

Referral Inquiry

The Referral Inquiry transaction allows you to search, retrieve, and print approved referrals currently stored in the system.

Note: To print this user guide, right-click the screen and click **Print**.

Accessing the transaction

Click **Referral Inquiry** on the plan menu.

Steps

On the Referral Inquiry screen:


1. In the Search Type section:
 - Select a **Member**, **Referral Number**, or **Referral Date Range** search type.
2. In the Provider Information section:
 - Select if you are inquiring on behalf of the **Referred To Provider** or **Referring Provider**.
 - Select a **Provider Group** from the drop down menu.
3. Enter all required information corresponding to the selected Search Type.
4. Click **Search**.
 - If only one record is found, you are taken directly to the *Referral Details* screen.
 - If more than one record is found, you are taken to the *Search Results* screen where you can select the appropriate member.

On the Referral Details screen:

- If you have access to clinical reports, click the **View PDF** link to view member's clinical summary.
- If you have access to clinical reports, click the **Download Data File** link to download an XML version of the member's clinical summary.

Tips

General

- Fields marked with a red asterisk (*) are required.
- Fields with a question mark icon  indicate that more information is available about that field. Click on the icon to learn more.

Referral Inquiry screen

- Selecting a search type of **Member** requires the following fields:
 - **I am Inquiring on Behalf of:** Select either Referred To or Referring Provider;
 - **Provider Group:** Select from the drop down menu;
 - **Member Search Type:** Select from the following search types:
 - **Member ID:** Enter the member's ID;
 - **Member Name/Date of Birth:** Enter the member's first name, last name, and Date of Birth;
 - **Medicaid ID:** Enter the medicaid ID;
 - **Social Security Number:** Enter the member's complete social security number.
- Selecting a search type of Referral Number requires the following fields:
 - **I am Inquiring on Behalf of:** Select either Referred To or Referring Provider;
 - **Provider Group:** Select from the drop down menu;

- **Referral Number:** Enter the referral number.
- Selecting a search type of Referral Date Range requires the following fields:
 - **I am Inquiring on Behalf of:** Select either Referred To or Referring Provider;
 - **Provider Group:** Select from the drop down menu;
 - **Referral Issue Date From:** Select or enter a date - cannot be more than 2 years before today's date;
 - **Referral Issue Date To:** Select or enter a date - cannot be greater than today's date;
 - **Note:** *The duration between the Referral Issue Date From and the Referral Issue Date To cannot be more than 3 months.*
- Use the calendar widgets to select dates.
- On the Referral Search Results screen, you can view the search criteria by clicking the **Show Search Criteria** link. Likewise, you can hide the search criteria by clicking the **Hide Search Criteria** link.

Referral Details screen

- If you have access to clinical reports, selecting the **View PDF** link opens the member's clinical summary in a new window in PDF format.
- If you have access to clinical reports, selecting the **Download Data File** link downloads an XML version of the member's clinical summary in a new window as a .txt file type.
- If you do not have access to clinical reports, a link appears on the details screen providing information on gaining access to the reports.
- The referral Trace Number is displayed on the details screen.

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Referral Submission

The Referral Submission transaction allows primary care physicians to electronically submit a referral to a Passport Health Plan line of business for real-time approval. Once a PCP submits a referral and receives a referral ID response from Passport Health, the health plan member may visit the assigned specialist.

Note: To print this user guide, right-click the screen and click **Print**.

Accessing the transaction

Click **Referral Submission** on the plan menu.

Steps

On the Patient Search screen:


1. Select a search type and enter the required patient information.
2. Click **Search**. This results in one of the following scenarios:
 - **One member returned:** If your search result is one active member, you are taken directly to the *Referral Submission - Detail Entry* screen.
 - **More than one member returned:** If your search results in more than one member, the *Member Search Results* screen displays with member information in the results table. Click on the appropriate member in the results table to move on to the *Referral Submission - Detail Entry* screen.

On the Detail Entry screen

1. In the Provider Information section:
 - Select a **Referred From Provider Group** from the drop down menu.
 - Enter or search for the **Referred To Provider Group PIN/NPI**.
2. In the Diagnosis Information section:
 - Enter or search for a **Principal Diagnosis code**.
3. In the Request Information section:
 - Select a **Service Type** from the drop down menu.
 - Enter or use the calendar icon to select a **Referral Date**.
 - Enter the **Number of Visits**.
 - Verify the **Referral Length**.
 - Select the **Assigned Laboratory** from the drop down menu, if applicable.
 - Enter comments in the text box, if applicable.
4. Click **Submit** or **Preview**
 - Clicking **Submit** verifies the form and takes you to the *Referral Submission - Response* screen.
 - Clicking **Preview** takes you to the *Referral Submission - Verification* screen. From this screen, you can edit and confirm that the Diagnosis and Service information are correct before submitting.

Tips

General

- Users in offices classified as PCP have access to the referral submission transaction.
- Fields marked with a red asterisk (*) are required.
- Fields with a question mark icon  indicate that more information is available about that field. Click on the icon to learn more.
- The Referral Auth log is not updated. Referrals are immediately available in the Referral Inquiry

transaction.

Patient Search screen

- The minimum search criteria are:
 - **Member ID search:** Enter the full member ID;
 - **Member Name/Date of Birth search:** Enter the member's last name, first name, and date of birth;
 - **Medicaid ID search:** Enter the full medicaid ID; or
 - **Social Security Number:** Enter the member's social security number.
- On the Patient Search results screen, you can view the search criteria by clicking the **Show Search Criteria** link. Likewise, you can hide the search criteria by clicking the **Hide Search Criteria** link.

Detail Entry screen

- Use the **Search** link in the Provider Information section to find a Referred To Provider Group PIN/NPI.
- Use the **Search** link(s) in the Diagnosis Information section to find diagnosis code(s).
- At least one diagnosis code is required.
- You can include up to 12 diagnosis codes in the Diagnosis Information section by clicking the **Add More** link.
- Use the Calendar widget to select a Referral Date in the Request Information section.
- A manually entered date must be no earlier than 14 calendar days prior to the date the referral is being initiated.
- If a service type of Urgent Care is selected, the manually entered date of service must be no earlier than five (5) business days prior to the date the referral is being initiated.
- In the Request Information section, the Number of Visits and Referral Length are dependant upon the selected Service Type.
- Assigned Laboratory is an optional field.
- Clicking **Preview** on the Detail Entry screen takes you to the Referral Verification screen and allows you to edit diagnosis and service information if necessary.
- Clicking **Submit** on the Detail Entry screen takes you to the Referral Response screen.

Referral Submission - Verification screen

- Click the **Edit** link next to Service or Diagnosis Information to return to and edit information on the Detail Entry screen.
- Clicking Submit on the Referral Submission - Verification screen takes you to the Referral Submission-Response screen.

Referral Submission - Response screen

- The Passport Health Referral ID is listed on the response screen.
- No message is displayed if the same referral already exists.

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