

Referral Authorizations for Authorization Staff

Cerner PowerChart Ambulatory EDUCATION

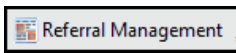


Summary: Referral Management provides a streamlined means to transfer and monitor inbound and outbound referrals. Referral Management also offers integration with Revenue Cycle scheduling for a seamless workflow to manage inbound referrals. This document provides instructions on adding authorization information to referrals.

When: October 18, 2021

Support: Ambulatory Informatics at 231-392-0229.

Referral Authorizations

Authorization information can be added to Referrals by the following:

1. Click Referral Management on the top toolbar in PowerChart  or the Referrals Icon 
2. Click on the **Patient-Centric Referrals** tab.
 - a. You may also locate the patient from the Referral Management list and search by the patient's name by clicking 
 - i. See Referral Management Settings and Preferences document for instructions on creating Worklists if needed.
3. Click on **Patient Search** to search for the desired patient.
4. Click on the **white space** next to the patient's name to open and edit referral information. (Clicking directly on the patient's name will open their chart).

The screenshot shows the 'Referral Management' window with the 'Patient-Centric Referrals' tab selected. A search bar contains 'AMBUNSON, CHANCE'. A table lists three referrals for 'AMBUNSON, CHANCE'. Callouts indicate: (2) the 'Patient-Centric Referrals' tab, (3) the 'Patient Search' field, (4) the blank space next to the patient name in the table, and (5) the 'Prep for Send' status in the table. A note states 'Authorization information can only be added for select Statuses.'

Patient	Indicators	Insurance	Referred...	Requeste...	Referred...	Status	Last Upd...	Requeste...
* AMBUNSON, CHANCE 25 yrs M DOB: OCT 20, 1995		Priority Health	Test MD, Phy. 08/05/2021...	Urology Hematuria		Not Started	08/05/2021...	08/05/2021
* AMBUNSON, CHANCE 25 yrs M DOB: OCT 20, 1995		Priority Health	Test MD, Phy. 07/16/2021...	Urology Hematuria	Other External	Prep for Send	07/16/2021...	07/16/2021
* AMBUNSON, CHANCE 25 yrs M DOB: OCT 20, 1995		Health	Bowden DO, 07/07/2021...	Urology Hematuria	AuSable Urol... Stirling DO,...	Completed	07/12/2...	

5. Click on the **Insurance Tab** within the Case Details.
 - a. Insurance Information must be associated to the referral before adding or editing Authorization information. To do this:
 - i. Highlight the Health Plan.
 - ii. Click Associate.

The screenshot shows the 'Insurance' tab in the Case Details view. The status is 'Pending Acceptance'. A table lists one health plan for 'AMBUNSON, CHANCE'. A callout (5) points to the 'Insurance' tab. A note at the bottom says 'You can associate a health plan to the referral by highlighting a health plan in the table and clicking the 'Associate' button.'

Asso...	Seq	Health Plan	Payer	Financial Class	Subscriber	Member Number	Begin	End
i	1	Priority Health	Priority Health	PRIORITY HEALTH	AMBUNSON, CHANCE	65412378900	06/22/2021	--

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6. Click **Edit** next to Authorization to enter Authorization information.
 - a. Authorization information can be **added or modified** for:
 - i. An outbound referral with a **Prep for Send** status.
 - ii. An inbound referral with a **Pending Acceptance** status.
 - b. Authorization information can be **added one time** for an inbound case in an **Accepted** status that does not have any authorization information added.
 - i. Authorization information **cannot be modified** when a referral is in an Accepted status.

Summary
Comments
Documents (1)
Insurance
Scheduling

Insurance Information

Asso...	Seq	Health Plan	Payer	Financial Class	Subscriber	Member Number	Group Begin	End
	1	Priority Health	Priority Health	PRIORITY HEALTH	AMBUNSON, CH	65412378900	-- 06/22/2021	--

You can associate a health plan to the referral by highlighting a health plan in the table and clicking the 'Associate' button.

Authorization

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Authorization Number	Authorization Type	Authorization Status	Number Authorized	Begin Date
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7. Enter Authorization information and click **Save**.

