

MANAGED CARE REFERRALS

Inquiry and Update through Availity's Authorization & Referrals

Accessed through the Availity Essentials Portal

REFERRAL INQUIRY AND UPDATE TIPS

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.***

REFERRAL INQUIRY AND UPDATE TIPS CONT.

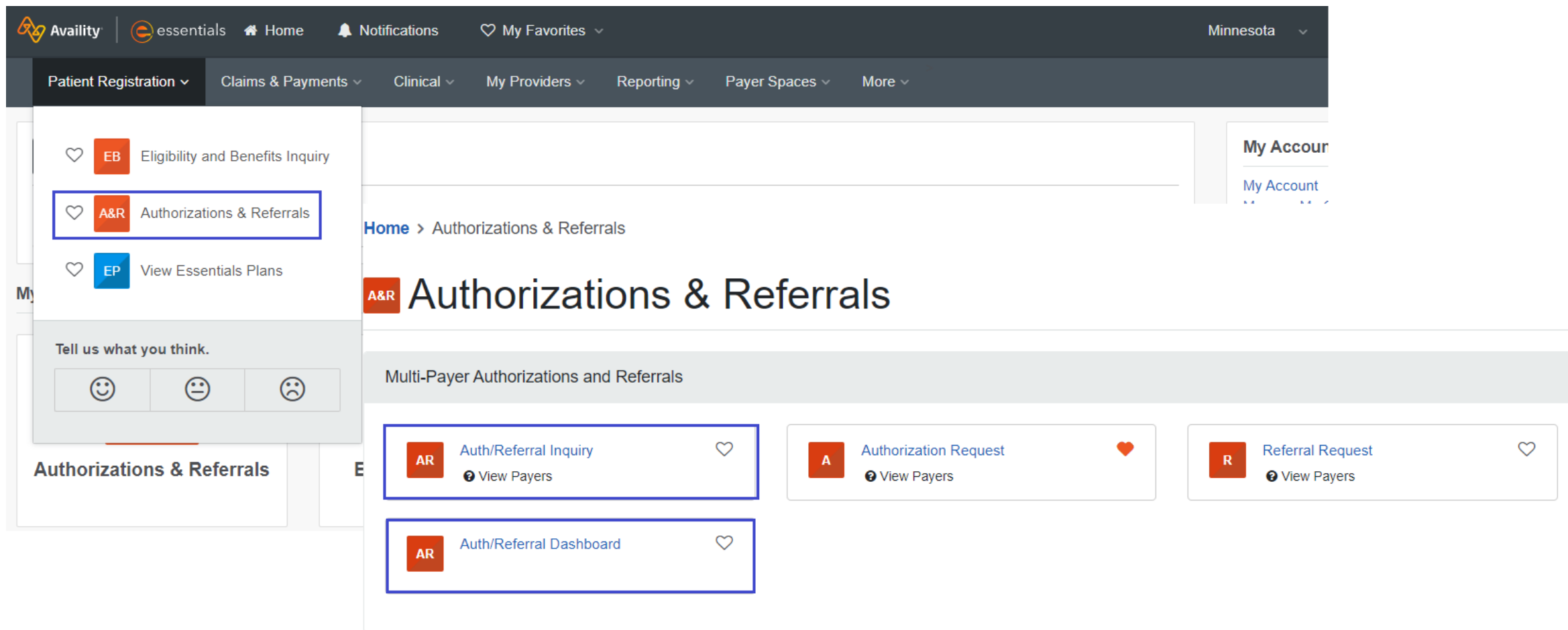
Currently deleting a referral is not an option.

Workaround for making a Referral obsolete:

- update the referral to represent 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.

MANAGED CARE REFERRAL – HOME PAGE



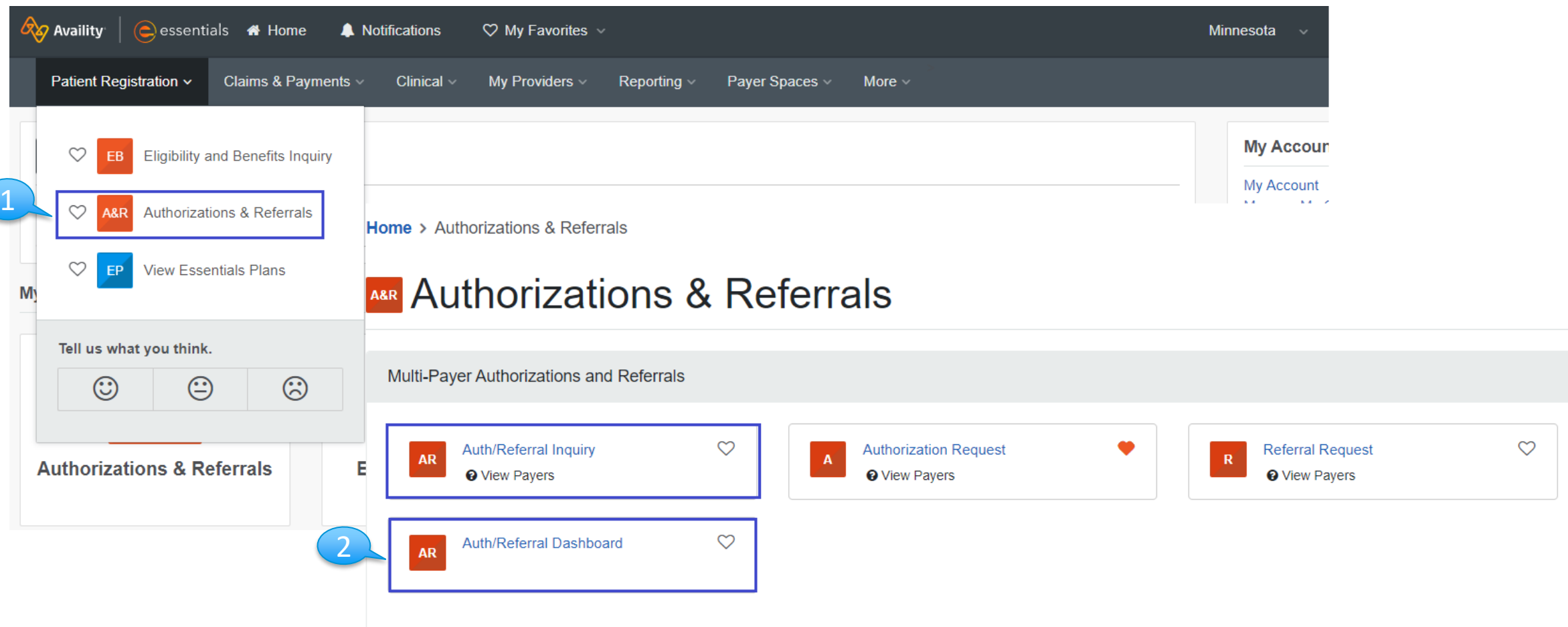
The screenshot shows the Availity web application interface. At the top, there is a navigation bar with the Availity logo and menu items: essentials, Home, Notifications, My Favorites, and Minnesota. Below this is a secondary navigation bar with categories: Patient Registration, Claims & Payments, Clinical, My Providers, Reporting, Payer Spaces, and More. A dropdown menu is open under Patient Registration, showing options: Eligibility and Benefits Inquiry (EB), Authorizations & Referrals (A&R), and View Essentials Plans (EP). The A&R option is highlighted with a blue border. On the right side, there is a 'My Account' section with a 'My Account' link. The main content area has a breadcrumb trail 'Home > Authorizations & Referrals' and a large heading 'A&R Authorizations & Referrals'. Below the heading is a section titled 'Multi-Payer Authorizations and Referrals' containing three cards: 'Auth/Referral Inquiry' (AR) with a 'View Payers' link, 'Authorization Request' (A) with a 'View Payers' link, and 'Referral Request' (R) with a 'View Payers' link. A fourth card, 'Auth/Referral Dashboard' (AR), is also visible below the first card. A feedback widget is present on the left side with the text 'Tell us what you think.' and three smiley face icons (happy, neutral, sad). A blue box highlights the 'Auth/Referral Inquiry' card in the main content area.

AUTH/REFERRAL DASHBOARD

Managed Care Referral through *Availity*

Accessed through the *Availity* Essentials Portal

MANAGED CARE REFERRAL – HOME PAGE



The screenshot shows the user interface for the Managed Care Referral Home Page. At the top, there is a navigation bar with the Availity logo and menu items: essentials, Home, Notifications, My Favorites, and Minnesota. Below this is a secondary navigation bar with categories: Patient Registration, Claims & Payments, Clinical, My Providers, Reporting, Payer Spaces, and More. A left sidebar contains a menu with 'A&R Authorizations & Referrals' highlighted, along with 'Eligibility and Benefits Inquiry' and 'View Essentials Plans'. A feedback widget is also present in the sidebar. The main content area features a breadcrumb trail 'Home > Authorizations & Referrals' and a large heading 'A&R Authorizations & Referrals'. Below the heading is a section for 'Multi-Payer Authorizations and Referrals' containing five cards: 'Auth/Referral Inquiry', 'Auth/Referral Dashboard', 'Authorization Request', and 'Referral Request'. Each card includes a 'View Payers' link and a heart icon. A 'My Account' section is visible on the right side of the page.

1

2

MANAGED CARE REFERRAL – AUTH/REFERRAL DASHBOARD



Home > Authorizations & Referrals > Auth/Referral Dashboard

Need help? [Watch a demo](#) about the Auth/Referral Dashboard.

Auth/Referral Dashboard

[Give Feedback](#)

[New Request](#)

Search



Search

Sort by: Last Updated

List View

Detail View

Filter List

Applied Filters:

STATUS: ALL

TYPE: ALL

ORGANIZATION: ALL

PAYER: ALL

DATE RANGE: LAST 90 DAYS

All Items

Followed Items



Drafts



Trash



Type	Cert #	Patient	Payer	Submitted	Last Updated	Service Info	Status	View/Action
Referral	AVL1111111111	JANE DOE ABC121212121001 DOB: 01/01/1988	BCBSMN	2022-05-23	2 hours ago	2022-02-15 - 2023-01-01	APPROVED	
Referral	AVL2222222222	JOHN DOE XYZ1212121210001 DOB: 02/02/1999	BCBSMN	2022-05-23	3 hours ago	2022-04-01 - 2022-04-30	APPROVED	

- Update
- View Details
- Print
- Follow this item
- Move to Trash

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.

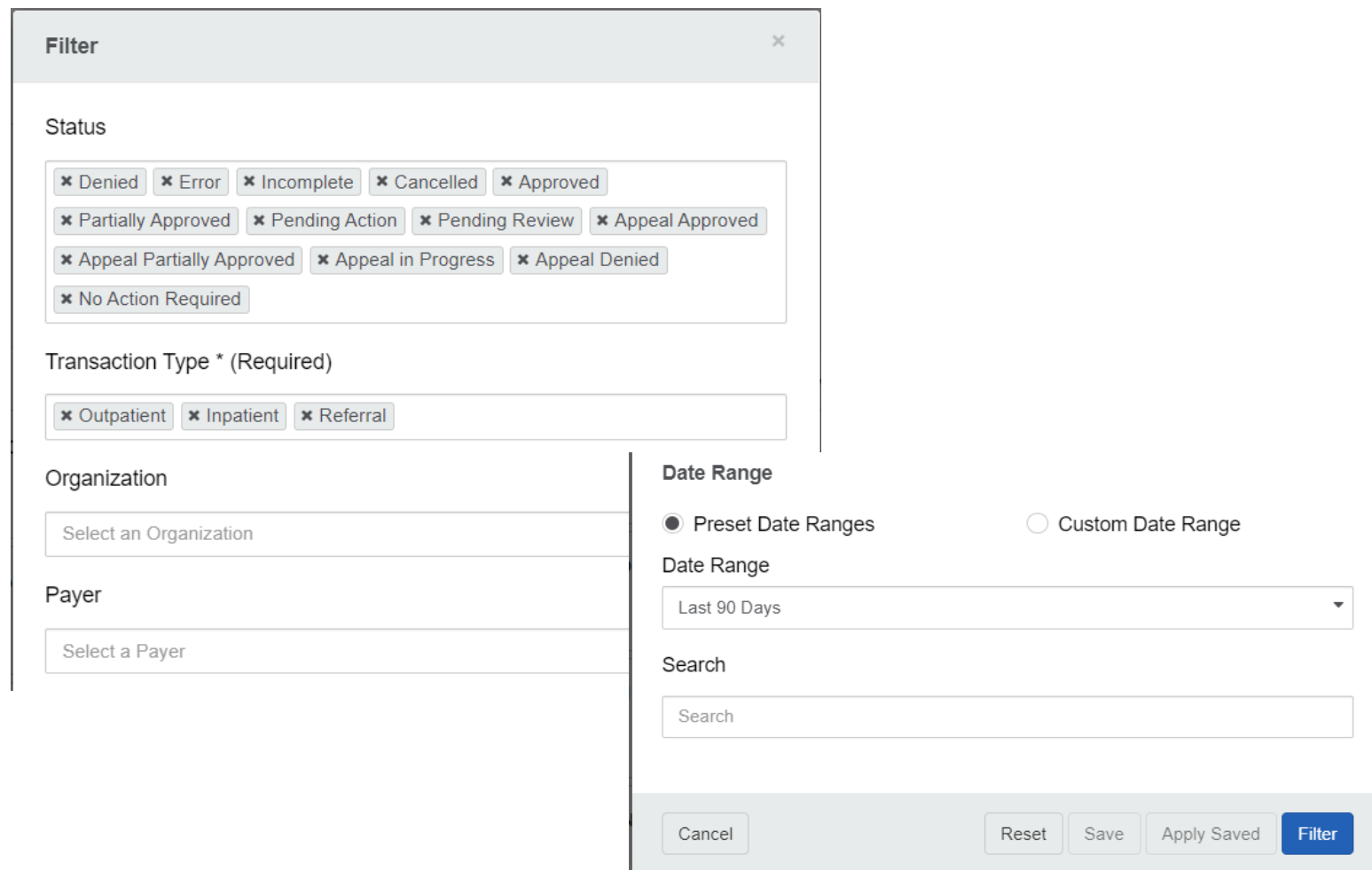
Transaction Type * (Required): Dashboard is used to display all submitted Referrals, and Inpatient and Outpatient authorizations based on select Organization.

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.



The screenshot shows a 'Filter' modal window with the following sections:

- Status:** A list of status options: Denied, Error, Incomplete, Cancelled, Approved, Partially Approved, Pending Action, Pending Review, Appeal Approved, Appeal Partially Approved, Appeal in Progress, Appeal Denied, and No Action Required.
- Transaction Type * (Required):** A list of transaction types: Outpatient, Inpatient, and Referral.
- Organization:** A dropdown menu with the text 'Select an Organization'.
- Payer:** A dropdown menu with the text 'Select a Payer'.
- Date Range:** Radio buttons for 'Preset Date Ranges' (selected) and 'Custom Date Range'. Below is a dropdown menu showing 'Last 90 Days'.
- Search:** A text input field with the placeholder 'Search'.
- Buttons:** Cancel, Reset, Save, Apply Saved, and Filter.

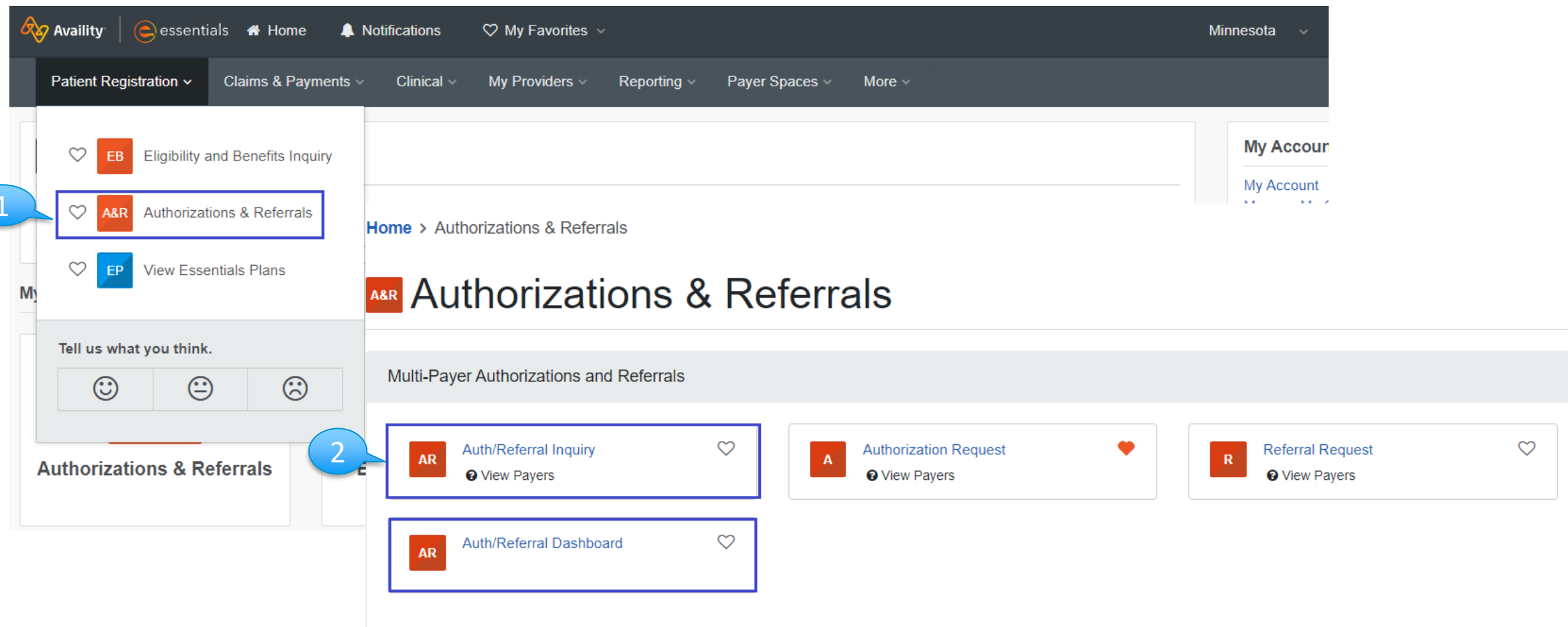
****Removed filters from the pre-populated fields can be recovered by clicking in blank space of that filter. Any removed options will display to be selected.**

REFERRAL INQUIRY

Managed Care Referrals through Availity

Accessed through the Availity Essentials Portal

MANAGED CARE REFERRAL – HOME PAGE



The screenshot shows the user interface for the Managed Care Referral Home Page. At the top, there is a navigation bar with the Availity logo and menu items: essentials, Home, Notifications, My Favorites, and Minnesota. Below this is a secondary navigation bar with categories: Patient Registration, Claims & Payments, Clinical, My Providers, Reporting, Payer Spaces, and More. A sidebar on the left contains a 'My Account' section with a heart icon and three items: EB Eligibility and Benefits Inquiry, A&R Authorizations & Referrals (highlighted with a blue box and a '1' callout), and EP View Essentials Plans. Below the sidebar is a feedback section titled 'Tell us what you think.' with three smiley face icons. The main content area features a breadcrumb 'Home > Authorizations & Referrals' and a large heading 'A&R Authorizations & Referrals'. Underneath is a section titled 'Multi-Payer Authorizations and Referrals' containing five cards: 'Auth/Referral Inquiry' (with 'AR' icon, 'View Payers' link, and a heart icon, highlighted with a blue box and a '2' callout), 'Auth/Referral Dashboard' (with 'AR' icon and a heart icon), 'Authorization Request' (with 'A' icon, 'View Payers' link, and a red heart icon), and 'Referral Request' (with 'R' icon, 'View Payers' link, and a heart icon).

MANAGED CARE REFERRAL – INQUIRY


[Home](#) > [Authorizations & Referrals](#) > Authorization/Referral Inquiry

Need help? [Watch a demo](#) about Authorizations and Referrals.

Authorization/Referral Inquiry

[Give Feedback](#)


[Go to Dashboard](#)

[New Request](#) 



SELECT A PAYER


Organization *

Select
Organization

Payer * 

Select
Payer as
BCBSMN

BCBSMN  

Request Type * 

Select
Referral as
Request
Type

Referral  

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.

PATIENT INFORMATION SHOW OPTIONAL FIELDS

Search By •

Select a Patient [?](#)
 ▼

Search by any combination of patient name (first and last), DOB, or Member ID.

Member ID • [?](#)

Patient Date of Birth •

PROVIDER SHOW OPTIONAL FIELDS

Provider Type •

NPI • [?](#)

SERVICE INFORMATION [?](#) SHOW OPTIONAL FIELDS

From Date • [?](#) To Date • [?](#)

MANAGED CARE REFERRAL – PCC INQUIRY RESULTS – SINGLE RESPONSE



Home > Authorizations & Referrals > Authorization/Referral Inquiry Results Need help? [Watch a demo](#) about Authorizations and Referrals.

Authorization/Referral Inquiry Results Give Feedback [Go to Dashboard](#) [New Request](#)

Transaction ID: [redacted] Customer ID: 314244 Transaction Date: 2022-05-31

Last, First	Patient			
Member ID	Date of Birth	Gender		
MNA 121212121001	1900-01-01	Male		
Transaction Type	Organization	Payer		
Referral	BCBSMN ALL DATA	BCBSMN		

[Print](#) [Update](#) [Edit Inquiry](#) [Pin to Dashboard](#)

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.

Certificate Information

Certification Number	Status	
AVL 4444444444	CERTIFIED IN TOTAL	
Effective Date	Expiration Date	Referral Type
2022-06-07	2023-05-26	Specialist

Requesting Provider

Name	NPI
Primary Clinic	1234567891
Provider Role	
Facility	

Rendering Providers

Provider	
Name	NPI
Care Clinic	1243568791
Provider Role	
Facility	

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.

Service Information

Service Type	Place of Service	Service From - To Date
1 - Medical Care	11 - Office	2022-06-07 - 2023-05-26
Quantity		
2 Visits		
Diagnosis Code 1		
G5602 - Carpal tunnel syndrome left upper limb		

MANAGED CARE REFERRAL – INQUIRY RESULTS – MULTIPLE RESPONSE



Transaction ID: [REDACTED] Customer ID: 314244 Transaction Date: 2022-05-31

Last, First Member ID MNA121212121001	Patient Date of Birth 1900-01-01	Gender Female	BlueCross BlueShield of Minnesota
Relationship to Subscriber Spouse	Subscriber Name		
Transaction Type Referral	Organization BCBSMN ALL DATA	Payer BCBSMN	

[Print](#) [Edit Inquiry](#)

Responses Found

From - To Date of Service	Transaction Type	Status	Diagnosis Code(s)	Referred-To-Provider(s)	Certification Number
06/07/2021 - 06/07/2022	Referral	Certified in Total	• H409	• PARK RAPIDS	AVL 11111111111
07/30/2021 - 08/13/2021	Referral	Certified in Total	• R002	• IRHYTHM	AVL 22222222222
07/30/2021 - 08/24/2021	Referral	Certified in Total	• R002	• SANFORD	AVL-33333333333
07/31/2021 - 08/24/2021	Referral	Certified in Total	• R002	• IRHYTHM	AVL 44444444444
05/17/2022 - 05/17/2023	Referral	Certified in Total	• H409	• PARK RAPIDS	AVL 55555555555

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.

Transaction ID: [REDACTED] Customer ID: 314244 Transaction Date: 2022-05-31

Last, First Member ID MNA121212121001	Patient Date of Birth 1900-01-01	Gender Female	BlueCross BlueShield of Minnesota
Relationship to Subscriber Spouse	Subscriber Name		
Transaction Type Referral	Organization BCBSMN ALL DATA	Payer BCBSMN	

[Back to Results](#) [Print](#) [Update](#) [Edit Inquiry](#) [Pin to Dashboard](#)

Certificate Information

Certification Number AVL11111111111	Status CERTIFIED IN TOTAL
Effective Date 2021-06-07	Expiration Date 2022-06-07
Referral Type Specialist	

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.

Home > Authorizations & Referrals > Auth/Referral Dashboard Need help? [Watch a demo](#) about the Auth/Referral Dashboard.



Auth/Referral Dashboard

[Give Feedback](#) [New Request](#)

Search Search Sort by: Last Updated

Filter List Applied Filters: STATUS: ALL TYPE: ALL ORGANIZATION: ALL PAYER: ALL DATE RANGE: LAST 90 DAYS

All Items Followed Items ★ Drafts ✎ Trash 🗑️

Type	Cert #	Patient	Payer	Submitted	Last Updated	Service Info	Status	View/Action
Referral	 AVL 4444444444	First Last MNA121212121001DOB: 01/01/1900	BCBSMN	2022-05-26	5 days ago	2022-05-25 - 2022-12-31	APPROVED	 <ul style="list-style-type: none">UpdateView DetailsPrintFollow this itemMove to Trash

REFERRAL UPDATE

Primary Care Clinic (PCC) only

Accessed through the Availity Essentials Portal

MANAGED CARE REFERRAL – UPDATE FROM INQUIRY BY PCC ONLY



Home > Authorizations & Referrals > Authorization/Referral Inquiry Results Need help? [Watch a demo](#) about Authorizations and Referrals.

Authorization/Referral Inquiry Results Give Feedback [Go to Dashboard](#) [New Request](#)

Transaction ID: [redacted] Customer ID: 314244 Transaction Date: 2022-05-31

Last, First Member ID MNA 121212121001	Patient Date of Birth 1900-01-01	Gender Male	
Transaction Type Referral	Organization BCBSMN ALL DATA	Payer BCBSMN	

[Print](#) [Update](#) [Edit Inquiry](#) [Pin to Dashboard](#)

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.

Certificate Information

Certification Number AVL 4444444444	Status CERTIFIED IN TOTAL
Effective Date 2022-06-07	Expiration Date 2023-05-26
Referral Type Specialist	

Requesting Provider

Name Primary Clinic	NPI 1234567891
Provider Role Facility	

Rendering Providers

Provider	
Name Care Clinic	NPI 1243568791
Provider Role Facility	

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.

Service Information

Service Type 1 - Medical Care	Place of Service 11 - Office	Service From - To Date 2022-06-07 - 2023-05-26
Quantity 2 Visits		
Diagnosis Code 1 G5602 - Carpal tunnel syndrome left upper limb		

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.

[Edit Certificate Information](#)

Certificate Information		
Certification Number AVL 4444444444	Status CERTIFIED IN TOTAL	
Effective Date 2022-06-07	Expiration Date 2023-05-26	Referral Type Specialist

Member Information

Patient Name Last, First	Patient Date of Birth 1900-01-01	Patient Gender Male
Member ID MNA 121212121001	Relationship to Subscriber Self	Subscriber Name Last, First

[Edit Diagnoses](#)

Diagnosis Information	
Description Carpal tunnel syndrome left upper limb	Code G5602

[Edit Service Information](#)

Service Information	
Place of Service 11 - Office	Service From - To Date Invalid date - Invalid date
Quantity 2 Visits	

Clear Submit

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.

Home > Authorizations & Referrals > Auth/Referral Dashboard Need help? [Watch a demo](#) about the Auth/Referral Dashboard.



Auth/Referral Dashboard

[Give Feedback](#) [New Request](#)

Search Search Sort by: Last Updated

Filter List Applied Filters: STATUS: ALL TYPE: ALL ORGANIZATION: ALL PAYER: ALL DATE RANGE: LAST 90 DAYS

All Items Followed Items ★ Drafts ✎ Trash 🗑️

Type	Cert #	Patient	Payer	Submitted	Last Updated	Service Info	Status	View/Action
Referral	 AVL 4444444444	First Last MNA121212121001DOB: 01/01/1900	BCBSMN	2022-05-26	5 days ago	2022-05-25 - 2022-12-31	APPROVED	 <ul style="list-style-type: none">UpdateView DetailsPrintFollow this itemMove to Trash

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**.

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

[Edit Certificate Information](#)

Certificate Information		
Certification Number AVL 4444444444	Status CERTIFIED IN TOTAL	
Effective Date 2022-06-07	Expiration Date 2023-05-26	Referral Type Specialist

Member Information

Patient Name Last, First	Patient Date of Birth 1900-01-01	Patient Gender Male
Member ID MNA 121212121001	Relationship to Subscriber Self	Subscriber Name Last, First

[Edit Diagnoses](#)

Diagnosis Information	
Description Carpal tunnel syndrome left upper limb	Code G5602

[Edit Service Information](#)

Service Information	
Place of Service 11 - Office	Service From - To Date Invalid date - Invalid date
Quantity 2 Visits	

Clear Submit

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.