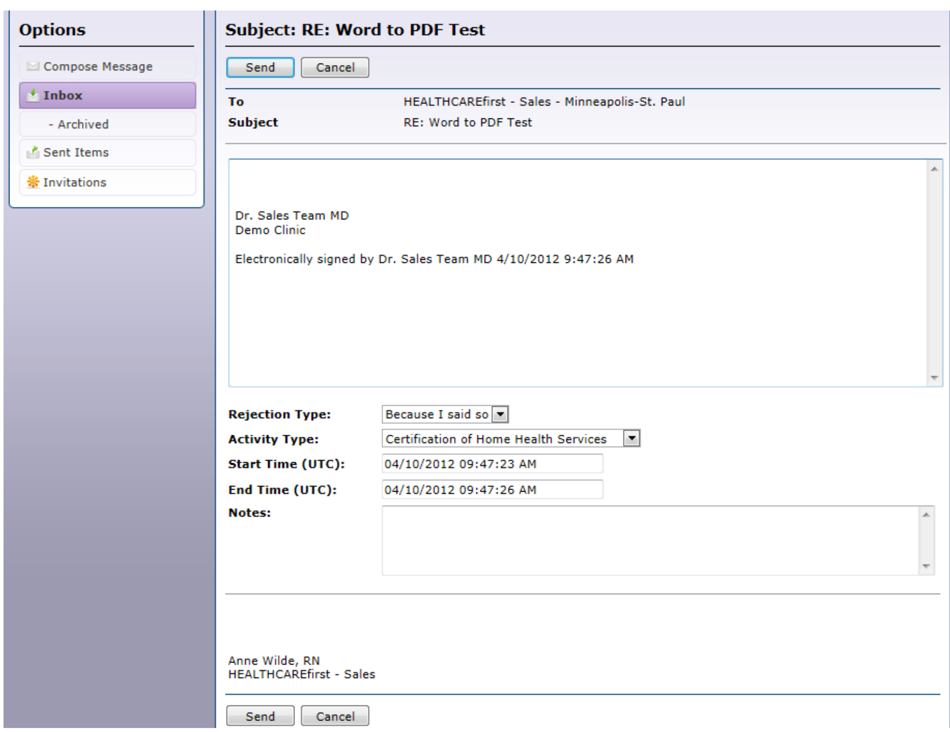
The following screen will appear when you click **Reply and Approve**:



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**:



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 *first*CPO account.

Invite a New Contact

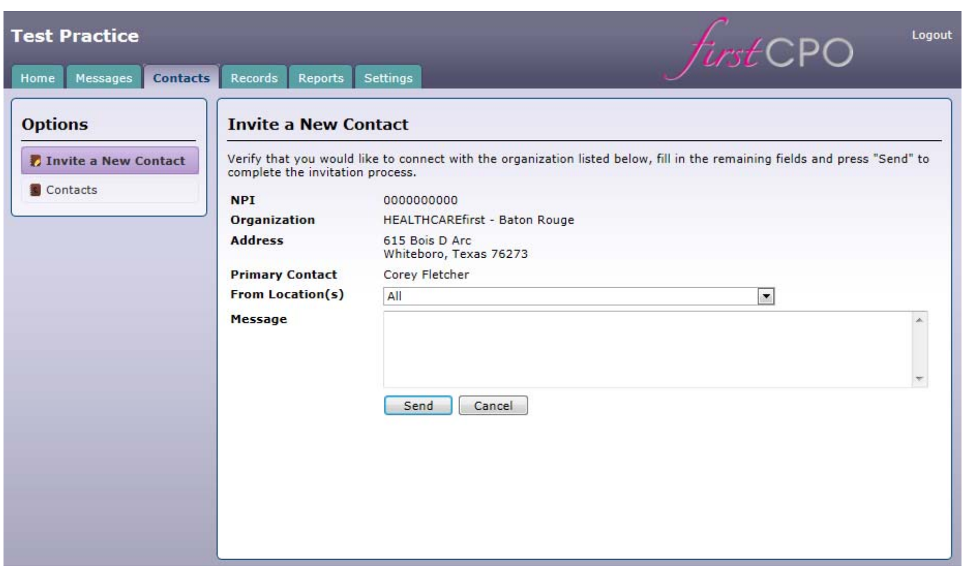
To verify if a physician is already registered for *first*CPO:

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 *first*CPO. 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.

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

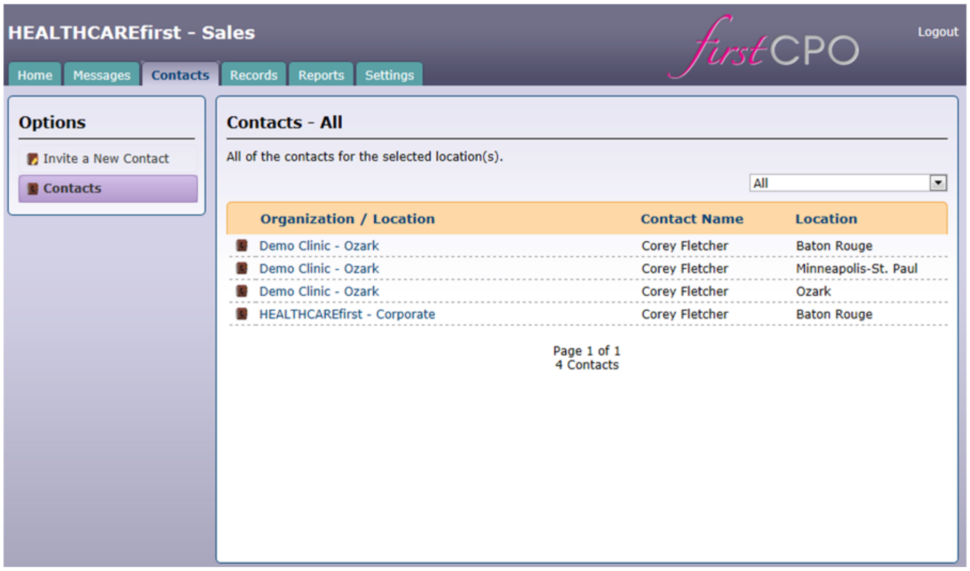
To send an invitation:

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

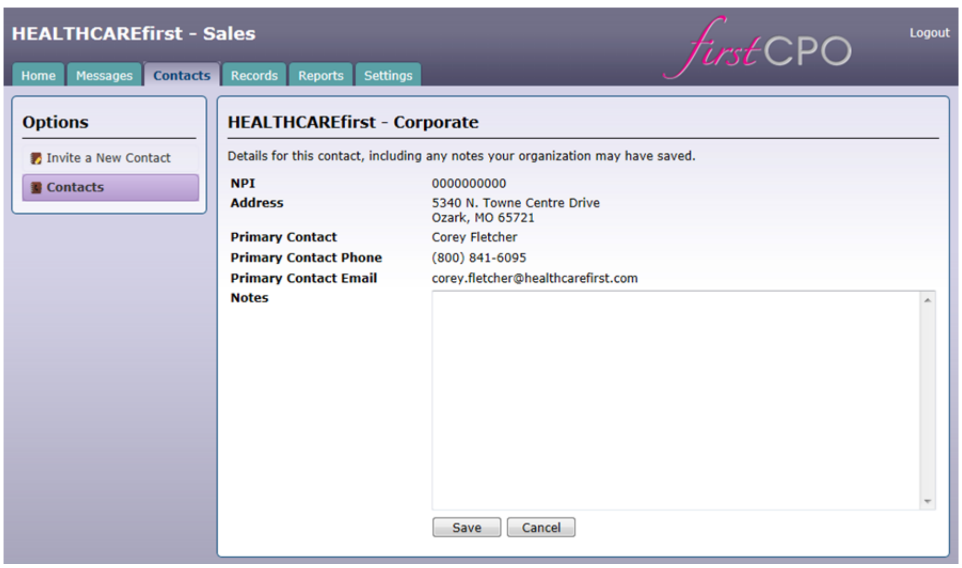
After the physician accepts the invitation they will receive a link to register for *first*CPO. Once they accept the invitation messages and documents can be sent to the physician.

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.



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.

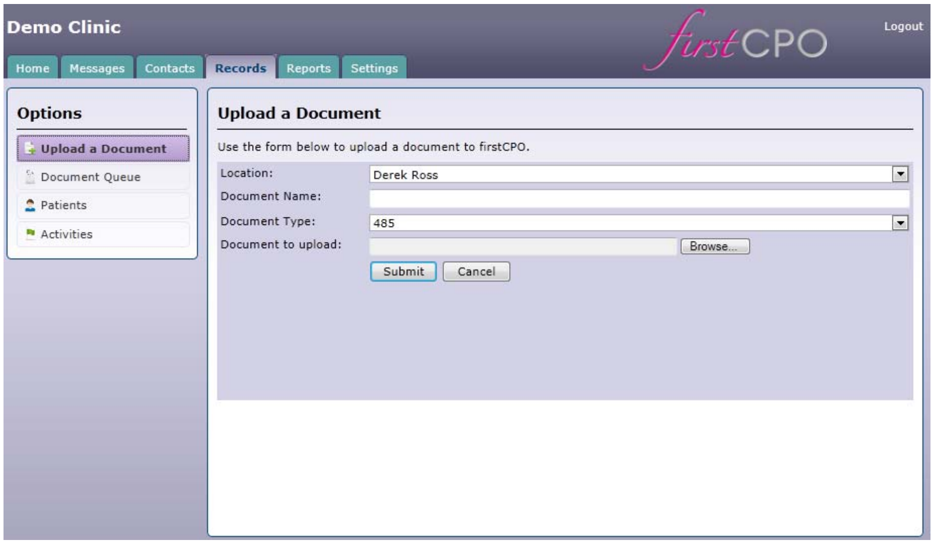


Records

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

- Upload a Document
- Document Queue
- Patients

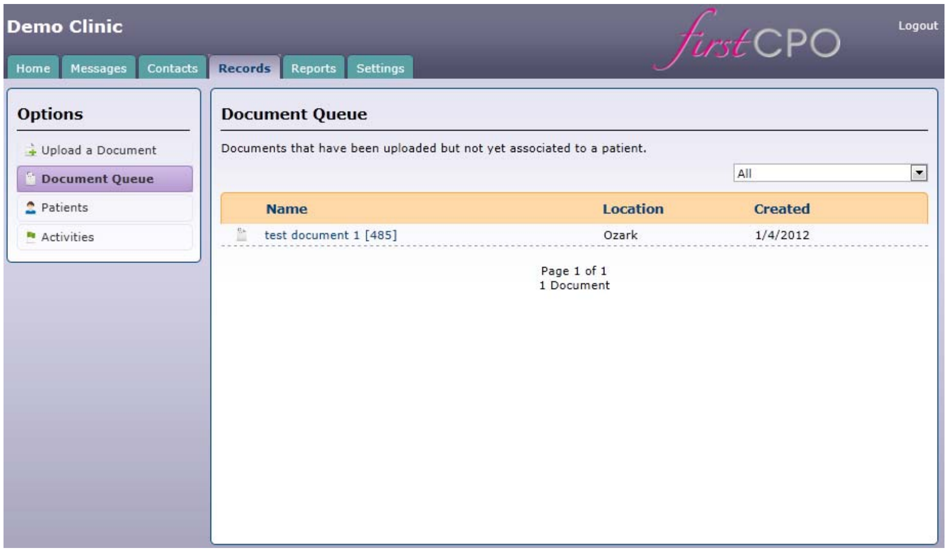
Upload a Document



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



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

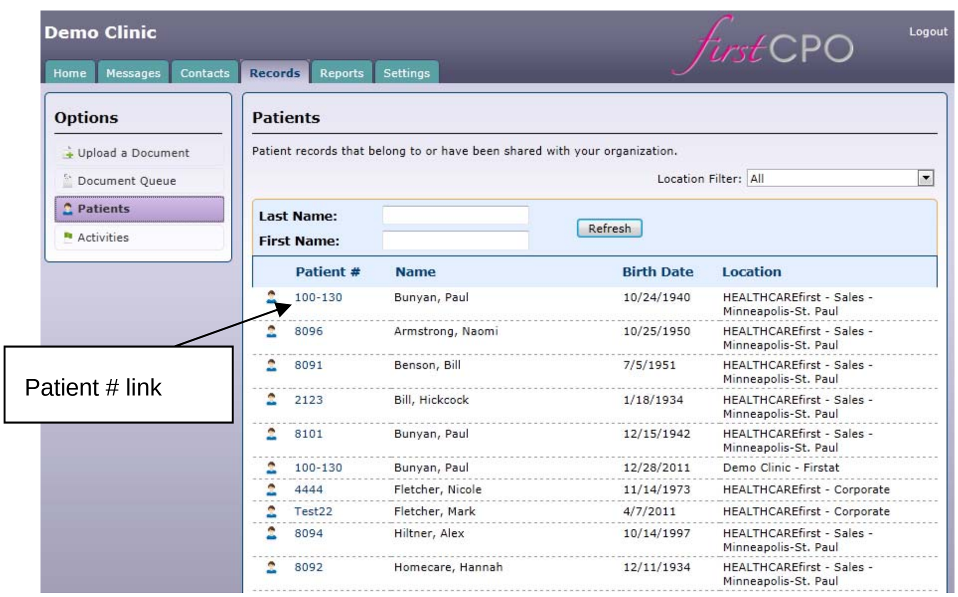
To assign a document to a physician:

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

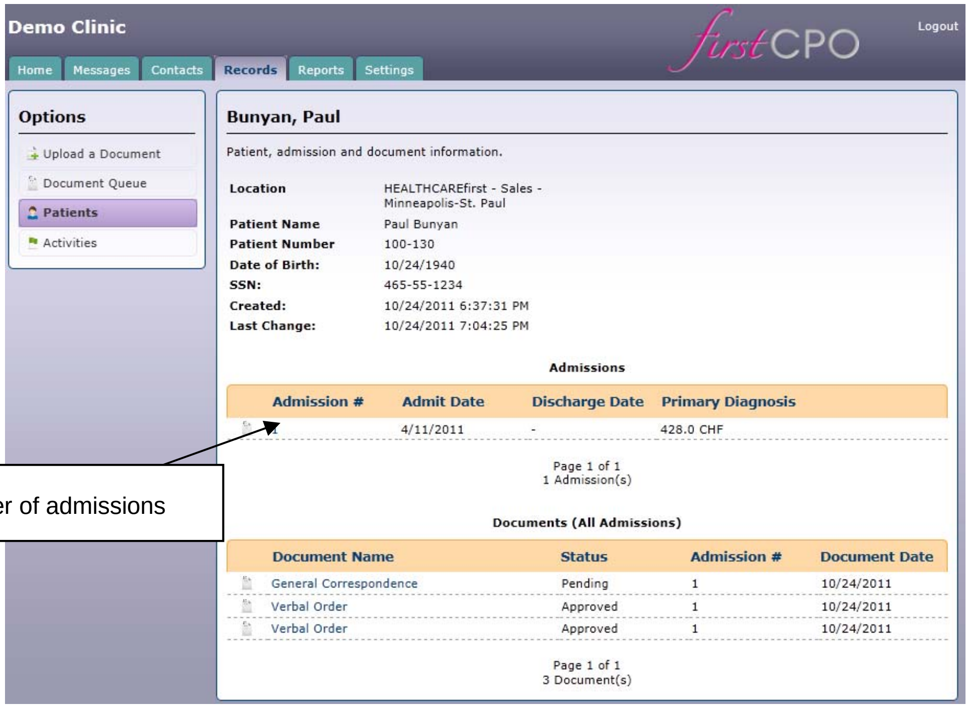
When the **Patients** tab is clicked the following screen will appear.



The 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.

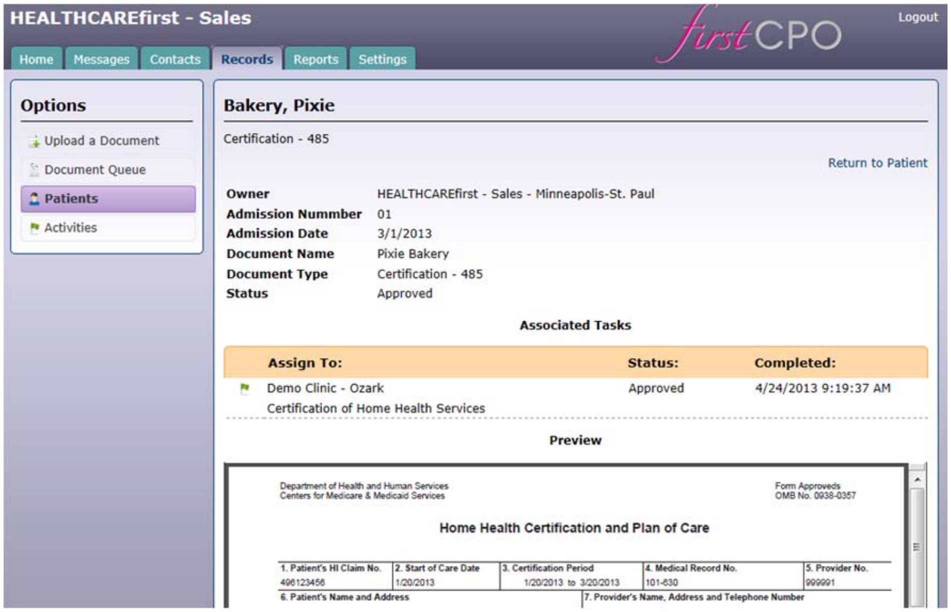


Number of admissions

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**.



Reports Tab

The Reports tab contains three options:

- Activities
- Transactions
- Avg Days to Sign

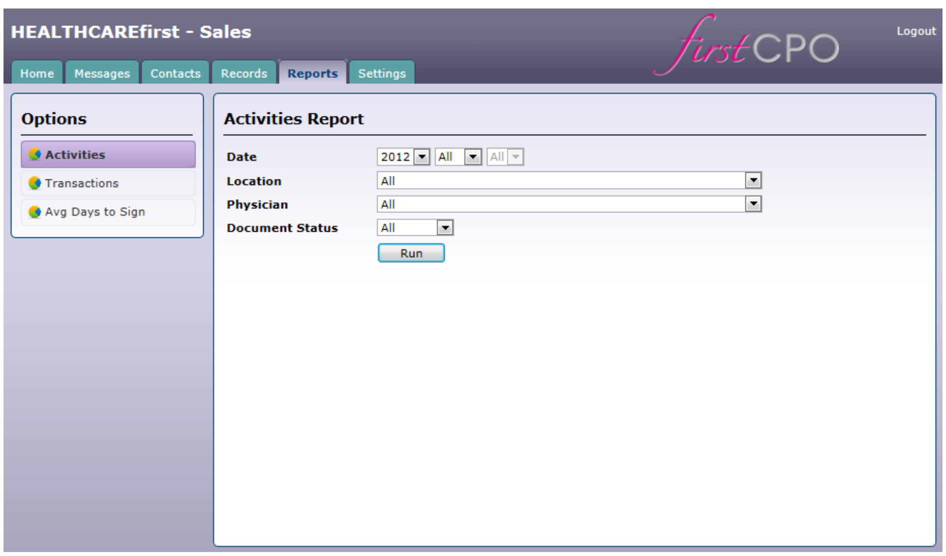
All three report screens will contain the same navigation, print, and export features at the top of the report screen:

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

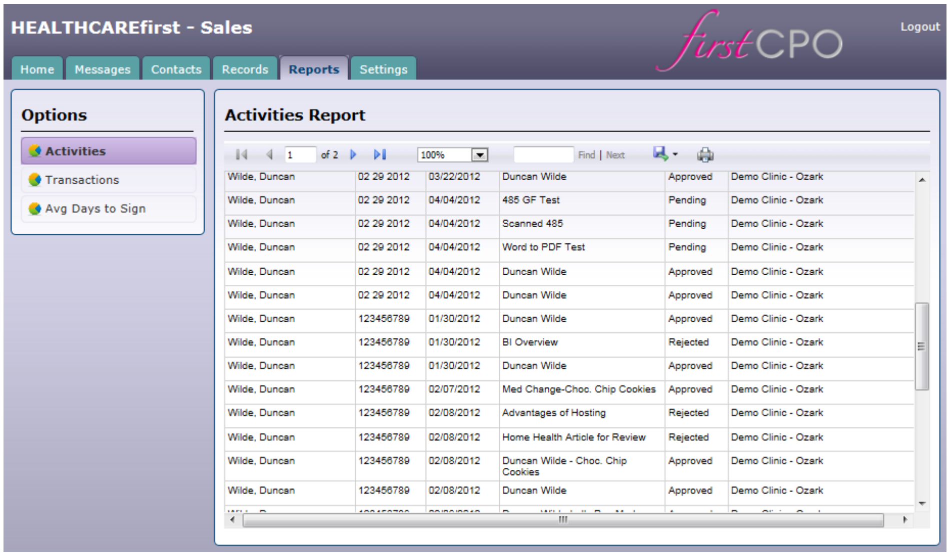
Activities Report

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**.



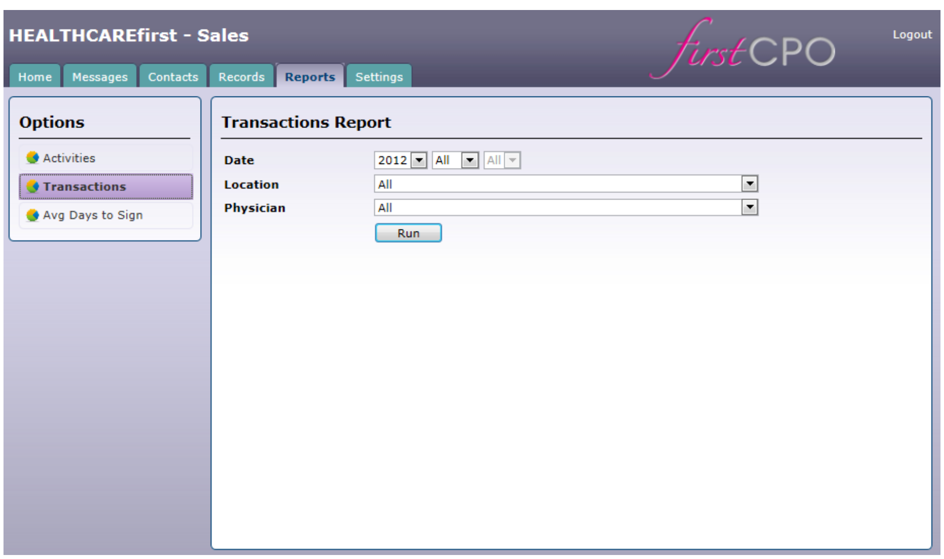
The report will appear similar to the following:



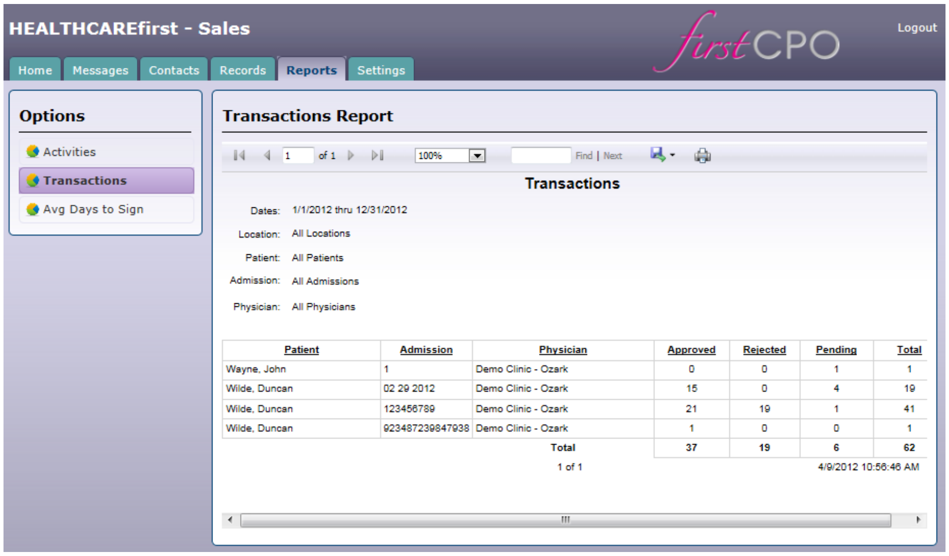
Transactions Report

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**.



The report will appear similar to the following:

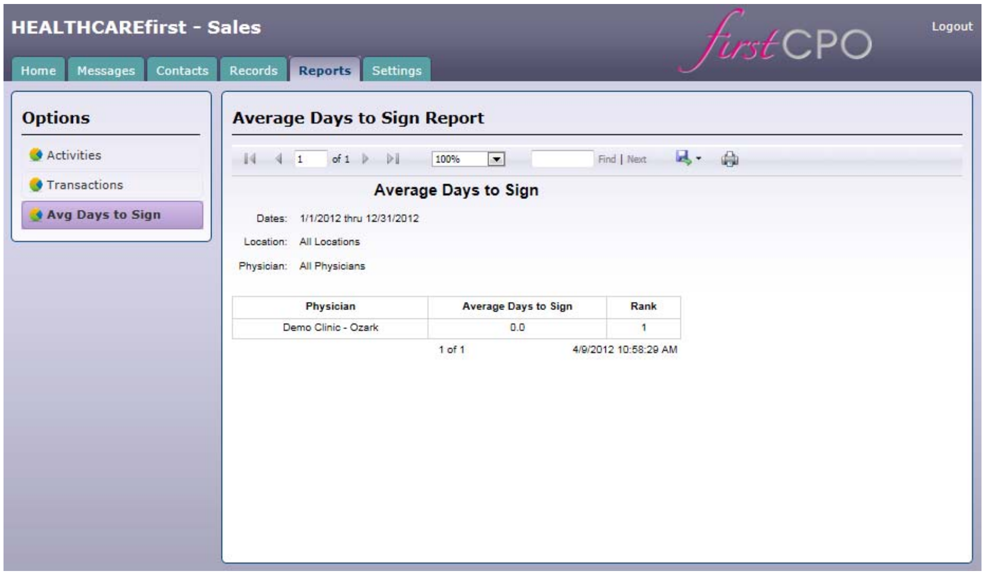


Avg Days to Sign Report

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**.

The following report will appear:



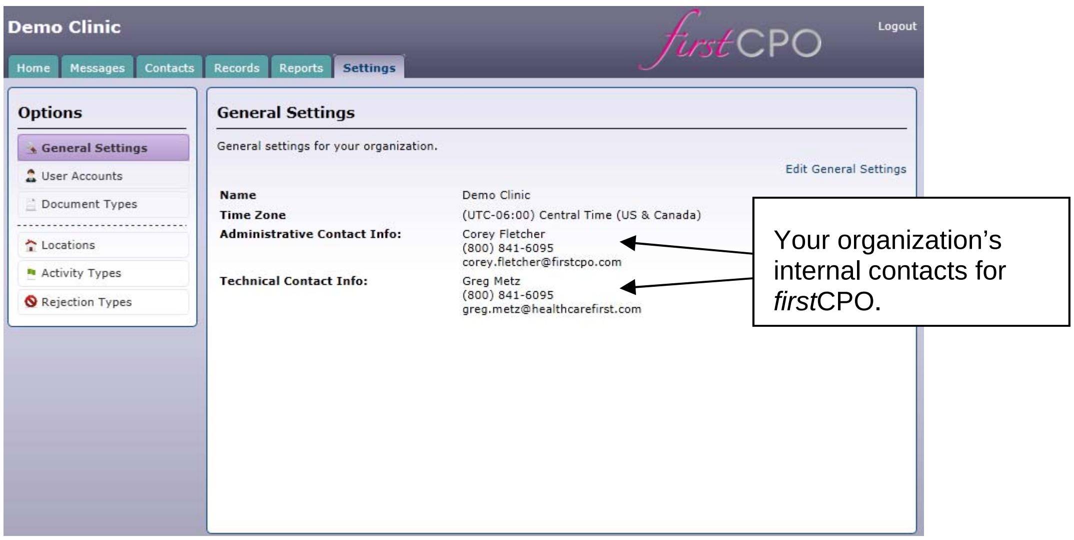
Settings

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

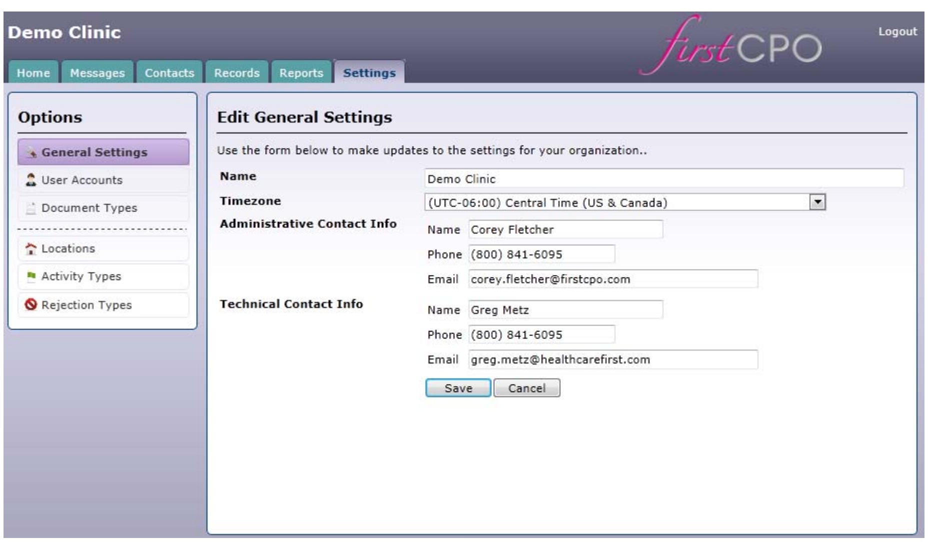
General Settings

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



To edit General Settings:

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



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.

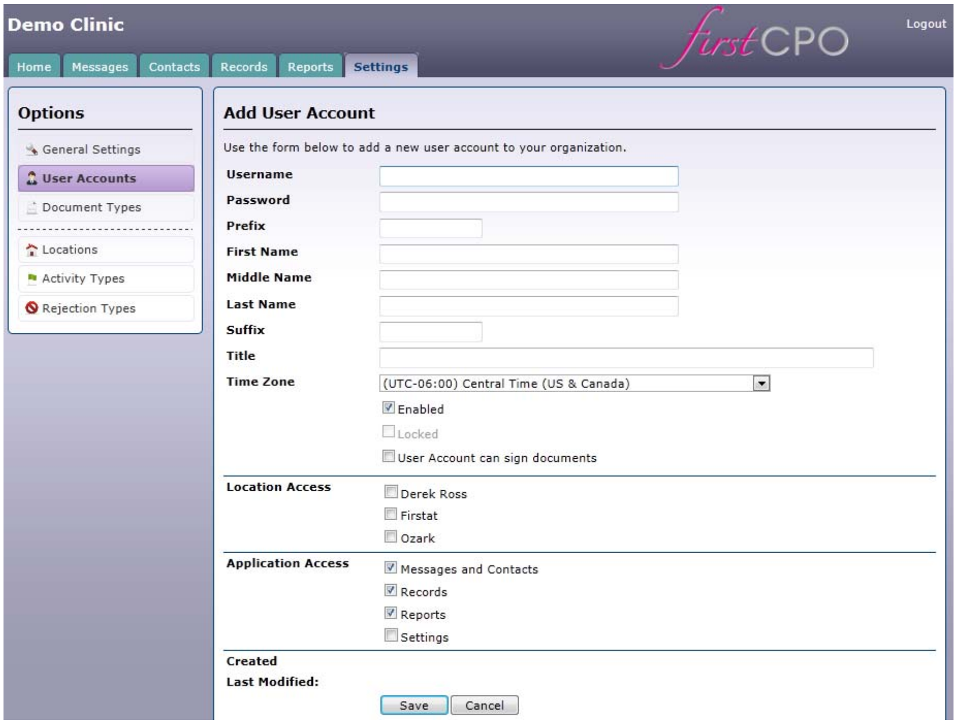
The User Accounts screen will list all of the registered users for the organization as shown below.

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.



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 *first*CPO 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**.

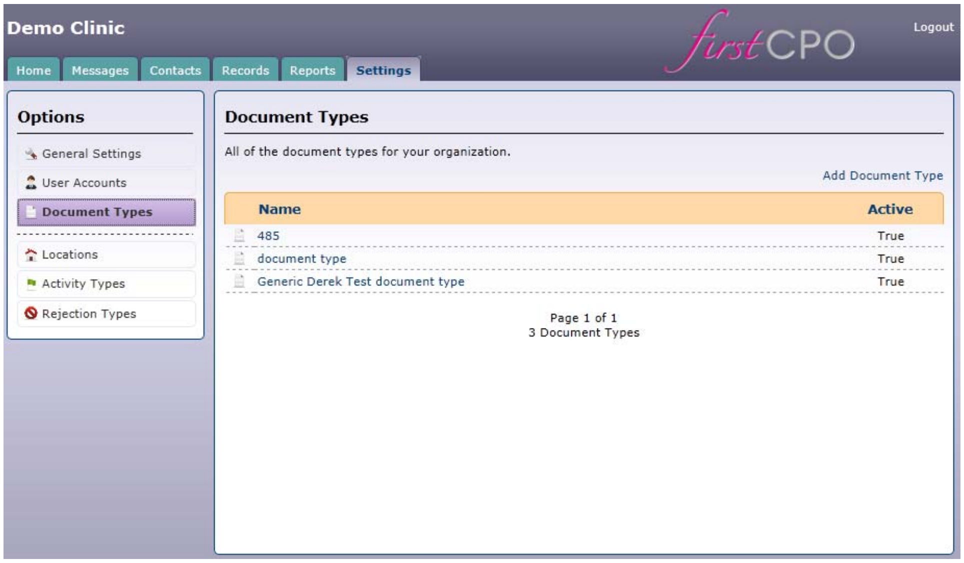
Document Types

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

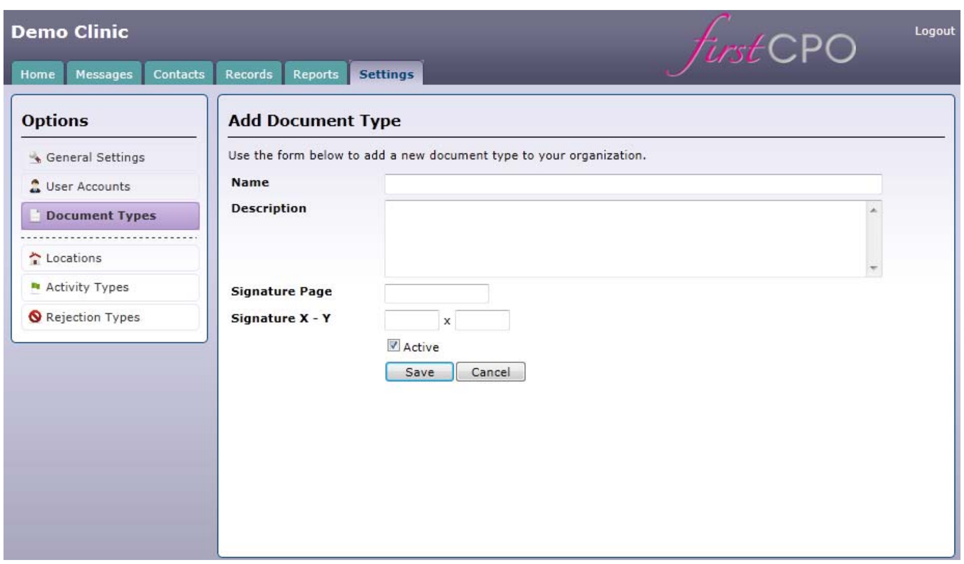
Add a New Document Type

To add a new document type:

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



The following screen will appear.

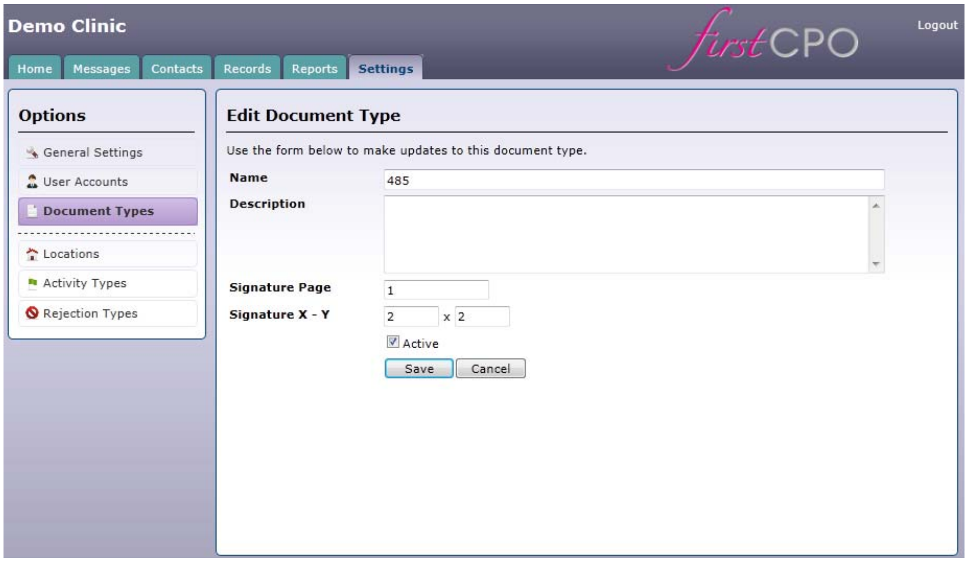


1. Enter the document **Name**.
2. Enter the document **Description**.
3. Enter the **Signature Page number**.
4. Enter the **Signature X – Y** values (set default to 10 X 10 if using *first*CPO print driver otherwise HEALTHCARE*first* will have to setup the signature location for the document).
5. Click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

Edit Document Type

To edit a document type:

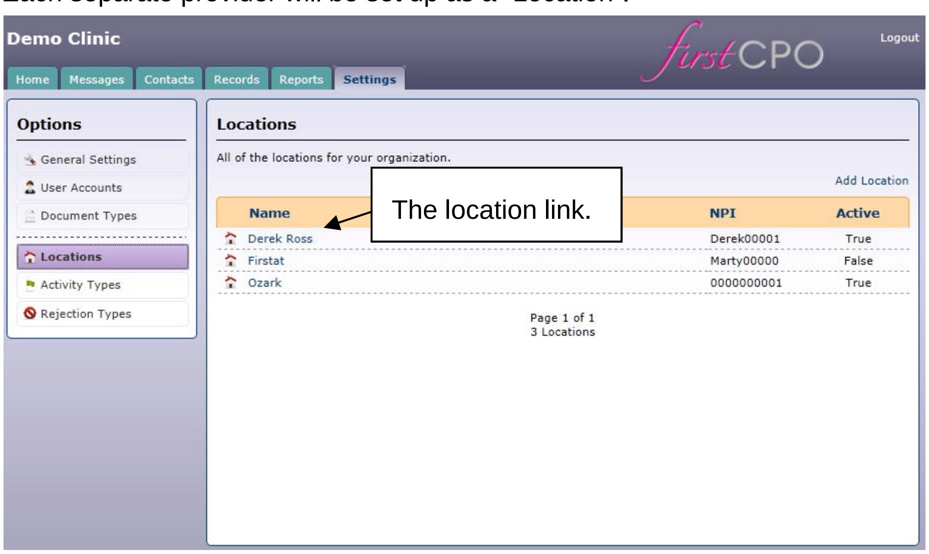
1 Click the **Settings** tab and the **Document Type** option.
2 Click the document link to edit.
3 The **Edit Document Type** screen will appear.
4 Make changes to all information that needs to be edited.
5 Click **Save**.



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".

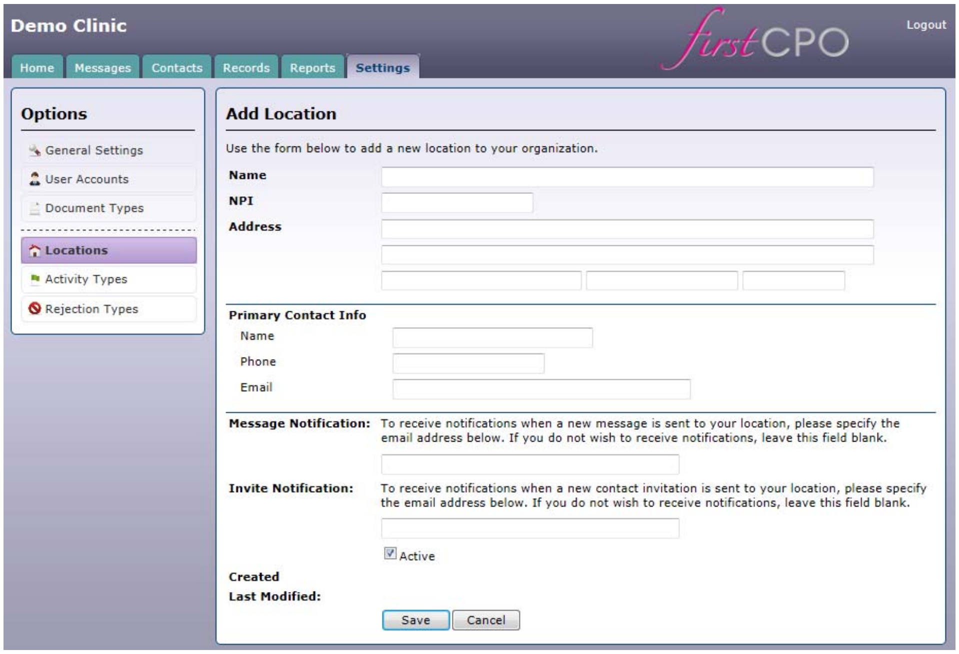


Add a New Location

To add a new location (provider):

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

The following screen will appear.

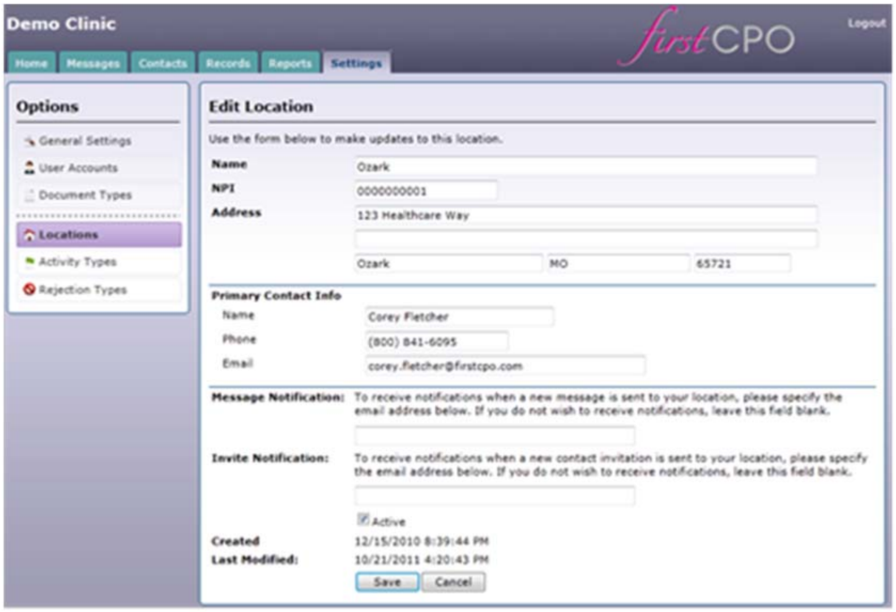


1 Enter the **Name, NPI** and **Address** for the provider. Make sure to verify that the NPI is correct when adding new locations.
2 Enter the **Primary Contact Info Name, Phone** and **Email**. This will be the contact that manages the information for the provider.
3 Enter the email address for **Message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



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. *first*CPO comes preloaded with four activity types based on the HCPCS codes.

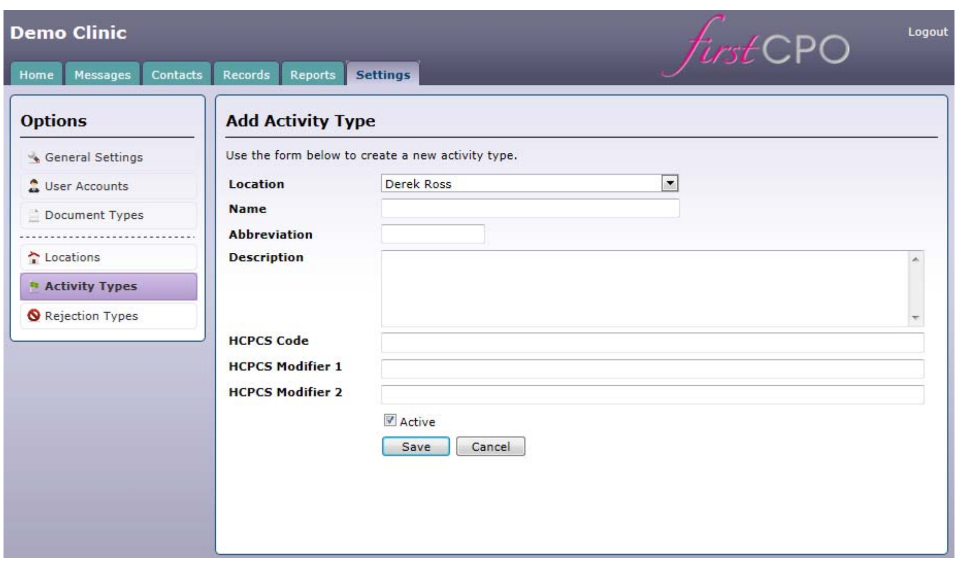
- Certification Home Health Services
- Recertification
- Home Health Services
- Supervision Home Health Services and Supervision Hospice Services

Add Activity Type

To add an activity type:

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

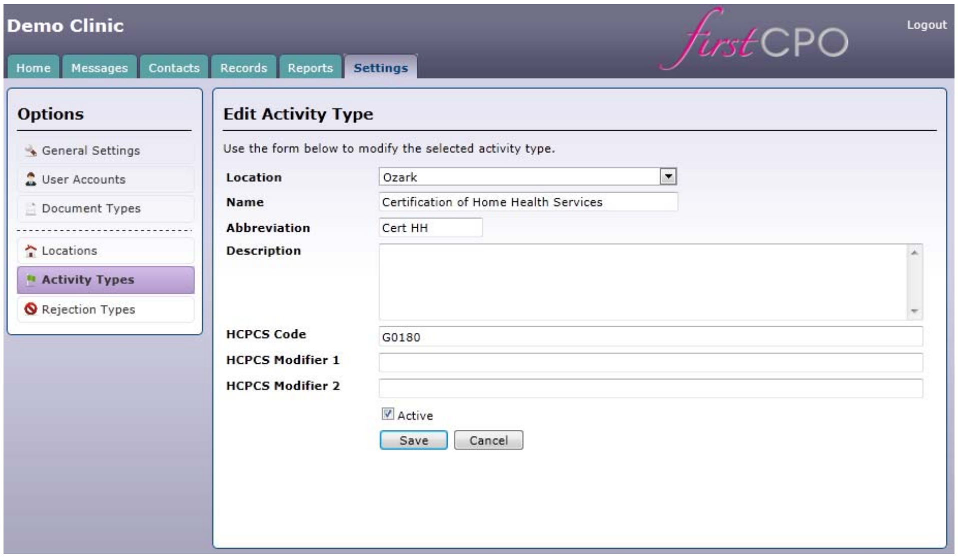
The following screen will appear.



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

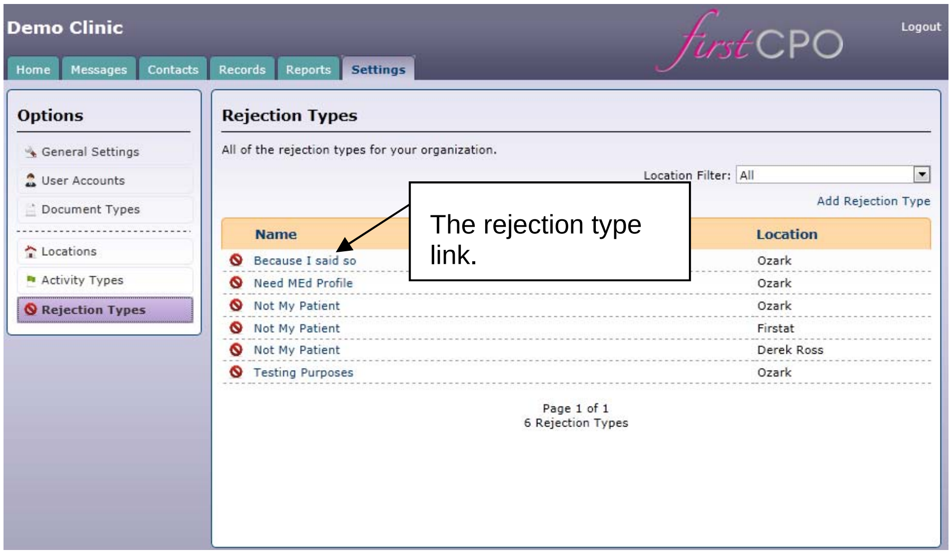
Existing Activity **Types** can be edited as needed. To edit an **Activity Type**:



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.

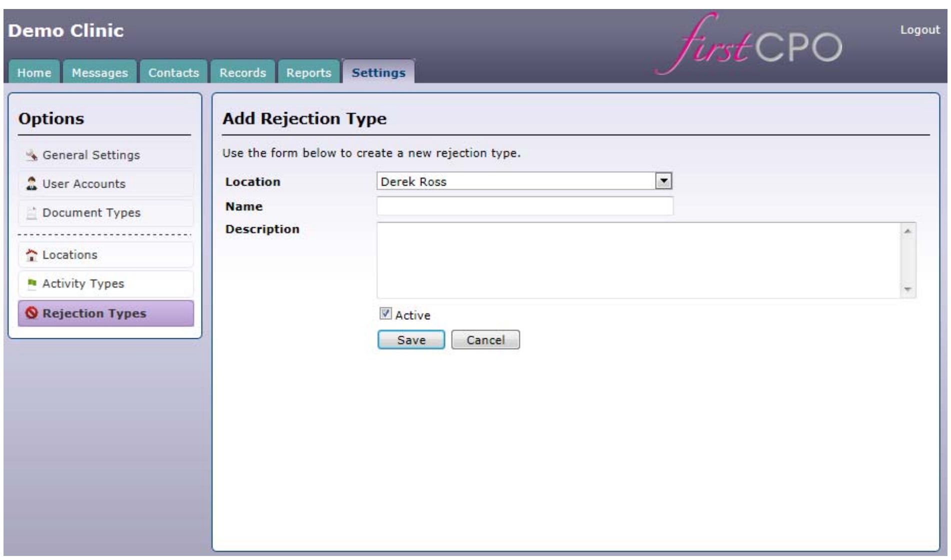


Add Rejection Type

To add a rejection type:

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

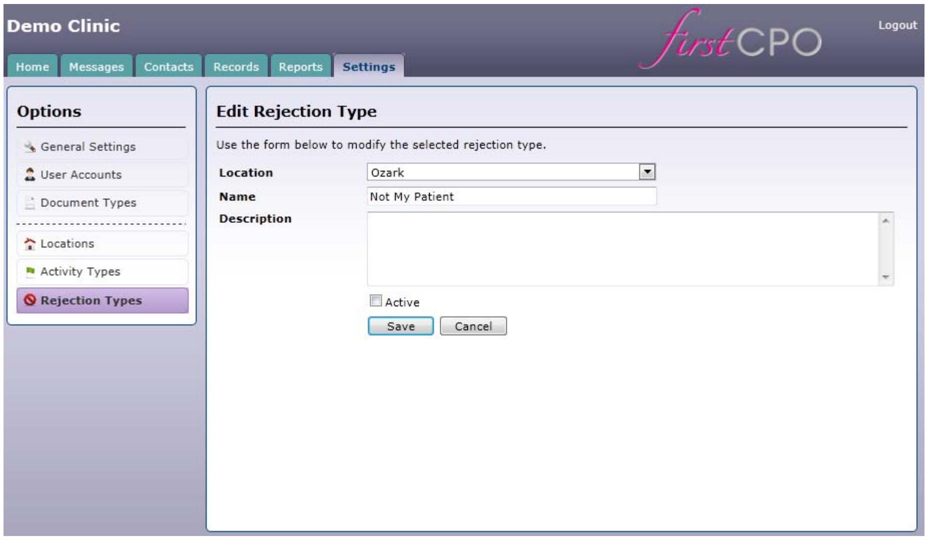
The following screen will appear.



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**:

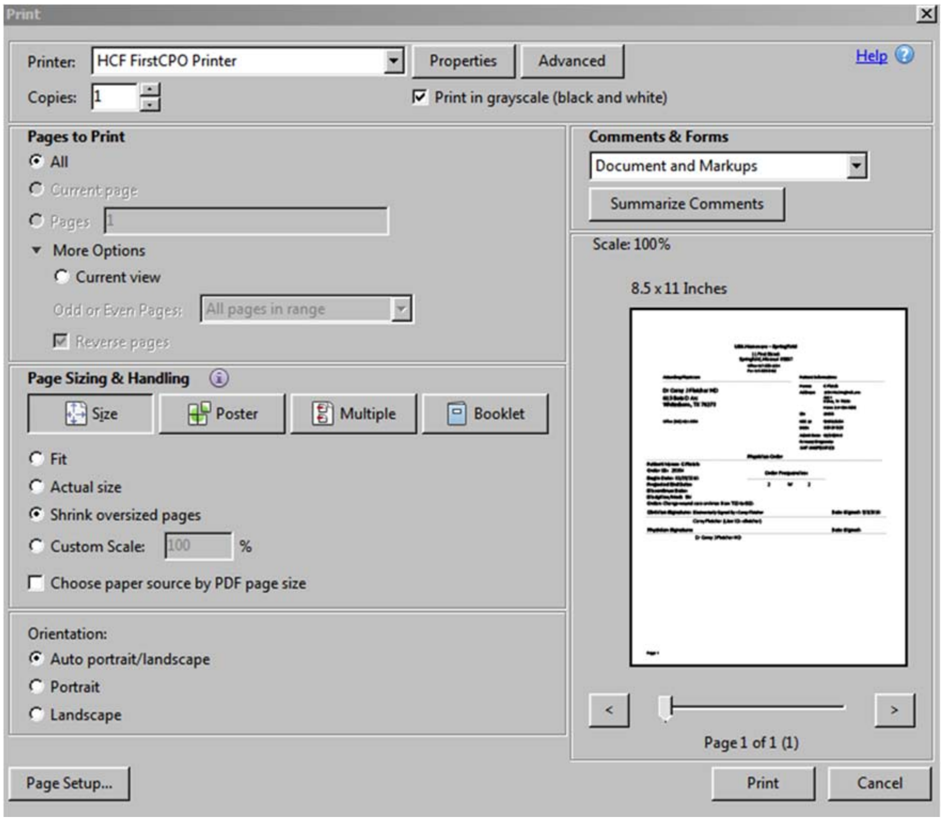


1. Click **Settings │ Rejection Type**.
2. Click the rejection type link.
3. Change the fields that need to be edited.
4. Click **Save**.

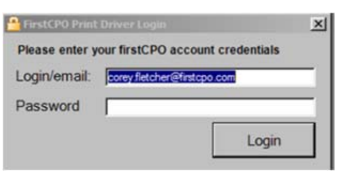
Print Wizard

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**.

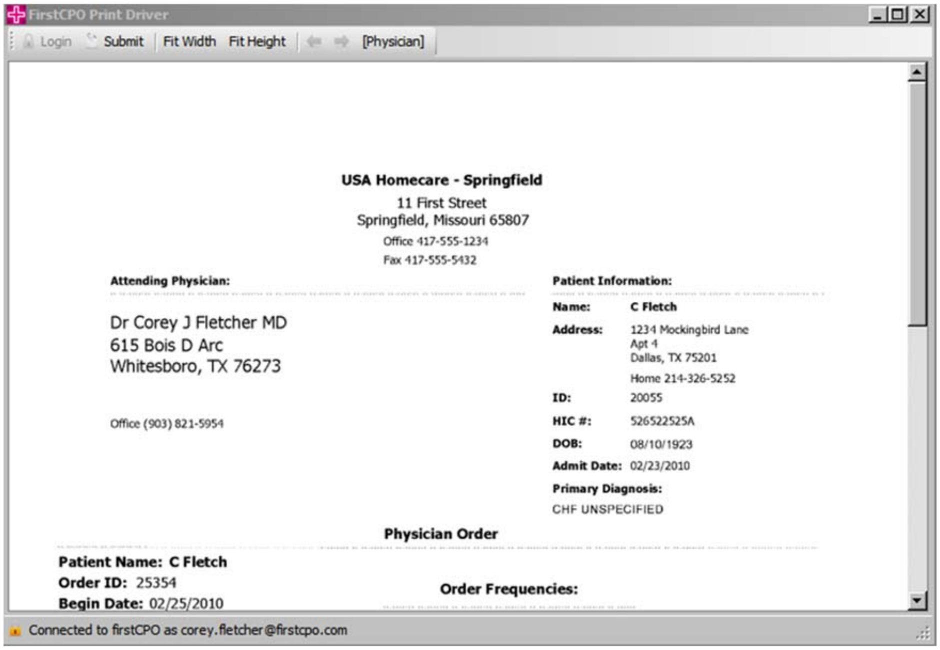


The Print Wizard will automatically check for updates when loading and prompt the user to login with your *first*CPO username and password.

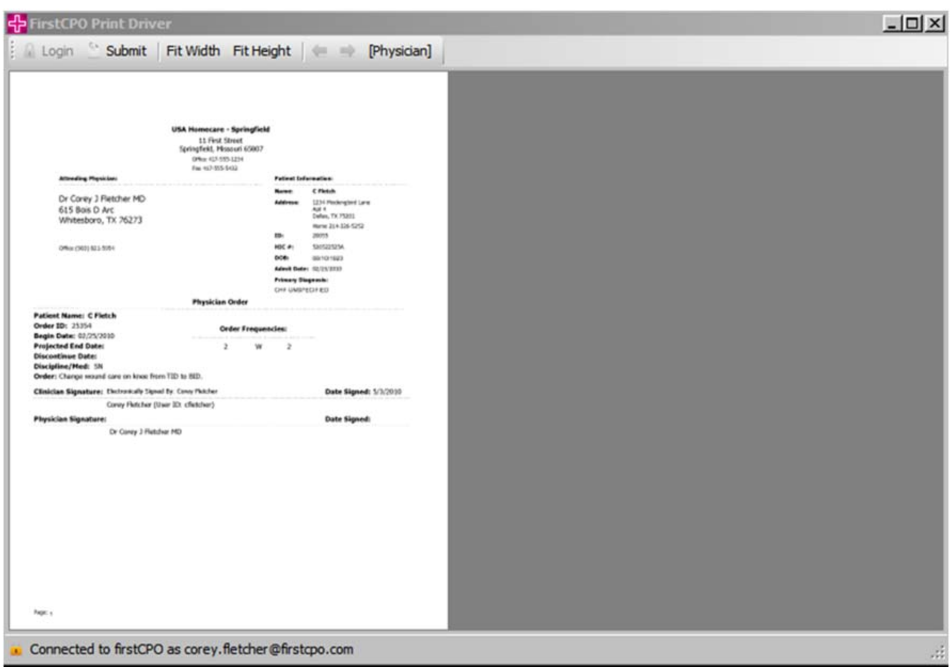


The document will appear in a Print Driver window. The view of the document on the screen can be changed by using the Fit Width or Fit Height buttons.

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.

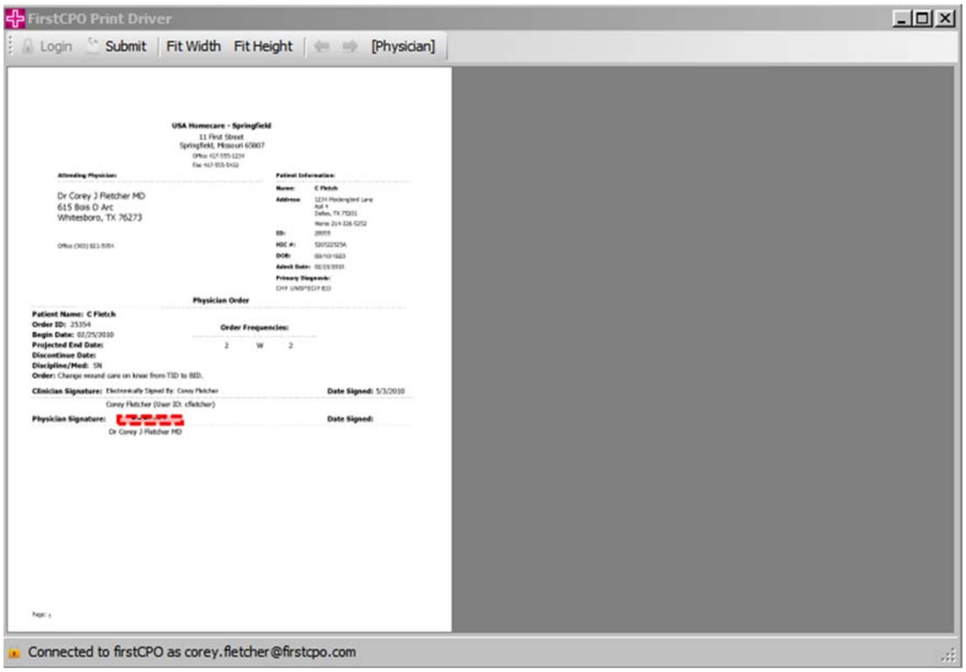


The **Fit Height** button will adjust the document to fit to the height of the screen, causing the full view of the document to appear on the screen. HEALTHCARE*first* recommends that the **Fit Height** view be used. See the **Fit Height** view below.

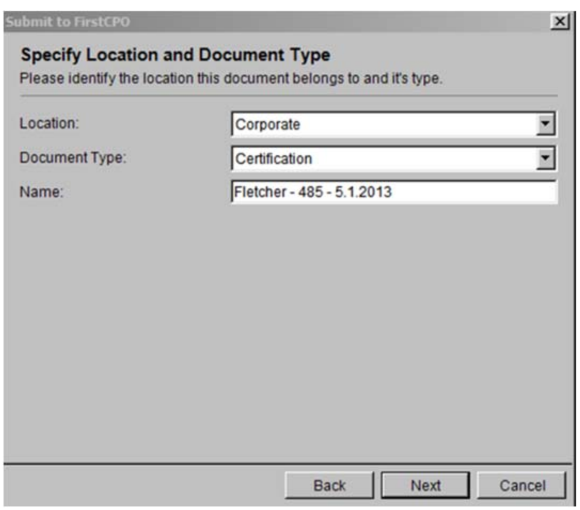


After the document view is selected, the physician signature field will need to be added to the document.

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



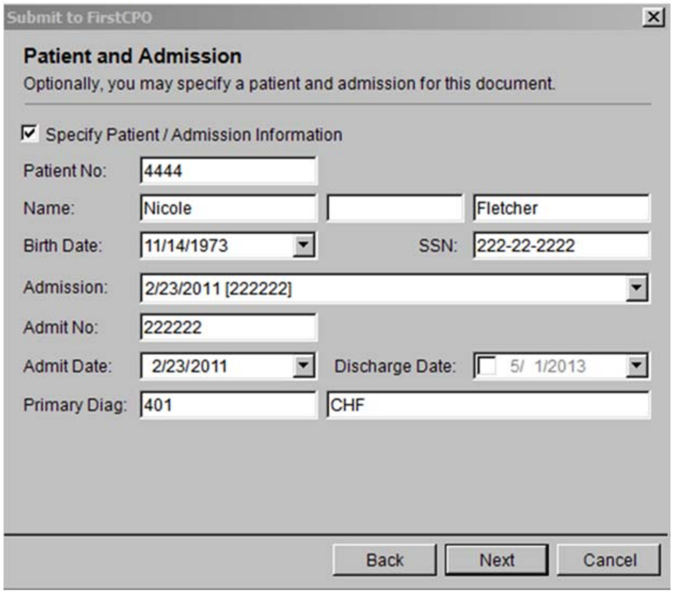
3 After the physician signature box is placed, click **Submit**.
4 The Print Wizard will prompt the user to name the document, assign the document to a patient, and select the appropriate physician.
5 A Submit window will appear. On the first screen select the location (office in your agency if more 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 *first*CPO. Once entered *first*CPO will recall the information when the Patient No is entered.

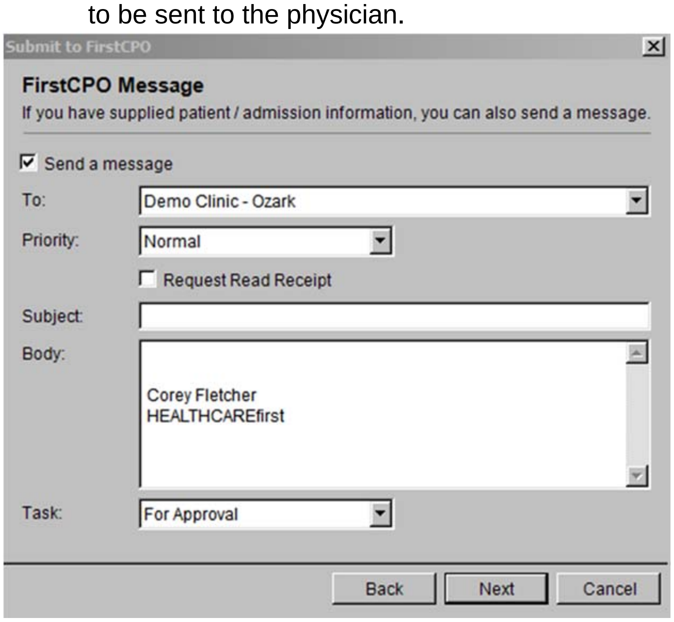
8 Check the **Specify Patient/Admission Information** box. Patient information cannot be entered until this box is checked.



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 *first*CPO, 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.



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.