Provider Quick Start Guide

Enter and Review Referrals

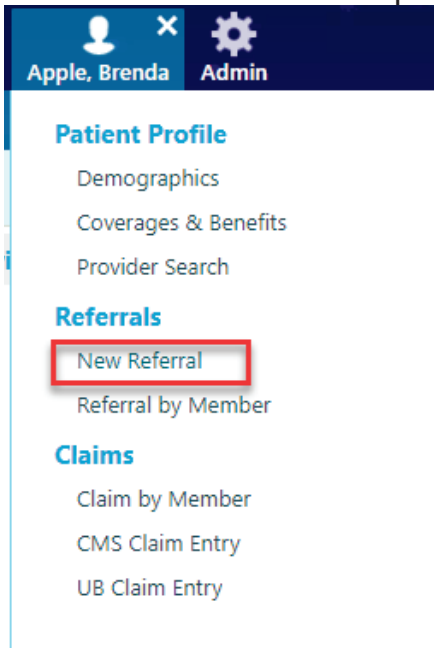# Contents

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**.

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**.

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.

> ℹ️ 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.

Add Notes and Attachments

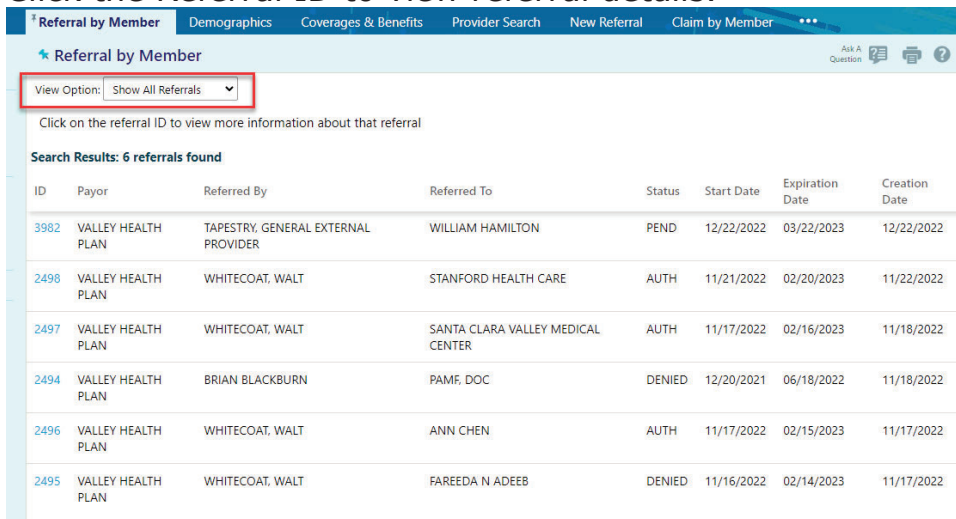1. On the **Diagnoses/Services** form, click 🔍, choose a note type, and then click ✔️ **Accept**.
2. Fill out the Note summary field.
3. Click **Add File**, select an appropriate file, and then click ✔️ **Accept**.
4. Click ✔️**Request Referral**.

Review referrals

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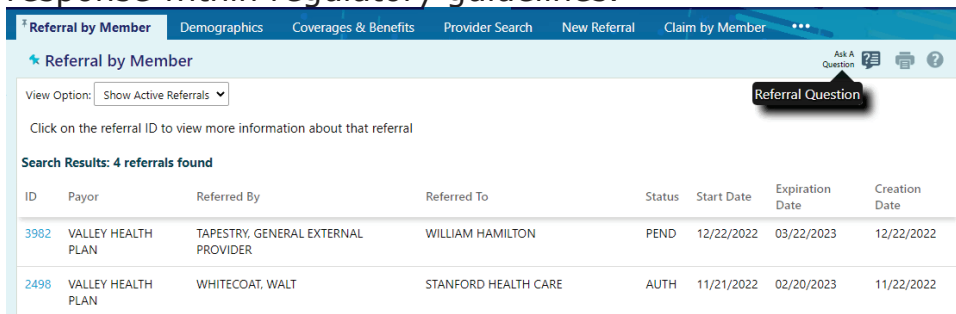

Ask a Question About a Referral

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.