Harvard Pilgrim Health Care
a Point32Health company

Performing Referral/Authorization Searches

HPHConnect users have several options available for conducting searches, either to pull up the necessary information to complete a submission request field or to find an existing referral or authorization request.

SMART and Advanced Search Functionality

Many of the fields on the referral and authorization pages are SMART search enabled. In many cases, using the SMART search function will yield the results you need, but if a broader search is necessary you may utilize the advanced search function.

SMART Search

With SMART search, your results will narrow as you type. You may click your desired selection as soon as you see it appear. SMART searches will only display the top 5 results, and in some cases, they only pull from a user's saved information (such as patient list), so if the information you need does not display please access the Advanced Search feature. For a SMART search, you don't need to click the magnifying glass icon next to the search bar.

Advanced Search

Advanced or broader searches that return more results are available for each field and can be accessed by clicking the icon to the right of the search bar. These searches will require you to type a full search term and/or select from dropdown lists to narrow your search, and then make your selection(s) from the displayed results. Multiple selections can be added at the same time from this screen (if applicable) by clicking the add button.

Searching in Fields Within a Request Submission

Searches are available for five different fields when entering a request: Patient, Diagnosis, Requesting Provider, Servicing Provider(s), and Procedure Code. Each field has both the SMART and Advanced search options.

Search tips:

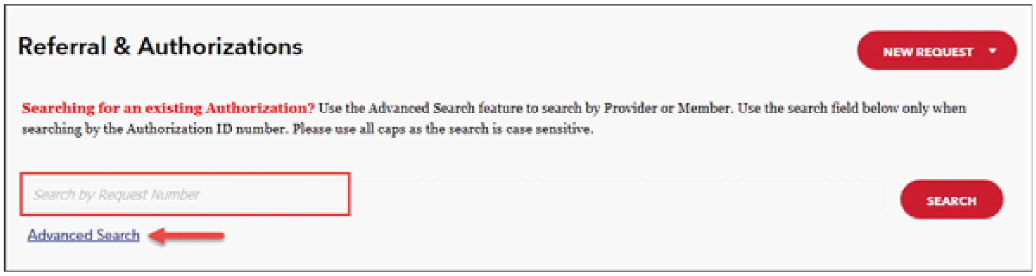
- When conducting a patient search, SMART search will only display results from your current patent list. Patients must first be added under patient management.
- You must use complete words or codes when conducting advanced searches.
- When selecting a servicing provider, it is important that you select the correct location as they may not be participating for a member's plan at all locations. If you do not see the location you are looking for in SMART search, you may need to open the Advanced Search.
- If you do not have the exact procedure or diagnosis code, you can search by keyword (i.e., knee, surgery, etc.) in the SMART field instead.

Searching for an Existing Request

You have several options for finding an existing referral or authorization: by request number, conducting an advanced search, loading a saved search, or accessing via patient management tab.

1. **Searching by Request Number**
   The Referral & Authorization landing page includes a search feature you can use to retrieve any existing requests for your provider group. Simply enter it right the authorization request number into the search bar and click "Search."

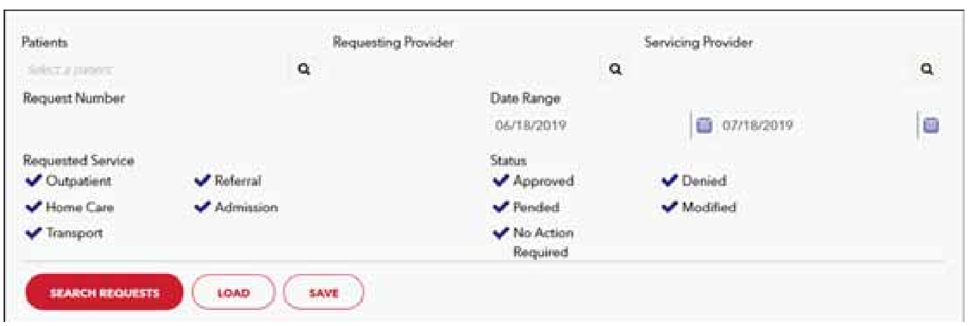
   When searching for an existing request by request number, you must use capital letters (i.e., HPA).



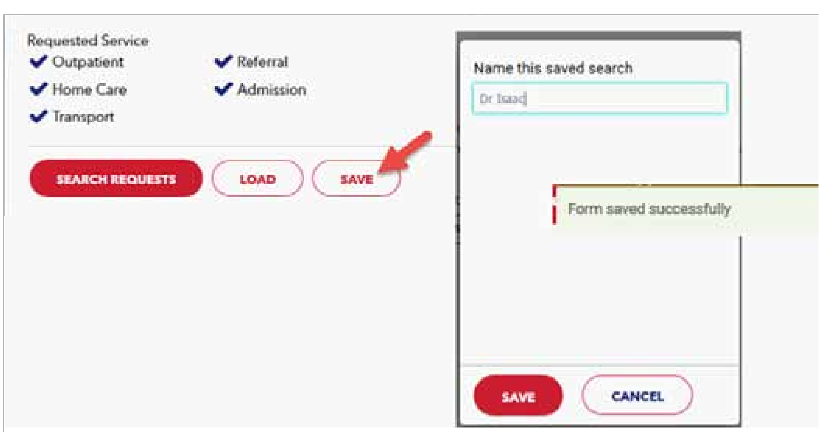
   If you do not have the request number, you can utilize one of the other search features to find the authorization request.

2. **Conducting an Advanced Search**
   You may also find an existing authorization request by conducting an Advanced Search. This feature will allow you to search by patient, date range (of the request's start date), requesting or servicing provider, or request number.

   You have the option to narrow your search by the service type and the status of the request using the checkboxes. Keep in mind that the start date of the request must be included in the date range you are searching by.



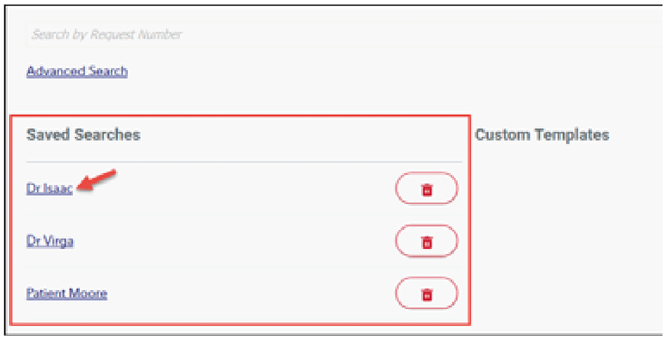
   On this screen, you can also save any searches that you perform frequently to access for future use. Simply complete the search criteria & click save then complete form name field & click save. You'll receive a message indicating that your form was saved.



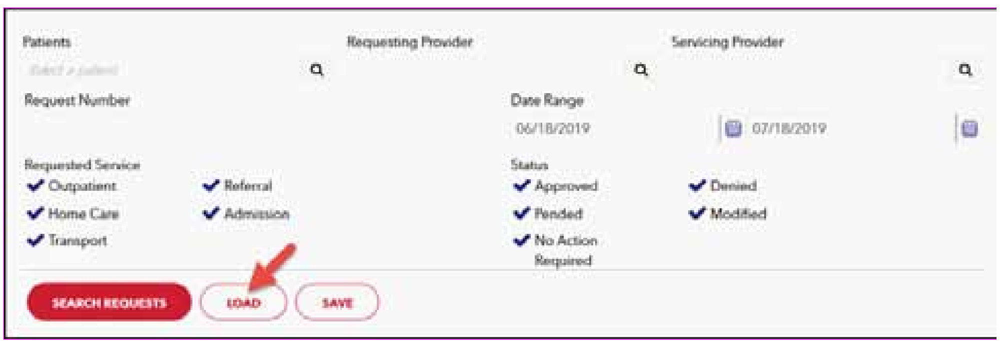
3. Using the Load Feature

Saved searches may also be loaded from the Referral/Authorization landing page. View the Saved Searches section of of the page and select the item you would like.

The search will run automatically and display your search results.



Alternatively, you may load searches from the advanced search page. Click on Load, then select the saved search to load the appropriate search parameters. Click "Search Requests" to run your search.



4. Accessing via Patient Management

You may also find existing authorizations via the Patient Management section of the portal. Navigate to "Patient Management" at the top of the page and select the appropriate patient's name.

Then select the Authorizations and Notifications link to be taken to a page listing the existing authorizations for that patient.