



# **Provider Quick Start Guide**

## **Enter and Review Referrals**

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# Enter and Review Referrals

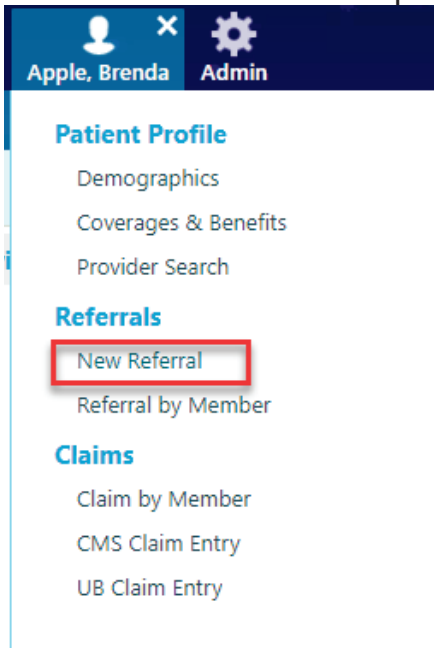
## Open a Member's Record

1. Click **Select Patient**.
2. Click **Search all Patients**.
3. Enter the member's name, birth date, or MRN and click **Search**.

The screenshot shows the Epic system's Patient Search interface. At the top, there is a navigation bar with icons for Home, In Basket, CRM, Patient List, Referral Search, Claims, Explanations of Payment, Patient, Menu, and Log Out. Below this is a secondary navigation bar with tabs for Referral by Member, Demographics, Coverages & Benefits, Provider Search, New Referral, and Claim by Member. The main content area is titled "Patient Search" and features two tabs: "Search My Patients" and "Search All Patients". A message box states: "Fill out the required fields to gain access to a patient/member. Enter additional information for a more accurate match." Below this is a "Search for Patient" section with a grid of input fields. The fields are: Name (required), Sex (required), Birth Date (required), SSN Last 4 (warning), MRN (warning), Member ID (required), ZIP Code (required), and Medicare Beneficiary Identifier (warning). At the bottom right of the search area are "Search" and "Clear" buttons.

## Create a New Referral

1. From a member's workspace, click **New Referral**



2. In the Referral Type Field select the appropriate Referral Type
3. Click →**Next**.
4. On the **General Information** form, confirm that the priority is correct. Common priorities include Routine and Urgent.
5. Check the Retroactive Referral box if the Service has already been rendered.
6. Optionally, enter a reason for the referral.


## Enter Referred By and Referred To Information

1. In the Referred by section of the **General Information** form, enter as much information as you can. You can specify a location/POS, provider, and/or department.
2. In the Referred to section, enter as much information as you can.
3. Click →**Next**.

The screenshot shows two form sections: 'Referral By' and 'Referral To'. The 'Referral By' section has a 'Provider' field with the text 'Tapestry, General External Provider, MD [E1000000]' and a 'Location/POS' field with a warning icon. The 'Referral To' section has 'Provider', 'Provider specialty', and 'Vendor' fields, each with a warning icon, and a 'Location/POS' field with a warning icon. A red arrow points to a search icon in the 'Referral To' Provider field. A red callout box with white text says 'Clicking here will open Provider Search'.

## Find a Provider

If you don't have a specific provider in mind when creating a referral, you can use Provider Finder to narrow down your choices.

1. In the Referred to section of the **General Information** form, click  to search for a provider.
2. Enter criteria including name, clinical interest, and provider specialty then click **Search**.
3. Select a provider, verify the provider's network status, and click **Accept**.

## Enter Diagnoses and Services

1. On the **Diagnoses/Services** form, enter a diagnosis code in the **Diagnoses (coded)** field.
2. Enter a procedure code in the **Services** field.




If you're entering codes but don't have a diagnosis code, enter a description in the **Diagnoses (coded)** field and press **ENTER** to search for a code.


**new referral**




✓ Referral Type    ✓ General Information    **Diagnoses/Services**

**Diagnoses**

Low back pain [M54.5] 

**+ Add**





**Services**  (It is required to fill in at least one item in this section)

98942 - PR CHIROPRACTIC MANIPULATIVE TX SPIR  Revenue code    Modifiers    Qty     Unit type 

**+ Add**


**Notes**

Note summary




   

Attachment





**Add file**

100.0 MB Total Allowed 

Allowed file types: doc, docx, jpeg, jpg, mpeg, mp3, pdf, png, tif, tiff, txt, wav

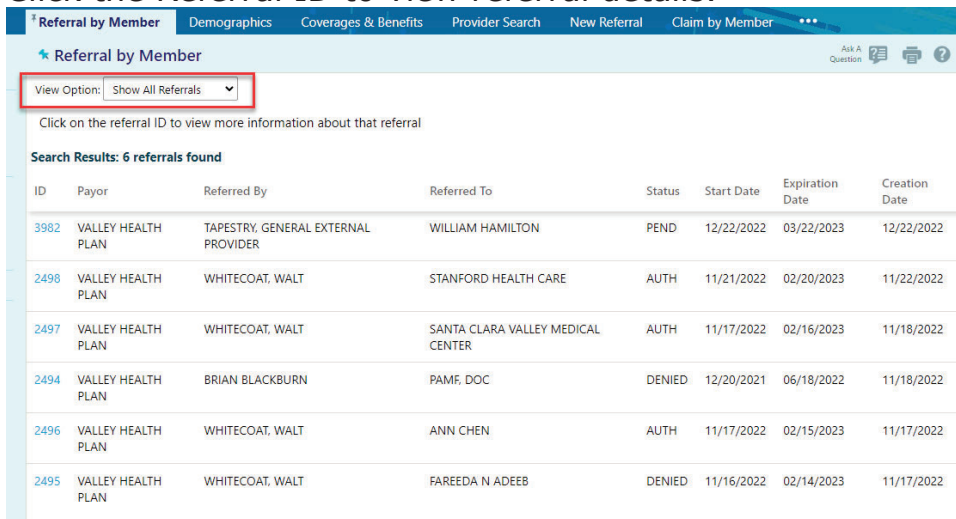
  

## Add Notes and Attachments

1. On the **Diagnoses/Services** form, click , choose a note type, and then click  **Accept**.
2. Fill out the Note summary field.
3. Click **Add File**, select an appropriate file, and then click  **Accept**.
4. Click  **Request Referral**.

## Review referrals

1. From a member's workspace, click **Referral by Member**.
2. Click the Referral ID to view referral details.



Referral by Member

View Option: Show All Referrals

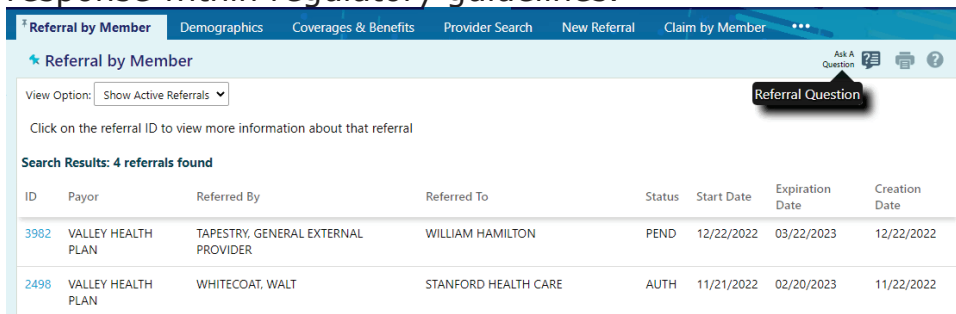
Click on the referral ID to view more information about that referral

Search Results: 6 referrals found

ID	Payor	Referred By	Referred To	Status	Start Date	Expiration Date	Creation Date
3982	VALLEY HEALTH PLAN	TAPESTRY, GENERAL EXTERNAL PROVIDER	WILLIAM HAMILTON	PEND	12/22/2022	03/22/2023	12/22/2022
2498	VALLEY HEALTH PLAN	WHITECOAT, WALT	STANFORD HEALTH CARE	AUTH	11/21/2022	02/20/2023	11/22/2022
2497	VALLEY HEALTH PLAN	WHITECOAT, WALT	SANTA CLARA VALLEY MEDICAL CENTER	AUTH	11/17/2022	02/16/2023	11/18/2022
2494	VALLEY HEALTH PLAN	BRIAN BLACKBURN	PAMF, DOC	DENIED	12/20/2021	06/18/2022	11/18/2022
2496	VALLEY HEALTH PLAN	WHITECOAT, WALT	ANN CHEN	AUTH	11/17/2022	02/15/2023	11/17/2022
2495	VALLEY HEALTH PLAN	WHITECOAT, WALT	FAREEDA N ADEEB	DENIED	11/16/2022	02/14/2023	11/17/2022

## Ask a Question About a Referral

1. From Referral by Member, click **Ask a Question**.
2. Select **Referrals Question**.
3. Enter as much information as you can, making sure to change the site to Tapestry Link.
4. Click **Submit** to route the question to an appropriate user. You will receive a response within regulatory guidelines.



Referral by Member

View Option: Show Active Referrals

Click on the referral ID to view more information about that referral

Search Results: 4 referrals found

ID	Payor	Referred By	Referred To	Status	Start Date	Expiration Date	Creation Date
3982	VALLEY HEALTH PLAN	TAPESTRY, GENERAL EXTERNAL PROVIDER	WILLIAM HAMILTON	PEND	12/22/2022	03/22/2023	12/22/2022
2498	VALLEY HEALTH PLAN	WHITECOAT, WALT	STANFORD HEALTH CARE	AUTH	11/21/2022	02/20/2023	11/22/2022