

Provider Create Referrals using Member ID or Name

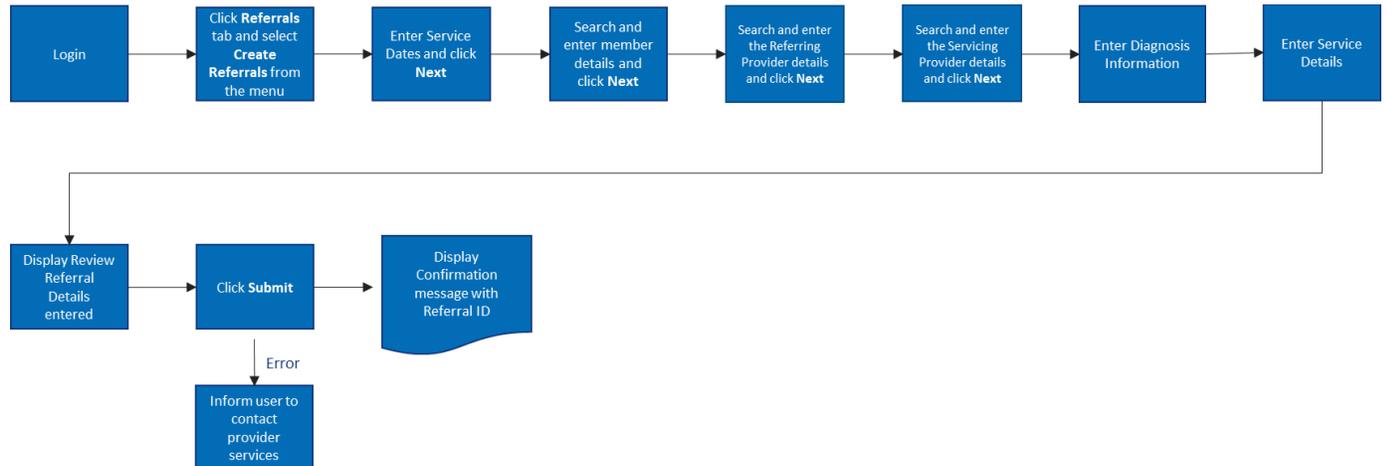
Quick Reference Guide (QRG)

ConnectiC



This Quick Reference Guide (QRG) will provide an overview of the Provider Portal – Create Referrals process.

Refer to the end-to-end process shown below for the Provider Portal – Create Referrals process.



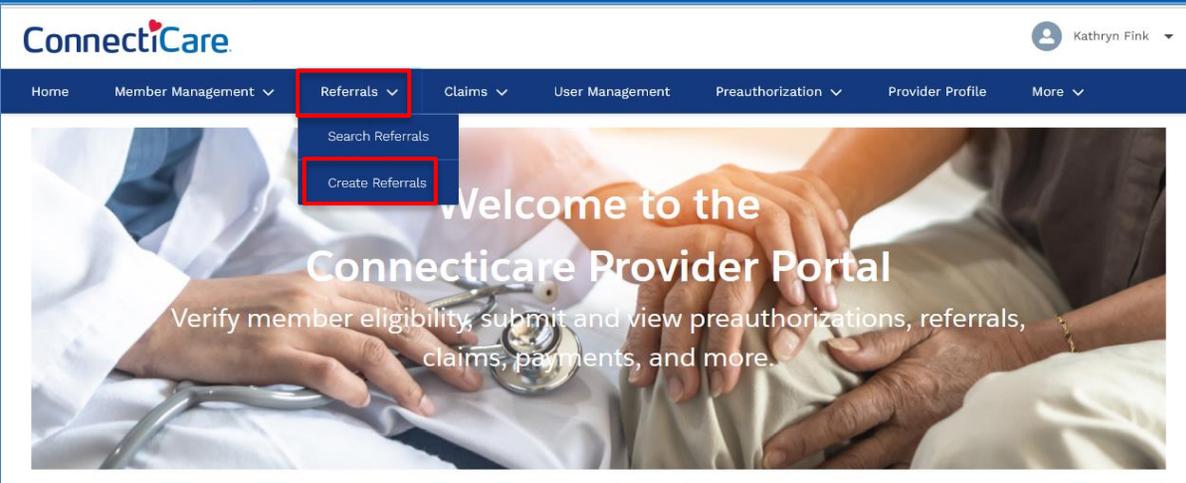
Let us look at the steps in detail for the Create Referrals process.

Purpose: Create a referral when a primary care physician (PCP) is sending a patient to a specialist.



Step 1:

1. From the **ConnectiCare Home** page, select the **Referrals** tab.
2. From the drop-down list, select **Create Referrals**.



Welcome to the
Connecticare Provider Portal
Verify member eligibility, submit and view preauthorizations, referrals, claims, payments, and more.



Step 2:

1. Enter the **Service Date From** date (required).
2. The **Service Date To** date will appear by default; change if required.
Note: Your referral will be valid for 365 days
3. Click **Next**.

CREATE REFERRALS
Service Dates

Complete the details below and click Next to continue. All fields with an asterisk * are required.

Referrals can't be saved or submitted until all the steps are completed. Be sure to have all necessary details available before you continue. If you refresh a page or leave at any point before submitting, you will have to begin your submission again.

Service Date From *	Service Date To
01/10/2021	01/09/2022

Next

Cancel



Step 3:

1. If an Incorrect Service Dates information error is displayed, edit and correct the information.
2. Click **Next** again.

CREATE REFERRAL
Service Dates

Complete the details below and click Next to continue. All fields with an asterisk * are required.

Referral can't be saved or submitted until all the steps are completed. Be sure to have all necessary details available before you continue. If you refresh a page or leave at any point before submitting, you will have to begin your submission again.

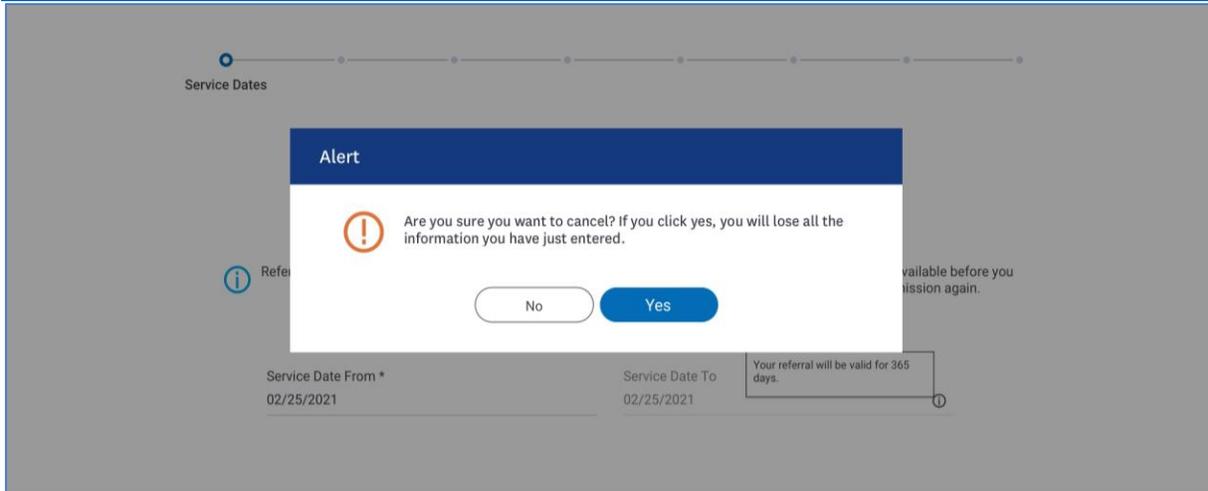
Service Date From *	Service Date From *
01/10/2021	01/09/2021

Service From date cannot be more than 30 days in the past.



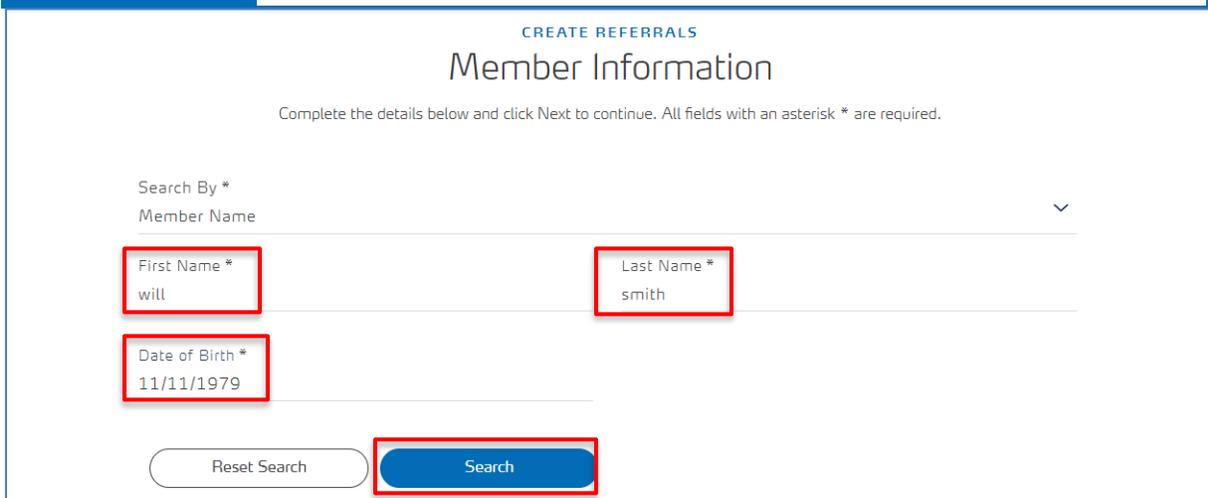
Step 4:

1. If you click **Cancel**, a warning is displayed.
2. Click **Yes** if you wish to cancel the transaction.



Step 5:

1. In the **Search By** field drop-down, select **Member Name**.
Note: If searching by Member ID, enter the ID exactly as it appears on the member ID card.
Note: For our example, we will use Member Name.
2. Enter the **Member First Name**, **Member Last Name**, and **Member DOB**.
3. Click **Search**.





Step 6:

1. If no results were found, a message displays.
2. Click **Reset Search** and enter new values.

Complete the details below and click Next to continue. All fields with an asterisk * are required.

Search By *
Member Name

First Name * Last Name *
john smith

Date of Birth *
05/16/1960

Reset Search

Search

We were unable to find anything based on your search. Please check your search and try again.



Step 7:

1. If results were found, these results will be displayed.
2. Click the radio button to select the active member.
3. Click **Next**.

Member Information

CREATE REFERRAL

Member Information

Complete the details below and click Next to continue. All fields with an asterisk * are required.

Search By *
Memebr ID

First Name *
Will

Last Name *
Smith

Date of Birth *
11/11/1979

Reset Search Search

i This Active/Inactive status is as of today's date.

Filter By

Member ID	Member Name	Coverage Start Date	Coverage End Date	Status	Date of Birth	Gender	Coverage Type	Plan Type
<input checked="" type="radio"/> K1000234532	Smith, Will	01/01/2020	12/31/9999	Active	11/11/1979	Male	Medical	Hmo
<input type="radio"/> K1000234532	Smith, Will	01/01/2019	12/31/2019	Inactive	11/11/1979	Male	Medical	Hmo

Total Records: 1 < Showing 1-2 >

Previous Next

Cancel



Step 8:

1. If the member has active coverage, the *Referring Provider* page displays.
2. In the **Search By** field, select either Provider Name or Provider NPI.
Note: For our example, we will use the NPI number.
3. Click **Search**.

Referring Provider

CREATE REFERRALS

Referring Provider

Complete the details below and click Next to continue. All fields with an asterisk * are required.

Search By
Provider NPI

Provider Name

Provider NPI

Reset Search Search



Step 9:

1. Enter the Referring Provider NPI number.
2. Click **Search**.

Referring Provider

CREATE REFERRAL

Referring Provider

Before you begin, please be sure that the service you are requesting is not managed by one of our partners. Check the [Provider Manual](#) for the most up to date information.

You can enter specialty, zip code, or city and state for better results.

i Only a member's PCP can submit referrals for that member.

Search By *
Provider NPI

Provider NPI *
1523423789

Reset Search Search



Step 10:

1. Select the In-Network Referring provider.
2. Click **Next**.

Referring Provider

CREATE REFERRAL

Referring Provider

Before you begin, please be sure that the service you are requesting is not managed by one of our partners. Check the [Provider Manual](#) for the most up to date information."

You can enter specialty, zip code, or city and state for better results.

Only a member's PCP can submit referrals for that member.

Search By *
Provider NPI

Provider NPI *
1523423789

Filter By

Name	Address	Tax ID	NPI	Type	Specialty	In-Network
<input checked="" type="radio"/> Hilred, Robert	500 Commack Rd, Ste 102b, Commack, NY, 11725	810616910	1523423789	Allopathic Physician	Dermatology	Yes

Total Records: 1 < Showing 1-2 >

Cancel



Step 11:

1. The *Servicing Provider* page displays.
2. In the **Search By** field, select either Provider Name or Provider NPI.
Note: For our example, we will use Provider NPI
3. Enter the NPI.
4. Click **Search**.

Servicing Provider

CREATE REFERRAL

Servicing Provider

You can enter specialty, zip code, or city and state for better results.

Search By *
Provider NPI

Provider NPI *
1811234211

Reset Search Search



Step 12:

1. Enter the Servicing Provider Name.
Note: If searching by Provider Name, you may enter the first two characters of the provider name.
Note: The referring provider may not be the same as the servicing provider.
Note: You may also enter four characters of the specialty.
2. Click **Search**.
3. **Note:** If no provider is found, an error message displays. Enter a new name and click **Search**.

CREATE REFERRAL

Servicing Provider

You can enter specialty, zip code, or city and state for better results.

Search By *
 Provider Name ▼

Provider Name * ⓘ Specialty ⓘ
 Watson, Laura Medicine

City _____ State _____

Zip Code _____

Filter By ⓘ

Name	Address	Tax ID	NPI	Type	Specialty	In-Network
<input type="radio"/> Watson, Laura	25 Central Park W, Apt 1u, New York, NY, 10023	463111392	1811234211	Allopathic Physician	Internal Medicine	Yes
<input checked="" type="radio"/> Watson, Laura	615 Broadway, Hastings On Huds, NY, 10706	463111392	1811234211	Allopathic Physician	Internal Medicine	No

Total Records: 1 < Showing 1-2 >



Step 13:

1. If an Out of Network provider is selected, an error message displays.
2. Click **OK** and select an In Network provider.
3. Click **Next**.

Servicing Provider

Warning

You have selected an Out-of-Network provider. Please select a In-Network provider to continue.

Ok

Search

Provider Name ▼

Provider Name * ⓘ

Specialty ⓘ

Watson, Laura ⓘ Medicine ⓘ

City State

Zip Code

Reset Search
Search

Filter By ⓘ

Name	Address	Tax ID	NPI	Type	Specialty	In-Network
<input type="radio"/> Watson, Laura	25 Central Park W, Apt 1u, New York, NY, 10023	463111392	1811234211	Allopathic Physician	Internal Medicine	Yes
<input checked="" type="radio"/> Watson, Laura	615 Broadway, Hastings On Huds, NY, 10706	463111392	1811234211	Allopathic Physician	Internal Medicine	No



Step 14:

1. Select the In-Network servicing provider.
2. Click **Next**.
3. The *Diagnosis Codes* page displays.

Servicing Provider

CREATE REFERRAL

Servicing Provider

You can enter specialty, zip code, or city and state for better results.

Search By *
Provider NPI

Provider NPI *
1811234211

Filter By

Name	Address	Tax ID	NPI	Type	Specialty	In-Network
<input checked="" type="radio"/> Watson, Laura	25 Central Park W, Apt 1u, New York, NY, 10023	463111392	1811234211	Allopathic Physician	Internal Medicine	Yes
<input type="radio"/> Watson, Laura	615 Broadway, Hastings On Huds, NY, 10706	463111392	1811234211	Allopathic Physician	Internal Medicine	No

Total Records: 1 < Showing 1-2 >

Cancel



Step 15:

1. The Diagnosis Code page displays.
2. Click the *Primary Diagnosis Information - Diagnosis Code/Description* field.
3. Enter the diagnosis code, if known.
4. If the code is not known, click the magnifying glass.

Diagnosis Codes

CREATE REFERRAL

Diagnosis Codes

Complete the details below and click Next to continue. All fields with an asterisk * are required.
You can click in to any diagnosis code to edit it. You can add up to 11 secondary diagnosis codes.

▼ Primary Diagnosis Information

Q Institution Name *

▼ Secondary Diagnosis Codes Add

Q Institution Name *

Previous Next

Cancel



Step 16:

1. Search by entering at least three characters.
2. Click **Search**.

The screenshot shows a 'Diagnosis Information' dialog box. At the top, there is a dark blue header with the text 'Diagnosis Information'. Below the header is a search field labeled 'Diagnosis Code/Description *'. To the right of the search field is a tooltip that reads 'Search for a code or description using at least 3 characters.' Below the search field are two buttons: 'Reset Search' and 'Search'. At the bottom of the dialog box are two more buttons: 'Cancel' and 'OK'. The dialog box is set against a grey background that shows parts of the underlying application interface, including a dropdown menu for 'Secondary Diagnosis Codes' and an 'Add' button.



Step 17:

1. Select the required diagnosis code.
2. Click **OK**.

Diagnosis Information

Diagnosis Code/Description
m54

Reset Search Search

Filter By

Diagnosis Code	Code Description
<input checked="" type="radio"/> M54	Dorsalgia
<input type="radio"/> M540	Panniculitis affecting regions of neck and back
<input type="radio"/> M5400	Panniculitis affecting regions of neck and back, site unspecified
<input type="radio"/> M5401	Panniculitis affecting regions of neck and back, occipito-atlanto-axial region
<input type="radio"/> M5402	Panniculitis affecting regions of neck and back, cervical region
<input type="radio"/> M5403	Panniculitis affecting regions of neck and back, cervicothoracic region
<input type="radio"/> M5404	Panniculitis affecting regions of neck and back, thoracic region
<input type="radio"/> M5405	Panniculitis affecting regions of neck and back, thoracolumbar region
<input type="radio"/> M5406	Panniculitis affecting regions of neck and back, lumbar region
<input type="radio"/> M5407	Panniculitis affecting regions of neck and back, lumbosacral region

Total Records: 37 < Showing 1-10 >

Cancel OK



Step 18:

1. The *Diagnosis Codes* page displays.
2. To add additional codes, click **Add**.
Note: A maximum of 11 codes may be added. An error displays if a duplicate code is entered. Click **Delete** to remove a code.
3. When all codes are added, click **Next**.

Diagnosis Codes

CREATE REFERRAL

Diagnosis Codes

Complete the details below and click Next to continue. All fields with an asterisk * are required.
You can click in to any diagnosis code to edit it. You can add up to 11 secondary diagnosis codes.

▼ Primary Diagnosis Information

Q Diagnosis Code/Description *
M54 Dorsalgia

▼ Secondary Diagnosis Codes 1 Add Delete

Diagnosis Code/Description *
M540 Panniculitis affecting regions of neck and back

▼ Secondary Diagnosis Codes 2 Add Delete

Diagnosis Code/Description *
M5400 Panniculitis affecting regions of neck and back, site unspecified

▼ Secondary Diagnosis Codes 3 Add Delete

Diagnosis Code/Description

▼ Secondary Diagnosis Codes 4 Add Delete

Diagnosis Code/Description

▼ Secondary Diagnosis Codes 5 Add Delete

Diagnosis Code/Description

▼ Secondary Diagnosis Codes 6 Add Delete

Diagnosis Code/Description

▼ Secondary Diagnosis Codes 7 Add Delete

Diagnosis Code/Description

▼ Secondary Diagnosis Codes 8 Add Delete

Diagnosis Code/Description

▼ Secondary Diagnosis Codes 9 Add Delete

Diagnosis Code/Description

▼ Secondary Diagnosis Codes 10 Add Delete

Diagnosis Code/Description

Previous Next

Cancel



Step 19:

1. The *Service Details* page displays.
2. The **Service Type**, **Place of Service** and **Type of Care** defaults and cannot be changed (value is greyed out).
3. In the **Units** field, enter the total number of units for this referral.
4. Click **Next**.

Service Details

CREATE REFERRAL

Service Details

Complete the details below and click Next to continue. All fields with an asterisk * are required.

Service Type Consultation	<div>The selected service type covers Consult/Follow-Up/Testing/Treatment.</div>	Place of Service Office
Type of Care Elective	Units * 9999	

Previous Next Cancel



Step 20:

1. The *Created By* page displays.
2. Edit **Name**, **Phone** fields, if required.
3. Click **Next**.

Progress indicator: Created By

CREATE REFERRAL

Created By

Complete the details below and click Next to continue. All fields with an asterisk * are required.

Name *	Phone *
Lucy Livingston	(847) 656-1953

Buttons: Previous, Next, Cancel



Step 21:

1. The *Review Referral Details* page displays.
2. Click **Edit** to revise information in a section.
Note: This is the last opportunity to edit information.
3. Click **Submit**.

Referral Details

CREATE REFERRAL

Review Referral Details

Your referral is not complete until you submit. If you need to make changes click edit next to section below.

Service Dates Edit

Service Date From 02/25/2021	Service Date To 02/25/2021
---------------------------------	-------------------------------

Member Information Edit

Member ID K1000234532	Name Simth, Will	Date of Birth 07/21/1987
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Referring Provider Edit

Name Hired, Robert	Address 500 Commack Rd, Ste 102b, Commack, NY, 11725	Provider ID 100000234321	NPI 1523423789
Type Practitioner	Specialty Dermatology	Network Type In-Network	

Servicing Provider Edit

Name Watson, Laura	Address 25 Central Park W, Apt 1u, New York, NY, 10023	Provider ID 100000133391	NPI 1811234211
Type Practitioner	Specialty Internal Medicine	Network Type In-Network	

Diagnosis Codes Edit

Primary Diagnosis Information

ICD-10 Code M54	ICD - 10 Code Description Dorsalgia
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Secondary Diagnosis Information

ICD-10 Code	ICD-10 Code Description
M540	Panniculitis affecting regions of neck and back
M5400	Panniculitis affecting regions of neck and back, site unspecified

Service Line Details Edit

Service Type Consultation	Place of Service Office	Type of Care Elective	Units 1
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Created By Edit

Name Lucy Livingston	Phone (847) 656-1953
-------------------------	-------------------------

Previous
Submit

Cancel



Step 22:

1. If the referral cannot be submitted, an error displays. Please try to resubmit the referral again later.
Note: Reasons for error could be lost internet or network connection, violation of processing rules, etc.
2. Click **Done**.



Oops! Your referral could not be submitted at this time.

Please contact Provider Services:

For Commercial Members call: 1-860-674-5850 or 1-800-828-3407 Available 8 a.m. to 6 p.m. Monday - Friday.

For Medicare Members call: 1-877-224-8230 Available 8 a.m. to 6 p.m. Monday - Friday.

Reference error code: xxxx



Step 23:

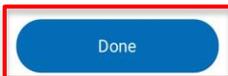
1. If successfully submitted, the final confirmation message displays, note the reference ID.
2. Click **Done**.



Submission Confirmation

A referral request from provider Robert Hilred to provider Laura Watson has been submitted on 02/25/2021 at 10:25 and can be identified by reference ID: 001812252

Payment is contingent on the member's continued eligibility, contractual benefits (if applicable) in the benefits year and care is rendered in accordance with the appropriate physician certification of medical necessity.



Thank
You