# MANAGED CARE REFERRALS

## Inquiry and Update through Availity's Authorization & Referrals

Accessed through the Availity Essentials Portal

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# REFERRAL INQUIRY AND UPDATE TIPS

BlueCross BlueShield Minnesota

**Referral Inquiry:**.

- Inquiry search can be completed on any Commercial BC MN Managed Care referral.
- Referrals are available for inquiry the next business day from entry.
- The NPI of the PCC (Primary Care Clinic) and Rendering provider must match exactly as submitted.
- Member ID needs to be submitted with prefix
- From Date and To Date must match or be greater than date span submitted on the Referral.
- Inquiry returned referrals can be pinned to the Auth/Referral Dashboard for quicker access.
- Referrals on the Auth/Referral Dashboard are viewable up to 90 days after submission or pin from Inquiry.

**Referral Update:**

- Only the Primary Care Clinic (PCC) can make Referral changes/updates from Inquiry results or Auth/Referral Dashboard.
- Referred-to Provider NPI cannot be updated after referral is submitted. A new referral is required.
- Updates are viewable the next business day via Inquiry and Dashboard.
- Date span rules are same as submission; “The date cannot be prior to 24 months from now and 12 months after today's date.”
- Original diagnosis can be changed; however no additional diagnosis can be added.
- Referral
- Referral

***YOU WILL NEED TO COMPLETE REGISTRATION PRIOR TO ACCESSING THIS INFORMATION. IF YOU HAVE NOT FINISHED THE REGISTRATION PROCESS, COMPLETE THAT FIRST, THEN RETURN TO THIS DOCUMENT.*

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# REFERRAL INQUIRY AND UPDATE TIPS CONT.

Currently deleting a referral is not an option.

Workaround for making a Referral obsolete:

- update the referral to respresent 1 visit and,
- change the date span to a past date with the same date for From and To.

This should only be done if new referral is needed with a corrected Rendering provider or if the referral entry was done in error.

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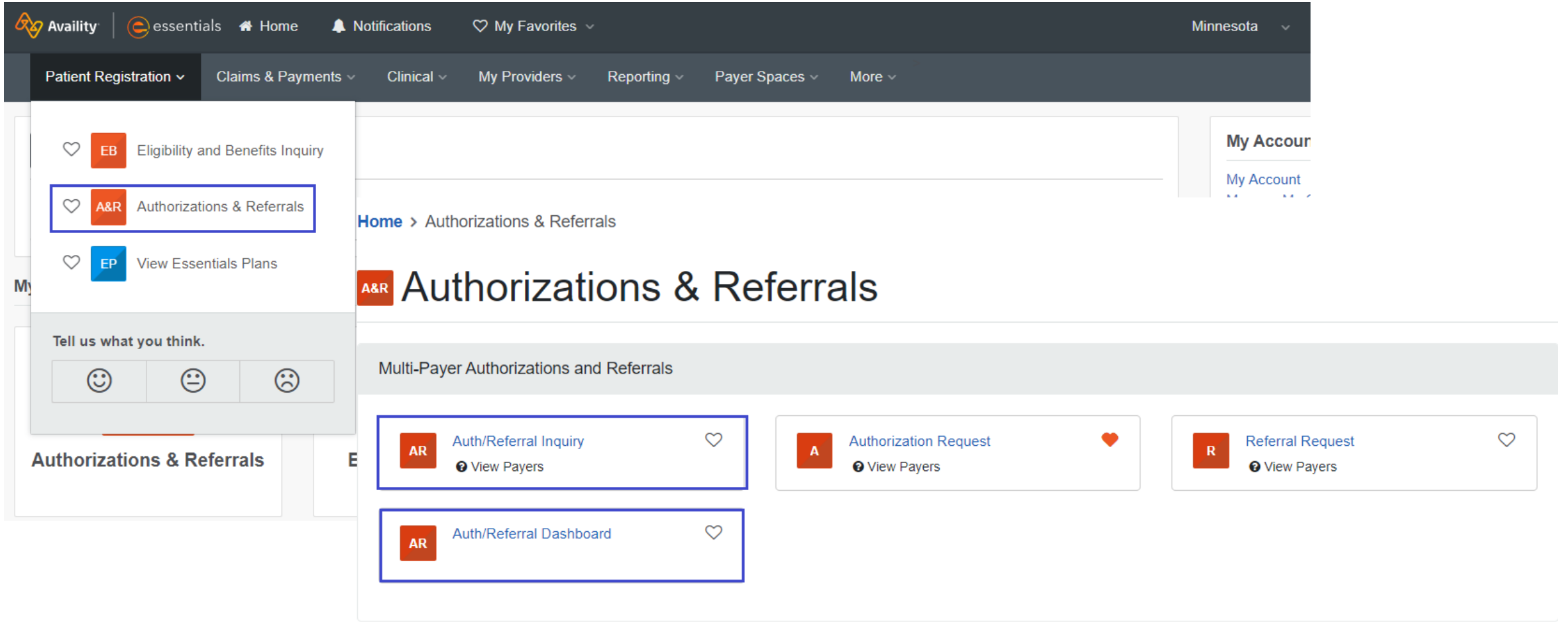
# MANAGED CARE REFERRAL – HOME PAGE



# AUTH/REFERRAL DASHBOARD

## Managed Care Referral through Availity

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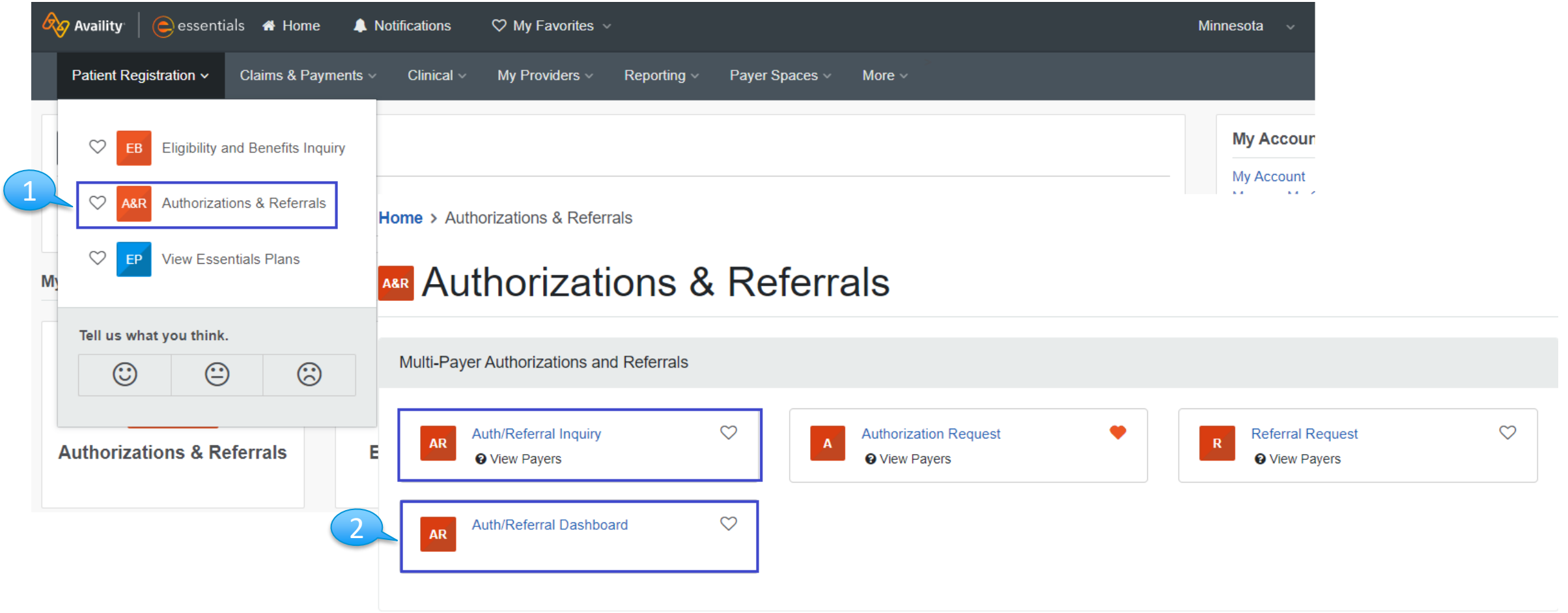
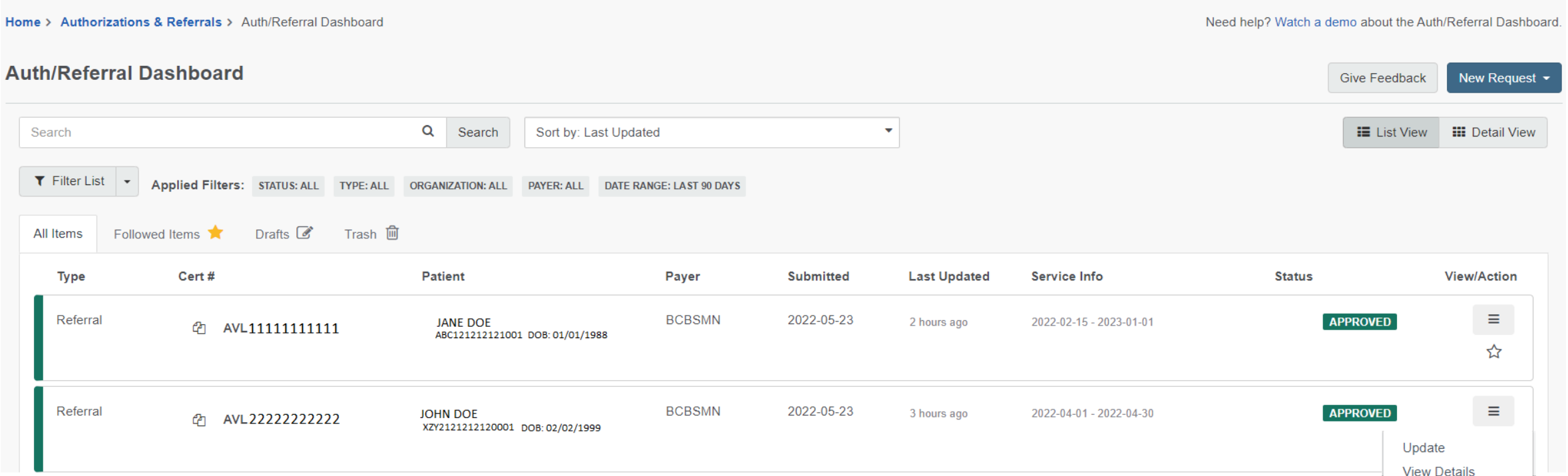
# MANAGED CARE REFERRAL – HOME PAGE



# MANAGED CARE REFERRAL – AUTH/REFERRAL DASHBOARD




The **Auth/Referral Dashboard** can be accessed from multiple points.

- The Authorizations & Referrals Home page.
- After submission of a referral or authorization, and from a referral or authorization inquiry.

The **View/Action** menu next to each case is typically referred to as the 'hamburger menu'. Click this menu to display options available based on the case type, case age, and current status.

- Referral options are limited to Update (when the Organization belongs to the submitted PCC), View Details, Print, Follow this item, and Trash which only removes from Dashboard view, it does not delete the referral internally at BC.

# MANAGED CARE REFERRAL – AUTH/REFERRAL DASHBOARD FILTERS

**Status**: Status's are listed for all transactions viewable on the dashboard. Only status 'Approved' applies to referrals.

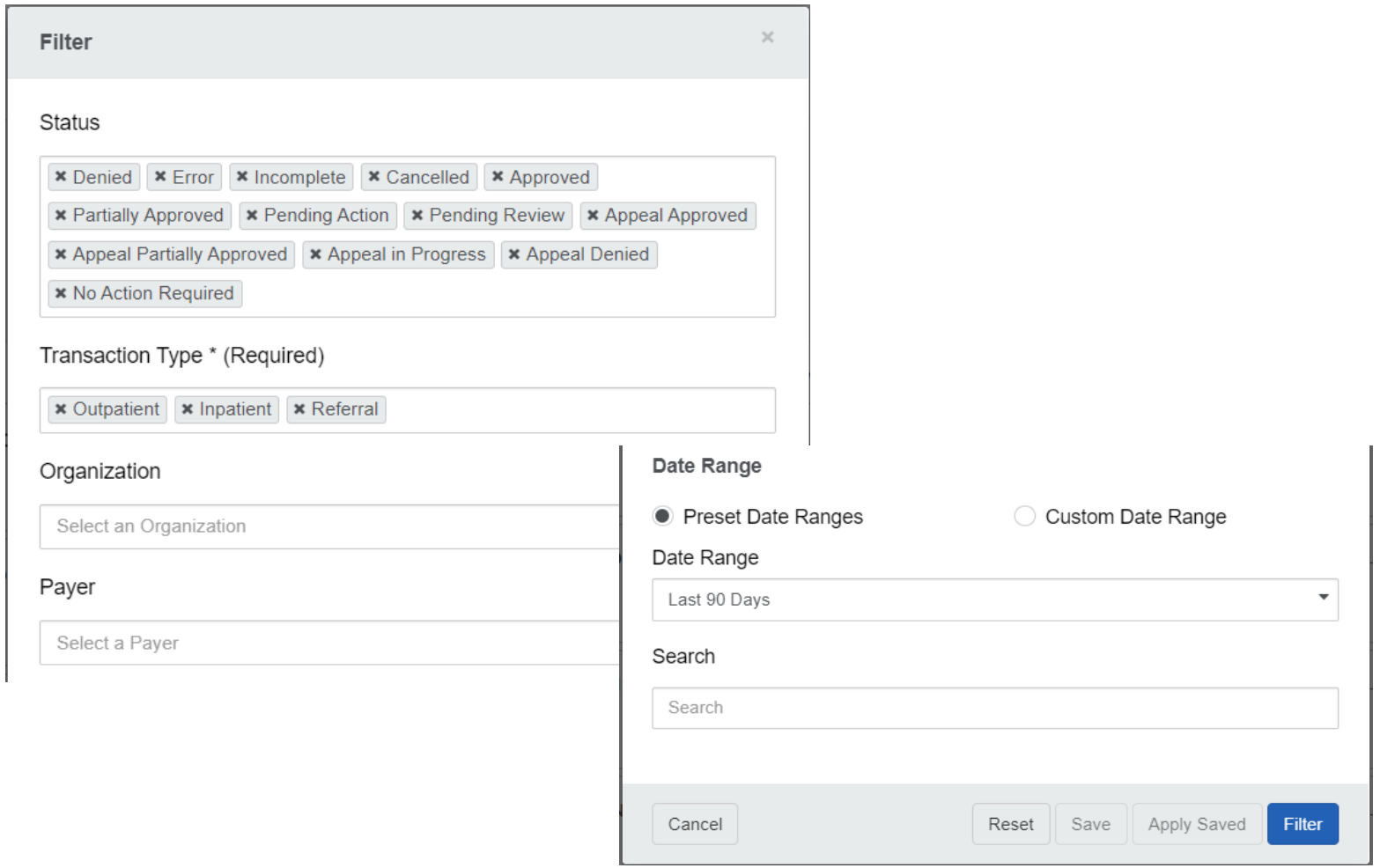
**Transaction Type * (Required)**: Dashboard is used to display all submitted Referrals, and Inpatient and Outpatient authorizations based on select Organization.

**Organization**: Select Organization used to submit referral or used as standard practice.

**Payer**: **BCBSMN**

**Date Range**: narrow date range displayed from only current day up to Last 90 Days; or create personal date range (Date range cannot exceed 90 days)

**Search**: free form text such as patient first or last name, referral number if known, ID number, etc.




****Removed filters from the pre-populated fields can be recovered by clicking in blank space of that filter. Any removed options will display to be selected.**

# REFERRAL INQUIRY

## Managed Care Referrals through Availity

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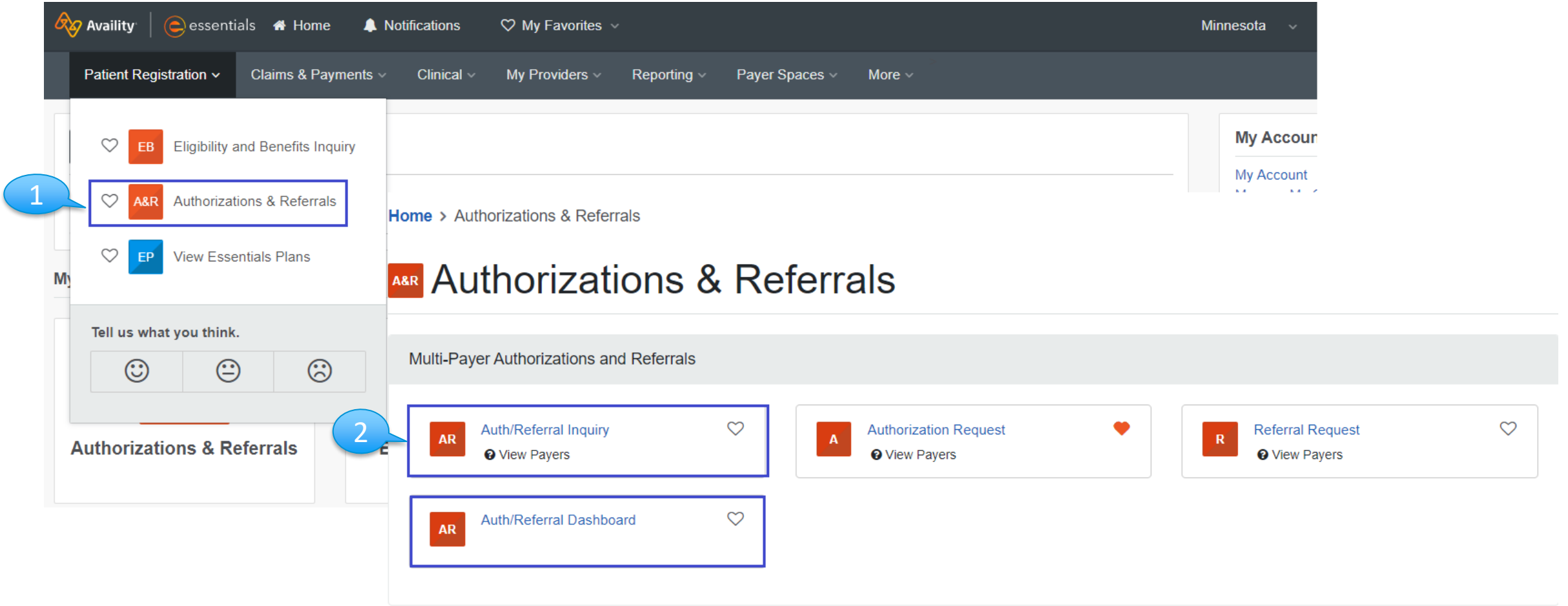
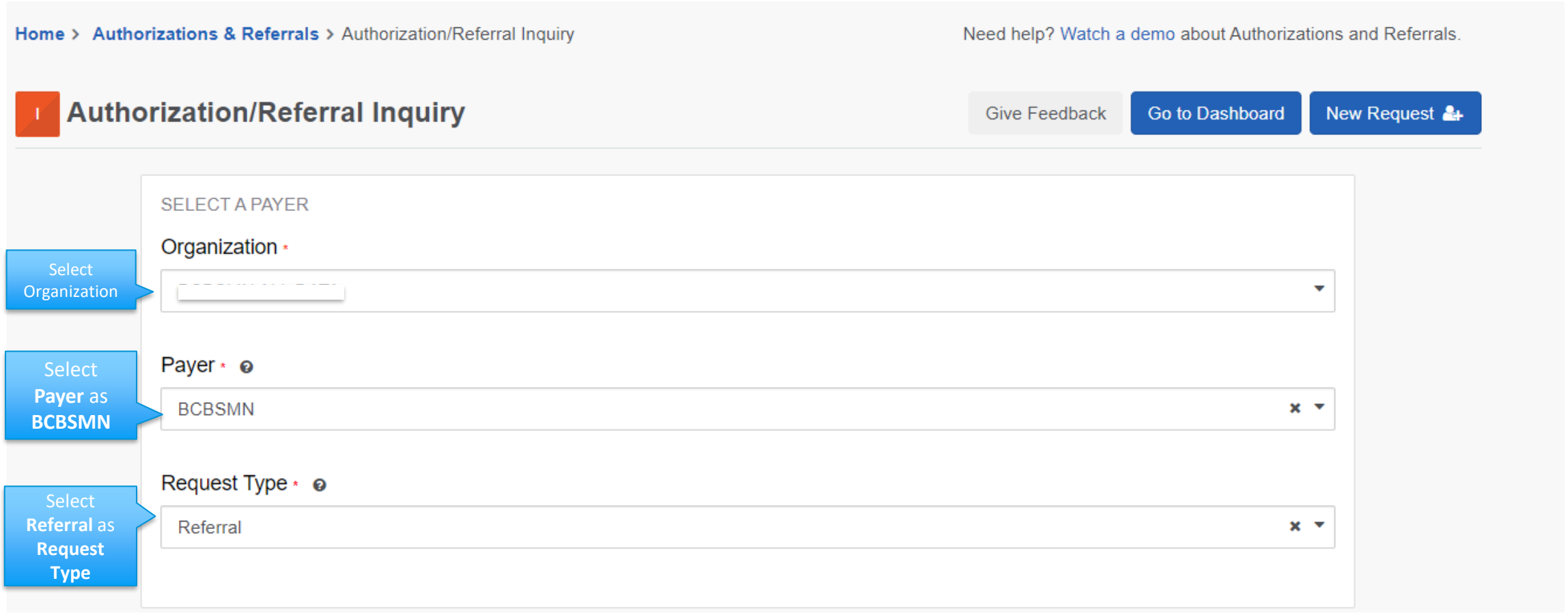


# MANAGED CARE REFERRAL – INQUIRY



# MANAGED CARE REFERRAL – INQUIRY

**Search By:**
These are the same options as available for Eligibility & Benefits transaction.
- Most common is Subscriber Member ID, Patient Date of Birth

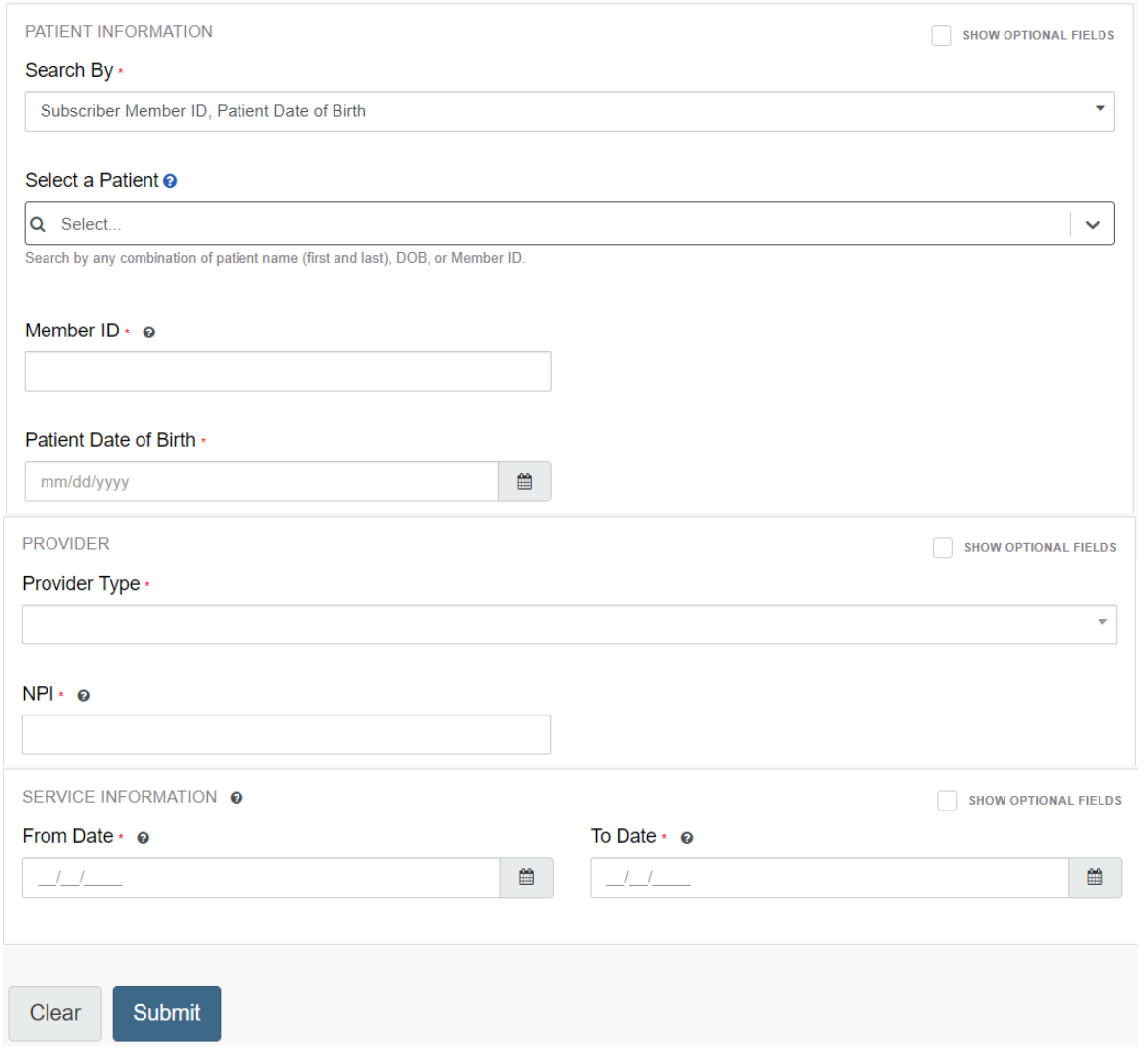
**Select a Patient:**
This is a drop down of patient information from the past 24 hours Eligibility & Benefits transactions.

If a recent Eligibility & Benefits transaction has not been completed, the member information can be manually entered.
- Member ID including prefix
- Patient Date of Birth

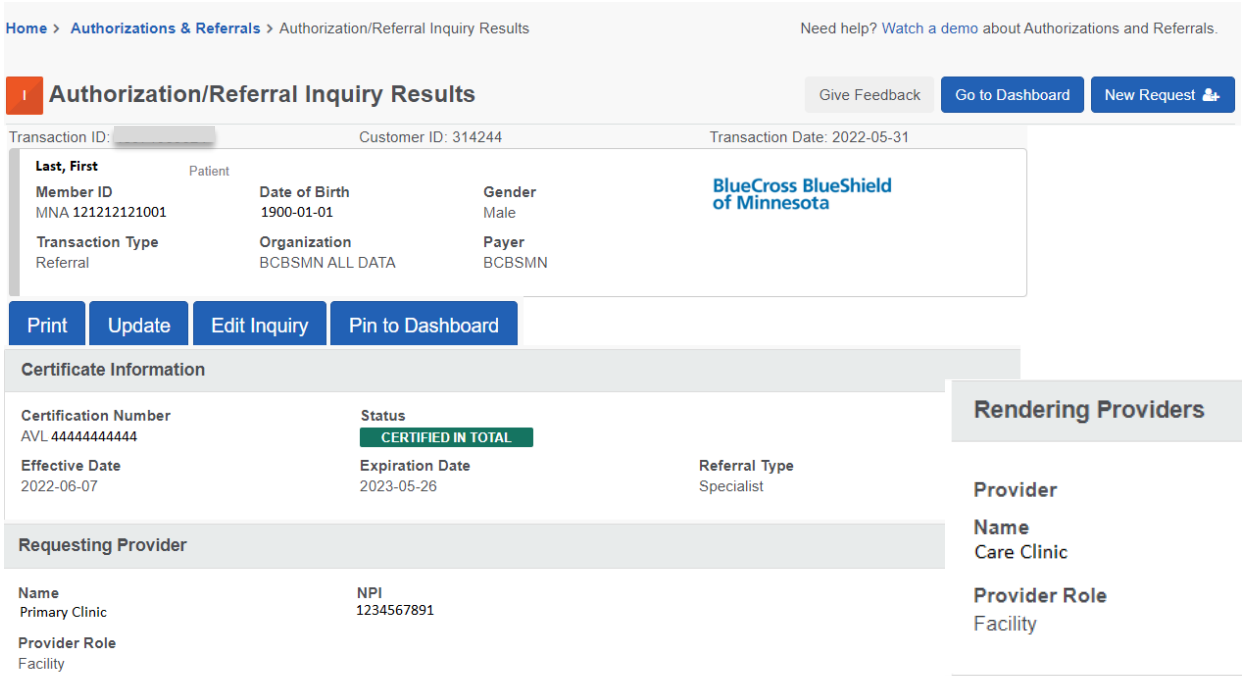
**Provider Type:**
- Requesting Provider
- Rendering Provider

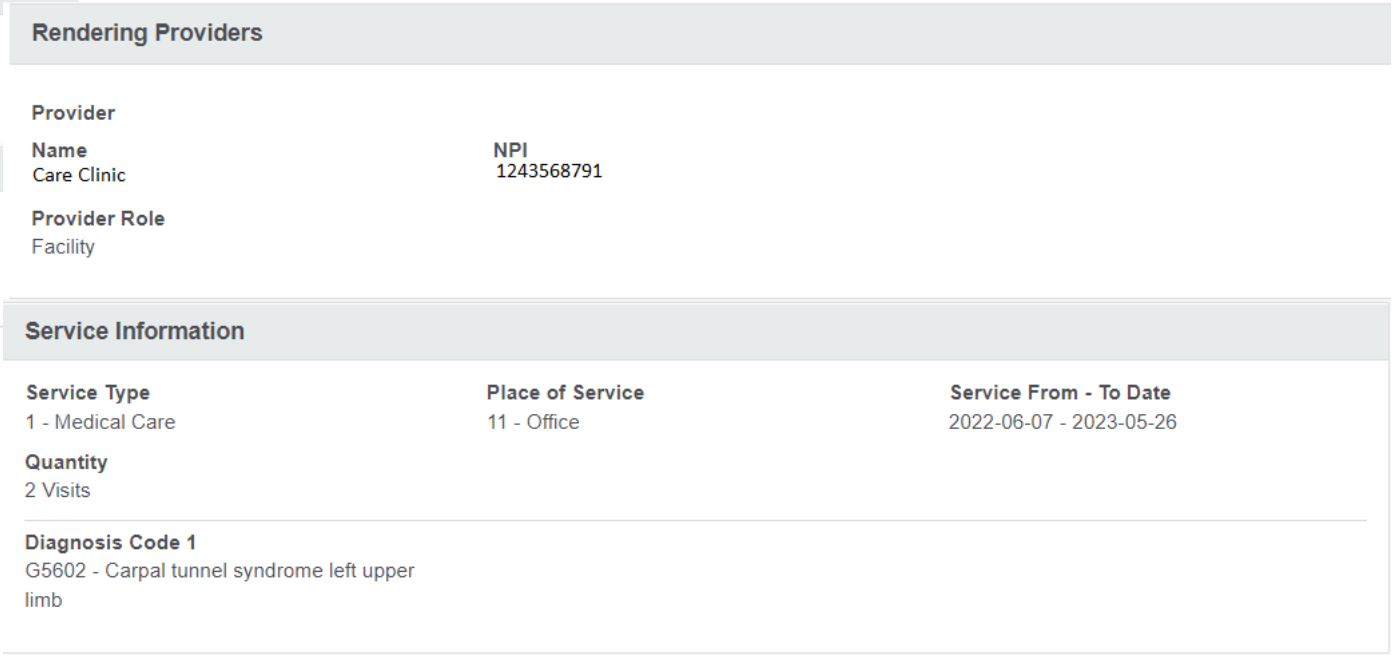
**NPI:**
The NPI of the Provider Type selected. **Note:** many clinics have multiple NPIs. The PCC NPI listed on the E&B results for dates in question is the one that needs to be used for inquiry.

**Service Information:**
From Date and To Date – this date range needs to be exactly as submitted or larger than submitted.



# MANAGED CARE REFERRAL – PCC INQUIRY RESULTS – SINGLE RESPONSE




An Inquiry can be done the next business after a Referral has been entered.

**Print** – creates a PDF copy for printing or saving.

**Edit Inquiry** – to be used to edit data used on Referral Inquiry.

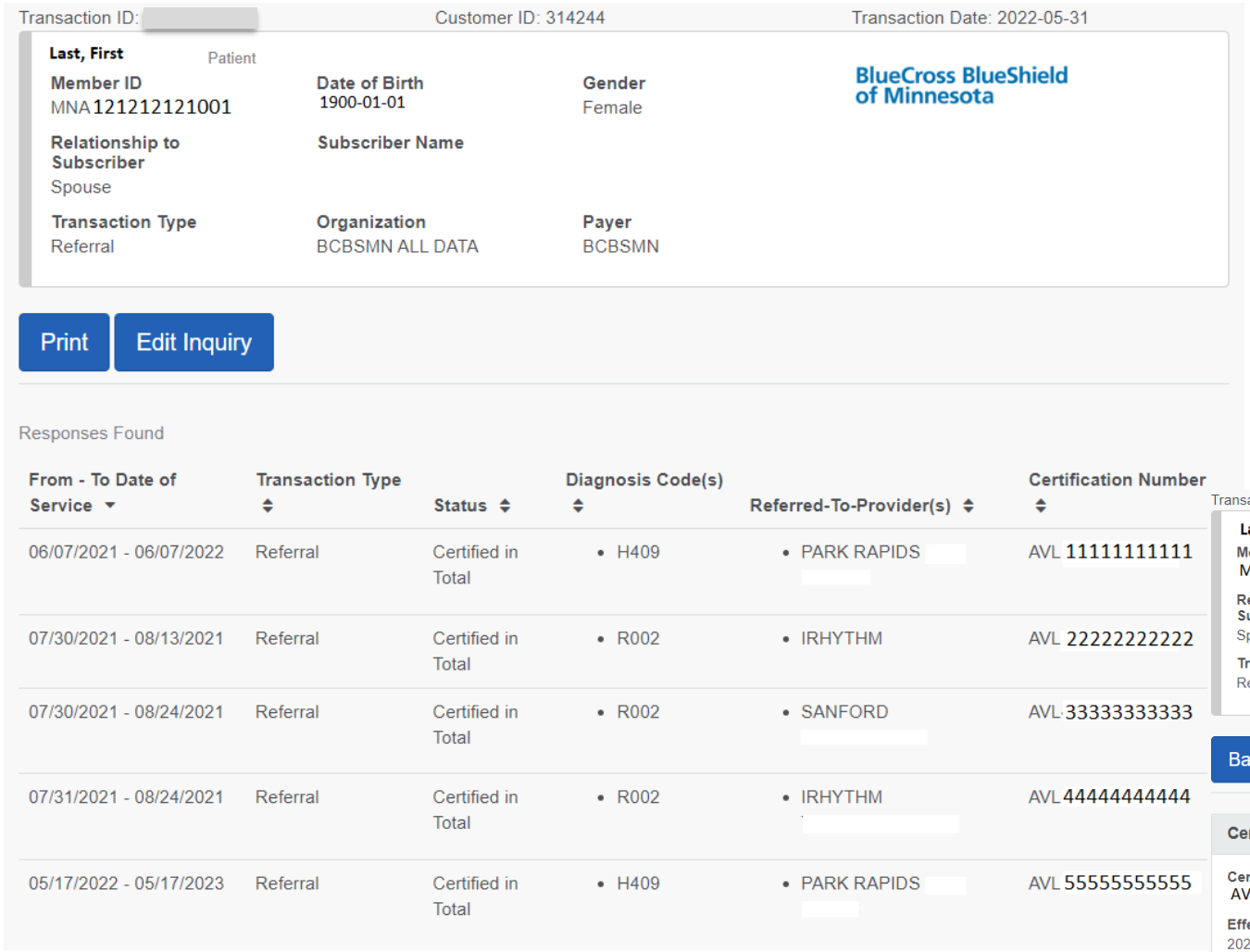
**Pin to Dashboard** – this will add the referral to the Auth/Referral Dashboard if it is not currently displaying.

**Update** - the PCC Inquiry response allows for updates to be made to the referral by the PCC.

- Number of visits
- Date range
- Diagnosis code
- Place of service
- Referral Type

*Note – a new referral will need to be entered if there is a change in the rendering provider NPI.

# MANAGED CARE REFERRAL – INQUIRY RESULTS – MULTIPLE RESPONSE



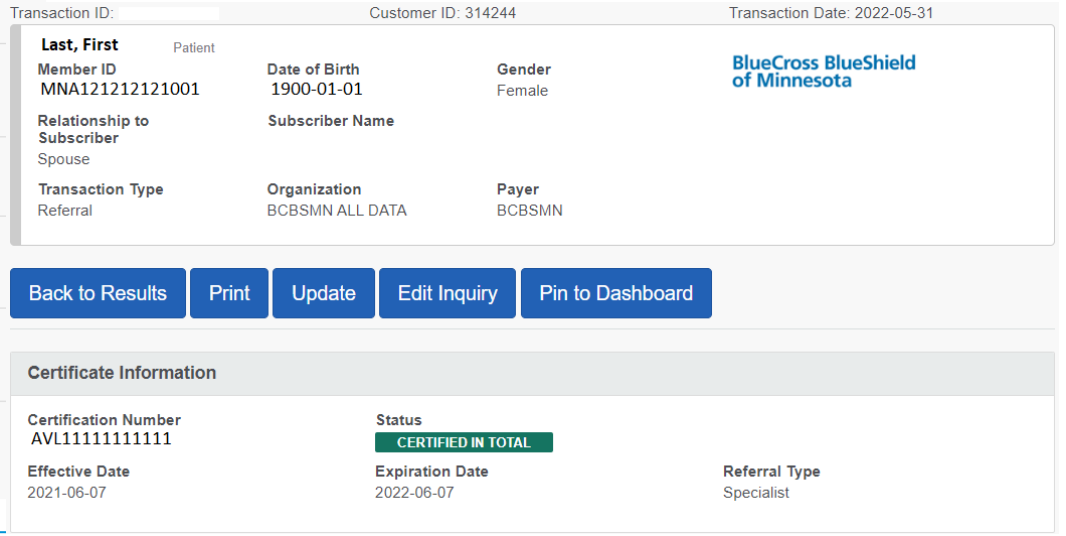

An Inquiry can be done the next business after a Referral has been entered.

Depending on the patient's referral history, there may be multiple matches to the Inquiry search data. All matching referrals will be returned.

Click on the line of the specific referral desired.

Click **Back to Results** from selected referral to return to multiple inquiry response page.

Button options displayed will depend on the Provider Type selected.

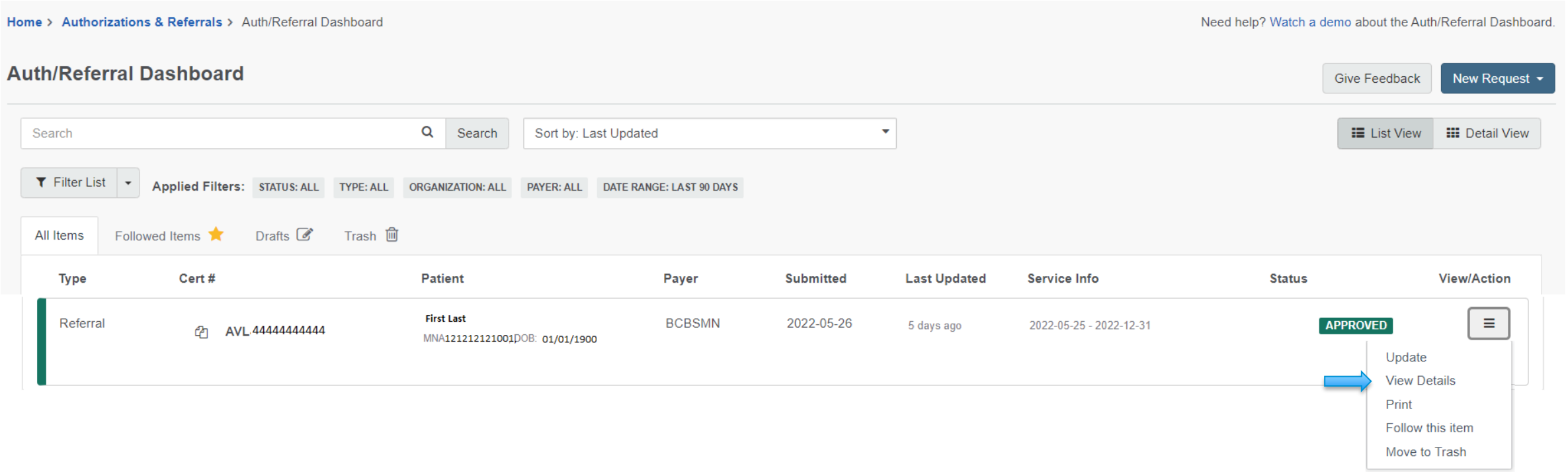


# MANAGED CARE REFERRAL – INQUIRY FROM THE AUTH/REFERRAL DASHBOARD

Click the 3-line View/Action menu.

Select **View Details**

The screen will change to summary version similar to **Inquiry** search.



BlueCross BlueShield Minnesota

# REFERRAL UPDATE

## Primary Care Clinic (PCC) only

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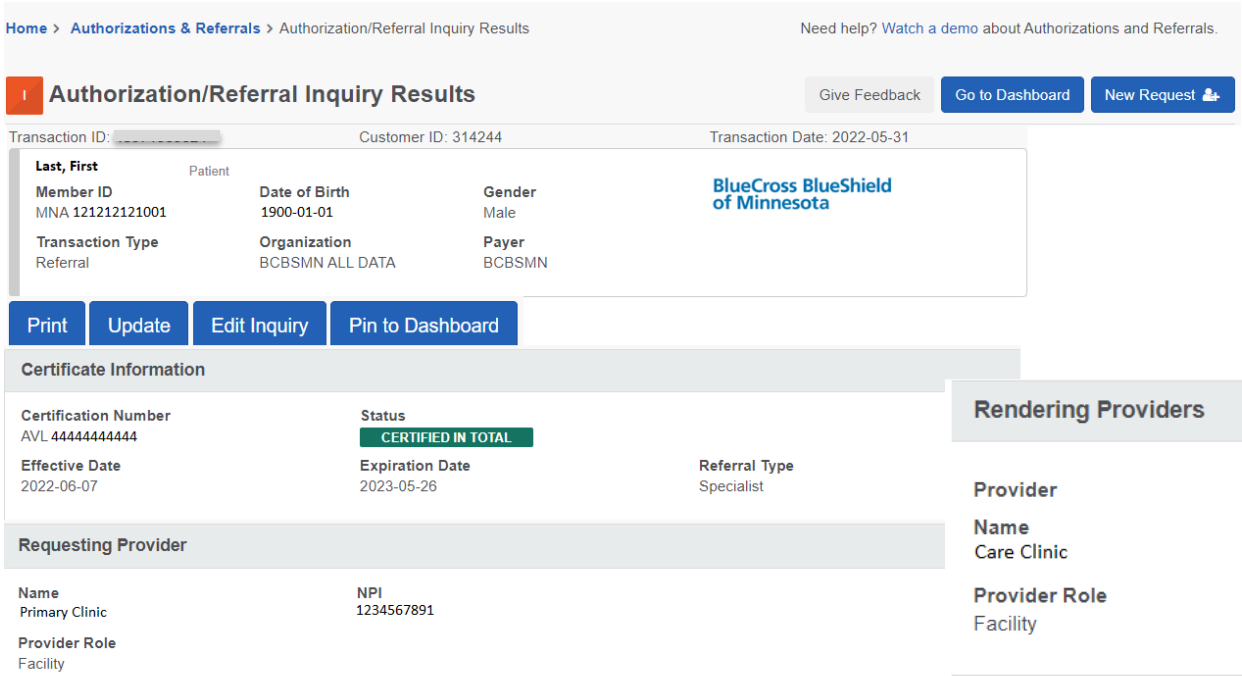
# MANAGED CARE REFERRAL – UPDATE FROM INQUIRY BY PCC ONLY

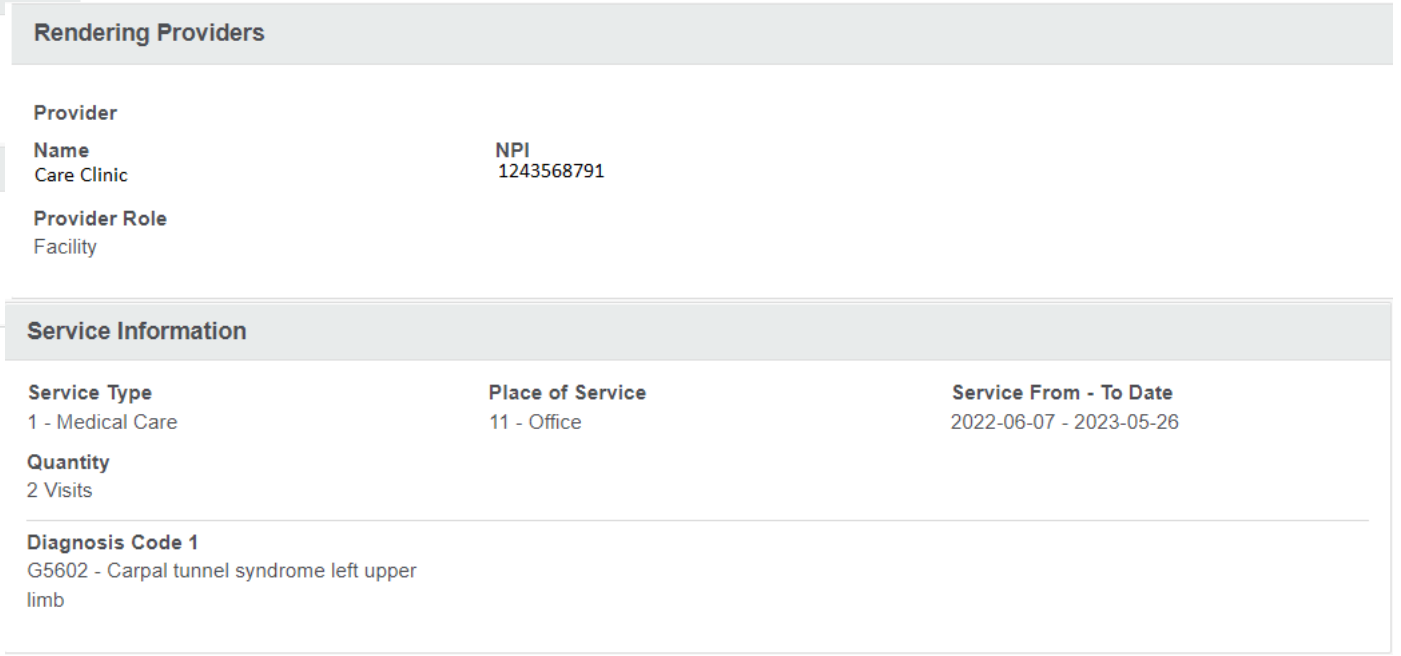



An Inquiry can be done the next business after a Referral has been entered.

**Print** – creates a PDF copy for printing or saving.

**Edit Inquiry** – to be used to edit data used on Referral Inquiry.

**Pin to Dashboard** – this will add the referral to the Auth/Referral Dashboard if it is not currently displaying.




**Update** - the PCC Inquiry response allows for updates to be made to the referral by the PCC.

- Number of visits
- Date range
- Diagnosis code
- Place of service
- Referral Type

*Note – a new referral will need to be entered if there is a change in the rendering provider NPI.

# MANAGED CARE REFERRAL – UPDATE FROM INQUIRY BY PCC ONLY

After clicking **Update** from the Inquiry screen, the screen will change showing blue **edit** arrows.

Click the appropriate blue **edit** arrow based on the data to be updated/changed.

**Edit Certificate Information** –
Allows for update/change to be made to the **Referral Type**.

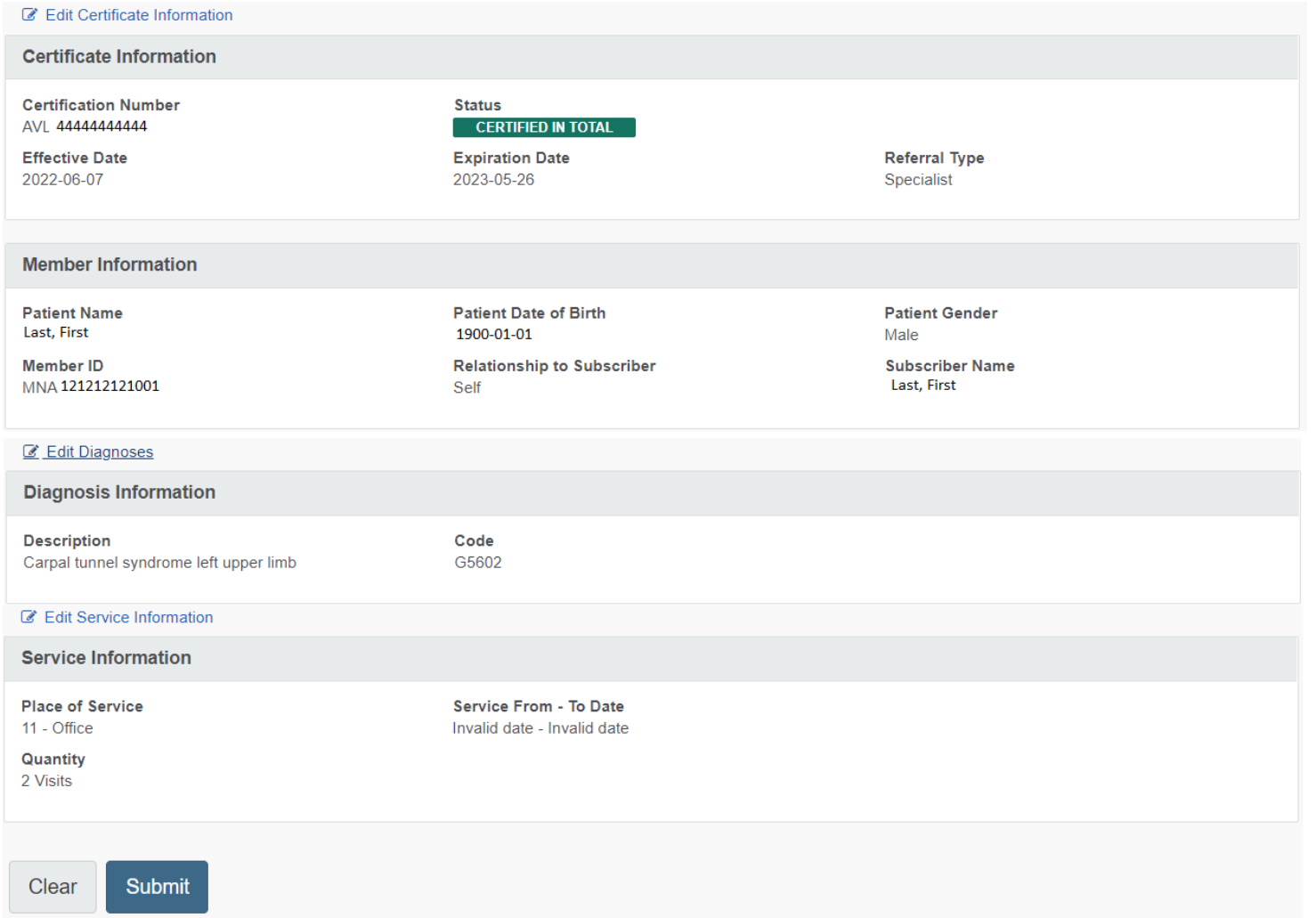
**Edit Diagnosis** – allows for update/change to the diagnosis code.

**Edit Service Information –** allows for update to:

- Place of Service
- Quantity
- Service from –To Date

Once updates are complete, click **Submit.**

Submitted updates will be viewable via Inquiry and the Auth/Referral Dashboard the next business day.

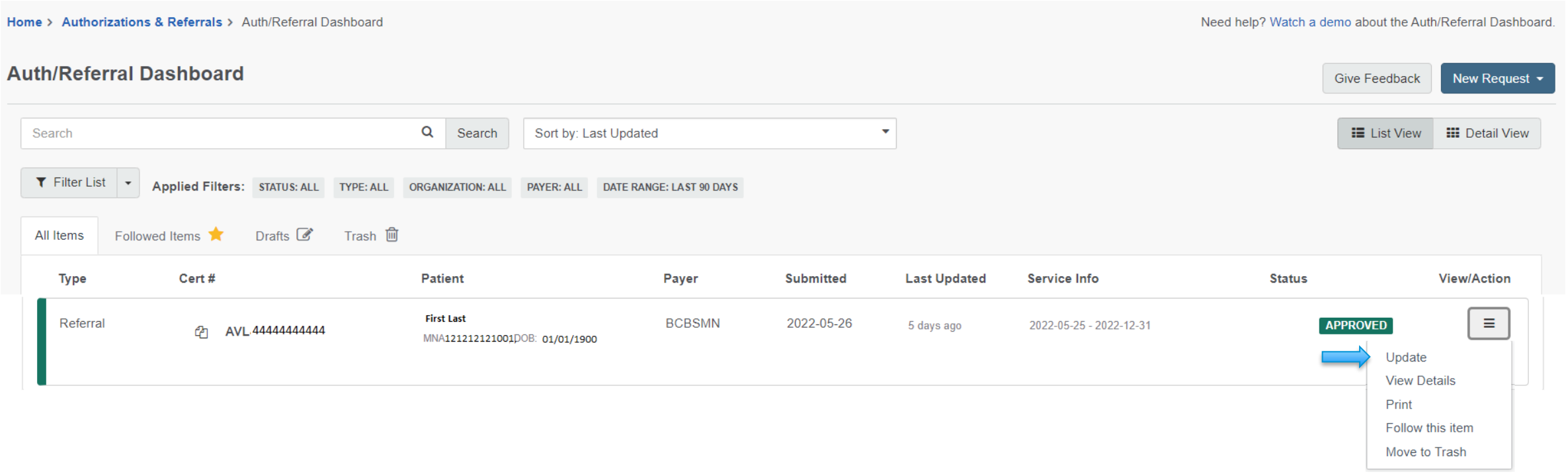


# MANAGED CARE REFERRAL – UPDATE FROM AUTH/REFERRAL DASHBOARD BY PCC ONLY

Click the 3-line View/Action menu.

Select **Update**.

The screen will change to summary version with option to edit.



# MANAGED CARE REFERRAL – UPDATE FROM AUTH/REFERRAL DASHBOARD BY PCC ONLY CONT.

After clicking **Update** from the **Auth/Referral Dashboard**, the screen will change showing blue **edit** arrows.

Click the appropriate blue **edit** arrow based on the data to be updated/changed.

**Edit Certificate Information** –
Allows for update to be made to the **Referral Type**.

**Edit Diagnosis** – allows for update to the diagnosis code.

**Edit Service Information –** allows for update to:

- Place of Service
- Quantity
- Service from –To Date

Once updates are complete, click **Submit.**

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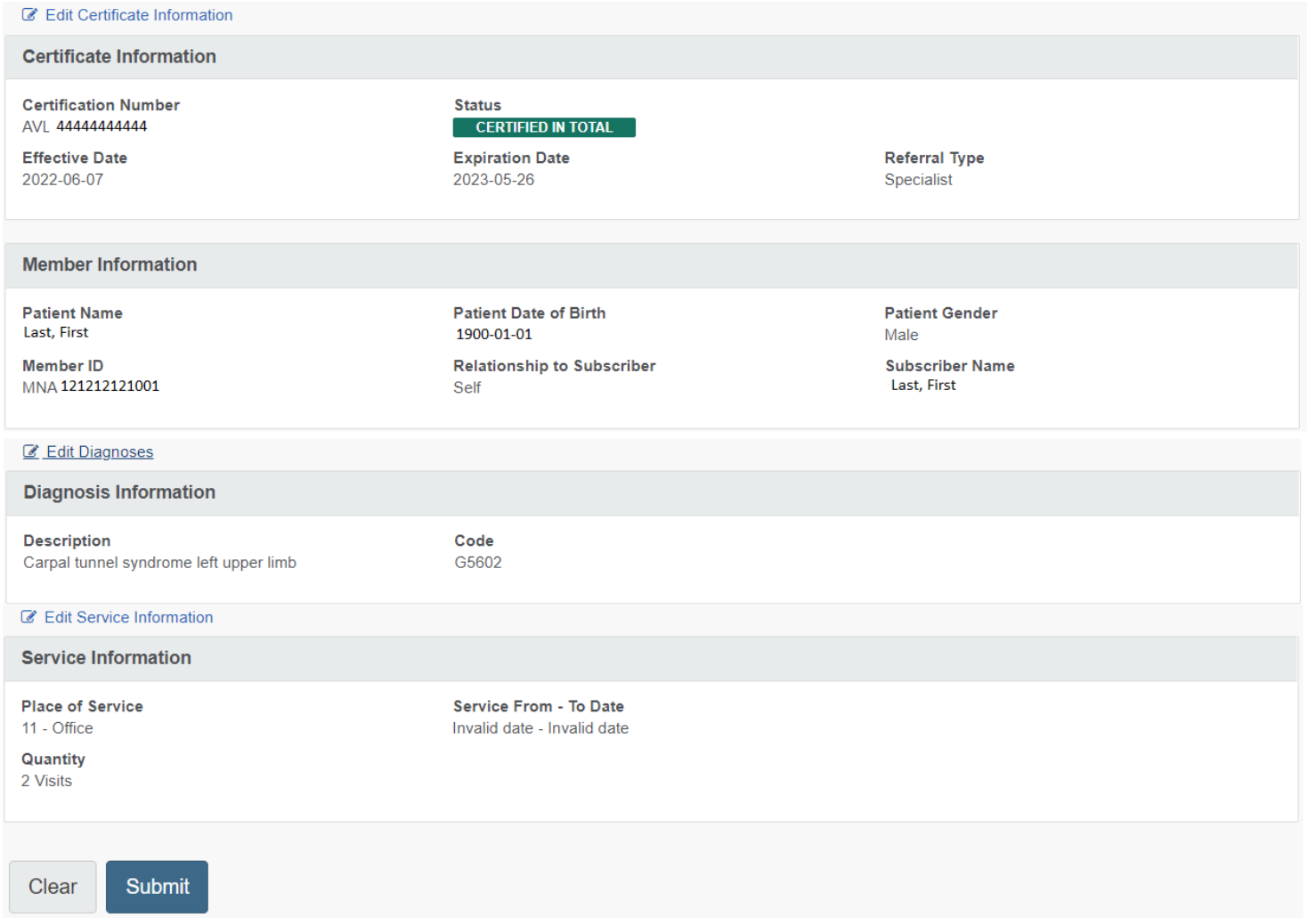

# THANK YOU

For technical support contact Availity 1-800-282-4548 or 1-800-AVAILITY. Or select **Help & Training | Availity Support** for additional Availity assistance.

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