

# Provider Search Referral by Member ID or Name

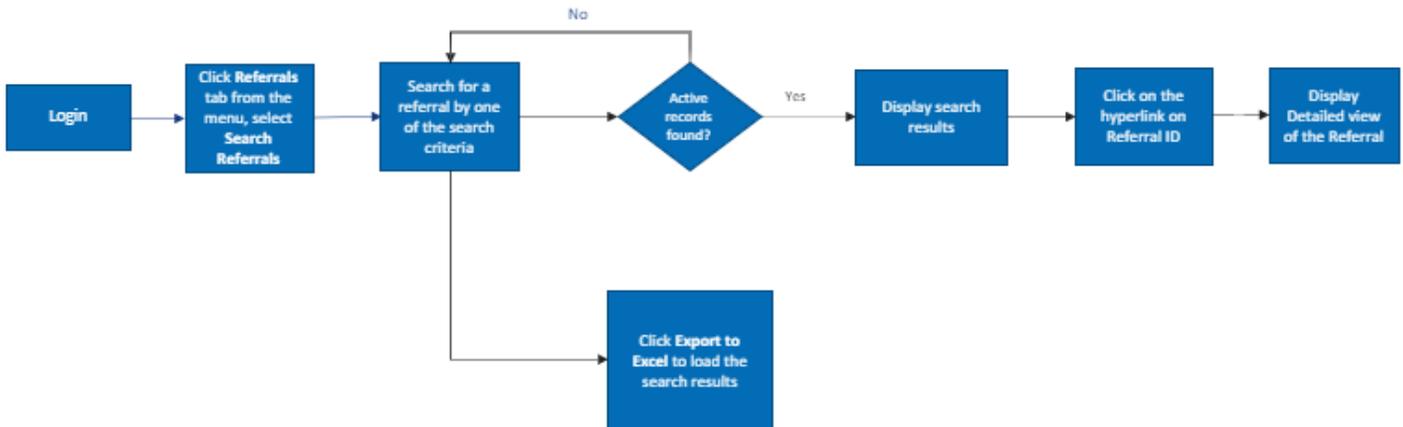
Quick Reference Guide (QRG)

ConnectiC



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

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

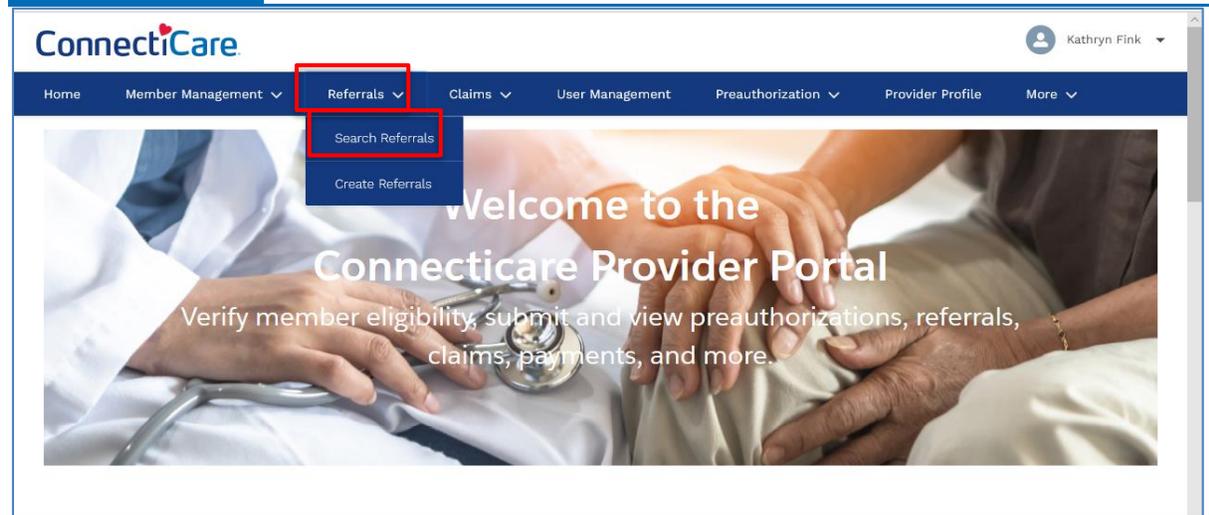


Let us look at the steps in detail for the Search Referrals process.

**Purpose: Search for a referral to verify the referral was created.**

**Step 1:**

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





Step 2:

1. In the **Search By** field, select **Reference ID, Member ID, Member Name, Referring Provider Name or NPI, or Servicing Provider Name or NPI.**

**Note:** For our example, we will use Member Name.

### Referrals

You can view up to 10,000 records at a time. If you want to save your data, make sure you narrow down your results to 10,000 or less.

You can search for referrals that have been submitted within the last 24 months. Referrals submitted by means other than portal, such as by fax or phone, will take some time to be seen in the portal.

Export to Excel

Create Referral

Search By \*

- Reference ID
- Member ID
- Member Name
- Referring Provider Name
- Servicing Provider Name
- Referring Provider NPI
- Servicing Provider NPI



Step 3:

1. Enter the member's **First Name, Last Name, and Date of Birth.**  
**Note:** You may search by entering at least three characters of the first name.
2. Click **Search.**

### Referrals

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Export to Excel

Create Referral

Search By \*

Member Name

Member First Name \*

John



Member Last Name \*

Davis

Member DOB \*

06/06/1972

Reset Search

Search



Step 4:

1. If no results are found, an error message will be displayed.
2. Click **Reset Search**, enter new values and click **Search**.  
**Note:** Try searching by member ID instead of member name.

### Referrals

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Export to Excel

Create Referral

Search By \*

Member Name



Member First Name \*

John



Member Last Name \*

Davis

Member DOB \*

06/06/1971

Reset Search

Search

We were unable to find anything based on your search. Please try searching by Member ID.



Step 5:

1. If the search is successful, results will appear.
2. Click the radio button to select the appropriate member ID.
3. Click **Proceed**.

### Referrals

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Export to Excel

Create Referral

Search By \*

Member Name

Member First Name \*

John



Member Last Name \*

Davis

Member DOB \*

06/06/1972

Reset Search

Search

Select Provider

Filter By ⓘ

Member ID	Member Name	Address	Date of Birth
<input checked="" type="radio"/> K1000441247	Davis, John	25 S Regent St, Port Chester, NY 10573	06/06/1972

Total Records: 3

< Showing 1 - 3 >

Cancel

Proceed



Step 6:

1. Enter the **Service Date Range**.
2. Click **Search**.

### Referrals

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You can search for referrals that have been submitted within the last 24 months. Referrals submitted by means other than portal, such as by fax or phone, will take some time to be seen in the portal.

Export to Excel

Create Referral

Search By \*

Member Name

Member First Name \*

John



Member Last Name \*

Davis

Member DOB \*

06/06/1972

Select Provider

Member ID ↑	Member Name ↑	Address ↑	Date of Birth ↑
K1000441247	Davis, John	Port Chester, NY	06/06/1972

Service [01/09/2021] [04/09/2021]

Reset Search

Search



Step 7:

1. You will see results if there are referrals on file.
2. Click **Export to Excel**.

### Referrals

You can view up to 10,000 records at a time. If you want to save your data, make sure you narrow down your results to 10,000 or less.  
 You can search for referrals that have been submitted within the last 24 months. Referrals submitted by means other than portal, such as by fax or phone, will take some time to be seen in the portal.

[Export to Excel](#)

[Create Referral](#)

Search By \*  
Member Name

Member First Name \*  
John



Member Last Name \*  
Davis

Member DOB \*  
06/06/1972

Select Provider

Member ID ↑	Member Name ↑	Address ↑	Date of Birth ↑
K1000441247	Davis, John	25 S Regent St, Port Chester, NY 10573	06/06/1972

Service Date Range

01/09/2021



04/09/2021



[Reset Search](#)

[Search](#)

Referral submission doesn't guarantee claim payment. Payment is subject to member's eligibility for benefits on date of service. Emergency services do not require a referral.

Below is the list of referrals that match your search. It may take up to 3 hours to see detailed information for recently submitted and updated requests.

Filter By



Reference ID	Status	Member ID	Member Name	Referring Provider Name	Servicing Provider Name	Service Start Date	Servic
999551195	Fully Approved	K1000234532	Davis, John	Brown, Linda	Watson, Laura	01/16/2019	01/16

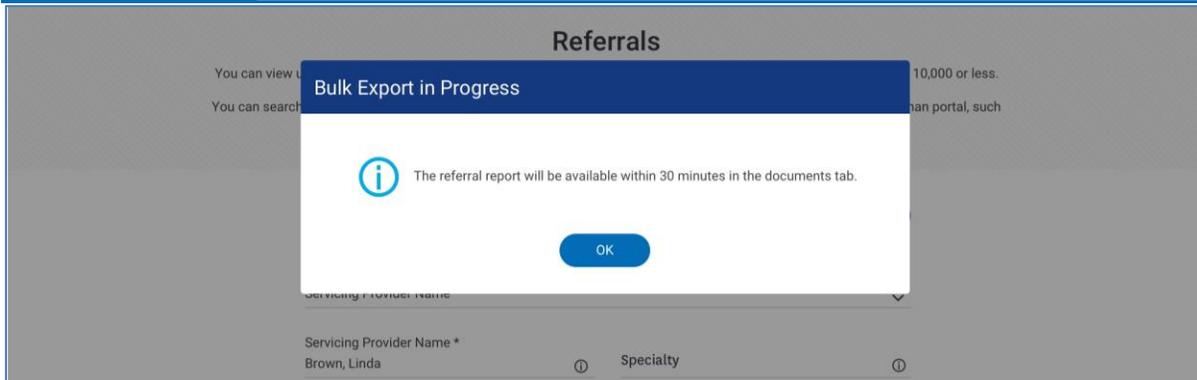
Your search returned 1 results.

< Showing 1-1 >



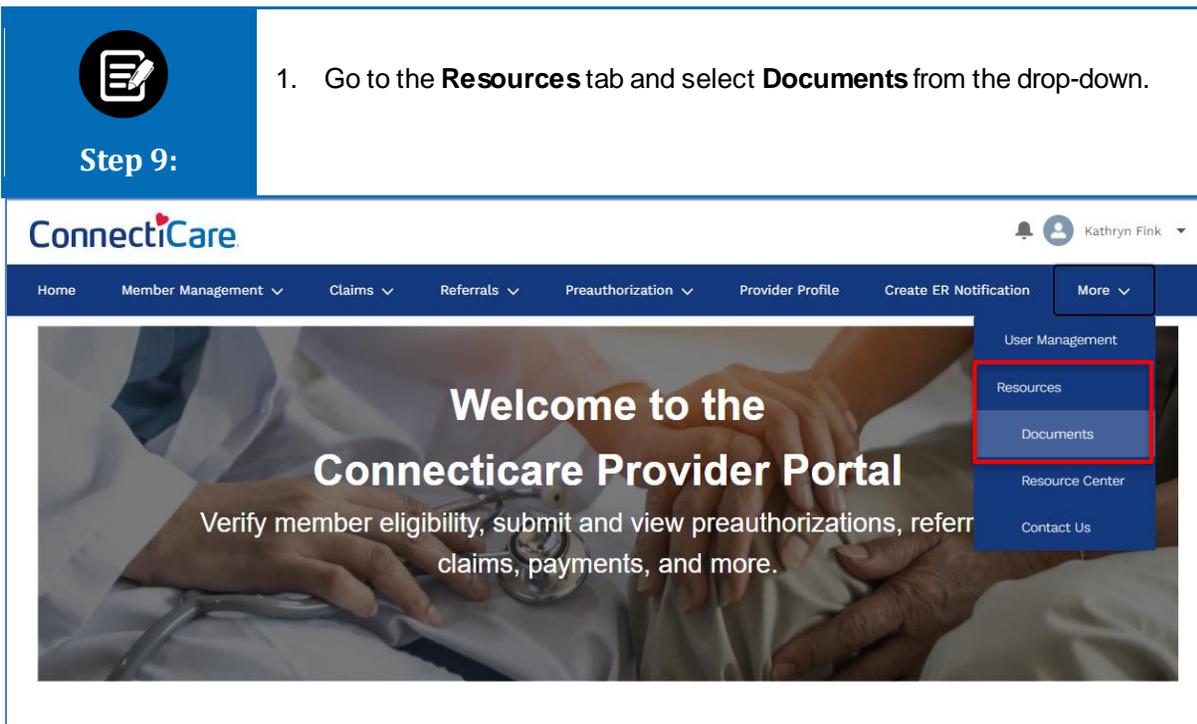
Step 8:

1. The *Bulk Export in Progress* windows displays indicating when the report will be available in the **Resources Documents** tab.
2. Click **OK**.



Step 9:

1. Go to the **Resources** tab and select **Documents** from the drop-down.



Thank  
You