1 OVERVIEW

ProviderSource™ is a unique tool for data entry for Providers. It has a plethora of features. It also has various roles which are used to serve a provider. Until now, Account Manager had been one which would serve provider by filling out their application for them, thereby saving time. But the void was that if there were a number of providers working on the same location, Account Manager needed to go into each provider’s application and refill same information over and over again. There was a need for a tool in which a location, services, affiliation, health plans etc are needed to be added only once. Office Manager was developed to fill this void.

Office Manager is functionality within ProviderSource™. That means you can access it using ProviderSource™ login itself. Once logged in, you’ll be navigated to Office manager homepage, where you will see a drop down of locations and a list of providers under each location. On Manage Practice page you can add a location, services, affiliates and health plans to your organization. And on Manage Provider, a.k.a. the homepage, you will be able to add a provider to your location and manage provider applications.

The following document first explains the flow using a swim-lane diagram and then explains each window using screenshots.

2 WORKFLOW

2.1 SWIM-LANE

The following swim-lane diagram shows the flow of Office Manager Functionality. It is divided into 4 lanes or levels and each lane is divided into 2 sections.

At Organization Level, you are taken to the Homepage, which happens to be “Manage Provider” page as well. You can navigate to “Manage Practice” page from where you can do Organization specific sub-functionalities.

At Location Level, like Organization level, you can select the functionality of “Add Provider” from “Manage Provider” page and the sub-functionalities are available on “Manage Practice” page.

At Provider Level, you have the functionality of “Manage Application”.

At Provider Source Level, the Manage Application functionality takes the Office Manager into ProviderSource™ where the office manager can view/ edit Provider data.
FUNCTIONALITY FLOW

ORGANIZATION LEVEL

OFFICE MANAGER HOMEPAGE

ADD LOCATION

ADD SERVICES

ADD AFFILIATES

ADD HEALTH PLAN

LOCATION LEVEL

SELECT LOCATION

ASSOCIATE SERVICES

ASSOCIATE AFFILIATES

ASSOCIATE HEALTH PLAN

PROVIDER LEVEL

SELECT PROVIDER

MANAGE APPLICATION

PROVIDER SOURCE LEVEL

EDIT/ VIEW PROVIDER'S APPLICATION DATA
3 SCREENSHOTS

3.1 PROJECT LEVEL

Hereafter, I will give the explanation based on the Swim-lane diagram given above and screenshots from the application.

3.1.1 PROJECT HOMEPAGE

In screenshot #1, Visible is the ONEHEALTHPORT homepage where Office Managers can login.

![Screenshot #1: Project’s Homepage]
3.1.2 OFFICE MANAGER HOMEPAGE/ MANAGE PROVIDER

In screenshot #2, the Office Manager home page is explained. To be precise this is the “Manage Provider” page and it gives the fastest access to managing a provider’s application. As you can see, from “Select Location” drop down you can select a location and based on it, the list of providers added to that location will be displayed. Providers can be added to the roster (provider list) using “Associate OHP Provider” button. Providers connected to the office manager will have a “Manage Application” link.

In screenshot #3, “Associate OHP Provider” page is shown. This is a pop-up page which shows up when the user clicks on “Associate OHP Provider” button on “Manage Provider” page. As you can see, it first takes some data of the Provider office manager is searching for. After Search button is clicked, based on various data combinations, a grid is populated with matching results. At this point, the user has the option to either click on “Add to Roster”
from the grid thereby adding an existing provider to his roster or he can click on “Add Provider” button, which will just take the data given in textboxes and create a new unconnected record for the provider. Provider will be sent an invitation to connect to the office manager in both cases, and also in both cases, will still get an option to connect this record to an existing ProviderSource™ account, if he has any. In case, he does not have any account, he will be asked to create a new one and once created, that account will automatically be connected to this office manager.

3.1.3 MANAGE PRACTICE

Screenshot #4: Manage Practice

Screenshot #4 shows the “Manage Practice” section. There are various functionalities and sub-functionalities shown here. Most of these will be covered in detail in following sections, but their description is given as follows:

“Locations” is a tab which lists out all the added location for an Organization or Affiliate. Each location has sub-functionalities to associate/ disassociate affiliations, services and providers and to edit details of that location itself, for which links are provided.

“Manage Affiliations”, “Manage Health Plans” and “Manage Services” tabs works on Organization level and not on Location level. That means, if an affiliation, health plan or service has to be added to an Organization, one should visit that tab and do it. And once an entity (affiliation, plan or service) has been added to the Organization, office manager can click the link for “Associate Affiliation” or “Associate Service” and select the entity to be added to that specific location. Associating has been described in sections given ahead in the document.

“Add New Location” and “Edit Location” as name suggests, opens a pop-up where the location details can be given to add or edit a location. This also has been covered in detail in sections ahead.
“Associate Provider” is a functionality to add a provider to a location. Please take care, that once you add a provider to a location using “Manage Provider” page, and the provider has accepted your invitation, only then he will be available in this pop-up so that he can be simply associated with other locations as well. The theory is that once a user accepts an office manager, he should not need to resend invitations for adding him to more locations.

“Edit Organization” is has been covered ahead. It only shows to “OrgAdmin” role members.

### 3.1.4 ADD NEW/ EDIT LOCATION

![Screenshot #5: Add/ Edit Location](https://armsqa.providersource.com/officemanager/Location.aspx?locId=0&orgId=0)

Screenshot #5, shows the window which is used to enter details of an Office/Practice Location. If the user has clicked the “EDIT” button on “Manage Practice” page then the fields will be filled up with data and the office manager will be able to edit and save it. As you can see there are 6 tabs of data to be filled out. It is not mandatory
that all the tabs of data should be filled out for a successful record. But on each tab there are certain validations, such that if one starts filling out data, they have to give minimum required data for the record to be saved.

### 3.1.5 ASSOCIATE PROVIDER

*Screenshot #6: Associate Providers*

Screenshot #6 shows the pop-up for “Associate Provider”. In case of Providers, it is the collection of Providers who have accepted office manager’s invitation irrespective of the location they were added to. When an entity is added from left list box to the right list box using the “Add” (>) button, it gets removed from the left box and shows up in the right box. Disassociation works in a similar way, that is by selecting entity from the right box and clicking “Remove” (<) button. That will move the item from right box to left box.

### 3.1.6 EDIT ORGANIZATION

Screenshot #7 shows the “Edit Organization” pop-up. The button to open this window is given on “Manage Practice” page and it is visible only to office managers with “OrgAdmin” role. This role is set when the office manager is creating his new account and he selects “Yes” to the question “Are you authorized to make data changes for your organization?” and then he gives DBA name and Tax ID number.

In this window the Organization details will show up and the user can make changes. These changes will be reflected on the homepages of all the other office managers or providers who are associated with this Organization.
4 CONCLUSION

This is a basic work flow descriptive document to explain the basics of the Office Manager functionality. The user should navigate through the application to understand all the features and functionalities provided and handle the data with care as it involves working with Provider’s data and a mistake in data entry will reflect on their application. Keeping the market voids in mind, this application is poised to grow bigger and more features will be added to it in due time.

5 REVISION HISTORY

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<tr>
<td>1/15/2013</td>
<td>Gaurav Gupta/Joel Capps</td>
<td>Office Manager Work Flow</td>
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