

HPHConnect Referrals Page Update

Using the Provider Portal for Referrals

March 2019

Agenda

- 1. Introduction to HPHConnect's Referral Updates and Capabilities**
- 2. Getting Started with Submitting a Referral**
- 3. Conducting Searches in Key Fields**
- 4. Submitting and Saving Your Work**
- 5. Creating Time-saving Templates**
- 6. Searching for a Specialist Referral**
- 7. New Resource Page**
- 8. Additional Information and Resources**

Section 1

Introduction to HPHConnect's Referral Updates & Capabilities

Good to Great

- ✓ A commitment to improving **provider experience**
- ✓ Fresh, **intuitive** design
- ✓ Greater **simplicity**, fewer fields
- ✓ Smart searches for **quicker** entry
- ✓ **Templates** for frequently used requests

Referrals 101

Referral capabilities



- Submit and search referrals for specialty care
- Access 2 years of referral transaction history online for:
 - Requesting provider
 - Servicing provider
 - Patient's PCP

Sign in to HPHConnect for Providers at:

harvardpilgrim.org/providerportal

Referral requirements



Please refer to the Referral, Authorization and Notification

section of our online Provider Manual

www.harvardpilgrim.org/providers

Section 2

Getting Started with Submitting a Referral

Submitting a Referral

1. **Log in:**

<http://www.harvardpilgrim.org/provider>

2. **Click:**

Office Management

3. **Select:**

Referrals link



Welcome to the New Referral Start Page

From here you can:

- Create new referral requests
- Access incomplete referral requests
- Access custom referral templates

To create a referral request:

- ✓ Select New Request
- ✓ Click Specialist from the drop down

The screenshot shows the Harvard Pilgrim HealthCare web application interface. At the top left is the logo and name "Harvard Pilgrim HealthCare". At the top right, the user's role is identified as "Office Manager". Below the logo is a navigation menu with tabs for "HOME", "PATIENT MANAGEMENT", "OFFICE MANAGEMENT", "ADMINISTRATION", and "REFERENCES". The main heading is "Referral & Authorizations", with a "New Request" button to its right. Below the heading is a message: "This is where content messages will appear on the new Ref/Auth screens." There is a search bar labeled "Search by Request Number" with a "Search" button and a link to "Advanced Search". Underneath, there are sections for "Incomplete Requests" and "Custom Templates". The "Incomplete Requests" section shows a single entry for "Leary" with a "Saved 1/18/2019" date and a "Specialist" role, accompanied by a trash icon. The "Custom Templates" section lists "Virga" and "virga 2", each with a trash icon.

Referral Submission Basics



Complete all required fields — indicated by a red asterisk *



Access additional **search** criteria by clicking on the magnifying glass icon



Use the save feature if you are not ready to submit your request

All search fields on the submission screen are **SMART** fields. As you type, the portal searches and displays matching results.

Referral & Authorizations / Search Requests

Specialist Ref/Auth Submission

This is where content messages will appear on the new Ref/Auth screens.

Patient

* Search Current Patients

Select a patient

Diagnosis

* Search and select a diagnosis

Requesting Provider

* Requesting Provider Contact Name Contact Info Phone

Servicing Providers

* Servicing Providers Contact Name Contact Info Phone

Service Details

* Service * Level of Service

* Service Units * Start Date * End Date

Requested Procedures

Procedure Code

Additional Information

* Release of Information Remarks

Characters remaining: 225 / 225

Paperwork

Description

* Attachment Type * Transmission Method

File

No paperwork added.

Referral Fields

Required fields:

- Patient name
- Diagnosis
- Requesting provider
- Servicing provider
- Service
- Level of service
- Service units
- Start date
- End date
- Release of information

Optional fields:

- Contact name/info
- Procedure code & Quantity
- Clinical upload (Attachment)

Section 3

Conducting Searches in Key Fields

Conducting a Patient Search


Referral & Authorizations / Search Requests

Specialist Ref/Auth Submission

This is where content messages will appear on the new Ref/Auth screens.

Patient

*Search Current Patients

Leary, M 

LEARY, MAURA (HP)

Search Current Patients ×

Collapse Search ^

Member ID


First Name ura

Last Name

Date of Birth

Search

Patient ID	HP	Birthdate
LEARY, MAURA		

 **+ Add**

Option 1: Smart Search

- ✓ Searches within your current patient list only (patients must first be added under patient management)
- ✓ Begin typing member ID # or patient last name into the search field
- ✓ Results appear automatically

Option 2: Advanced Search

- ✓ Includes those not on your current patient list
- ✓ Click on the magnifying glass to search all members by ID #, name and/or date of birth.
- ✓ Select the appropriate patient and click the add button

Conducting Diagnosis and Procedure Code Searches: Smart Function

Diagnosis

* Search and select a diagnosis

Q

- 1 Type directly into search field & search terms narrow automatically
- 2 Search by diagnosis code, procedure code, or search term (knee, hip, etc.)
- 3 Click on the desired selection when visible underneath the search bar

Conducting Diagnosis and Procedure Code Searches with Advanced Search

Search and select a diagnosis ×

Modify Search ▾

OTHER BURSITIS OF KNEE RIGHT KNEE			+ Add
Code M70.51	Code Set	ICD10CM	
OTHER BURSITIS OF KNEE LEFT KNEE			+ Add
Code M70.52	Code Set	ICD10CM	



Advanced search

- Offers more results & additional search criteria.
- Must use complete words or codes
- Multiple procedure or diagnosis codes can be added at the same time from this screen.
- Close the search box (by clicking the X) after adding selections to return to request entry screen.

Requesting and Servicing Provider Searches

Requesting Provider

* Requesting Provider

smith, joh

Smith, John (Z69364)
NPI: 0123456789
John S Smith
1211 Ashley Cir
BOWLING GREEN, KY, 42104

Contact Name

Contact Info Phone

e

Contact Info Phone

Servicing Providers

smith, john Practice Name, Practice ID Address

Clinician Specialty Zip Code In Network

Smart Search:
Search by name or NPI

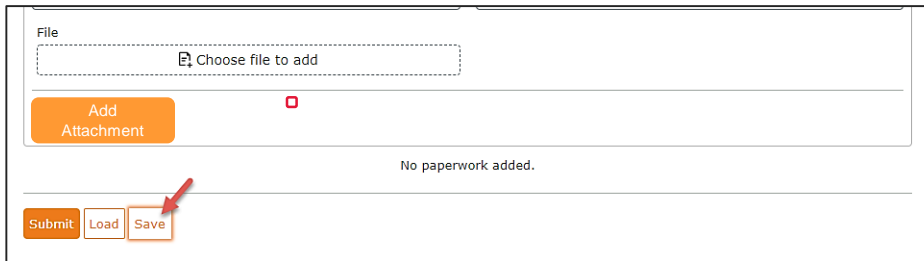
Requesting Provider:
Narrow search by type.
Limited to providers you
already have access to in
HPHConnect.

Servicing Provider:
Narrow your search by
address, type, or
specialty.

Section 4

Submitting and Saving Your Work

Saving Requests to Submit at a Later Date



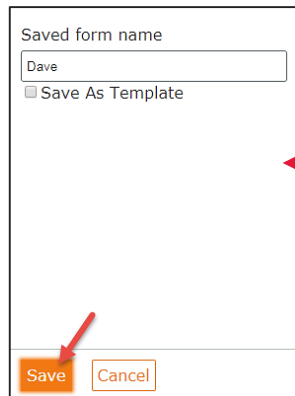
File
Choose file to add

Add Attachment

No paperwork added.

Submit Load Save

Click the **“Save”** button at the bottom of the submission entry screen at any time to save your progress if you need to come back to a request.



Saved form name
Dave

Save As Template

Save Cancel

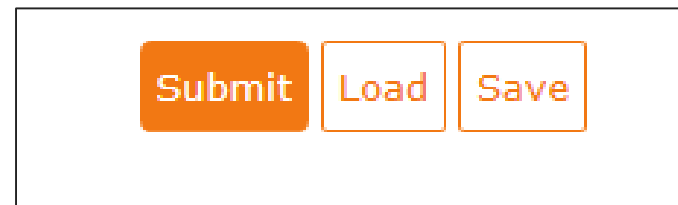
The system will prompt you to **name** your saved request. Click save to add this request to your saved list on the Referral start page screen to be loaded at a later time.

A message will appear indicating the request has been saved.

This item has been successfully saved to your Incomplete Requests list. Please note, attached files are not saved as part of an incomplete request.

Open your saved request one of two ways:

1. From the Referral start page by clicking on the name of your request under Incomplete Requests
2. By clicking the “load” button on the referral entry screen.



Submit Load Save

Submission and Responses

Submission

- Submit the request once all required fields have been completed.

Request Responses:

- Approved
- Pended
- Denied (remarks should include denial reason)
- Rejected (remarks should include rejection reason)
- No Plan Action Required (referral is not required; no further steps needed)

Request Detail, includes:

- Status
- Patient's Name and Member ID#
- Request Number, e.g. HPA123456789
- Submitted on Date
- Requesting provider's and servicing provider's National Provider Identifier (NPI)

Section 5

Creating time-saving templates

Templates for Common Submissions



New feature to save you time and effort

- ✓ Store the types of referral submissions that you use most
- ✓ Call them up from the Referral start page and update with just a few strokes
- ✓ Submit quickly and easily

Templates for Common Submissions

Step 1: Create the template

- Complete the fields for a common request.
- Click the save button at the bottom of the submission entry.



Templates for Common Submissions

Step 2: Save and load the template

Saved form name

Save As Template

Save Cancel

- Follow system prompt to name your saved request.
- Click the box next to Save as Template.
- Click Save to add to your Custom Templates list on the Referral start page.
- A message will appear indicating the request has been saved.

This item has been successfully saved to your Incomplete Requests list. Please note, attached files are not saved as part of an incomplete request.

Templates for Common Submissions

Step 3: Use your template

1. Open your template by either:
 - Going to the Referral start page and clicking on the name of the template found under custom Templates.
 - Going to the referral entry screen, clicking the Load button, and selecting the applicable template.
2. Edit the member and start/end date information.
3. Submit the request

The screenshot displays a user interface with two main sections: 'Incomplete Requests' and 'Saved Searches'.
Under 'Incomplete Requests', there is a table with one row: 'Leary' (name), 'Saved 1/18/2019' (date), 'Specialist' (status), and a trash icon.
Under 'Saved Searches', there is a header 'Custom Templates' and two rows: 'Virga' and 'virga 2', each with a trash icon. Red arrows point to the 'Custom Templates' header and the 'Virga' row.

Section 6

Searching for a specialist referral

Searching for a Specialist Referral

3 Ways to Search

1. **Enter Request Number**
2. **Use Advanced Search:** Access additional search features.
3. **Utilize the Load Feature:** Use a saved search.

Referral & Authorizations

[New Request](#) ▼

This is where content messages will appear on the new Ref/Auth screens.

[Advanced Search](#)

Search Requests

Patients:

Requesting Provider:

Servicing Provider:

Request Number:

Date Range:

Requested Service

- Outpatient
- Specialist
- Home Care
- Admission
- Transport

Status

- Approved
- Denied
- Pended
- Modified
- No Action Required
- Contact Plan

Referral Search Results

Referral & Authorizations

Search Requests

Modify Search ▾

Approved **Specialist** **Request Number** HPA100868960

Patient
LAUREN M CANDLER

Effective Dates
3/19/2019-6/17/2019 **VIEW >**

Requesting Provider
Jane Doe

Servicing Providers
John Smith

Results include:

- Status
- Service type
- Request number
- Member name
- Requesting & servicing provider names

Click on View to see the details of the request.

Viewing Referral Details

Referral & Authorizations / Search Requests

Request Detail

[View Audit](#) [Print](#) [Edit](#) [Cancel](#)

Specialist Request
Approved

Patient CANDLER, LAUREN M	Member ID HP123456700	Request Number HPA100868960	Submitted On 3/19/2019
-------------------------------------	---------------------------------	---------------------------------------	----------------------------------

Diagnosis
Diagnosis Codes
H02.525 BLEPHAROPHIMOSIS LEFT LOWER EYELID

Requesting Provider

Provider Smith, John	Provider NPI 0123456789	
Contact Name	Contact Medium	Contact Info

Servicing Providers

Doe, Jane	See More ▾	
Contact Name	Contact Medium	Contact Info

Requested Service

Service Consult	Level of Service Elective (E)
Requested Units 1 (Visit(s))	Allowed Units 1
Start Date 3/19/2019	End Date 6/17/2019

Requested Procedures
No records available.

Additional Information

Release of Information Signed statement/Claims (Y)	Additional Remarks Transaction approved
--	---

Paperwork
No records available.

Attachments
No records available.
If you have attached supporting documentation, your files may not be displayed immediately due to file processing. Please check back later.

To Print, Edit, or Cancel the Request:

Click on the applicable button at the top of the Request Detail screen.

- The Request Detail screen displays the full details of the request
- Please review the Additional Remarks section for further details on the request response

Saving Common Searches

Referral & Authorizations

Search Requests

Patients:

Requesting Provider:

Servicing Provider:

Request Number:

Date Range:

Requested Service:

- Outpatient
- Specialist
- Home Care
- Admission
- Transport

Status:

- Approved
- Denied
- Pended
- Modified
- No Action Required
- Contact Plan

1. Complete the search criteria & click save
2. Complete form name field & click save

Success! You'll receive a message indicating your form was saved.

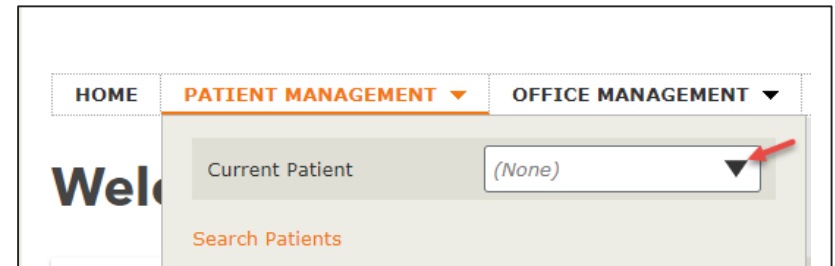
Saved form name

Form saved successfully

Access Referrals from Patient Management

1

Click on the Current Patient drop down and select a member



2

Select the Referrals link



3

This brings you to the new Referrals and Authorizations start page

Section 7

New Resource page

Introducing Our New Resource Page

Find the information you access most frequently — in one handy spot!

- ✓ Convenience
- ✓ Ease of use
- ✓ Created with your needs in mind

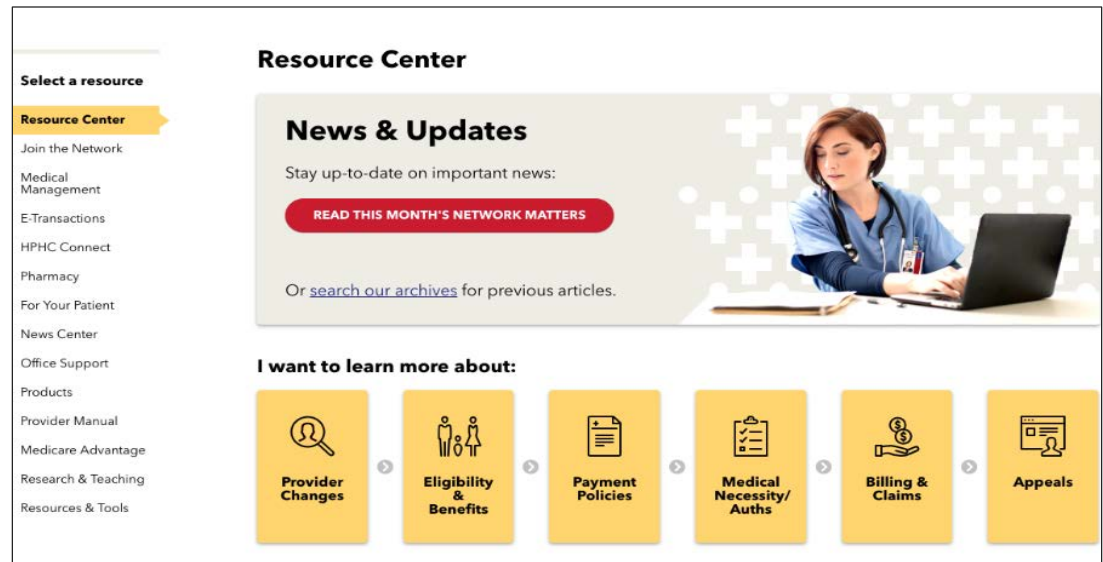
Launching on May 1

The screenshot displays the 'Resource Center' page. On the left is a vertical navigation menu titled 'Select a resource' with the 'Resource Center' option highlighted. The main content area is titled 'Resource Center' and features a 'News & Updates' section with a 'READ THIS MONTH'S NETWORK MATTERS' button and a link to search archives. Below this is a section 'I want to learn more about:' with six yellow buttons: 'Provider Changes', 'Eligibility & Benefits', 'Payment Policies', 'Medical Necessity/ Auths', 'Billing & Claims', and 'Appeals'. The 'Commonly used resources:' section is organized into six teal-colored boxes: 'Manuals' (listing Commercial Provider Manual, Medicare Provider Manual, HPHConnect User Guides, and Referral/Authorization Chart), 'E-Transactions' (listing 837I/837P Health Care Claim, 835 Electronic Remittance Advice, 270/271 Eligibility Inquiry & Response, 276/277 Claims Status Inquiry & Response, and Electronic Funds Transfer), 'Forms' (listing Commercial Forms, Medicare Forms, HCAS Provider Enrollment, Provider Change Form, and Prior Authorization Request Forms), 'Pharmacy' (listing Prior Authorization & Therapy), 'Medicare Advantage' (listing Medicare Provider Portal), and 'Vendor Partners' (listing Overview of Partners). A background image of a healthcare professional at a laptop is visible in the top right of the main content area.

Accessing the Resource Page



Simply click on the Resources (formerly References) tab at the top of your home screen.

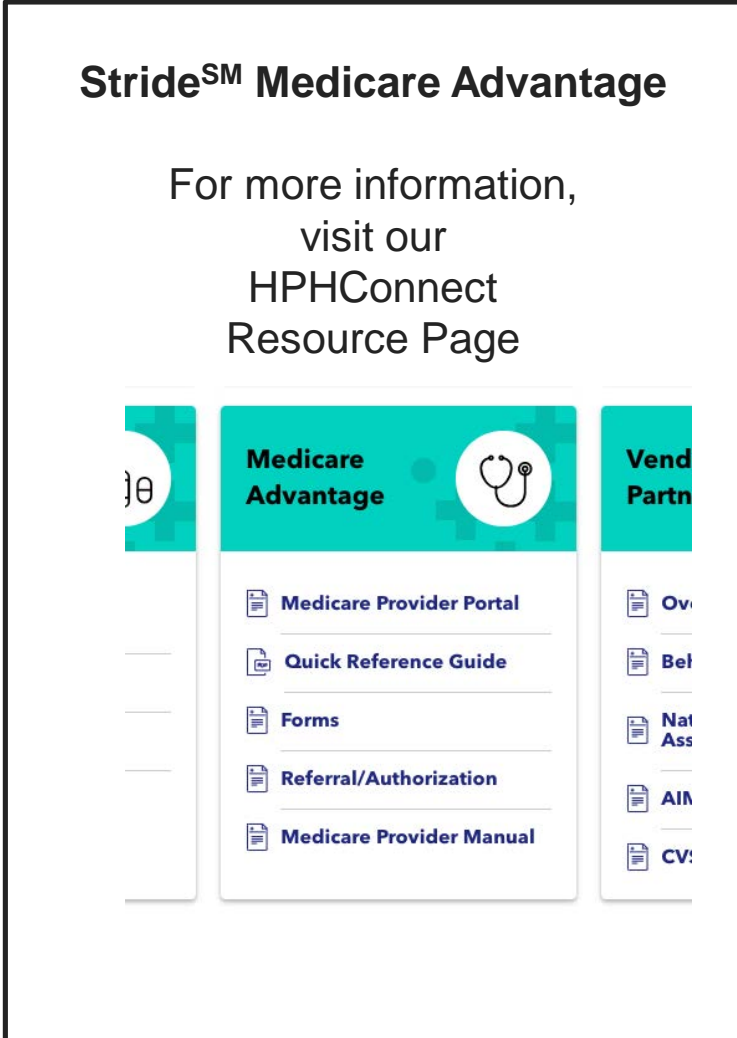


Section 8

Additional information and resources

New Functionality for Medicare Members

- Beginning May 5th
- **Conduct eligibility verification** and **check claims status** for Medicare Advantage StrideSM members *HConnect* portal.
- Continue using our Medicare Advantage provider portal to conduct other transactions for StrideSM members — member benefit details and all referral and authorization activity.



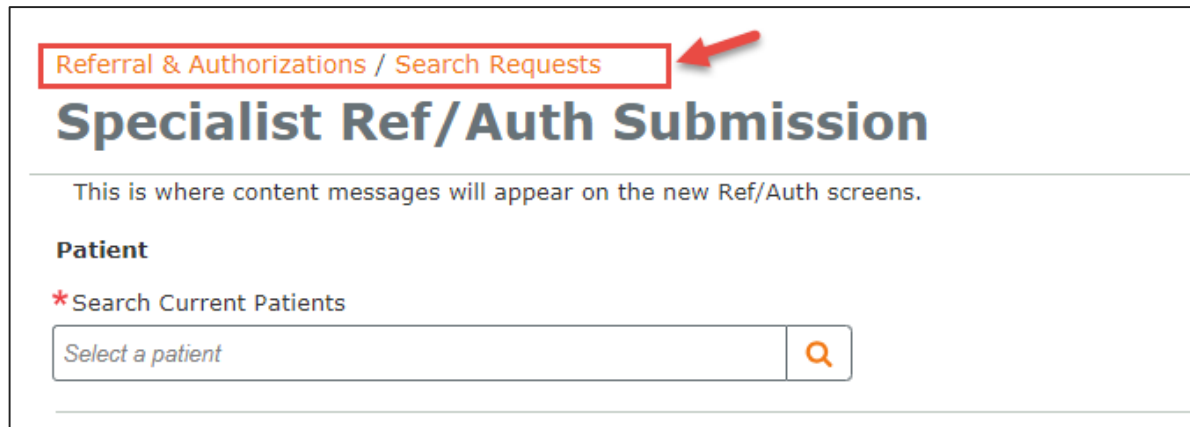
StrideSM Medicare Advantage

For more information,
visit our
HPHConnect
Resource Page

The screenshot shows a web interface with a teal header. The main content area is divided into three columns. The central column, titled "Medicare Advantage" with a stethoscope icon, lists several resources: "Medicare Provider Portal", "Quick Reference Guide", "Forms", "Referral/Authorization", and "Medicare Provider Manual". To the right, a partial column titled "Vend Partn" lists "Ov", "Bel", "Nat Ass", "AIN", and "CV".

Helpful Tips

- ✓ Use the **orange breadcrumb** links at the top of each page to return to previous screens at any time.
- ✓ Maximum date span for referral requests is **364 days**. To enter a request for a full year you will need to use an end date one day before the requested start date (i.e. 1/29/2019 – 1/28/2020).
- ✓ Searching by request number is **case sensitive**. Use capital letters when searching.




Referral & Authorizations / Search Requests

Specialist Ref/Auth Submission

This is where content messages will appear on the new Ref/Auth screens.

Patient

* Search Current Patients

Select a patient 

Resources

Weekly Call-in Hours:

The eBusiness Team is available to answer your questions during drop-in conference calls throughout May:

- Every Tuesday and Thursday from 9–9:30 a.m.
- 1-240-454-0887, then enter access code 162 317 66

Online resources:

- Referral Training Presentation
- Submitting Physician Referrals User Guide
- Submitting Physician Referrals Quick Reference Guide
- HPHConnect webpage

Visit www.harvardpilgrim.org/providers, select HPHConnect and Updated HPHConnect Referral Page

Contact information:

- Call 800-708-4414 (select Option 1 then press 6)
- Email Provider_eBusiness_Services@point32health.org

What We've Covered

- ✓ Understanding the Referral start page
- ✓ Submitting a referral
- ✓ Using the smart and advanced search features
- ✓ Conducting searches
 - Patient, procedure or diagnosis code, requesting or servicing provider
- ✓ Creating and saving templates
- ✓ Accessing and viewing referrals
- ✓ Utilizing the new Resource Page
- ✓ Additional resources and information

Any Questions?



Thank You