AVERA SYSTEM LINK USER GUIDE

Supporting Avera & Avera Health Plans

Avera System Link User Guide

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Getting Started

Avera System Link is a tool that provides real-time web access to patient and member information, allowing you to access clinical and administrative data and communicate with Avera Health and/or Avera Health Plans to support quality care and efficient coordination. Through System Link, users can interact with both the Avera Health System and Avera Health Plans from a single, combined provider portal.

For **Avera Health**, System Link allows you to access patients' clinical information, communicate with Avera Health, and quickly refer patients to our organization to support care delivery and continuity.

For **Avera Health Plans**, System Link allows you to view member eligibility and benefits, submit and view claims, submit and view authorizations, and communicate directly with Avera Health Plans regarding coverage and administrative needs.

System Link is a collection of different web pages, or activities, that correspond to specific tasks. The activity you use depends on whether you are working with Health System related clinical workflows, Health Plan related workflows, or both.

This guide takes you on an introductory tour of Avera System 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 Avera System Link.

Access in Avera System Link varies by user role. Some features described in this guide may not be available to you.

Help and contact information

For help using an activity, click on the webpage.

- **Password Reset:** If you forget your password or can't log in, you can use the **Forgot Password?** link on the sign in page or contact the System Link Site Admin for your facility.
- **Unblocking Account:** Please contact your System Link Site Admin for your facility.
- **Two-Factor Authentication Reset:** Follow the steps in this guide to Reset your authentication method.
- **All other issues**: Call the Help Desk at 605-322-6000 to Report an Issue.

If you're not sure who your Site Admin is or if they are unavailable, call 605-322-6000.

Password Requirements

- Minimum 12 characters
- At least one lower case letter.
- At least one upper case letter.
- At least one number.
- At least one special character.

Browser, system, and connection requirements

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

- Google Chrome version 118 or later
- Microsoft Edge version 118 or later
- Mozilla Firefox version 115 or later
- Safari version 17 or later

System Link requires a minimum screen resolution of 1024x768 pixels. We recommend that you use a high-speed Internet connection to achieve the best system speed and performance.

How do I log in?

- Use the link provided by your organization to access System Link.
- Enter the user ID and password that you received for System Link.
- Enter your single-use passcode that you receive through your two-factor authentication method.
- After you enter the passcode, optionally select the **Remember me** checkbox to indicate that you're using a device that's not shared with anyone else. This means you won't be asked for a passcode the next time you sign in from the same device for a while. Note that if you log in through a different device or browser, or your browser's settings are reset, you are still prompted for a passcode.

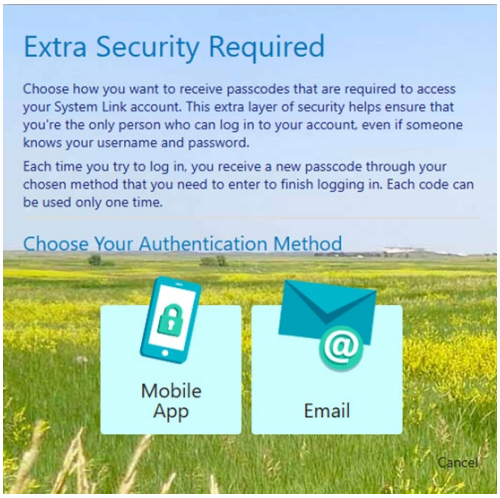
Choose an authentication method

Two-factor authentication (2FA) is a process by which you verify your identity through a single-use passcode before you can access your account. This extra layer of security helps ensure that you're the only person who can log in to your account, even if someone knows your username and password.

When you first log in with your username and password, you're prompted to choose how you'll receive these single-use passcodes.

- Use the link provided by your organization to access System Link.
- Enter the user ID and password that you received for System Link.

- Choose how you want to receive 2FA passcodes. You can receive the passcodes through a mobile application or email.
  - **Mobile application** requires you to have access to a smartphone with an application like Microsoft Authenticator or Google Authenticator installed. These applications are free on the Apple App Store and the Google Play Store, but standard data rates apply.
  - **Email** requires you to access your email at the same time as having the System Link website open.

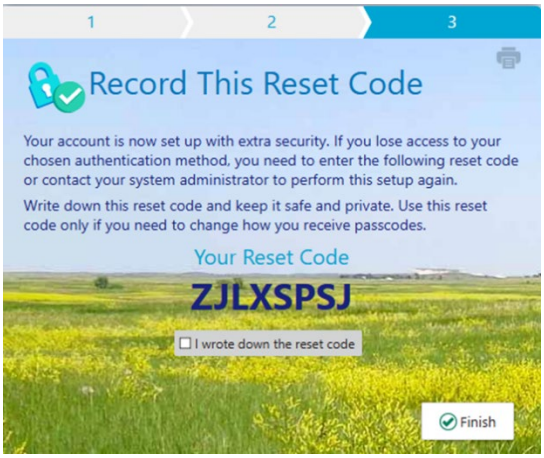


Set up mobile application 2FA

- Install an authentication app, such as Microsoft Authenticator or Google Authenticator, on your smartphone if you don't already have one. You can find these apps on the Apple App Store and Google Play Store.
- Open the authentication app and scan the QR code that appears on the EpicCare Link screen after you choose Mobile App as your 2FA authentication method. If you can't scan the code, enter the alphanumeric code that appears below the QR code.
- Click → **Next**.
- Enter the code that appears in the authentication app and click → **Verify**.

> The authentication app shows a code, along with the remaining time that the code is valid. The app frequently generates a new code, so if only a few seconds remain to use the code that's on your screen, wait until a new code appears.

- Write down the reset code that appears on the screen and keep it private. You can use this reset code if you need to change how you receive passcodes. For example, if you get a new smartphone, you can use the reset code to set up your new phone to receive passcodes.
- Click I wrote down the reset code, then click **Finish**. Going forward, you'll enter the passcodes generated by your authentication app to log in to System Link.



> **A new passcode is sent to you each time you log in. Enter this code to complete the login** process.
>
> Unlike passcodes, the reset code appears only once after you set up your authentication method. Use this reset code only if you need to change how you receive passcodes.

Set up email 2FA

- Enter your email address in the indicated field.
- Click → Next.
- Enter the passcode that was emailed to you. Note that it might take a minute or two for the passcode to be sent. If you wait several minutes and still don't receive a passcode, click Re-send Code.
- Click → Verify.
- Write down the reset code that appears on the screen and keep it private. You can use this reset code if you need to change how you receive passcodes. For example, if you get a new email address, you can use the reset code to set up your email to receive passcodes.
- Click I wrote down the reset code, then click **Finish**. Going forward, you'll enter the passcodes you receive via email to log in to System Link.

> A new passcode is sent to you each time you log in. Enter this code to complete the login process.
>
> Unlike passcodes, the reset code appears only once after you set up your authentication method. Use this reset code only if you need to change how you receive passcodes.

Reset your authentication method

You can reset your authentication method. For example, you might change the phone number at which you receive passcodes.

- On the login screen, Enter the user ID and password that you received for System Link.
- Click **reset additional authentication**.

- Enter the single-use reset code you were given when you originally set up your authentication method.
- Click Reset.

> If you lost the single use reset code, contact your site administrator.

Navigating in System Link

When you log in to System Link, several sets of navigation tools appear at the top of the page. Your navigation tools may appear different depending on your login role.

(A) Navigation Tabs: Use these tabs to open different activities in System Link. Each tab contains one or more related activities. For example, the Patient tab contains patient-specific activities. When you click a tab, the default activity for that tab opens.

(B) 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.

(C) Action Options: Use these buttons, located on the top right of the screen, to see all your available activities, access Happy Together Link or to log out.

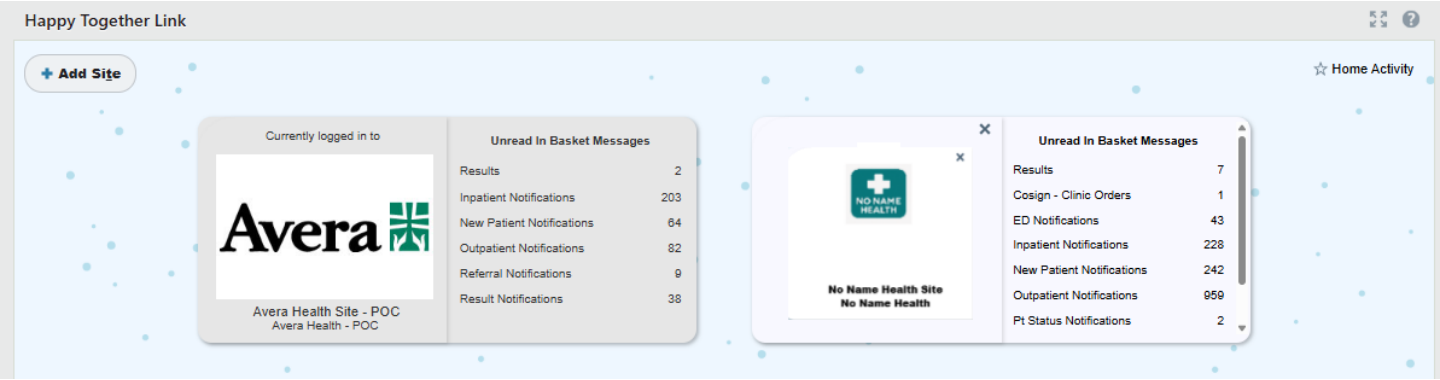
How do I log out?

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

- Click Log Out Log Out. 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.

Using Happy Together Link

With Happy Together Link, you can add Link accounts you might have with other organizations for reviewing patient information. From the Happy Together Link page, you can switch from one account to another without having to enter your login information again. You can also see when there are unread messages for each account, so you know whether there are any updates you need to review.



Add an account

To add a Link account to the Happy Together Link page:

- Click + Add Site Add Site.
- Search for the account by the organization, site name, or postal code.
- Select the site from the search results.
- In the new window that opens, enter your account credentials for the site.

After you add an account to the Happy Together Link page, click it to jump to that account from your current account.

Remove an account

To remove an account from the Happy Together Link page:

- Click the ✖ icon on the site's card.

After verifying that you want to remove the account, click **Accept**.

Make Happy Together Link your default page

You can make Happy Together Link your default page so it appears right away when you log in to System Link.

To make Happy Together Link your default page, click ☆ **Home Activity** in the top-right corner of the page.

Update Your System Link Settings

Change your Password

- Go to **Menu > Settings > Change Password**.
- Enter your old password, then a new password, and then your new password again.
- Click ✔ **Accept**.

Set up your email preferences

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

- Enter your email address, title, degree, languages, and specialties, if applicable. The fields that appear depend on your user role.
- Click **Receive e-mail notifications** if you want to receive notifications for unread In Basket messages at your specified email address.
- In the **Days between e-mails** field, enter the number of days you want to wait between notification emails.
- Click **Receive notifications for group events** if you want to receive email notifications about all patient events for the provider groups you belong to.
- Click ✔ **Accept**.

Change your default login page

- Go to **Menu > Settings > Set Default Page.**
- Go to the page that you want to set as your default page.
- Click **Set Default Page** to set the current page as your default page.

> ⓘ 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.

- Go to **Menu > Settings > Notification Preferences.**
- Select the email and text check boxes depending on the type of notifications you want to receive for each type of message.
- Enter the email address that you want to receive the email notifications.
- Enter the phone number that you want to receive the text messages.
- Click ✔ **Accept.**

Accessing the Patient Chart

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

- 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.
- Click the patient's name to open their chart.

- To view of 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 of PCP, attending, admitting, or treatment team on admission.
- Select a patient's name to view additional patient-specific information in the report pane.

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

- Click Patient and enter the patient's name or MRN.
  - To help refine your results, you can filter the search by primary care provider.
- In the Search Results window, click the name of the patient whose chart you want to open.

> 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.

Troubleshoot when you 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 name, last name and DOB when using this method.

- If your initial search returns no results, click Search All Patients from the Search Results window.
- Complete all of the required fields, and then click Search.
- 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.

Remove a patient from your patient list

You can remove a patient from your list if you no longer need access to them. For example, you might remove a patient from your list if the patient moves away.

- From the list of patients, hover over the patient you want to remove and click .
- Review the information in the window that appears to confirm that you want to remove the patient, then click Remove Patient.

Review the Patient Chart in System Link

Review the patient's chart before a visit

- Open the patient's chart, click **Chart Review**, and select a tab that includes information you want to review.
- To view more detail, such as a specific patient visit, click the date link that appears in the row.

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

- To send a message to the patient's PCP regarding an office visit, click **Ask a Question**, fill out the message form, and click Send Message.

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.

User filters to focus information

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.

- In Chart Review, select a tab.
- 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.
- Click Apply to make the results of your search appear.

> To remove the search criteria and begin a new search, click **Clear All**.

View trending data in graph or table format in Chart Review

- In Chart Review, select the check box for the data you want to view. For example, select specific visits or lab tests.
- Select the type of flowsheet that you want to create.
  - Click Encounter Flowsheets to graph data such as vital signs or medications. Then select a specific flowsheet, such as Diabetes- Brief.
  - Click Lab Flowsheets to graph lab result data.
- Click and drag to select the table cells that contain data that you want to graph.
- Click Line Graph or Bar Graph to create a graph of the selected data.

View trending lab results in Results Review

- Select the **Patient** tab and click **Results Review**.
- Select the date range for the results data you want to see and click **Accept**.
- 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.
- To view more columns of results, click **Load More**. To view all columns of a patient's results for the time range that you selected, click **Load All**.

Customize the way results appear

- In Results Review, click **Options**.
- To make the most recent results appear from left to right by default, select the **Trend Dates in reverse chronological order** check box.
- Set your other default preferences, such as the default number of columns to show, using the other options.
- Click **Accept.**

View a patient's allergies

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

> 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.**

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

View a patient's current medication

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

> 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.

> 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.

View a patient's billing information

- To view information about the patient's eligibility for health plans, coverages, service areas, networks, and more, select the **Patient** tab and click **Coverages & Benefits**. You can expand and collapse the sections in the Services section and use the **Jump to** search bar to find specific services.
- You can also see details about a particular coverage on the Benefits Summary page to:
  - Determine whether a particular service is covered in or out of network.
  - Determine whether coverage is active.
  - Determine whether benefits for a particular service are metered and what the limits are for each level of benefits.
  - Determine what the patient portion will be for a particular service.
  - Review a complete summary of benefits.

Manage Orders in System Link

Place a new order

- Select the **Patient** tab and click **Order Entry**.
- Select an ordering clinic and authorizing provider and click **Accept**.
- Click **Preference List** to see a list of available orders.
- Select the check box next to each order that you want to place.
  - Use the subsections in the left pane to filter orders by type.
  - Use the search bar at the top of the activity to look up an order by its name. Click **Select And Stay** to select an order and continue searching for more.
- Click **Accept** to review a list of your orders and make any necessary changes before signing them.
- If there's a required or recommended icon next to an order, you can enter more information. Click an order's name to edit details like quantity or associated diagnoses.
  - For a procedure order, you can attach a file, such as a scanned image, to the order.
  - To associate a diagnosis with a single order, either select the check box for a recent diagnosis in the **Dx Association** section or enter a new diagnosis in the **Add a new diagnosis** field and press **Enter**.
- Accept and sign the orders.
- If there's decision support associated with any of the orders, select a follow-up action and click **Accept**.
- Enter your password if prompted and click **Accept**.

If you already know the name of the order in System Link, you can search for it in the **New procedure** field instead of opening the Preference List. Enter a partial word in a field instead of a whole word t reduce the amount of time you spend typing.

For example, entering gluc in the **New procedure** field in Order Entry shows you all of the procedures beginning with gluc. You can use this shortcut for any information that is stored in the database, such as procedures and other providers' names.

Save an order for later

- Pend an order to save it for later. For example, you might pend an order if you need to review information in the patient's chart before you finish filling out the order details.
  - From the Order Entry activity, select the order that you want to place.
  - Click the order name to edit its details as needed.
  - Click **Pend Orders**.

Continue a pended order

- When you return to the Order Entry activity, you can resume any orders that you pended. You can also see orders that were pended by other people at your site. For example, you might have support staff who prepared an order for you to sign.
  - Click **Continue Order** to resume editing a pended order.

You can jump to the Order Entry activity from your In Basket to edit a pended order. From your **My Unassigned Orders** In Basket folder, click **Order Entry**.

Associate diagnosis for multiple orders

- You can:
  - Associate all of the patient's orders with all of the patient's diagnoses by clicking **Associate All** on the Diagnosis Associate page.
  - Manually associate orders and diagnoses by selecting the appropriate check boxes.
  - Select a problem from the Quick Picks list, which includes the patient's problems and recently-used diagnoses, and click the left arrow ( ) icon to add the problem as a diagnosis for the encounter.
  - Remove a diagnosis from the Diagnoses list by selecting the diagnosis and clicking the delete the selected diagnosis ( ) icon.

Cancel a signed order

- Select the **Patient** tab and click **Order Review.**

- Select and cancel the order.
- Enter a reason for canceling and click **Accept**.

Select orders to schedule

- Select the **Patient** tab and click **Order Review**.
- Select an order and click **Schedule Orders**. Note that you can select multiple orders to schedule them simultaneously, such as if the patient is going to have a set of labs done on the same day.
- Answer any questions that appear before you can continue with scheduling. Depending on how you answer the questions, the visit type or provider might need to change so that the appointment meets the patient's needs. If a change is needed, click Apply to make the change.
- Use the Filters section on the right side to limit the available slots by day, time, and location.
- Use the left side of the screen to enter appointment notes, a referring provider, and any required information the clinic needs.
- Click an appointment time slot to hold an appointment. If you do not see an appropriate time slot, click the ellipsis button to load more options.
- Click **Schedule**. An Appointment Review window appears for you to confirm appointment information, patient instructions, and insurance information.
- Click **Schedule** to confirm the appointment.
- To print the appointment information for the patient, click .

Cancel a scheduled order

- You can cancel a scheduled order if necessary. For example, you might need to cancel a scheduled order after the patient is informed about the cost of a procedure.
  - Select the **Patient** tab and click **Order Review.**
  - Select an order and click **Cancel Orders**.

Manage Referrals in System Link

Create a new referral

To create a referral, you might be required to enter information such as the referring and referred to providers, procedures to be performed, or diagnoses associated with the referral. You can also enter notes to communicate other information about the referral.

- Select the **Patient** tab and click Order Entry.
- Click Preference List to see a list of available orders.
- Click **Referrals** and select the referral you want to order.
- Click **Accept Orders**.

- In Order Entry, click the link for the referral to add information such as the associated diagnoses, attach any relevant files, and enter any comments. Click ✔ Accept when you're finished.
- Click ✔ Sign Orders.
- Enter your password if prompted and click ✔ Accept.

View a list of referrals for a patient

- Select the Patient tab and click Referral by Member.
- The patient's active referrals appear, including any that are new, open, authorized, or pending review. To see all referrals, select Show All Referrals in the View Option field.
- For more information about a referral, click the referral ID link to view a report.

> ⓘ You can't edit a referral that you've already created, but you can add additional notes or attachments to it and send a referral message.

View a list of referrals for specific providers or locations

- Select the Referral Search tab.
- Select either Incoming or Outgoing depending on whether you want to see referrals sent to your organization or referrals placed by your organization.
- In the Referred To or Referred By section, select one or more providers or locations.
- In the Referral Status section, select each referral status that you want to include in your search results.
- Enter dates in the From and To fields to limit your search to particular dates.
- Click Search.
- For more information about a referral, click the referral ID link to view a report. Click 📂 to open the associated patient's chart.

Monitor Your Patients in System Link

Event Monitor allows you to monitor events that occur in your patients' 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.

- Go to **Menu > Settings > Event Settings**.
- Choose which types of events you'll receive notifications for in the Event Filter section.
- Choose which events you'll receive notifications for by selecting one of the options in the Relationship Filtering section:
  - **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.
  - **Only events associated with my group**. 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.
  - **Only events associated with me** (recommended).
  - **Only associations that I select**. This option includes only events associated with the relationships you select.
- Choose who your notifications are sent to in the In Basket Settings section:
- Any user in my group. Your notifications are sent to a group of users at your organization, and any of the users can access the message and mark it as Done, which removes it from the In Baskets of all the users in the group. This option helps reduce the risk of duplicate follow-up and can save time.
- Only me. You are the only user who can mark the notifications as Done. Other users might still see and act on the same notifications, but they can't mark the message as Done. This option helps ensure that you see every notification.

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.

> For more information on In Basket, refer to In Basket: View Messages

View a patient's recent events

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

Upload Files to the Patient Chart in System Link

Upload a file

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

- Drag and drop a file from your computer into the section 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 ⓘ.
- Select a document type for the file, such as a study attachment.
- Enter a description of the file.
- If you want to remove a file that you selected, click ✖.
- If the Message for reviewer section appears, enter a message for the administrator who review files.
- Click **Attach To Patient's Chart**.

Manage In Basket in System Link

View 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.

ⓘ A count of our unread In Basket messages appear 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

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

- Click Search.
- 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.
- 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.

- 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.
- Click Print Selected.
- Select the right print settings and print the messages.

Send 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

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

> To send a message to Avera Health Plans customer service, follow the instructions here.

- 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 .
- Enter a brief subject in the **Subject** or **Summary** field.
- 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.
- Complete any other required fields.

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

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

Avera Health Plans Activities

Accessing a member's record

- Click Patient.
  - If you have already established a relationship with a member in System Link previously, click on the Search My Patients tab and select the member you would like to view. If you have many members listed, you can Search by Name or MRN to help locate the member.
  - If this is your first time accessing the member, select the Search All Patients tab, enter the required member information and click Search. On the next screen, confirm that you found the correct member and select a Reason why you need access to the member's record.

View a member's benefits and eligibility

- While viewing a member's record, select the Coverage & Benefits tab.
- Click Benefits Inquiry to see a detailed view of the member's coverage.
- Click ID Card to view or print a copy of the member's ID card.

> If you have any questions about the member's benefits, you can send a customer service message by clicking on Ask A Question in the upper right of the screen of the Benefits Inquiry screen.

Create a new prior authorization request

To create an authorization, you will be required to enter information such as the referring and referred to providers, procedures to be performed, or diagnoses associated with the authorization. You can also enter notes to communicate other information about the authorization.

- Select the Patient tab and click Prior Authorization Requirements.
- In Service Search, search for the Procedure or Revenue Code.
- Add a Referred to Provider by searching in the Referred To Provider field.
- Click Search

- Authorization Requirements will notify you if a prior authorization is required.

> Prior authorization requests for Musculoskeletal (MSK) services (surgery and pain management), cardiovascular services, and diagnostic imaging are available through Cohere. Click the link to SSO directly to Cohere.

- Click +Create Authorization.
- On the General Information tab, complete all fields with .
- Click Next.
- Enter a Diagnoses.
- Add additional Services or Notes.
- Click Request Referral.

View the status of a prior authorization request

- Select the **Patient** tab and click **Referral by Member**.
- The patient's active referrals appear, including any that are new, open, authorized, or pending review. To see all authorizations, select **Show All Referrals** in the **View Option** field.
- For more information about a referral, click the referral ID link to view a report.

> You can't edit an authorization that you've already created, but you can add additional notes or attachments to it and send an authorization message.

View a list of authorizations for specific providers or locations

View a list of referrals for specific providers or locations

- Select the **Referral Search** tab.
- Select **Outgoing**.
- In the **Referred By** section, select one or more providers or locations.
- In the Referral Status section, select each referral status that you want to include in your search results.
- Enter dates in the **From** and **To** fields to limit your search to particular dates.
- Click **Search**.
- For more information about a referral, click the referral ID link to view a report. Click to open the associated patient's chart.

Submit a claim

- While viewing a member's record, select the three dots to expand the menu.
- Choose CMS Claim Entry or UB Claim Entry.
- Complete all the required fields.
- Click Check For Issues. Correct any issues on the submission.
- Click Submit & Add Attachments.

- Upload **PDF** attachments to the claim. Select the attachment document type from the dropdown list. Click **Upload.** Select the file location and add the file. Repeat for additional attachments.
- Click **Finish** to submit the claim.
- Click **Done.**

View the status of a claim

- **Option 1:** While viewing a member's record, select **Claims by Member**. If you do not see Claims by Member, click the three dots to expand the menu.
  - The **Claims Inquiry** screen will list the claims you have submitted for this member.
  - Click the **Claim #** to see the **Claims Details** screen.
- **Option 2:** In the tabs at the top of the screen, hover over **Claims.** Select **Claims Search**.
  - On the **Claims Search** screen, search for the claim by Vendor, Tax ID, Provider, Member ID, Claim ID, Submitted ID, or Check Number.
  - Update the **From date** and **To date** to narrow the search.
  - Click the Claim # to see the Claims Details screen.

> If you have any questions about a claim, you can send a customer service message by clicking on **Ask A Question** in the upper right of the screen of the **Claim Details, Claim Inquiry,** or **Claim Search** screens.

Cancel a claim request

- While viewing a claim on the **Claims Details** screen, click **Cancel Claim** in the upper left corner.
- Acknowledge the pop-up message. Click **OK** to continue the cancel request. Click **Cancel** to back out of the cancel request.

View remittance advice

- In the taps at the top of the screen, hover over **Claims.** Select **Remittance Advice Search.**
  - On the **Remittance Advice Search** screen, search for the claim by Vendor, Tax ID, Provider, Member ID, Claim ID, Submitted ID, or Check Number.
  - Update the **From date** and **To date** to narrow the search.
  - Click the Remittance Advice # to see details.

Submit an inquiry or question to Avera Health Plans

Avera System Link provides a convenient and efficient way to communicate with Avera Health Plans through secure messages called CRMs. This feature allows providers and staff to easily reach our team regarding a variety of needs, including Member Eligibility questions, Claims inquiries, Prior Authorization questions, submitting Appeals or Grievances for members, and contacting our Provider Operations team for contracting, credentialing, and other support. Using CRMs through System Link

offers several advantages over calling Customer Service, including secure documentation of your request, the ability to include detailed information, and a written response that can be referenced later. This helps streamline communication, reduce time spent on phone calls, and ensures your inquiry is directed to the appropriate team for timely follow-up.

To get started and click on In Basket. In Basket. Click on the ▾ upside down triangle next to New Msg. Select Message Avera Health Plans.

Submit a Customer Service request about a member's eligibility

- In the Topic field, select Member Eligibility
- Choose a Subtopic that best meets your request.
- Click Select Patient. **If you were already viewing the member's record, this will already be filled in with the member's information.
- Add information about your request in the Details box.
- Optional: Attach any documents that would help with your request by clicking Add files.
- Click ✔ Submit.

Submit a request about a previously filed claim

- In the Topic field, select Claim
- Choose a Subtopic that best meets your request.
- Click Select Patient. **If you were already viewing the member's record, this will already be filled in with the member's information.
- Click Attach Claims. Select the claim(s) you are inquiring about. Click ✔ Attach.
- Add information about your request in the Details box.
- Optional: Attach any other documents that would help with your request by clicking Add files.
- Click ✔ Submit.

Submit a request about a previously filed authorization

- In the Topic field, select Authorization
- Choose a Subtopic that best meets your request.
- Click Select Patient. **If you were already viewing the member's record, this will already be filled in with the member's information.
- Click Attach a Referral. Select the authorization(s) you are inquiring about. Click ✔ Attach.
- Answer the other questions on the form.
- Add information about your request in the Details box.
- Optional: Attach any other documents that would help with your request by clicking Add files.
- Click ✔ Submit.

Submit an appeal or grievance request on behalf of a member

- In the Topic field, select Authorization
- Choose a Subtopic that best meets your request.

- Click **Select Patient.** **If you were already viewing the member's record, this will already be filled in with the member's information.
- Click **Attach a Referral** or **Attach a Claim.** Select the authorization(s) or claims. you are inquiring about. Click ✔ **Attach**.
- Answer the other questions on the form.
- Add information about your request in the **Details** box.
- Attach a signed AOR from the member, a formal appeal letter, and supporting documentation by clicking **Add files.**
- Click ✔ **Submit.**

Submit a provider request for reconsideration

- In the **Topic** field, select Provider Request for Reconsideration
- Choose a **Subtopic** that best meets your request.
- Select the **Source Provider**.
- Carefully review the **Guidelines for Submission** and **Support Document Examples**.
- Click **Select Patient.** **If you were already viewing the member's record, this will already be filled in with the member's information.
- Click **Attach a Claim.** Select the claim. you are inquiring about. Click ✔ **Attach**.
- Answer the other questions on the form.
- Add details about your request in the **Details** box.
- Attach supporting documentation by clicking **Add files.**
- Click ✔ **Submit.**

Submit a credentialing request

- In the **Topic** field, select Credentialing.
- Choose a **Subtopic** that best meets your request.
- Complete all required information.
- To add multiple practitioners, down, complete, and attach a Fillable Roster.
- Add information about your request in the **Details** box.
- If a Fillable Roster was used, click **Add files** to include it with your request.
- Click ✔ **Submit.**

Submit a contracting request

- In the **Topic** field, select New Contracting.
- Choose a **Subtopic** that best meets your request.
- Complete all required information.
- Add information about your request in the **Details** box.
- Optional: Attach any other documents that would help with your request by clicking **Add files.**
- Click ✔ **Submit.**

Submit an Electronic Remittance Advice (ERA) and Electronic Funds Transfer (EFT) enrollment request

- In the **Topic** field, select New Contracting.
- Choose a **Subtopic** that best meets your request.
- Download, complete and attach the EFT/ERA Form.
- Choose a **Clearing House** option.
- Add information about your request in the **Details** box.
- Attach the EFT/ERA Form and a voided check or bank letter by clicking **Add files.**
- Click ✔ **Submit.**

Using the Provider Search

- Click **Patient** and go to **Provider Search.**
- Click **Search My Patients** and select the member from the list. If you haven't established a relationship with the member yet, use **Search All Patients** to find the appropriate member.
- Use the available fields to narrow the search criteria.
- Click **Search**

Managing Your Organization (Site Admin)

Set a user's initial password

- Select the **Admin tab** and click **My Groups.**
- The **Set Initial Password** window appears if there are users who need an initial password set. Click on a user to set their password.
- In the **New Password** and **Verify New Password** fields, enter the new password for the user. See Password Requirements for details on required formatting.
- In the **Password for <your name>** field, enter your password.
- Click **Accept**. The next time the user signs in using this password, they will be promoted to select a new password of their choice.

Change a user's password

- Select the **Admin tab** and click **My Groups.**
- Click the key icon in the row for a user to change their password.
- In the **New Password** and **Verify New Password** fields, enter the new password for the user. See Password Requirements for details on required formatting.
- In the **Password for <your name>** field, enter your password.
- Click **Accept**. The next time the user signs in using this password, they will be promoted to select a new password of their choice.

Verify users

You might receive a Site Verification message from Avera 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 System Link 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 the 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.

- 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.
- Select the **Acknowledgement** check box to acknowledge that you have reviewed the list of users.
- Click the ✔**Verify** to verify the list of users and close the screen.

Deactivate a user

- Select the **Admin tab** and click **My Groups.**
- Click the minus ▬ icon in the row for a user to deactivate them.
- Enter a comment indicating why you're deactivating the user and click ▬**Deactivate.**

Unblock a user

- Select the **Admin tab** and click **My Groups.**
- A lock 🔒 icon appears next to any user whose account is blocked. Click 🔓 **Unblock** to unblock them.

Reset a user's two-factor authentication

You can reset the two-factor authentication settings for a user. For example, if a provider at your clinic gets a new phone but lost their reset code, you can reset the provider's two-factor authentication without having to contact Avera Health Plans to make the change.

- Select the **Admin tab** and click **My Groups.**
- Click the **Two-factor authentication settings** in a row for a user whose settings you want to reset.
- Confirm that you want to reset the user's setting and click **Reset.**

Request a new user or site in System Link

- Select the **Admin tab** and click **My Groups.**
- Click ✚ **Request New Account.**
- Choose the type of account you want to create. For example, to create an account for a user who only needs access to Avera Health Plans, click **Avera Health Plans Only User.**
- Fill in the demographic information for the user or site request.

- In the **User Group** field for a user request, select the user group to which the user should belong.
- If you're requesting an account for a new provider and that provider doesn't need to log in to System Link, select the check box under the **Basic Information** section to indicate as such.
- Enter a comment about your request, if necessary, and click ✔**Submit Request.**
- After your request has been processed, the new user will receive a login instructions email.

Request a change to an existing user's role

If you need to change a user's role (for example, changing an **Avera Health Plans Only User** to a **Clinician** so they can access Avera Health), follow the same steps used to request a new user.

Submit the request using the existing user's name and information. When the request is received, we will identify that the user already exists in System Link and process it as a role change request.

ⓘ You can see the status of requests that have been submitted in the Status column. The Submitted By column shows who submitted the request, which is helpful if multiple people at your site and submit account requests.

Update facility information

- Select the **Admin tab** and click **My Facilities.**
- Click the name of the facility to update its contact information, including the phone number, fax number, and address.
- Depending on the facility, additional tabs might appear. Use these tabs to document additional information about the facility, such as website, organizational description, the service it provides, and eligibility requirements.
- After you've finished editing the information, click ✔**Accept.**