HEALTH PLAN OF NEVADA
A UnitedHealthcare Company

SIERRA HEALTH AND LIFE
A UnitedHealthcare Company

Online Provider Center Tutorial
Search and Manage Referrals

Search and Manage Referrals:

To review and work a **Referral**, select **Referral/Prior Authorization** and **Search and Manage Referrals.**

Search and Manage Referrals Continued:

Search and Manage Referrals

Please select desired filter options. At least one filter option must be selected. The date range cannot exceed 90 days.

Filter Options

Referral Date From	06/18/2020		Referral Date To	09/16/2020

Priority
- ☐ Routine
- ☐ At Risk
- ☐ Expedited
- ☐ Stat
- ☐ UC - Expedited
- ☐ Hospital Discharge

Direction
- ◉ All
- ○ Incoming
- ○ Outgoing

*Status
- ☐ Accepted
- ☐ Addl_Info_Provided
- ☐ Addl_Info_Requested
- ☐ Awaiting Member to Schedule
- ☐ Awaiting Physician Review
- ☐ Awaiting signature
- ☐ Cancelled
- ☐ Complete
- ☐ DAC READY
- ☐ Debbie Test
- ☐ Declined
- ☐ Dictation Provided
- ☐ LIFETIME REFERRAL
- ☐ Navigator Rev
- ☐ New

*Provider

*Category
- ▶ ☐ 📁 Access Center
- ▶ ☐ 📁 Access Referrals
- ▶ ☐ 📁 Allergy/Immunology
- ▶ ☐ 📁 Anticoag Clinic - Network Only
- ▶ ☐ 📁 Anticoag Clinic - SMA Only
- ▶ ☐ 📁 Audiology
- ▶ ☐ 📁 BHO Consults - SMA Only
- ▶ ☐ 📁 Breast Care Program
- ▶ ☐ 📁 CGM Referrals - SMA Only
- ▶ ☐ 📁 CM ONLY Referrals
- ▶ ☐ 📁 COPD Clinic (SMA)
- ▶ ☐ 📁 Cardiology
- ▶ ☐ 📁 Cardiology - Pediatric

Additional Options
- ○ Referral ID   ○ Member ID   ○ Medicaid ID   ○ Member Name   ○ SMA MRN   [_____]

New Referral/Prior Authorization | **Apply Filter** | **Reset Filter** | **Refresh**

Filter Options
The Filter Options on the **Search and Manage Referrals** screen will be used to filter the types of referrals the user wants to view or manage. These filters can be used separately or together to define the view the user is seeking.

The user will be able to filter their views by various selections:
Priority, Direction, Status, Provider, Category, or **Additional Option features** which are subject to the 90 day timeframe <u>with the exception of</u> **Referral ID, Member ID,** or **Medicaid ID**.

Search and Manage Referrals - Filters Continued:

- **Priority:** The **Priority** is the urgency of the referral. Only one **Priority** at a time can be selected as a filter. Priorities of a referral are defined as Expedited (3 days), At Risk (14 days), or Routine (30 days). Subject to the 90 day timeframe.

  Priority
  ☐ Routine
  ☐ At Risk
  ☐ Expedited

- **Direction:** The **Direction** of the referral indicates whether the referral is being sent *from* or **to** that specialty. Only one **Direction** at a time can be selected as a filter. Subject to the 90 day timeframe.

  Direction
  ◉ All
  ○ Incoming
  ○ Outgoing

Search and Manage Referrals - Filters Continued:

Status: The **Status** is the description of the stage or status of the referral such as, New, Declined, or Scheduled. Subject to the 90 day timeframe.

Status Name	Definition
Awaiting Signature	Referral not viewable by Specialist until electronically signed by the Physician.
New	Initial referral sent to Specialist. All New referrals require review.
Addl Info Provided	When referring (requesting) provider returns additional information as requested.
Addl Info Requested	A request sent back to referring provider for additional information required to process referral.
Cancelled	When patient refuses the referral at time of submission or cancels the scheduled appointment.
Declined	Specialist (or receiving team) declines acceptance of the referral based on specific reasons listed for users to select from.
Awaiting Member to Schedule	When referral is awaiting member to call to schedule appointment. • Attempting to Schedule Member • No Response from Member
Scheduled	Patient appointment has been made & appointment date indicated.
Rescheduled	Appointment date is rescheduled based on specific reason listed below required for Providers to enter. • Member requested to reschedule • Provider requested to reschedule
Outsource	Sending to an outside Contracted Specialist for services not offered by SMA. This status is only accessible by a SMA provider.
Overflow	Sending to an outside Contracted Specialist because unable to meet access guidelines.
No Show	The patient did not arrive or keep their appointment.
Awaiting Physician Review	Specialist is reviewing Referral information for a decision.

- **Category:** The **Category** is defined as the type of specialty or department that would provide the referral services or procedures (the referred to department). Subject to the 90 day timeframe.

*Category

▸ ☐ 📁 Dermatology

▸ ☐ 📁 Dermatology (No NV)

▸ ☐ 📁 Endocrinology

▸ ☐ 📁 Endocrinology - Pediatric

Search and Manage Referrals - Filters Continued:

Additional Options: Allows a search from one of the options displayed in the drop-down.

Once an option is selected the user then places the value for this option in the **Criteria** box provided under the **Additional Options** drop-down box. Only the **Referral ID**, **Member ID** and **Medicaid ID** will override the 90 day calendar date range.

Search and Manage Referrals - Filters Continued:

Search and Manage Referrals

Please select desired filter options. At least one filter option must be selected. The date range cannot exceed 90 days.

Filter Options

| Referral Date From | 06/18/2020 | | Referral Date To | 09/16/2020 | |

Priority
- ☐ Routine
- ☐ At Risk
- ☐ Expedited
- ☐ Stat
- ☐ UC - Expedited
- ☐ Hospital Discharge

Direction
- ⦿ All
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*Status
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- ☐ Dictation Provided
- ☐ LIFETIME REFERRAL
- ☐ Navigator Rev
- ☐ New

*Provider
- ☐
- ☐
- ☐

*Category
- ▶ ☐ 📁 Access Center
- ▶ ☐ 📁 Access Referrals
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- ▶ ☐ 📁 COPD Clinic (SMA)
- ▶ ☐ 📁 Cardiology
- ▶ ☐ 📁 Cardiology - Pediatric

Additional Options
- ◯ Referral ID ◯ Member ID ◯ Medicaid ID ◯ Member Name ◯ SMA MRN [_____]

| New Referral/Prior Authorization | Apply Filter | Reset Filter | Refresh |

Once all the **Filter Options** are selected, select the **Apply Filter** button and the screen produces new results.
- The **New Referral/Prior Auth** button will launch the screen to create a new referral or a new prior auth.
- The **Reset Filter** button resets the filters back to the default values and refreshes the screen showing all referrals (for the user's default view or login).
- The **Refresh** button will refresh the screen with the latest referral information without changing the filters.

After the filters are applied, the **Referral(s) count** will appear right above the list of referrals.

Display of Referrals:

Priority	ID	Patient	Status/Status Age	Submitted	Category	Direction	Provider	Buttons
Expedited			New Jun 23, 2020 9:52:01 AM 84 days	Jun 23, 2020 9:52:01 AM 84 days Last Update: Jun 23, 2020 9:52:01 AM 84 days	Orthopedic Surgery	IN		Print
At Risk			New Jun 23, 2020 10:09:21 AM 84 days	Jun 23, 2020 10:09:21 AM 84 days Last Update: Jun 23, 2020 10:10:38 AM	Orthopedic Surgery	IN		Print
Routine			New Jul 20, 2020 6:34:05 PM 57 days	Jul 20, 2020 6:34:05 PM 57 days Last Update: Jul 20, 2020 6:34:05 PM 57 days	Orthopedic Surgery	IN/OUT		Print

Referrals are displayed in order by **Priority**; **Expedited**, **At Risk** then **Routine**.

The definitions of the columns in the display are:
Priority: The urgency of the referral, which is set at Expedited (3 days) , At Risk (14 days) or Routine (30 days).
ID: The referral ID number assigned when the referral was created.
Patient: The patient's name, DOB and Member Number and Phone Number
Status/Status Age: The referrals age as of the screen refresh (or as of today) and the current Status of the referral, such as New, Scheduled, etc.
Submitted: The date and time the referral was submitted. The system will translate the date comparing it to today's date and display when the referral was submitted in either days or a descriptor of today or yesterday.
Category: The department or team to receive or service the referral.
Direction: They system will identify whether the referral is incoming or outgoing to the user's department.
Provider: The To/From provider or team will be displayed. The receiving provider's group will initially be displayed until the specialist/provider has been assigned to this referral.
Comment icon: Selecting this icon displays all the comments added for the referral with a date/time stamp for each addition.
Copy icon: Selecting this icon provides the user the ability to copy this referral and create a new one from the original information
Print icons: Selecting these icons provide the users the ability to print the referral.

Viewing an Existing Referral

The **Search and Manage Referrals** screen will display the summary information for each referral on the first row and will allow the **Servicing Team** to change the **Priority** &/or **Status** per medical need.

To view an existing referral, select the referral **ID** (i.e. 9173923) and the **Search and Manage Referrals** screen expands to display the **Referral Details**.

Referral Details

Priority	ID	Patient	Status/Status Age	Submitted	Category	Direction	Provider	Buttons
Routir ▼	9173923		Scheduled ▼ Scheduled for Date: 09/30/2020 📅 Update	Sep 16, 2020 12:44:05 PM Today Last Update Sep 16, 2020 2:51:10 PM Today	Orthopedic Surgery	IN	From: DIAGNOSTIC CENTER OF MEDICINE To: NEVADA ORTHOPEDIC & SPINE CENTER	📄 🖨

As the user scrolls through the **Referral Details**, all sections become viewable of **Diagnosis/Active Problems**, **Questionnaire, Health Information**, **Attachments** (optional), and **Assigned to Specialist** (optional), and **Comments** (provides the history of the referral).

Active Problems - Category

Diagnosis codes(s)/Active Problems		Category	Subcategory
code	Description	Orthopedic Surgery	Ankle/Foot
R69	ILLNESS, UNSPECIFIED		

Questionnaire

Orthopedic Surgery

1.Was the patient seen in an Emergency Room or Urgent Care within 60 days of this referral?
No

Ankle/Foot

2.Pain location:
Left

Health Information

Attachments

Assign To Specialist

Select One ▼

Save

Comments

Managing Referrals

After selecting the referral from the list of referrals as described in the previous section, the Servicing Team reviews the referral as submitted and determines what course of action is appropriate per the medical need.

Upon specific transitions, such as Scheduled, the user can **assign** the referral to a particular specialist within the group (if applicable). The user can also enter additional **comments** if needed. After the patient has completed their visit, transitioning the referral into the **Scheduled** status will update our claims system for payments (when required) and will assure all future care for the member is coordinated at the appropriate benefit level. ___*All referrals*___ should be transitioned into the **Scheduled** status if the patient was seen for care.

Managing Referrals (end)

If the referral is Declined, the status will need to be changed to **Declined**. The user must enter a status reason as to why the referral is being declined. The user may also enter additional comments.