Entering a Specialist Referral

Purpose

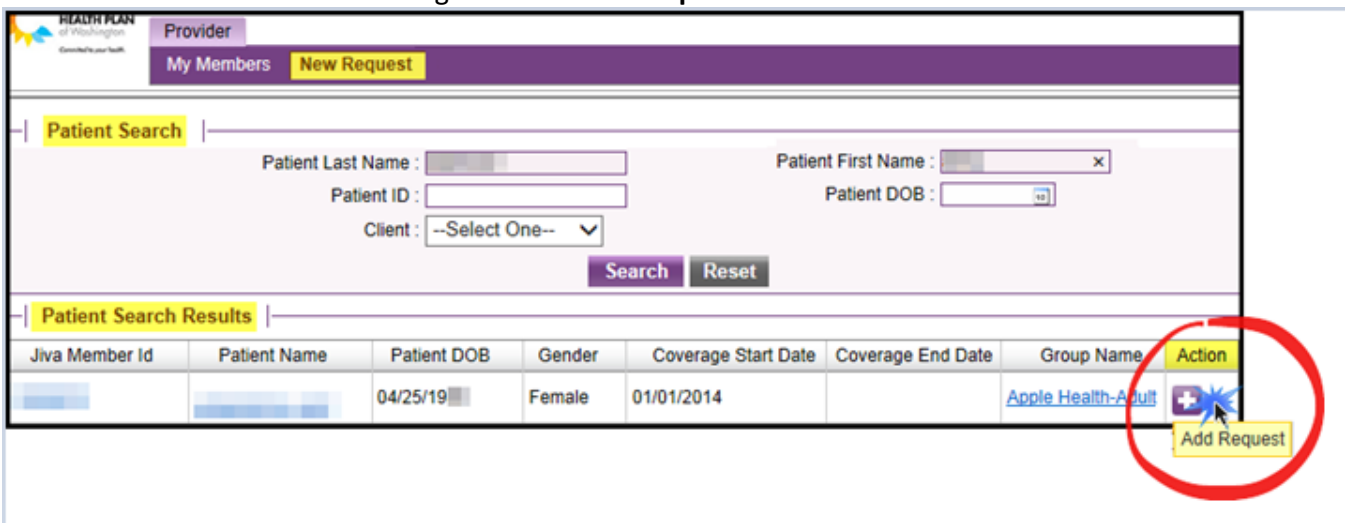
The purpose of this document is to provide step-by-step instructions on how to enter a Specialist Referral.

Step-by-Step Instructions:

Starting the Request

Specialist Referrals are used by the Primary Care Provider (PCP) to request services for the member to see a specialist for the initial four office visits: evaluation and treatment. This document starts with the process after the member's eligibility is verified.

1. Click on the **Action** icon to navigate to the **Add Request** screen.



2. Click on the **Episode Type** drop down window located in the **Add New Request** section. Click on **Specialist Referral** then click **Save.**

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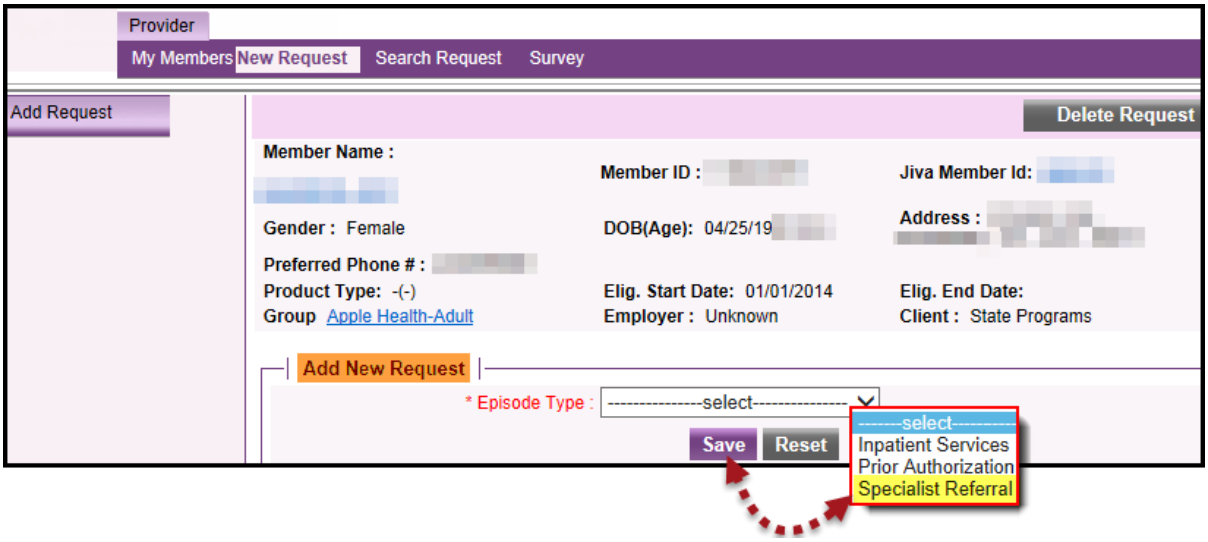
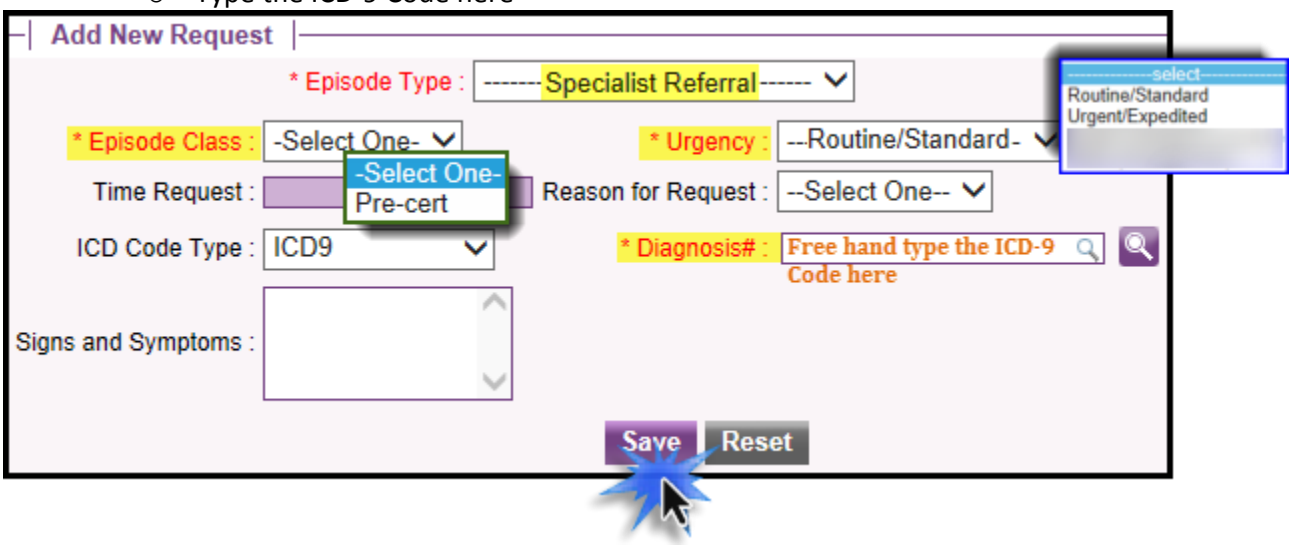


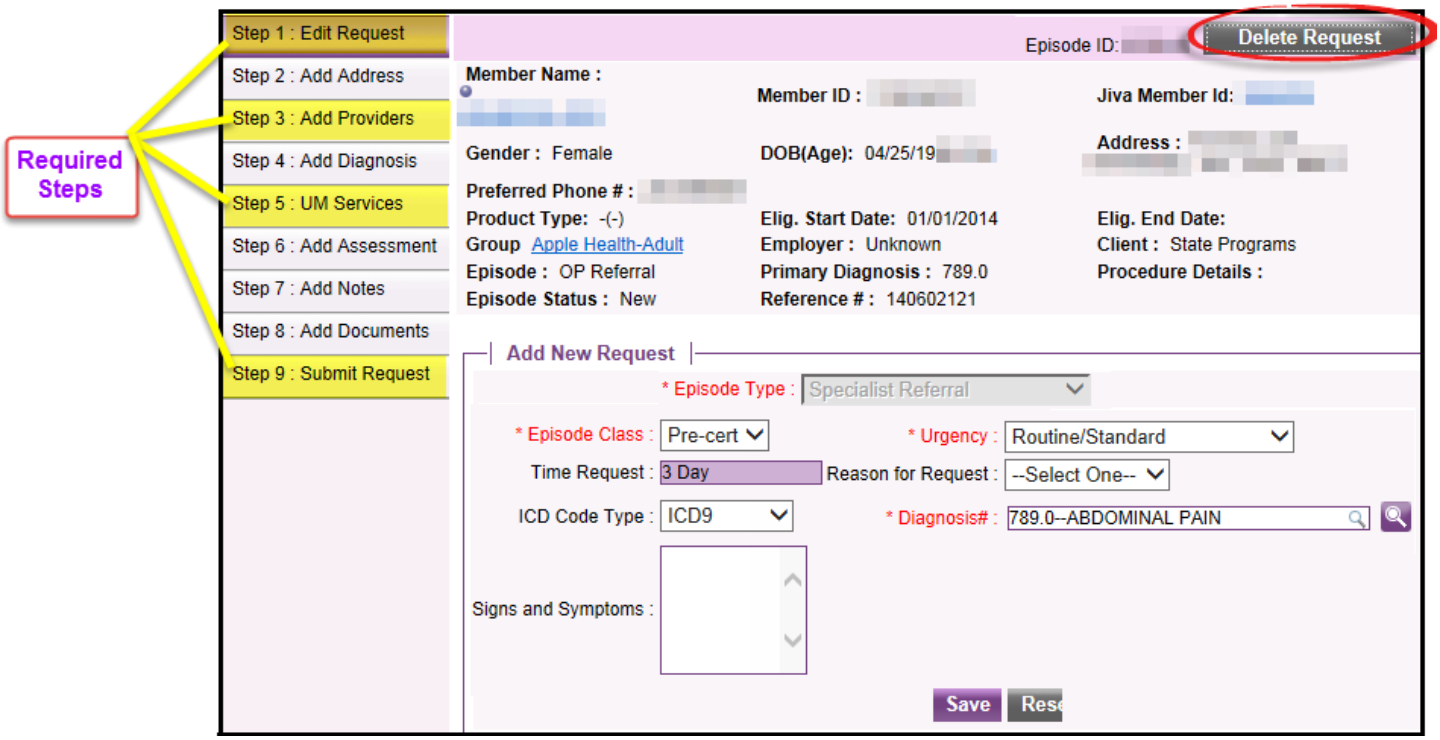
3. After clicking **Save,** several windows will auto populate. Work the following windows in the following order:
    - **Episode Class**:
        - Pre-Cert
    - **Urgency** : (*Choose one*)
        - Routine/Standard
        - Urgent/Expedited
    - **Diagnosis#:**
        - Type the ICD-9 Code here



Required Steps

Clicking the save button starts the request process. Steps 1 thru 9 are now listed on the left side of the screen. Not all the steps are requires to be worked. This section gives step-by-step instructions with each required step along with the required sections to be entered within each step.

Note: If the user clicks the save button then later realizes the request is no longer needed; click the delete request button on the top right corner of the page.



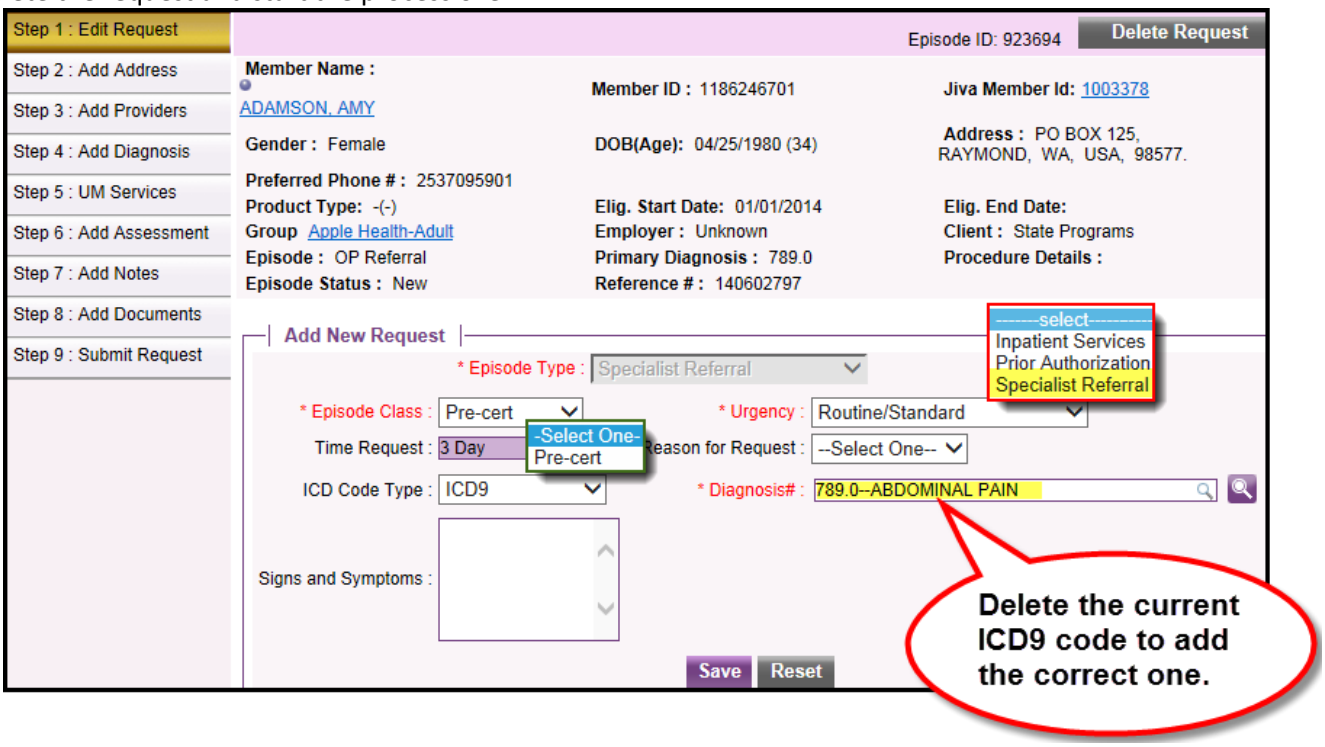
Required steps are:

- **Step 1: Edit Request**
  - This is the same information that's populated under **Add New Request**.
- **Step 3: Add Providers**
  - Requesting provider:
    - Provider who is referring the member to the specialist. (PCP)
  - Treating Provider:
    - Provider who is treating the member. (Specialist)
- **Step 5: UM Services**
  - Adding the service type (CPT codes)
- **Step 9: Submit Request**
  - The request will not process if step 9 is not complete.

Entering Appropriate Fields

Step 1: Edit Request:
This step allows the user to edit three sections of the **Add New Request**: **Episode Class, Urgency,** and **Diagnosis.** Clicking the widget on dropdown windows will allow the user to edit what was previously entered.

Note: Episode Type is the only function that cannot be modified. If the incorrect episode type was selected the user must delete the request and start the process over.



Step 3: Add Providers:

1. Click **Step 3: Add Provider** then click **Attach New**.

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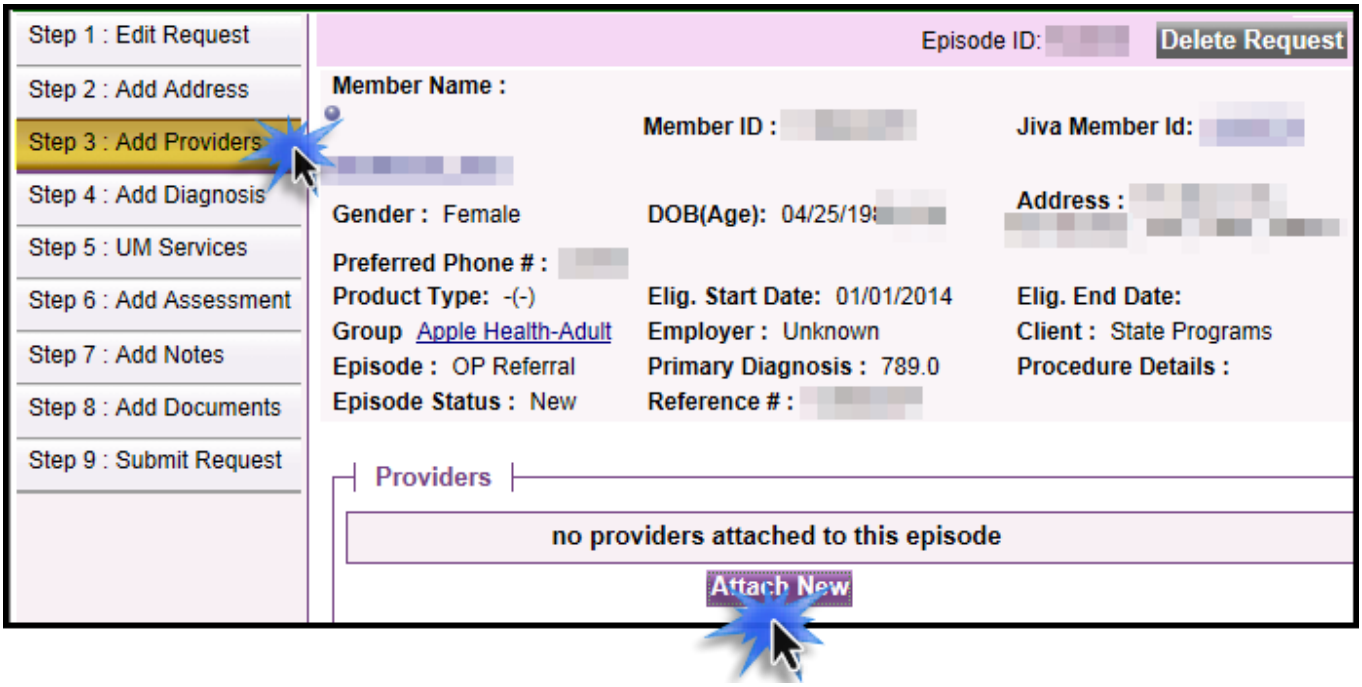
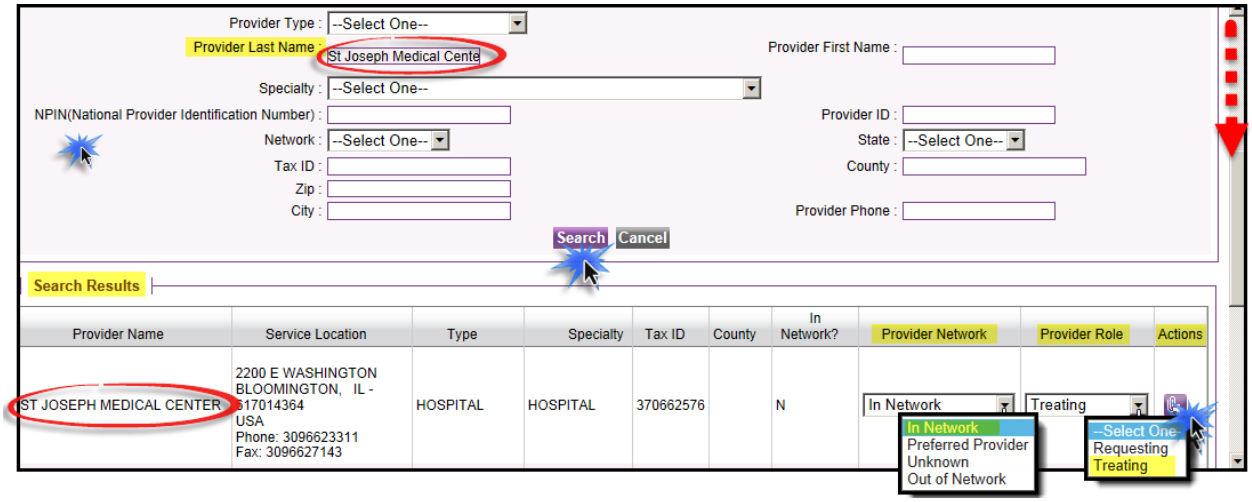
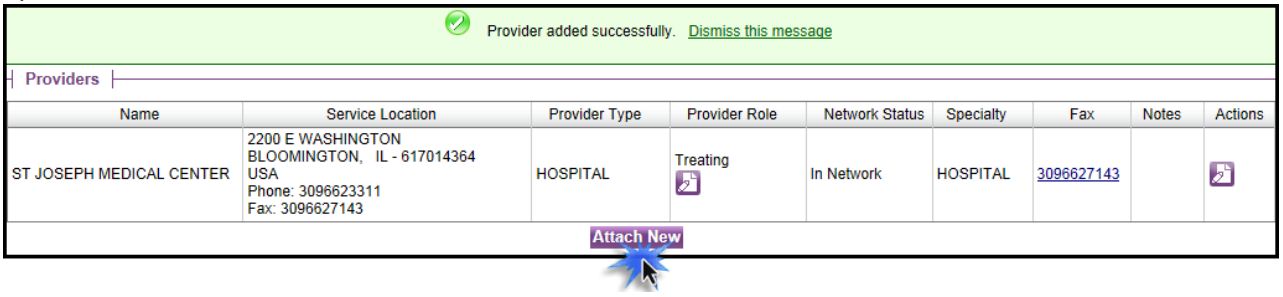


2. Click in the **Provider Last Name** section to add the facility, group, or the specialist last name the member is being referred to then click **Search** to attach the treating and/or requesting provider**.**
3. Scroll down to **Search Results**. Click the dropdown window of **Provider Network** and **Provider Role** to select the network and role of the facility, group, or provider needed.
    - **Provider Network:**
        - In-network
        - Preferred
        - Unknown
        - Out-of-Network
    - **Provider Role:**
        - Requesting
        - Treating

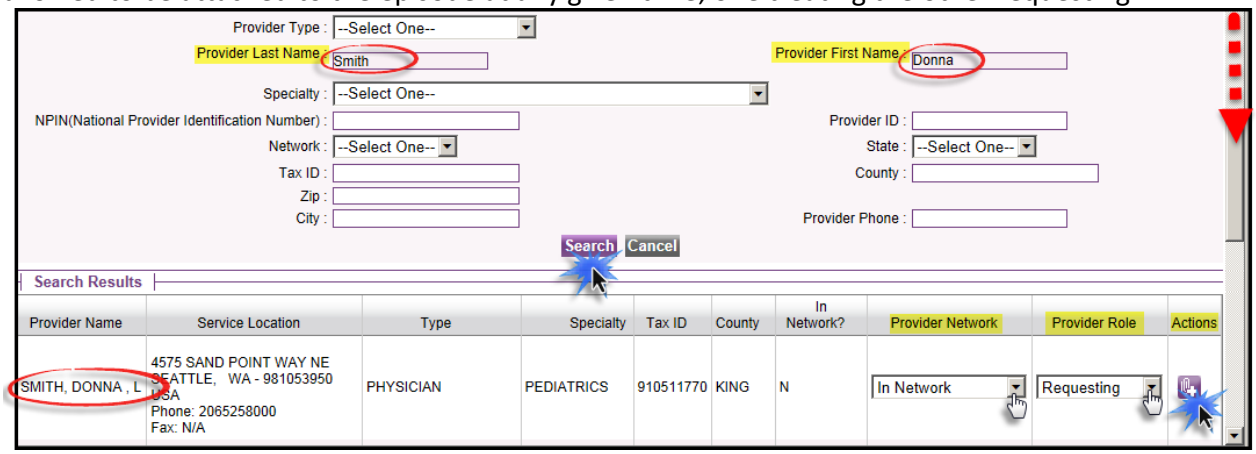


4. Click the **Attach New** button within the **Providers** section to add another facility, group, or provider to the episode.

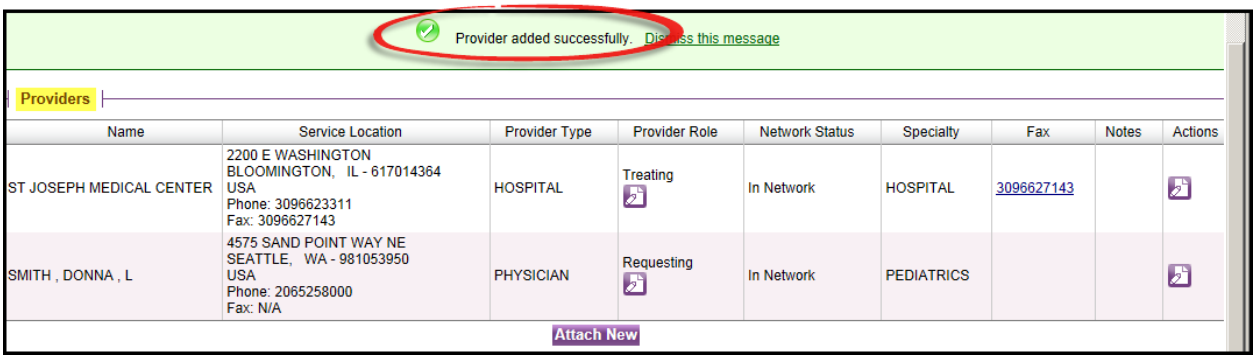


5. Follow step **2** above to add the other provider role. E.g. If the first choice for the provider role is **Treating** the next provider role entered would be **Requesting.**

- **Note:** There is not a specific order the provider role has to be entered. No more than two providers are allowed to be attached to the episode at any given time; one treating the other requesting.

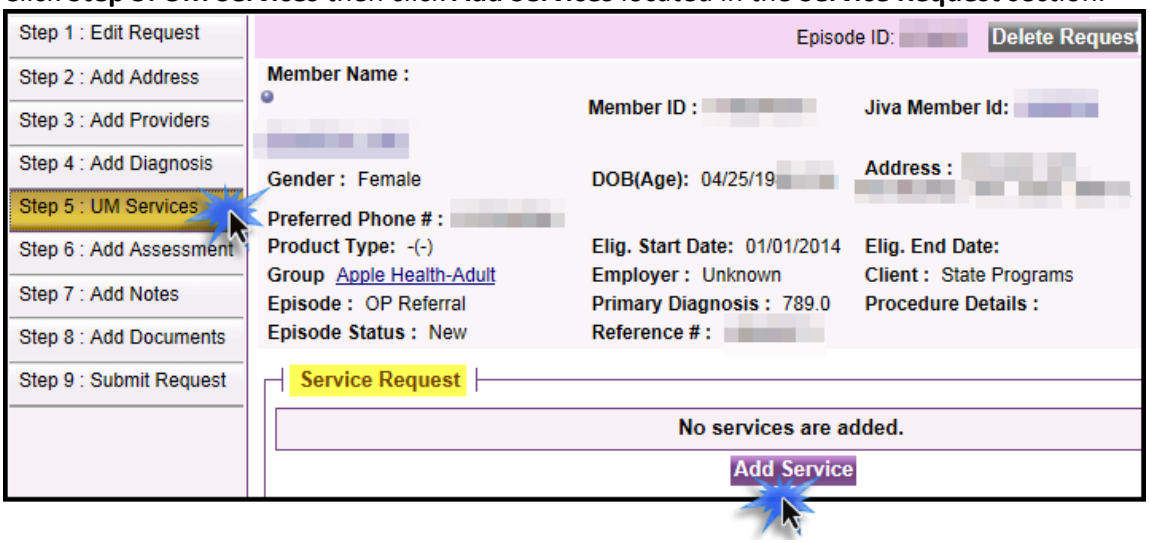


6. Attached will show the two provider roles entered. The message **Provider added successfully** will appear at the top of the screen.

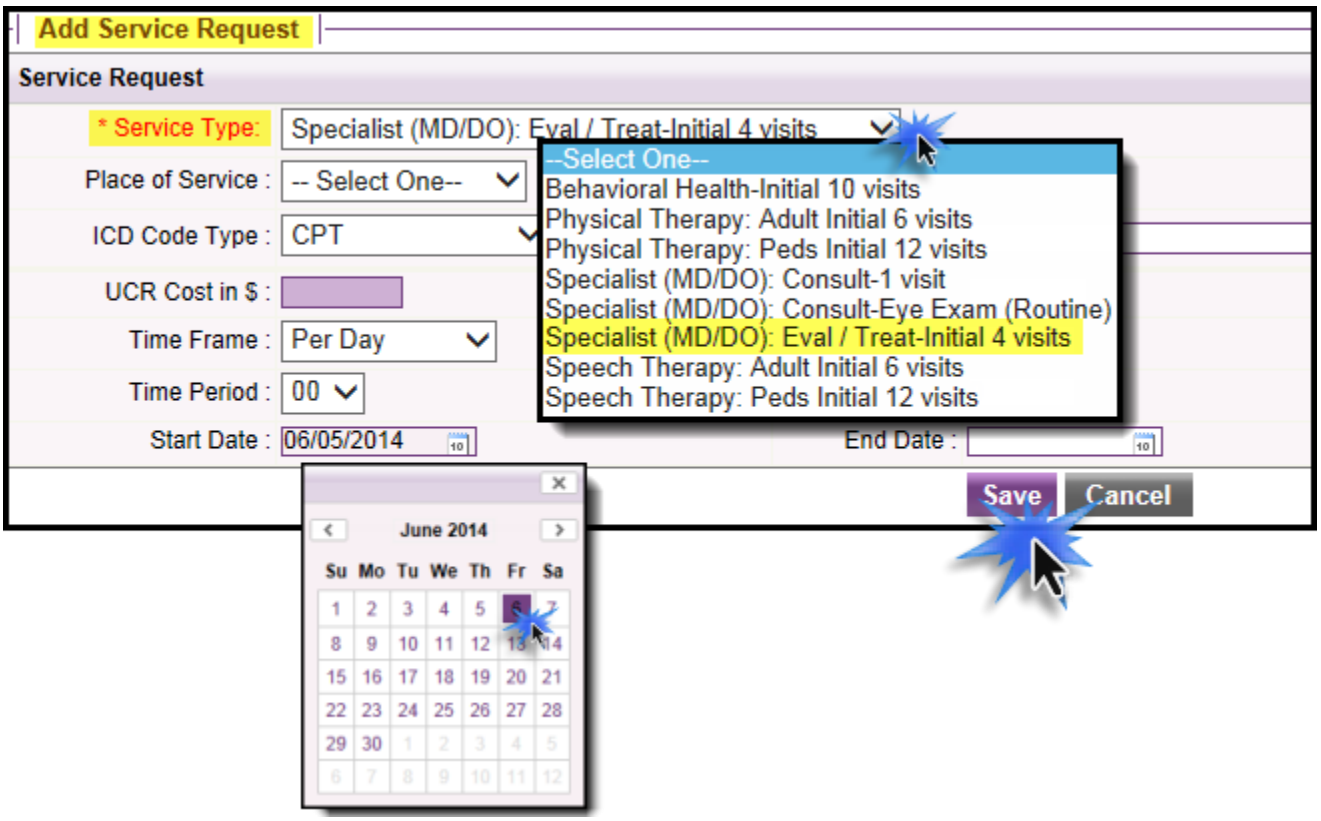


Step 5: UM Services:

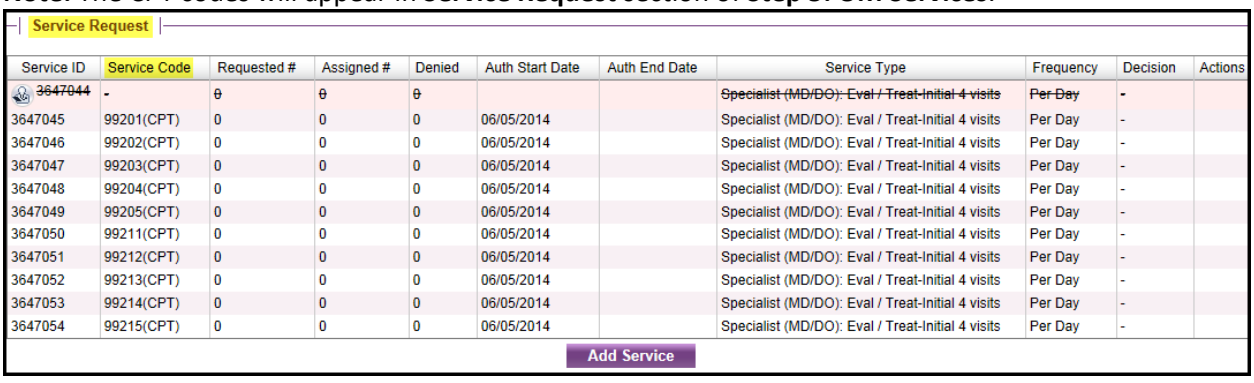
1. Click **Step 5: UM Services** then click **Add Services** located in the **Service Request** section.



2. Click on **Service Type** and click on the type of services that will be rendered. Click within the **Start Date** section to populate the calendar. Click the date the request was started then click **Save.**



Note: The CPT codes will appear in **Service Request** section of **Step 5: UM Services**.



Service Request

Service ID	Service Code	Requested #	Assigned #	Denied	Auth Start Date	Auth End Date	Service Type	Frequency	Decision	Actions
~~3647044~~	-	~~0~~	~~0~~	~~0~~			~~Specialist (MD/DO): Eval / Treat-Initial 4 visits~~	~~Per Day~~	-	
3647045	99201(CPT)	0	0	0	06/05/2014		Specialist (MD/DO): Eval / Treat-Initial 4 visits	Per Day	-	
3647046	99202(CPT)	0	0	0	06/05/2014		Specialist (MD/DO): Eval / Treat-Initial 4 visits	Per Day	-	
3647047	99203(CPT)	0	0	0	06/05/2014		Specialist (MD/DO): Eval / Treat-Initial 4 visits	Per Day	-	
3647048	99204(CPT)	0	0	0	06/05/2014		Specialist (MD/DO): Eval / Treat-Initial 4 visits	Per Day	-	
3647049	99205(CPT)	0	0	0	06/05/2014		Specialist (MD/DO): Eval / Treat-Initial 4 visits	Per Day	-	
3647050	99211(CPT)	0	0	0	06/05/2014		Specialist (MD/DO): Eval / Treat-Initial 4 visits	Per Day	-	
3647051	99212(CPT)	0	0	0	06/05/2014		Specialist (MD/DO): Eval / Treat-Initial 4 visits	Per Day	-	
3647052	99213(CPT)	0	0	0	06/05/2014		Specialist (MD/DO): Eval / Treat-Initial 4 visits	Per Day	-	
3647053	99214(CPT)	0	0	0	06/05/2014		Specialist (MD/DO): Eval / Treat-Initial 4 visits	Per Day	-	
3647054	99215(CPT)	0	0	0	06/05/2014		Specialist (MD/DO): Eval / Treat-Initial 4 visits	Per Day	-	

Add Service

Step 9: Submit Request:

1. Click on **Step 9: Submit Request,** then click the **Submit Request** button**.**

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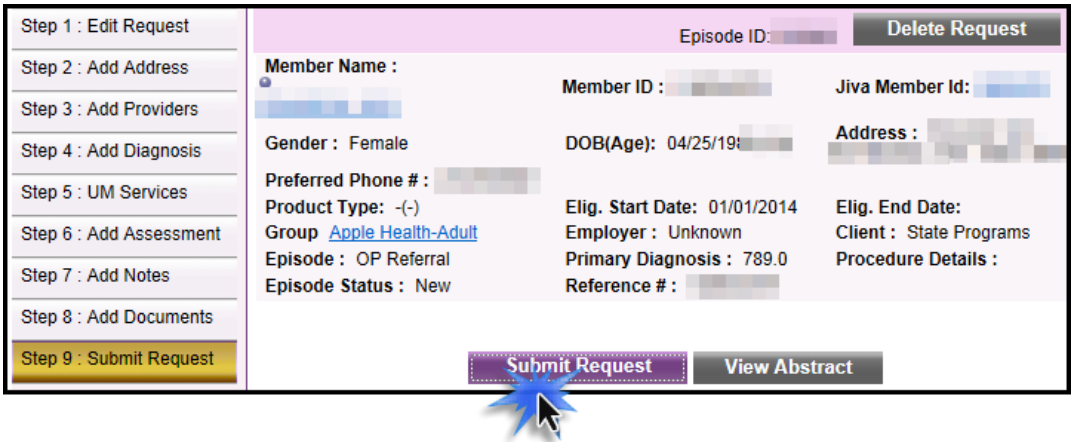
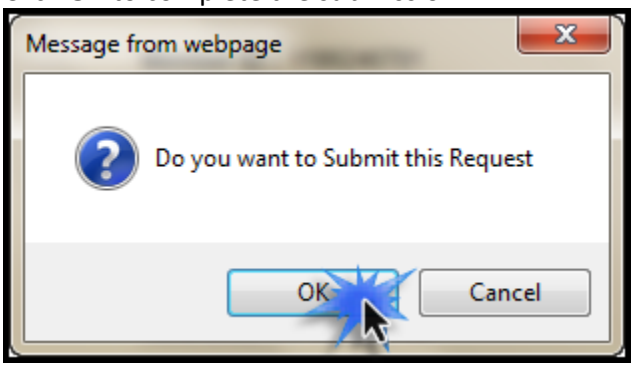
2. Click **OK** to complete the submission.