

Health Plan of Nevada
A UnitedHealthcare Company 

Sierra Health and Life
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Online Provider Center Tutorial

Search and Manage Referrals

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Search and Manage Referrals:

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

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TIN:



Dashboard

Members

Claims

Claim Doc Requests

EOP Search

Referrals/Prior Authorizations

Provider Demographics

Rx Prior Authorizations

News

News Item

News content here

Read More

Urgent: Online Provider Center will have scheduled maintenance this weekend from Friday, September 18 at 7:00pm until Saturday, September 19 at 5:00pm.

Recent Claims

Claim Number	Member Number	Status	Claim Type
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Recent Members

Member Number	First Name	Last Name	Date of Birth	As of Date
			9/16/2020	
			9/14/2020	
			9/2/2020	
			9/2/2020	
			9/2/2020	

2021 plan notifications, upcoming events, important call-outs...can all be posted here!

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WELCOME,

Logout 

TIN:

New Referral / Prior Authorization

Search and Manage Referrals

Search and Manage Prior Authorizations

Search and Manage Referrals

From Date

To Date

APPLY FILTER

RESET FILTER

REFRESH

Filter Options

Direction

Priority

Status

Providers

Category

Additional Options

☐ Referral ID

☐ Member ID

☐ Medicaid ID

☐ SMA MRN

☐ Member Name

Search and Manage Referrals Continued:

Search and Manage Referrals

From Date

7/19/2024

To Date

10/17/2024

APPLY FILTER

RESET FILTER

REFRESH

Filter Options

^

Direction

All

▼

Priority

All

▼

Status

All

▼

Providers

All

▼

Category

▼

Additional Options

☐ Referral ID

☐ Member ID

☐ Medicaid ID

☐ SMA MRN

☐ Member Name

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:

Direction, Priority, Status, Providers, Category, or Additional Option features which are subject to the 90-day timeframe with the exception of Referral ID, Member ID, or Medicaid ID.

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Search and Manage Referrals - Filters Continued:

Filter Options

Direction

All

Priority

All

- **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

- **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

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
New	Initial referral sent to Specialist (servicing) provider. All New referrals require review.
Additional Info Provided	When referring (requesting) provider adds additional information to an existing referral.
Additional Info Requested	Additional information is requested by the Specialist (servicing) provider.
Cancelled	When patient refuses the referral at the time of the submission or cancels their appointment. *Providers can transition referral to Scheduled if member changes their mind. A New referral is NOT required.
Declined	Specialist (servicing) provider declines the referral based on specific reasons listed for user to select from. *Providers can transition referral to Scheduled if member changes their mind. A New referral is NOT required.
Awaiting Member to Schedule	When a referral is waiting for the member to be scheduled. *Attempting to Schedule Member *No Response from Member
Scheduled	Member appointment has been made & appointment date indicated.
Overflow	Specialist (servicing) provider sends referral to an outside Contracted Overflow Specialist (servicing) provider because they are unable to meet access guidelines.
No Show	Member did not arrive or keep their appointment.
Awaiting Physician Review	Specialist (servicing) provider is reviewing the referral information for a decision. *Referral must still be worked within the priority guidelines of the referral.

- **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 date range.

Categories

- > Category: Endocrinology
- > Category: Endocrinology - Pediatric
- > Category: Gastroenterology

Search and Manage Referrals - Filters Continued:

Additional Options: Allows a search from one of the options displayed.

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WELCOME, [User Name] Logout [X] TIN: [TIN]

New Referral / Prior Authorization

Search and Manage Referrals

Search and Manage Prior Authorizations

Search and Manage Referrals

From Date: 7/19/2024 To Date: 10/17/2024

APPLY FILTER RESET FILTER REFRESH

Filter Options

Direction: All Priority: All

Status: All Providers: All

Category: [Dropdown]

Additional Options

☐ Referral ID ☐ Member ID ☐ Medicaid ID ☐ SMA MRN

☐ Member Name

[Text Input Field]

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

Search and Manage Referrals - Filters Continued:

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WELCOME, [User Name] Logout [X] TIN: [TIN]

New Referral / Prior Authorization

Search and Manage Referrals

Search and Manage Prior Authorizations

Search and Manage Referrals

From Date: 7/19/2024 To Date: 10/17/2024

APPLY FILTER RESET FILTER REFRESH

Filter Options

Direction: All Priority: All

Status: All Providers: All

Category: [Dropdown]

Additional Options

☐ Referral ID ☐ Member ID ☐ Medicaid ID ☐ SMA MRN

☐ Member Name

Once all the **Filter Options** are selected, select the **Apply Filter** button and the screen produces new results.

- 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.
- Users can also use **New Referral/Prior Auth** button will launch the screen to create a new referral or a new prior auth.

Display of Referrals:

Referral Count:289

PRINT SELECTED

Priority	ID	Patient	Status/Status Age	Submitted	Category	Direction	Provider	Buttons
Expedited			New Oct 01 2024 09:04:50 AM 20 days	Oct 01 2024 09:04:50 AM Schedule Date:	Orthopedic Surgery	IN		  
Expedited			New Oct 01 2024 08:55:56 AM 20 days	Oct 01 2024 08:55:56 AM Schedule Date:	Orthopedic Surgery	IN		  
Routine			New Oct 22 2024 07:43:17 AM Today	Oct 22 2024 07:43:17 AM Schedule Date:	Audiology	OUT		  

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**.

Priority	ID	Patient	Status/Status Age	Submitted	Category	Direction	Provider	Buttons
Expedited			New Oct 01 2024 09:04:50 AM 20 days	Oct 01 2024 09:04:50 AM Schedule Date:	Orthopedic Surgery	IN		

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

Active Problems-Category

Diagnosis codes(s)/Active Problems

Code	Description
S42.402A	UNSPECIFIED FRACTURE OF LOWER END OF LEFT HUMERUS, INITIAL ENCOUNTER FOR CLOSED FRACTURE

EDIT

Category

Orthopedic Surgery

Subcategory

Consult-Medicaid

Questionnaire

Orthopedic Surgery

1 .Was the patient seen in an Emergency Room or Urgent Care within 60 days of this referral?
If Yes, please indicate below where & the date the incident occurred.,
Siena Urgent Care, Sept 29, 2024

Consult-Medicaid

2 .Pain location:
left elbow

3 .Has the patient had Physical Therapy within the last 4 weeks?
No

4 .Has imaging (xray, MRI, etc.) been ordered and results received?
Yes, please attach or fax reports and have patient bring any films to the appointment.

Attach File

No Attachments

ADD NEW FILES

Assign-Specialist

Specialist
Select One

SAVE CLEAR

Comments

Date	Provider	User	Status Change	Text
10/1/2024 9:04:50 AM	NGO, TONY			Contact Name: DoNotReply@c
10/1/2024 9:04:50 AM				This request was submitted by

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.

Referral Details

Priority	ID	Patient	Status/Status Age	Submitted	Category	Direction	Provider	Buttons
Priority Expedited	1211	Phone:	Status New	10/1/2024 9:04:50 AM 20 days Last Update: 20 days	Orthopedic Surgery	IN	From: [REDACTED] SOUTHWEST MEDICAL ASSOCIATES To: NEVADA ORTHOPEDIC & SPINE CENTER	Print PDF

Status Change

Status
Scheduled

Schedule Date
10/22/2024

Select a Physician

Status Comment

SAVE

CANCEL

Status

Addl_Info_Requested

Awaiting Member to
Schedule

Awaiting Physician
Review

Cancelled

Declined

Dictation Provided

New

Scheduled

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 when needed.

When a referral is Cancelled or Declined & member calls back for an appt due to Cancelled or Declined by their mistake, the Servicing Specialist can schedule the member using the same Referral. A New Referral is not necessary or required. All Referrals can be transitioned into Scheduled at any time.

Status Change

Status
Declined

Select a Reason

- Add'l Info Not Received
- Declined Treatment
- Duplicate Referral
- Incorrect Member
- Member Expired
- Member Ineligible
- Member Refused Appointment
- Other
- Referred to incorrect Specialist
- Unable to contact after 3 attempts
- Unable to contact patient

Status Change

Status
Declined

Select a Reason
Declined Treatment

Status Comment

SAVE CANCEL