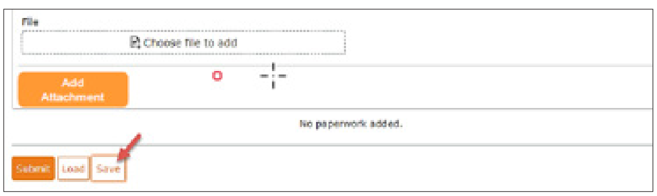
Harvard Pilgrim Health Care
a Point32Health company

Transferring Saved Referrals and Authorizations

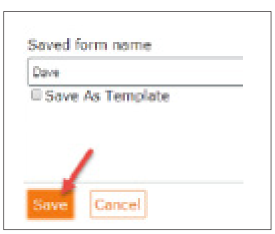
Submitting and Saving Your Work

Saving requests to submit at a later date

1. If you need to come back to a request, click the “Save” button at the bottom of the submission entry screen at any time to save your progress.



2. The system will prompt you to name your saved request. Click “Save” to add this request to your saved list on the *Referral or Authorizations* & *Notifications* start page screen to be loaded at a later time. A message will appear indicating the request has been saved.



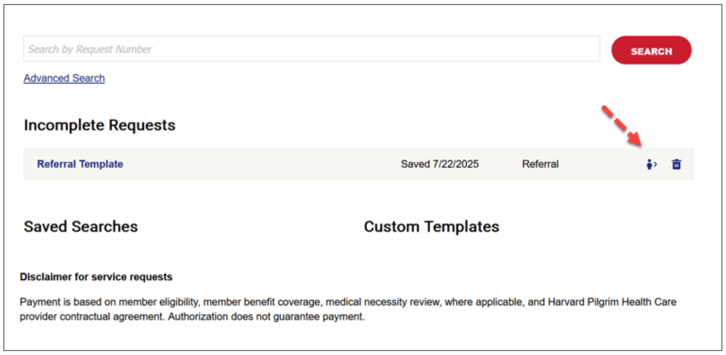
Note: Open your saved request one of two ways:

- From the *Referral or Authorizations* & *Notifications* start page by clicking on the name of your request under Incomplete Requests.
- By clicking the “Load” button on the referral-entry screen.

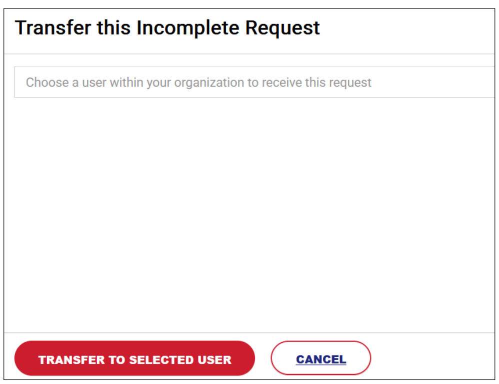
Transferring Saved Referrals/Authorizations

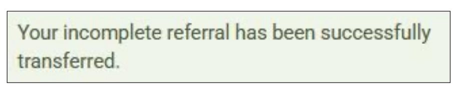
1. Select “Office Management” and choose “Referrals” or “Authorizations & Notifications.”

2. Select the transfer icon.



3. Choose the user from the drop-down menu and select “Transfer To Selected User” to complete the transfer.





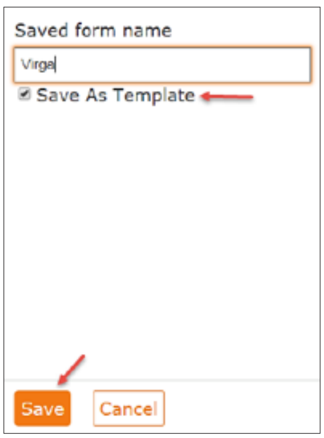
BACK TO TOP

Creating Time-Saving Templates

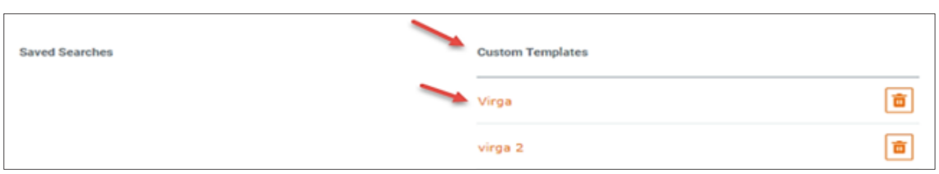
Templates for common submissions

1. Create the template
   a) By completing the fields for a common request
   b) Click the save button at the bottom of the submission entry.

2. Save and load the template
   a) Follow system prompt to name your saved request.
   b) Click the box next to "Save as Template."
   c) Click "Save" to add your custom templates list on the *Referral or Authorizations* & *Notifications* start page.
   d) A message will appear indicating the request has been saved.



3. Use your template
   a) Open your template by either going to the *Referral or Authorizations* & *Notifications* start page and clicking on the name of the template found under custom templates or going to the referral entry screen, clicking the "Load" button, and selecting the applicable template.
   b) Edit the member and start/end date information.
   c) Submit the request.



BACK TO TOP