CooperCare Link User Guide

Welcome to CooperCare Link

CooperCare Link offers real-time, view-only access to their Cooper University Hospital patients' medical records. In Basket messaging facilitates communication with staff, including provider-to-provider discussions regarding patient care.

CooperCare Link users receive patient event alerts, allowing providers to monitor their patients throughout the referral process, including registration, admission, order results, discharge, and more.

Important Contact Information

For CooperCare Link Support help, please contact us at

(856) 807-5604, option 1 or email CooperHealth@experis-ext.com.

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Getting Started

CooperCare Link is a tool that provides real-time Web access to patient information, so you can access patients' clinical data and communicate with Cooper to provide quality patient care. You can also use CooperCare Link to quickly refer patients to our organization.

CooperCare Link is a collection of different web pages, or activities, that correspond to different tasks. The *activity* that you use depends on what you want to accomplish.

This guide takes you on an introductory tour of CooperCare Link. The first pages include information to help you get started, such as browser requirements and how to log in. The rest of the guide contains explanations of how to use CooperCare Link. Terms that appear in *italics* throughout the guide are further defined in the glossary at the end of the guide.

Help and contact information

For help using an activity, click 💬 on the Web page.

- If you forget your password or can't log in, please contact your office's site administrator to reset it. If you still have an issue after your password is reset, please call (856) 807-5604 and press option 1.
- For all other issues, send an In Basket message to Help Services.

If you need to submit a help desk request, your help desk support is likely going to ask you for key technical information. To get this information, go to **Settings > Session Information Report**.

Browser, system, and connection requirements

You must use one of the following Internet browsers to access CooperCare Link:

- Google Chrome 88 and any later versions
- Microsoft Edge version 88 or later
- Mozilla Firefox version 88 or later

CooperCare Link requires a minimum screen resolution of 1024x768 pixels. While you can use a dial-up Internet connection to access CooperCare Link, we recommend that you use a high-speed Internet connection to achieve the best system speed and performance. In addition, you need Java enabled to display graphs and scanned images in CooperCare Link.

How do I log in?

Open your Web browser and access the following URL:
www.CooperCarelink.org

1. Enter the user ID in the **User ID** field. There are two ways you can receive your User ID. If you're an existing office using CooperCare Link, your Site Administrator will provide you with your User ID. If you're a new office who requested access to CooperCare Link, your User ID will be emailed to you with your CooperCare Link New Office signup letter.

2. Press **TAB** to move to the **Password** field and press **ENTER**. There are two ways you can receive your password. If you're an existing office using CooperCare Link, your Site Administrator will provide you with the temporary password. Your new password must be in the following format
   • 8 characters in length
   • Contain at least 1 letter
   • Contain at least 1 number
   • Contain at least 1 special character

If you're a new office who requested access to CooperCare Link, your temporary password will be emailed to you with your CooperCare Link New Office signup letter. After you have entered your user ID and password correctly, press **ENTER**.

On your first login to CooperCare Link, a Terms and Conditions page will appear, read the agreement and click **Accept** to acknowledge your agreement with the terms.

You are now logged in to CooperCare Link.

**When you are first provided your temporary password, per CooperCare Link password policy you must immediately reset it. Please create your new password using the following:

Your new password must be in the following format

- 8 characters in length

- Contain at least 1 letter

- Contain at least 1 number

- Contain at least 1 special character

Navigating in CooperCare Link

When you log in to CooperCare Link, two sets of navigation tools appear at the top of the page.

1. **Navigation Tabs**: These tabs allow you to navigate to different activities in CooperCare Link. Each tab contains one or more related activities. For example, the **Patient** tab contains patient-specific activities. You click a tab, the default activity for that tab opens.
2. **Activity Menu**: Use this menu to open the various activities that are contained in the selected navigation tab. For example, the **Patient** tab activity menu contains the **Allergies** and **Chart Review** activities.

   - If there are more activities than can fit on the screen, hover over the ellipsis on the far right of the menu to see all the activities contained in the tab.
   - You can also click 🔯 to pin an activity so it appears first in the menu. If you pin multiple activities, they appear in the order that you pinned them. Click and drag pinned activities in the menu to change their order.

3. **Action Options**: Use these buttons, located on the top right of the screen, to see all of your available activities or to log out.

How do I log out?

To maintain patient confidentiality, you need to log out or *secure screen* when you are done working or have to leave the computer for any reason. There are two ways to do this:

- Click **Log Out** to log out of CooperCare Link. The next time you log in, you are directed to your start page.
- Secure the computer by going to **Menu > Secure**. **When you log back in, you return to the same activity that you were using before you secured the screen**.

Updating Program Settings

You can use the CooperCare Link settings options to perform a variety of account maintenance tasks, including changing your password and setting the page that appears when you first log in. in addition, you can choose to receive email notifications at an external email address when you are granted access to a patient. You can set your preferences for these notifications, as well as specify the email address at which you'd like to receive them.

Change your password

1. Go to **Menu > Settings > Change Password**.

2. Enter your old password, then a new password, and then your new password again.

3. Click ✔ **Accept**.

Set up your email preferences

1. Go to **Menu > Settings > User Demographics**.

2. Enter your email address, title, degree, languages, and specialties, if applicable. The fields that appear depend on your user role.

3. Click **Receive e-mail notifications** if you want to receive notifications for unread In Basket messages at your specified email address.

4. In the **Days between e-mails** field, enter the number of days you want to wait between notification emails.

5. Click **Receive notifications** for group events if you want to receive email notifications about all patient events for the provider groups you belong to.

6. Click ✔ **Accept**.

Change your default login page

1. Go to **Menu > Settings > Set Default Page**.

2. Go to the page that you want to set as your default page.

3. Click **Set Default Page** to set the current page as your default page.

TIP: To reset your default page to the system default, go to Set Default Page and click **Click here to clear your default page and use the system settings instead**.

Set up notifications

You can receive text or email notifications when you receive specific types of In Basket messages. For example, you might want to receive a text when you have a new In Basket message about a patient being discharged from the hospital.

1. Go to **Menu > Settings > My Demographics**.

2. Select the email check boxes depending on the type of notification you want to receive for each type of message.

3. Enter the email address that you want to receive the email notification.

4. Enter a phone number in the Addresses/Phone Numbers section.

5. Click ✔ **Accept**.

Settings ▸ My Demographics

Information
Email
Days Between Email Notifications

Notification Preferences
☐ Receive email notifications for unread messages   ☐ Receive notifications for group events

Addresses/Phone Numbers
Phone

Address   State   ZIP
                                           County
City (or ZIP)   Country
                                                      ✔ Accept   ✘ Cancel

Accessing the Patient Chart

There are two ways to access a patient's chart: by selecting the patient from a list of your current patients or by searching for your patient based on name, date of birth, or other criteria. Both methods are described below.

Select your patient's chart from a list of current patients

1. Click ▣ **Patient** and go to the **My Patients** tab.

    - If you have access to many patients, your patients might appear on more than one page. Use the field at the top of the page to search for patients by their name.

2. Click a patient's name to open their chart.

3. To view a list of currently admitted patients, click ▣ **Patient List** and select the tab for admitted patients. For patients to appear on this list, you must have a provider relationship for PCP, attending, admitting, or treatment team on the admission.

4. Select a patient's name to view additional patient-specific information in the report pane.

5. If you view a report frequently, click ✦ to add a button for the report to the toolbar. From that page, you can also remove your report toolbar buttons, rearrange the order of buttons, and rename the reports.

6. Click ▬ to open a patient's chart.

TIP: To see only the patients for whom you are the PCP, select your name in the **Filter by Provider** field.

Search for a patient's record based on name or MRN

1. Click ⊞ **Patient** and enter the patient's name or MRN.

2. In the Search Results window, click the name of the patient whose chart you want to open.

TIP: In two clicks, you can quickly open a patient chart that you recently had open. In the Search My Patients section of the Patient Search activity, select the Recent tab and then click the name of the patient.

What if I can't find a patient?

If you don't find a patient using the methods above, you might not have been granted access to their chart yet, or they might not have a record in the system. Use the **Search All Patients** section of the Patient Search activity when you need to gain immediate access to a patient's chart for the first time, such as in the case of an emergency. Note that you must enter the patient's first and last name when using this method.

1. If your initial search returns no results, click **Search All Patients** from the Search Results window.

2. Complete all of the required fields, and then click 🔎 **Search**.

3. Select the patient record you want to open, select the reason you need access to the patient's chart in the **Reason** field, and add any comments. Enter any additional comments and click ✔ **Accept**.

Monitoring Your Patients

Event Monitor allows you to monitor events that occur in your patient's care, such as inpatient admissions or discharges, outpatient visits, or new lab results. You can view these events on the home screen or in your In Basket.

Target your event notifications

To focus on the medical events that matter most to you, use event and relationship filters in Event Monitor. You can tailor which types of events you're notified of and for which patients. For example, you can choose to be notified of only the events associated with you or certain providers in your group. You're associated with an event if you're the attending provider, admitting provider, referring provider, a treatment team member, a care team member, or the patient's PCP.

1. Go to **Menu > Settings > Event Settings**.

2. Choose which types of events you'll receive notifications for in the Event Filter section.

3. Choose which events you'll receive notifications for by selecting one of the options in the Relationship Filter section:

   a. **All events for patients in my group**. This option includes events for any patient that you have access to. For example, if you choose to receive referral notifications, you are notified of any authorized referrals, even if the referral isn't to you or your group.
   b. **Only events associated with my group (recommended)**. For example, if a patient you have access to is admitted to the hospital, and the patient's PCP is in your group, you receive a notification even if the PCP isn't associated with the admission.

      d. **Only associations that I select**. This option includes only events associated with the relationship you select.

View a patient's recent events

Select the **Home** tab and hover over each type of event in the Event Monitor section to review recent events for your patients.

If necessary, you can view more information about events and mark them as Done in In Basket by clicking the name of the patient in the Patient column.

Open a patient's chart from an event message

Select the In Basket message for the patient's event and click **Select Patient** to open the patient's chart.

Reviewing the Patient Chart

Review the patient's chart before a visit

1. Open the patient's chart, click **Chart Review**, and select a tab that includes information you want to review.

2. To view more detail, such as a specific patient visit, click the date link that appears in the row.

TIP: To view details on several rows at once, select the check boxes in those rows, and then click **Start Review.**

Find information quickly in the patient's chart

For patients with large charts, you can enter text in the **Search Chart** field to quickly find the information you need. For example, search for "cholesterol" to see a list of relevant matches in the patient's chart, such as lipid panel results and progress notes that mention cholesterol.

Use filters to narrow the list of information you see

You can also use filters to find visits, labs, medications, or other information in Chart Review. For example, on the **Encounters** tab, you can filter the list so you see only the visits associated with certain providers.

1. In Chart Review, select a tab.

2. Click ▼ **Filters** and select a filter type. Then, select check boxes next to the values that you want to see. For example, select Encounter Type, and then select the Billing Encounter filter.

3. Click ✔ **Apply** to make te results of your search appear.

TIP: To remove the search criteria and begin a new search, click ✎ Clear All.

View a patient's trending lab results in Results Review

1. Select the **Patient** tab and click **Results Review**.

2. Selec the date range for the results data you want to see and click ✔ **Accept**.

3. To view a specific result component type, such as Hematology, or a specific result component, such as Hemoglobin, expand the tree on the left. Select the name of the component or component type that you want to view.

4. To view more colums of results, click ◀ **Load More**. To view all columns of a patient's results for the time range that you selected, click ⏮ **Load All**.

TIP: Click ⊙ **Time Mark** so the next time you view the patient's results, you can easily distinguish any new results from those that you have already seen.

Customize the way results appear

1. In Results Review, click ⊫ **Options**.

2. To make the most recent results appear from left to right by default, select the **Trend Dates in reverse chronological order** check box.

3. Set your other default preferences, such as the default number of columns to show, using the other options.

4. Click ✔ **Accept**.

View a patient's allergies

Select the **Patient** tab and click **Allergies**.

TIP: For more information about an allergy, select the allergy and click ▣ **View History**.

View a list of the patient's current medical problems

Select the **Patient** tab and click **Problem List**.

TIP: For more information about a problem, click the **View Report** link.

View a patient's current medications

Select the **Patient** tab and click **Medications**.

TIP: For more information about a medication, click 📋 **View Details**.

View a patient's history

Select the **Patient** tab and click **Histories** to see a report with information about the patient's medical, surgical, family, and social history. Social history includes topics like tobacco use and sexual activity.

TIP: For a high-level summary of the current patient's chart, select SnapShot from the Clinical Review menu.

View a patient's demographics

Select the **Patient** tab and click **Demographics** to see a report with demographic information like the patient's address, PCP, emergency contacts, and more.

Uploading Files to the Patient Chart

Upload a file

You can attach a file to the patient's chart, such as an electronic copy of exam notes.

1. Drag and drop a file from your computer into the selection below the patient's photo on the left side of the screen. Alternatively, click **Upload document** on the left side of the screen to open a window where you can drag and drop the file.

   - If you don't want to drag and drop a file from your computer, click **Add file** to browse for the file on your computer and select it.
   - Any files that you add must be smaller than the maximum allowed file size and be of an appropriate type.
     - The maximum allowed file size appears in a message below the **Add file** button.
     - To see which types of files you can add, hover over ⓘ.

2. Select a document type for the file, such as a study ttachment.

3. Enter a description of the file.

4. If you want to remove a file that you selected, click ✖.

5. If the Message for reviewer section appears, enter a message for the administrator who review files.

6. Click **Attach to Patient's Chart**.

In Basket: Viewing Messages

In Basket is a quick and easy way to communicate with your colleagues. From here, you can view and sort messages, search for messages based on a number of criteria, and respond to your messages.

Select the **In Basket** tab to access your messages. Folders that group types of messages appear in the left pane. For example, you might see **CC'd Charts** or **Referral Authorization** folders. If you have new messages, the folder title appears in bold, and the number of new messages appears in parentheses next to the folder name. If you have a new high-priority message, the folder appears with a red arrow.

TIP: A count of your unread In Basket messages appears on the **In Basket** tab so you can see whether you have any new messages without having to open your In Basket.

View a message

1. Select the folder for the type of message you want (for example, **Result Notifications**).

2. Select a message to read its contents.

Indicate that you're working on a pool message

When an In Basket message is sent to a pool that you're a part of, click the **?** icon to take the baton for the message. The **?** icon becomes a **+** icon, which indicates to other members of the pool that you're working on the message.

If you need to stop working on a message before you're able to complete it, click the **+** icon again to pass the baton back to the pool. The message then appears with the **?** icon.

If another member of your pool is working on a message, it appears with a **−** icon.

Search for a message

1. Click 🔍 **Search**.

2. Enter as many search criteria as you want and click ✓ **Search**. You can search by patient, message type, status, recipient, priority, date, or any combination of these.

3. To return to your normal In Basket view, click **My In Basket**.

Print multiple messages at once

If you are working with a paper system, you can print multiple In Basket messages to keep on file. Note that you can print multiple messages at once only for certain message types.

1. Select the folder containing the messages that you want to print and select the check boxes next to the messages that you want to print.

2. Click 🖶 **Print Selected**.

3. Select the right print settings and print the messages.

In Basket: Sending Messages

In Basket is a communication hub where you can send and receive secure messages similar to email. Messages are sent to individual recipients or to a number of recipients grouped in a class or a pool. You can also associate a patient with the message using the **Patient** field on the message form so that the recipient can refer to the patient's chart.

Send an In Basket message

1. Select the **In Basket** tab, click the arrow next to 📬 **New Msg**, and select the type of message you want to send.

2. In the **To** field, completion match on the name of the person or group to whom you would like to send your message. To see a list of all possible recipients, click 🔍.

3. Enter a brief subject in the **Subject** or **Summary** field.

4. If you are sending a message regarding a patient, either click **Use <patient name>** to pull in the patient's name, or search for a different patient. This attaches the patient's name to the message.

5. Complete any other required fields.

6. Enter your message in the **Note** field.

7. When you are finished, click ✔ **Send Message**.

Reply to or forward a message

Click a message to select it.

- To reply to a message, click ⤷ **Reply**.
- To forward a message, click ⤷ **Forward**.

Note: Reply and Forward options might not be available depending on the message you've received.

View messages you've sent

1. Select the **In Basket** tab and click **My Out Basket**.

2. Select a message type and then select a particular message to view it.

3. To return to your In Basket, click **My In Basket.**

Manage Your Clinic

Change a user's password

1. Select the **Admin** tab and click **My Groups**.

2. Click the key ⚷ icon in the row for a user to change their password.

3. In the **Old Password** field, enter your password.

4. In the **New password** and **Verify New Password** fields, enter the new password for the user.

5. Click **Accept**. The next time the user signs in using this password, they will be prompted to select a new password of their choice.

Verify users

You might receive a Site Verification message asking you to verify that all users working at your site are current and active. These users might include providers who don't log in to the web application but are listed because they need to be schedulable. From the message, you can click **Verify Now** and you are brought to the Site Verification activity. From the Site Verification activity, you can verify that all users and providers working at your site are current, and you can deactivate users as needed to prevent unauthorized access by users whose accounts are outdated.

1. In the Active? column, select No for all the users whose accounts you want to deactivate. You can enter a comment in the **Comments** field that appears.

2. Select the Acknowledgment check box to acknowledge that you have reviewed and confirmed the list of users.

3. Click ✔ **Verify** to verify the list of users and close the screen.

TIP: When the Login ID column says (No Access) and the Provider? column says Yes, this indicates a provider who doesn't log in to the web application but might be listed because they need to be schedulable.

Deactivate a user

1. Select the **Admin** tab and click **My Groups**.

2. Click the minus ➖ icon in the row for a user to deactivate them.

3. Enter a comment indicating why you're deactivating the user and click ➖ **Deactivate**.

Unblock a user

1. Select the **Admin** tab and click **My Groups**.

2. A lock 🔒 icon appears next to any user whose account is blocked. Click 🔓 **Unblock** to unblock them.

Request a new user or site in CooperCare Link

1. Select the **Admin** tab and click **Account Requests**.

2. Click ✚ **Request New Account**.

3. Choose the type of account you want to create. For example, to create an account for a new physician at your site, click **Request access for a new provider**.

4. Fill in demographic information for the user or site request.

5. In the **User group** field for a user request, select the user group to which the user should belong.

6. If you're requesting an account for a new provider and that provider doesn't need to log in to the application, select the check box under the **Basic Information** section to indicate as such.

7. Enter a comment about your request, if necessary, and click ✔ **Submit Request**.

8. After your request has been processed; the new user will receive a login instructions letter.

TIP: You can see the status of user requests that have been submitted in the Status column.

Update facility contact information

1. Select the **Admin** tab and click **My Facilities**.

2. Click the name of a facility to update its contact information on the **Basic Demographics** tab, including the phone number, fax number, and address.

3. Go to the **Extended Demographics** tab to document additional information about the facility, such as its website, organizational description, and the services it provides.

4. After you've finished editing information, click ✔ **Accept**.

TIP: If an active address isn't on file, you can search for a matching address by entering an address and clicking **Find Address**. Alternatively, click **Manual Entry** to enter all of the address information yourself.

Releases of Information

Use the Requests activity to view released portions of a patient record. The data that you can view in the patient's chart is predetermined and is limited to the information that you need to accomplish your specific task.

Send a request for a patient's record

1. Select the **In Basket** tab, click the arrow next to 📤 **New Msg**, and select **Customer Service**.

2. In the **Topic** field, select **ROI Request**.

3. Fill out information about the release request, such as the patient's name and why you are requesting the release of information.

4. Click ✔ **Submit**.
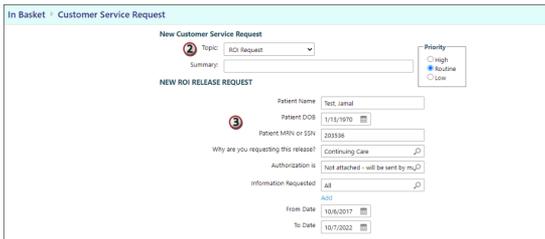
Access your releases of information

1. Select the **Requests** tab.

2. If there are too many requests, search using the **Requester, Requested From Date**, or **Requested To Date** fields.

3. Click the link for the information that you need to see.

4. To print your report, click 🖶.

TIP: When the reports are something other than PDFs, you can select the check box next to each report you want to view and click 🗔 **View Selected Reports** to view multiple reports at the same time.
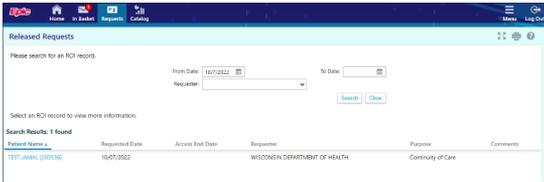
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CooperCare Link Glossary

Activity

Any Web page that corresponds to a specific task, such as selecting a patient, reviewing a patient's results, or creating a referral. There are several different activities in CooperCare Link, and the activities that you use depend on the tasks that you want to complete. Each activity has a name in CooperCare Link, such as Results Review, that helps you determine the activity's purpose.

Completion matching

Entering a partial word in a field instead of a whole word to reduce the amount of time you spend typing. For example, entering "gluc" and then pressing **ENTER** in the **New procedure** field in Order Entry shows you all of the procedures beginning with "gluc." Since it is likely that few procedures have names that start with this letter combination, it is easy to find the procedure without typing the whole name. You can use this shortcut for any information that is stored in the database, such as procedures and other providers' names.

Encounter

One visit with a provider. This might include a visit type such as an inpatient stay, an office visit, or a telephone call from a patient. Encounters appear in Chart Review. When you view an encounter, you can see all of the information associated with that specific visit, including the patient's vital signs, progress notes, procedures and medications ordered during the visit, and more. Encounters are classified by date, type, and provider.

Event

A clinically relevant business event that occurs for a patient. Events are recorded in the system at several points in a patient flow. For example, events are triggered when a patient schedules an appointment, is admitted to the hospital, cancels an appointment, has new results, etc. The urgency of events can vary. For example, a scheduled appointment for a physical might not be as urgent as an admission to the hospital.

Field

Any place in CooperCare Link where you can enter information. Each field has a prompt to indicate the type of information you should enter, such as **Name** or **MRN**.

First Access

A tool that you can use to open the record for a patient with whom you do not have an established relationship. This tool might be useful in case of emergencies or at other times when you might need to access a patient's record before you've been granted access. The **First Access** hyperlink appears in the Patient Lookup activity. After you click **First Access**, you are prompted to enter specific pieces of information about the patient before you can gain access to the record. You will have 30 days of access to this patient if you have been granted access to the patient via **First Access.**

Hyperlink

Text that you can click to access a different Web page. Hyperlinks appear in several places in CooperCare Link. When your mouse pointer moves over a hyperlink, the pointer typically changes to a hand icon and the text of the hyperlink becomes underlined.

Provider

Any person involved in patient care, such as a nurse, the patient's primary care physician, or a referring provider. Patient information in CooperCare Link is often associated with a specific provider. For example, procedure orders are associated with the provider who wrote the orders. Similarly, when you create a referral, you can enter a referred by and referred to provider.

Recommended field

Information that we recommend you enter. ⚠ appears next to recommended fields. You can continue to save or submit information if you do not complete recommended fields.

Required field

Information that you are required to enter. ❶ appears next to required fields. You cannot save or submit a form until you complete all required fields.

Secure screen

A method for securely hiding patient information when you need to temporarily stop your work in CooperCare Link. Click 🔒 to secure your computer. Your Web browser returns to the login page for the application. When you are ready to continue your work, you can re-enter your password and click **Resume** to return to the same page that you were using before you secured the screen.

Time mark

Click 🕙 **Time Mark** in the Results Review activity to indicate that you have seen the patient's new results. When you do so, the results are no longer considered new to you. The next time you access Results Review for the patient and select the **New Results View** from the View menu, only the results that have been entered since you clicked 🕙 **Time Mark** appear. New results appear in italic font, and all other results that you indicated that you've seen appear in normal font.