

Entering a Specialist Referral


Purpose

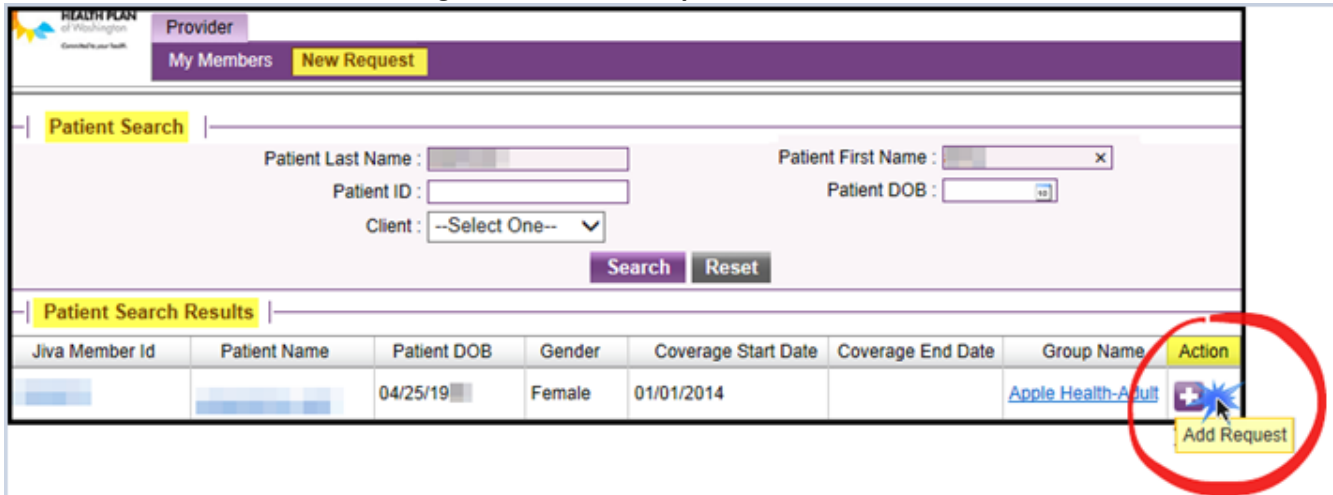
The purpose of this document is to provide step-by-step instructions on how to enter a Specialist Referral.

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.




Patient Search

Patient Last Name : Patient First Name : x

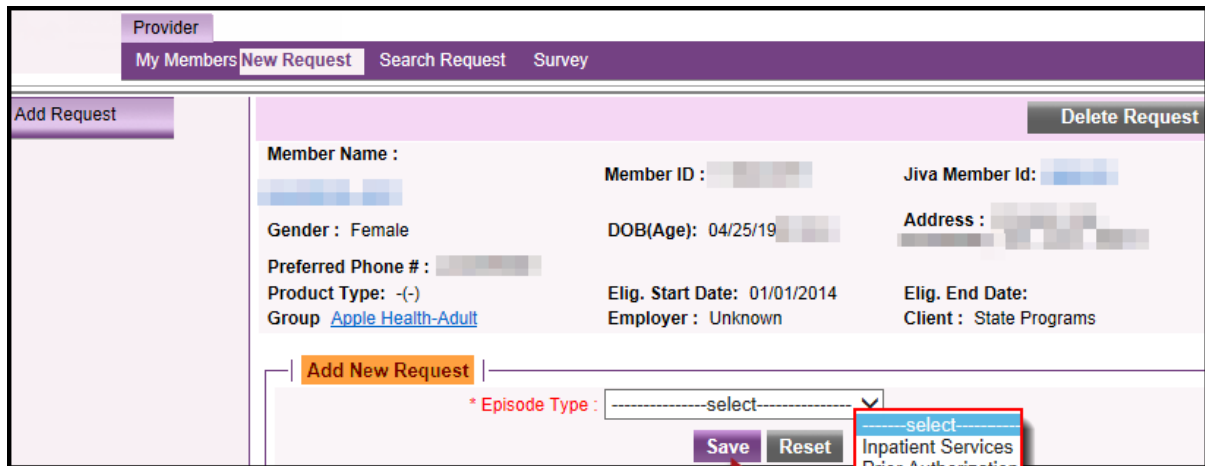
Patient ID : Patient DOB :

Client : --Select One--

Patient Search Results

Jiva Member Id	Patient Name	Patient DOB	Gender	Coverage Start Date	Coverage End Date	Group Name	Action
		04/25/19	Female	01/01/2014		Apple Health-Adult	 Add Request

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



Provider
 My Members **New Request** Search Request Survey

Add Request Delete Request

Member Name : [REDACTED] **Member ID :** [REDACTED] **Jiva Member Id:** [REDACTED]
Gender : Female **DOB(Age):** 04/25/19 [REDACTED] **Address :** [REDACTED]
Preferred Phone # : [REDACTED] **Elig. Start Date:** 01/01/2014 **Elig. End Date:**
Product Type: -(-) **Employer :** Unknown **Client :** State Programs
Group [Apple Health-Adult](#)

Add New Request

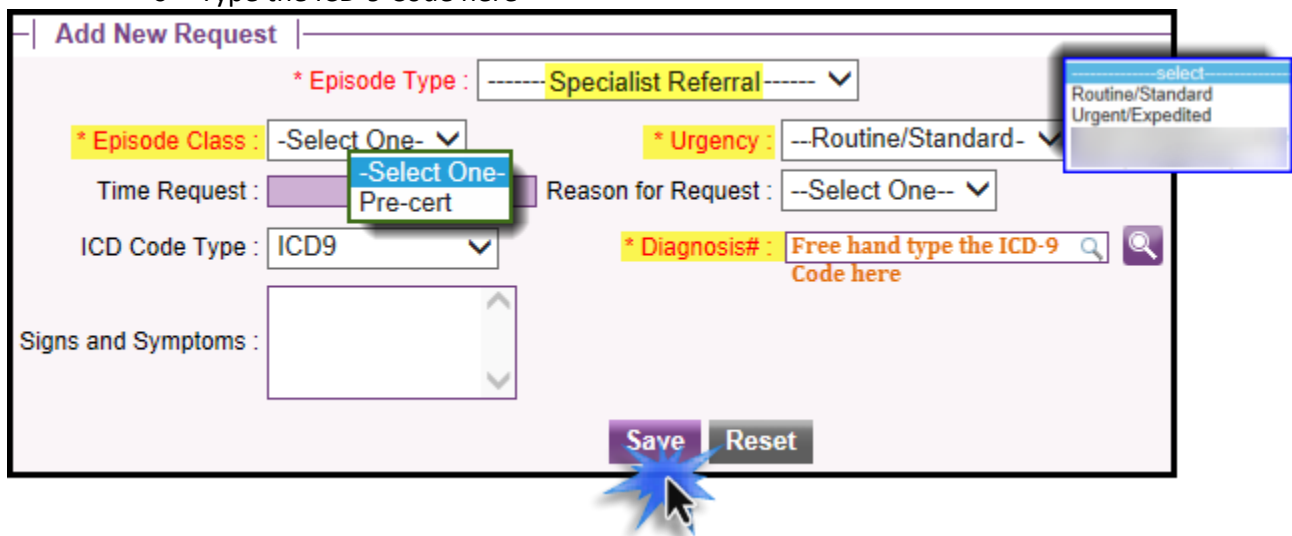
* Episode Type : select

Save Reset

select
 Inpatient Services
 Prior Authorization
 Specialist Referral

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



Add New Request

* Episode Type : Specialist Referral

* Episode Class : -Select One-

* Urgency : --Routine/Standard-

Time Request : -Select One-

Reason for Request : --Select One--

ICD Code Type : ICD9

* Diagnosis# : Free hand type the ICD-9 Code here

Signs and Symptoms : [REDACTED]

Save Reset

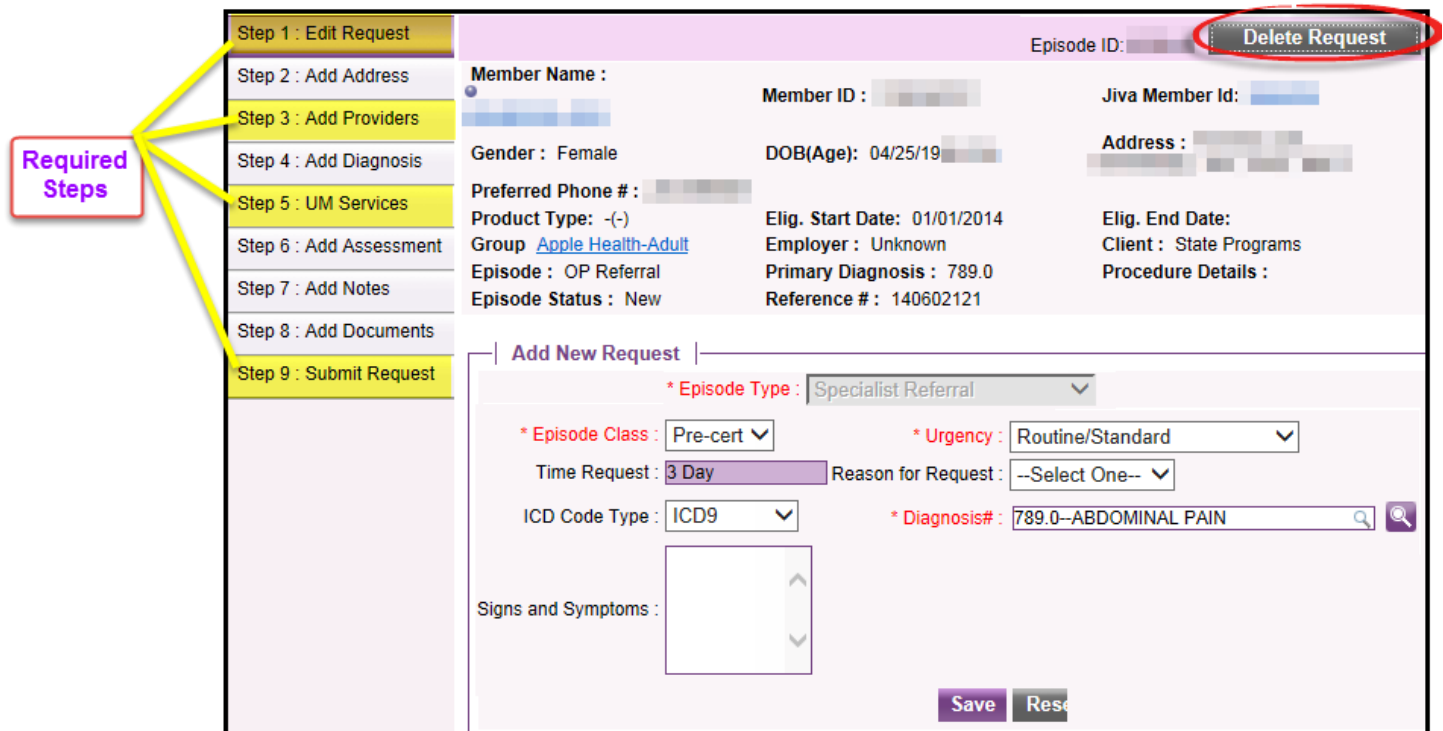
select
 Routine/Standard
 Urgent/Expedited

-Select One-
 Pre-cert

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

- Step 1: Edit Request
- Step 2: Add Address
- Step 3: Add Providers
- Step 4: Add Diagnosis
- Step 5: UM Services
- Step 6: Add Assessment
- Step 7: Add Notes
- Step 8: Add Documents
- Step 9: Submit Request

Delete Request

Episode ID: [Redacted]

Member Name: [Redacted] Member ID: [Redacted] Jiva Member Id: [Redacted]

Gender: Female DOB(Age): 04/25/19 [Redacted] Address: [Redacted]

Preferred Phone #: [Redacted]

Product Type: -(-) Elig. Start Date: 01/01/2014 Elig. End Date: [Redacted]

Group: [Apple Health-Adult](#) Employer: Unknown Client: State Programs

Episode: OP Referral Primary Diagnosis: 789.0 Procedure Details: [Redacted]

Episode Status: New Reference #: 140602121

Add New Request

* Episode Type: Specialist Referral

* Episode Class: Pre-cert * Urgency: Routine/Standard

Time Request: 3 Day Reason for Request: --Select One--

ICD Code Type: ICD9 * Diagnosis#: 789.0--ABDOMINAL PAIN

Signs and Symptoms: [Redacted]

Save Resc

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 1 : Edit Request	Episode ID: 923694 Delete Request		
Step 2 : Add Address	Member Name : ADAMSON, AMY		
Step 3 : Add Providers	Member ID : 1186246701 Jiva Member Id: 1003378		
Step 4 : Add Diagnosis	Gender : Female DOB(Age): 04/25/1980 (34) Address : PO BOX 125, RAYMOND, WA, USA, 98577.		
Step 5 : UM Services	Preferred Phone # : 2537095901		
Step 6 : Add Assessment	Product Type: -(-) Elig. Start Date: 01/01/2014 Elig. End Date:		
Step 7 : Add Notes	Group Apple Health-Adult Employer : Unknown Client : State Programs		
Step 8 : Add Documents	Episode : OP Referral Primary Diagnosis : 789.0 Procedure Details :		
Step 9 : Submit Request	Episode Status : New Reference # : 140602797		

Add New Request	
* Episode Type :	Specialist Referral
* Episode Class :	Pre-cert
Time Request :	3 Day
ICD Code Type :	ICD9
* Urgency :	Routine/Standard
Reason for Request :	--Select One--
* Diagnosis# :	789.0--ABDOMINAL PAIN
Signs and Symptoms :	

Save **Reset**

Delete the current ICD9 code to add the correct one.

Step 3: Add Providers:



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

Step 1 : Edit Request Step 2 : Add Address Step 3 : Add Providers Step 4 : Add Diagnosis Step 5 : UM Services Step 6 : Add Assessment Step 7 : Add Notes Step 8 : Add Documents Step 9 : Submit Request	<div> <div>Episode ID: <input type="text"/></div> <div>Delete Request</div> </div> <div> <div>Member Name : <input type="text"/></div> <div>Member ID : <input type="text"/></div> <div>Jiva Member Id: <input type="text"/></div> </div> <div> <div>Gender : Female</div> <div>DOB(Age): 04/25/1981</div> <div>Address : <input type="text"/></div> </div> <div> <div>Preferred Phone # : <input type="text"/></div> <div>Product Type: -(-)</div> <div>Elig. Start Date: 01/01/2014</div> <div>Elig. End Date:</div> </div> <div> <div>Group Apple Health-Adult</div> <div>Employer : Unknown</div> <div>Client : State Programs</div> </div> <div> <div>Episode : OP Referral</div> <div>Primary Diagnosis : 789.0</div> <div>Procedure Details :</div> </div> <div> <div>Episode Status : New</div> <div>Reference # : <input type="text"/></div> </div> <div> <div>Providers</div> <div>no providers attached to this episode</div> <div>Attach New</div> </div>
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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


Provider Type : --Select One--
 Provider Last Name : **St Joseph Medical Center**
 Provider First Name :
 Specialty : --Select One--
 NPIN(National Provider Identification Number):
 Network : --Select One--
 Tax ID :
 Zip :
 City :
 Provider ID :
 State : --Select One--
 County :
 Provider Phone :
 Search Cancel

Search Results


Provider Name	Service Location	Type	Specialty	Tax ID	County	In Network?	Provider Network	Provider Role	Actions
ST JOSEPH MEDICAL CENTER	2200 E WASHINGTON BLOOMINGTON, IL - USA Phone: 3096623311 Fax: 3096627143	HOSPITAL	HOSPITAL	370662576		N	In Network	Treating	 

In Network
 Preferred Provider
 Unknown
 Out of Network
 --Select One--
 Requesting
 Treating

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

 Provider added successfully. [Dismiss this message](#)

Providers

Name	Service Location	Provider Type	Provider Role	Network Status	Specialty	Fax	Notes	Actions
ST JOSEPH MEDICAL CENTER	2200 E WASHINGTON BLOOMINGTON, IL - 617014364 USA Phone: 3096623311 Fax: 3096627143	HOSPITAL	Treating	In Network	HOSPITAL	3096627143		



Attach New

- 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.

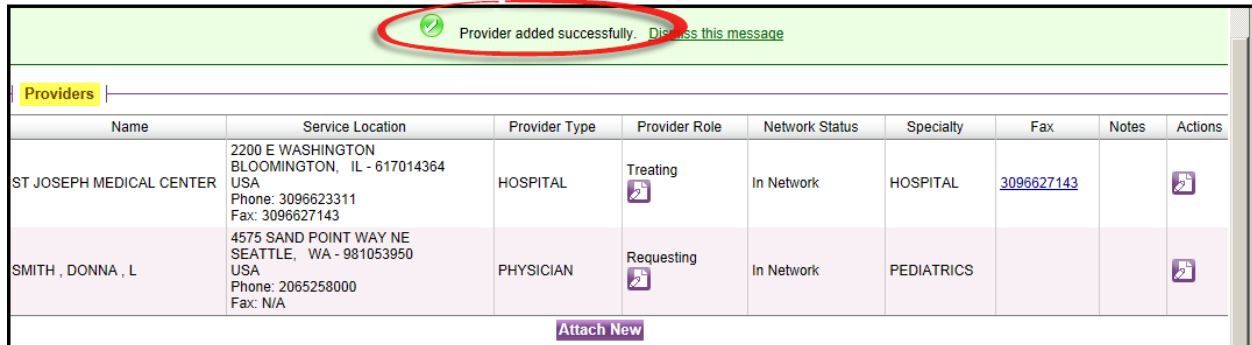
Provider Type : --Select One--
 Provider Last Name : **Smith**
 Provider First Name : **Donna**
 Specialty : --Select One--
 NPIN(National Provider Identification Number):
 Network : --Select One--
 Tax ID :
 Zip :
 City :
 Provider ID :
 State : --Select One--
 County :
 Provider Phone :
 Search Cancel

Search Results

Provider Name	Service Location	Type	Specialty	Tax ID	County	In Network?	Provider Network	Provider Role	Actions
SMITH, DONNA, L	4575 SAND POINT WAY NE SEATTLE, WA - 981053950 USA Phone: 2065258000 Fax: N/A	PHYSICIAN	PEDIATRICS	910511770	KING	N	In Network	Requesting	 

In Network
 Requesting

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



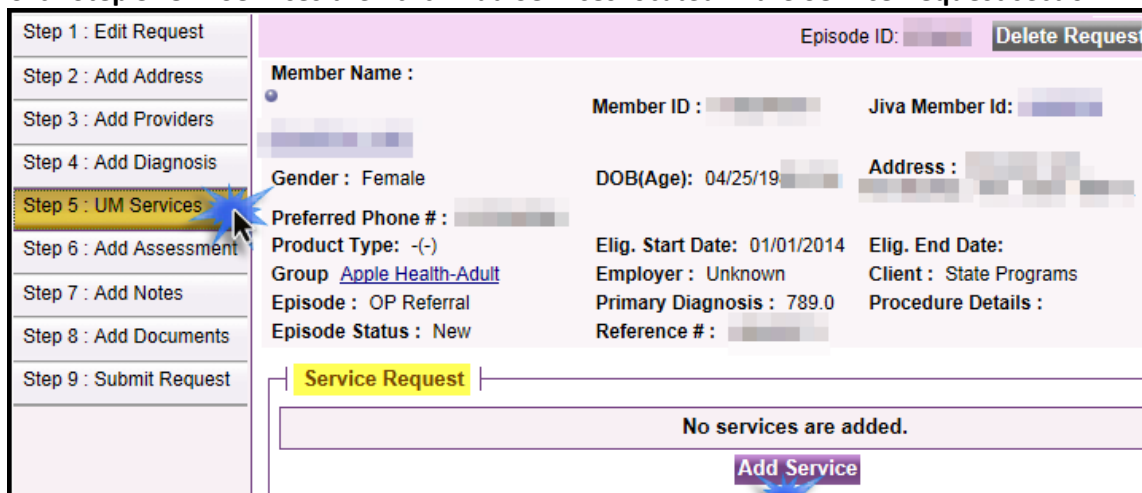
Provider added successfully. [Discuss this message](#)

Name	Service Location	Provider Type	Provider Role	Network Status	Specialty	Fax	Notes	Actions
ST JOSEPH MEDICAL CENTER	2200 E WASHINGTON BLOOMINGTON, IL - 617014364 USA Phone: 3096623311 Fax: 3096627143	HOSPITAL	Treating	In Network	HOSPITAL	3096627143		
SMITH, DONNA, L	4575 SAND POINT WAY NE SEATTLE, WA - 981053950 USA Phone: 2065258000 Fax: N/A	PHYSICIAN	Requesting	In Network	PEDIATRICS			

[Attach New](#)

Step 5: UM Services:

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



Step 1 : Edit Request | Step 2 : Add Address | Step 3 : Add Providers | Step 4 : Add Diagnosis | **Step 5 : UM Services** | Step 6 : Add Assessment | Step 7 : Add Notes | Step 8 : Add Documents | Step 9 : Submit Request

Episode ID: [Delete Request](#)

Member Name :

Member ID : Jiva Member Id:

Gender : Female DOB(Age): 04/25/19 Address :

Preferred Phone # :

Product Type: -(-) Elig. Start Date: 01/01/2014 Elig. End Date:

Group [Apple Health-Adult](#) Employer : Unknown Client : State Programs

Episode : OP Referral Primary Diagnosis : 789.0 Procedure Details :

Episode Status : New Reference # :

Service Request

No services are added.

[Add Service](#)

- 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**.

Add Service Request

Service Request

* Service Type: Specialist (MD/DO): Eval / Treat-Initial 4 visits

Place of Service: -- Select One--

ICD Code Type: CPT

UCR Cost in \$:

Time Frame: Per Day

Time Period: 00

Start Date: 06/05/2014

End Date:

--Select One--

Behavioral Health-Initial 10 visits

Physical Therapy: Adult Initial 6 visits

Physical Therapy: Peds Initial 12 visits

Specialist (MD/DO): Consult-1 visit

Specialist (MD/DO): Consult-Eye Exam (Routine)

Specialist (MD/DO): Eval / Treat-Initial 4 visits

Speech Therapy: Adult Initial 6 visits

Speech Therapy: Peds Initial 12 visits

Save

Cancel

June 2014

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

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	06/05/2014		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:

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

Step 1 : Edit Request	Episode ID: [REDACTED] Delete Request	
Step 2 : Add Address	Member Name : [REDACTED]	Member ID : [REDACTED] Jiva Member Id: [REDACTED]
Step 3 : Add Providers	Gender : Female	DOB(Age): 04/25/19[REDACTED] Address : [REDACTED]
Step 4 : Add Diagnosis	Preferred Phone # : [REDACTED]	
Step 5 : UM Services	Product Type: -(-)	Elig. Start Date: 01/01/2014 Elig. End Date:
Step 6 : Add Assessment	Group Apple Health-Adult	Employer : Unknown Client : State Programs
Step 7 : Add Notes	Episode : OP Referral	Primary Diagnosis : 789.0 Procedure Details :
Step 8 : Add Documents	Episode Status : New	Reference # : [REDACTED]
Step 9 : Submit Request	Submit Request View Abstract	

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

