

# 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 patient 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.



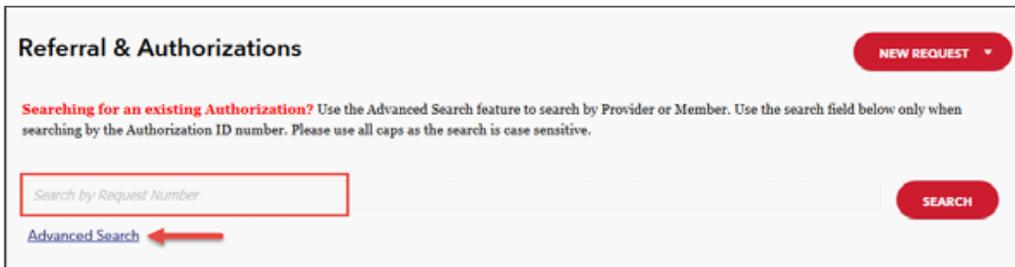
## Searching for an Existing Request

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).



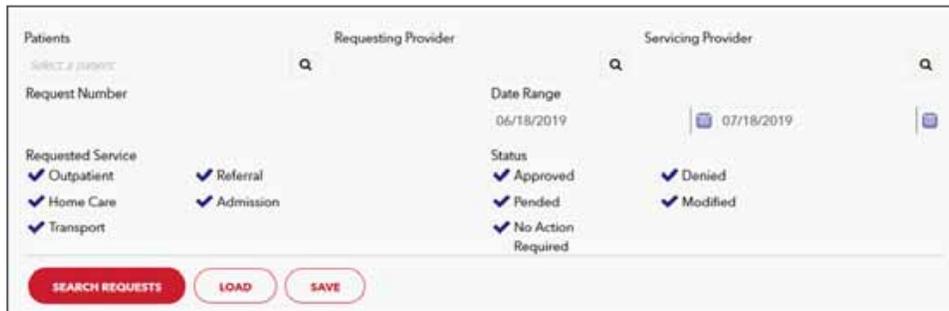
The screenshot shows the "Referral & Authorizations" page. At the top right is a "NEW REQUEST" button. Below the header, there is a red text prompt: "Searching for an existing Authorization? Use the Advanced Search feature to search by Provider or Member. Use the search field below only when searching by the Authorization ID number. Please use all caps as the search is case sensitive." Below this is a search bar with the placeholder text "Search by Request Number" and a "SEARCH" button to its right. A red box highlights the search bar, and a red arrow points to a blue link labeled "Advanced Search" located below the search bar.

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

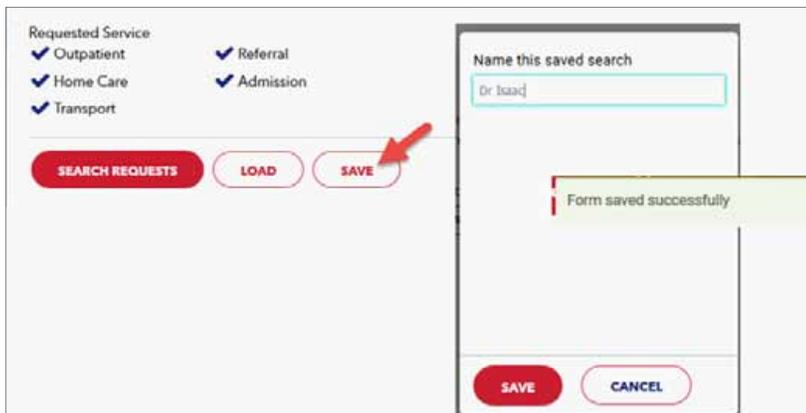
You may also find an existing authorization request by conducting an Advanced Search. This feature will allow you to search by patient, date range (of the request's start date), requesting or servicing provider, or request number.

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.



The screenshot shows the "Advanced Search" interface. It features three search filters: "Patients" (with a "Select a patient" dropdown), "Requesting Provider" (with a search bar), and "Servicing Provider" (with a search bar). Below these are fields for "Request Number", "Date Range" (with date pickers for 06/18/2019 and 07/18/2019), and "Requested Service" (with checkboxes for Outpatient, Home Care, Transport, Referral, and Admission). There is also a "Status" section with checkboxes for Approved, Pended, No Action Required, Denied, and Modified. At the bottom are buttons for "SEARCH REQUESTS", "LOAD", and "SAVE".

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.

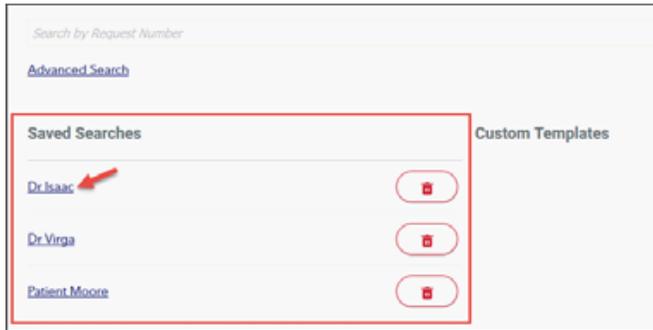


The screenshot shows the "SAVE" button from the previous screen being clicked, which opens a dialog box titled "Name this saved search". The dialog box has a text input field containing "Dr. Isaad". Below the input field is a green message box that says "Form saved successfully". At the bottom of the dialog box are "SAVE" and "CANCEL" buttons. A red arrow points to the "SAVE" button on the main search interface.

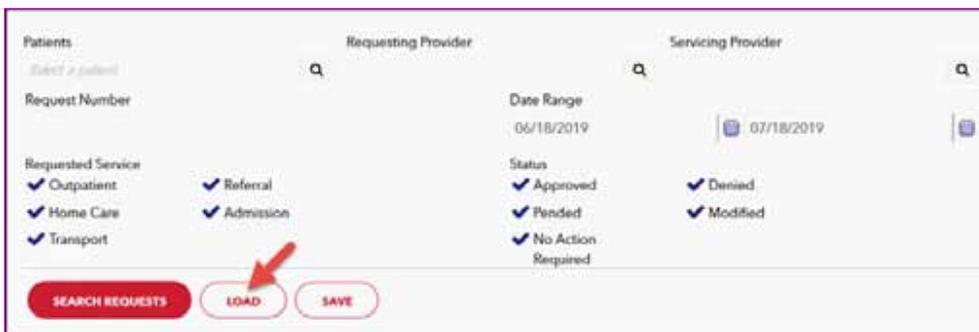
### 3. Using the Load Feature

Saved searches may also be loaded from the Referral/Authorization landing page. View the Saved Searches section 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.

