

Kaiser Foundation Health Plan of Washington

Affiliate Link

User Guide

Rev. October 17, 2023

Coverage provided by Kaiser Foundation Health Plan of Washington or Kaiser Foundation Health Plan of Washington Options, Inc., referred to as Kaiser Permanente in this publication.

Contents

Contents	1
Introduction	2
Tips & Tricks	3
Affiliate Link Home Page	4
Requesting Chart Access	5
Referral/Örder Entry	8
Manual/Exception Referral Entry	21
Referral Status Lookup	28
In Basket Messages	31
Patient Menu	34

Introduction

Affiliate Link is accessed by selecting *Referral Request and Status* from the Kaiser Permanente Washington Secure Provider Portal.



The Secure Provider Portal is accessed by selecting Kaiser Permanente Washington from the OneHealthPort home page. If you do not have a OneHealthPort account, please visit OneHealthPort at https://www.onehealthport.com/.

Upon selection of Referral Request and Status, users will be directed to the Affiliate Link home page.

The Affiliate Link home page is organized based on security permissions. User views may vary. If advanced security has not been granted to view patient charts, the tile labeled *Open Chart Review* will not display.



IMPORTANT:

Regardless of whether the provider is the <u>Referring</u> or <u>Referred to</u> provider:

- Providers with an Affiliate Link account (anyone accessing the Kaiser Permanente Washington Secure Provider Portal through OneHealthPort) will receive referral and coverage determinations via the Affiliate Link <u>In Basket</u>.
 - Provider offices without a referring or referred to clinician will follow rules b) and c) below.
- b) If provider has no Affiliate Link account and Kaiser Permanente has a fax number on file, the provider will receive referral and coverage determinations via fax.
- c) If none of the above is set up, the provider will receive a hard copy referral and coverage determination notice via USPS mail.

Tips & Tricks

- A red exclamation point is a required field.
- A yellow yield sign is a recommended field.
- Selecting the magnifying glass will bring up a table of options from which to select
- If you are referring to an <u>owned and operated Kaiser Permanente</u> clinic, choose the To Kaiser option. If you are referring to a provider outside of a Kaiser Permanente owned and operated clinic, choose the standard order.

REF CARDIOLOGY
REF CARDIOLOGY - TO KAISER CARDIOLOGY

 In some cases, the option to refer to either a Kaiser Permanente provider or an external provider is on the same order. If you are referring to an <u>owned and operated Kaiser Permanente</u> clinic, choose "Internal" if both Internal and External options are displayed. If you are referring to a provider <u>outside</u> of an owned and operated Kaiser Permanente clinic, choose "External."

Class: External P Internal External

- Select the calendar icon to quickly enter a date , or
- Enter T for today's date
- Enter T+ number for today plus x days in the future
- Enter T- number for today back x days in the past
- Enter mb for the first day of the month (month beginning)
- Enter me for the last day of the month (month end)
- Gray fields cannot be edited.
- "Information Only" referrals are no longer being issued. These will now display as Closed. The *status reason* will identify the Closed reason, such as:
 - o Coordination of Benefits
 - Visiting member
 - No further review
- Incoming Provider office is the referred-to provider
- **Outgoing** Provider office is the <u>referring</u> provider

3

- e.g. T+2 will be two days from now
- e.g. T-1 will is yesterday



Ç

Affiliate Link Home Page

- 1. Select **Referral/Order Entry** to request an authorization and/or submit a procedure request. <u>Most</u> <u>contracted</u> providers will use this option unless otherwise instructed.
- 2. Select **Referral Search** to view the status of a requested authorization.
- Select Manual/Exception Referral Entry when the clinic name does not display under Select Ordering Clinic/Tax ID or when the practitioner name does not display under Select Authorizing Provider on the Referral/Order Entry option. <u>Most non-contracted</u> providers will use this option. Some contracted providers may use this option only if instructed to do so.
- 4. Select Patient to search by member name or medical record number.
- 5. Select In Basket to:
 - a. Request chart access if appropriate to the office needs.
 - b. <u>View messages</u> pertaining to authorization requests along with approval and denial notices.
- Select Open Chart Review to view a patient's chart if the office has access. If access is needed, select In Basket and view instructions under <u>Requesting Chart Access</u>.



View additional information by selecting the tiles for *In The News*, *References*, and *Help and Contact Information.*

In The News	References	Help and Contact Information
A new look - you are seeing a new look while much of the functionality remains the same. Most noticeable are navigation menus in chart review formerly on the left hand side are now top. The "Patient" button has expanded to provide all the features formerly on the left hand navigation menu. Click on any feature to jump to a specific section of chart review. The "Menu" button contains all the features of the site.	OLA Quick Reference Order Entry Reference Order Entry Video Part 1 - Getting to Order Entry Order Entry Video Part 2 - Order Provider	Need chart access but do not have it yet? Request access via an In Basket message above. If you need other assistance with KP HealthConnect Online-Affiliate, please contactEnter Contact Information Here
Need a little more help with the changes? Check out materials in the <i>Reference</i> section.		

Requesting Chart Access

Chart access allows providers to view the medical record of a patient with a Kaiser Permanente primary care physician.

Patients located in Kaiser Permanente regions outside of Washington cannot be accessed through this feature. Users must access the patient's Kaiser Permanente home region portal.

1. To request chart access, on the Affiliate Link home page, select In Basket.



ġ	KASER PERMANENTE	Home In Basket Patient List	t Referral Search Uatapum, I	Lily	1.1	1	Hern	Ge Log Out	Epic
	2.4	My In Basket	My Messages				53 G	0	
		My Messages	B O New Msg Refresh						
			Folder Summary - My Mess	2991					
4									
1 2					Q				
	B :'								
They	1								
	-								
		My in Basket							
		Opened Patient							

- 2. Select New Msg.
- 3. Select Request Chart Access from the drop down menu.



4. Answer the displayed questions, replacing the asterisk *** with answers to the questions, and select *Send Message*. **Answering all questions will be necessary in order to expedite the request.**

	Home In Ba	sket Patient List	Referral Search	L Uatapum, Lilly	*	P		*	•	* 1 [*]		Menu	C) Log Out	Epic
NUSER NUMBER	Home In Baske	Pontere List Pontere List Pontere List	Reformal Search	Lustapum, tily	To: Provi Subject: Charling Priority: Routed Priority: Routed Priority: Routed Priority: Routed Rout	ider Network Service The Access Request ine You have smartloot tt $\phi \leftrightarrow \phi \equiv \phi$ are to diverge the Access parts to soudent a transformer to a source a transformer to a	s s dia matcheresolved on only open records only open records only open records only open records only open records only open records of the following get's agroup name? of the following open records open records	removed (None information). de la generation (None information) t Plans inter this requires ing information: *** *** *** *** *** *** *** *	ast				Che Contraction of the Che Che Che Che Che Che Che Che Che C	
)										✓ S	end Message	× Canci	el	5

Tip: Select F2 to move to the next set of asterisks.

Once access has been granted, a message will be sent to the provider's In Basket and the *Open Chart* Review tile will display on the Affiliate Link home page upon next log in.



Referral/Order Entry

Most contracted providers will use this option unless otherwise instructed. Most services will not be autoauthorized unless the referral/order is requested through this option.

224	Q	-			
FI KAISER PERMANENTE.	Select Patient	Manual/Exception Referral Entry	Referral/Order Entry	Referral Search	
In The News A new look - you are seeing a new look while much of the functionality remains the same. Most motiocable are navigation menus in chart releve formerly on the left hand sale are now top. The "Patient" buttom has expanded to provide all the features formerly on the left hand navigation menu. Click on any feature to jump to a specific section of chart releve. The "Menu" buttom contains all the features of the site. Need a little more help with the changes? Check out materials in the <i>Reference</i> section.	References OLA Quick Reference Order Entry Reference Order Entry Video Part 1 - 6 Order Entry Video Part 2 - 0	etting to Order Entry der Provider	Help and Conta Areed chart access but of access via an in Basket If you need other assist Online-Affiliate, please Information Heree-	ct Information Io not have it yet? Request message above. ance with XP HealthConnect contactEnter Contact	

1. Select Referral/Order Entry.

A Note About **Search My Patients** The patients that display on the *My Patients* list are (1) patients the logged-in user has access to through any of the provider groups they are authorized for, and (2) there is a relationship established between the provider group and Kaiser Permanente (e.g., there is an existing referral for the patient). If the member is not on this list, select *Search All Patients*.

2. If the user performs work on behalf of more than one tax ID, select the appropriate TIN from the list.

Coverages Demographics Referral/Order Entry Manual/Exception Referral Entry	
☆ Order Entry	
Select a Clinic and Authorizing Provider for this order. If you don't see your clinic or provider, please use the Manual/Exception Referral specific authorization request reviewed for a coverage determination.	Entry fe
印 Select Ordering Clinic/Tax ID	
Patient currently associated with:	
0	
O Select Authorizing Provider	
• •	
✓ Accept	

Home In Basket Patient L	ist Referral Search	Patient		1						-	Menu	C+ Log Out
 ³ Referral/Order Entry	[‡] Chart Review	SnapShot	Results Review	Flowsheets	Allergies	Problem List	Medications	Histories	Face Sheet	***		
 Patient Search											ē	0
Search My Patient:	;		-									
		N	ame or MRN:				P Search					
My Patients Rec	ant		Addition	hal search criteria								

- 3. Enter the member name or medical record number and select *Search*.
- 4. Select the member.

apShot Chart Review	Results Review Flows	heets Allergies	Problem List	Medications Histories	Referral/Order Entry	••••
atient Search						ę
Search My Patients						
	Name or MRN:				Ø Search	
	Additio	onal search criteria				
My Patients Recent						
My Patients Recent	MRN	DOB	Sex	Street Address	City	
My Patients Recent Pat Name Cmtapum, Michael	MRN EID04353300	DOB 3/1/1972	Sex M	Street Address 13038 Interuban Ave S	City Spokane	
My Patients Recent Pat Name Cmtapum, Michael Tapumqms, Carly	MRN EID04353300 1218	DOB 3/1/1972 7/17/1975	Sex M M	Street Address 13038 Interuban Ave S 2715 Naches Ave SW	City Spokane RENTON	
My Patients Recent Pat Name Crntapum, Michael Tapumqms, Carly Tapumqms, Chuck	MRN EID04353300 1218 12112	DOB 3/1/1972 7/17/1975 7/17/1975	Sex M M M	Street Address 13038 Interuban Ave S 2715 Naches Ave SW 2715 Naches Ave SW	City Spokane RENTON RENTON	
My Patients Recent Pat Name Cmtapum, Michael Tapumqms, Carly Tapumqms, Chuck Tapumqms, Donald	MRN EID04353300 1218 12112 1217	DOB 3/1/1972 7/17/1975 7/17/1975 7/17/1975	Sex M M M M	Street Address 13038 Interuban Ave S 2715 Naches Ave SW 2715 Naches Ave SW 2715 Naches Ave SW	City Spokane RENTON RENTON RENTON	

KAISER PERMANENTE	Home In Bask	2 🤹 ket Patient List Re	eferral Search	Patient				Menu Log	Gout
SnapShot	Chart Review	Results Review	Flowsheets	Allergies	Problem List	Medications	Histories	Referral/Order Ent	ry
Patient Sea	irch								•
Search N	Ay Patients								
Search A	All Patients 🛩							Make	e this my default
All fields are	e required. Enter E	the first and last na nter patient inform () Name:	ame exactly as th nation	ney appear on	the patient's Kaise	er Permanente r	nember ID card.		
		Date of birth:							
							9 Search	🗶 Clear	
				2					

5. Confirm the correct member is displayed or select *Change patient* from the bottom of the screen to perform another search.

If the following message** is received, return to the home screen by selecting the *Home* button and select <u>Manual/Exception Referral Entry</u>.

We don't have your user record associated with a clinic or authorizing provider yet. Please use the Manual/Exception Referral Entry feature to have this specific authorization request reviewed for a coverage determination.

**Typically, this message appears because the Tax ID, Clinic or authorizing provider is not included within the selection options.



6. After confirming the member, select the provider requesting the service from the drop down menu and select *Accept*.

SnapShot	Chart Review	Results Review	Flowsheets	Allergies	Problem List	Referral/Order Entry	••••	
Order Ent	ry						ē	0
Select an au authorizatio	thorizing provider n request reviewed	for this order. If you d for a coverage dete	don't see your ermination.	provider, plea	se use the New Re	eferral feature to have this	specific	
		ິ se	elect Authorizin	ıg Provider				
				ſ				
					✓ Accept			

If the expected provider is not displaying in the drop down menu, please select *Home* and use the *Manual/Exception Referral Entry* option.

7. Enter service* being requested by name, e.g., Cardiology or Colonoscopy, or select the magnifying glass to search. Specialty names and their synonyms will return results.

le sket Patient Lis	t Referral Search	Japumqms, Sam				Menu Log Out	Epic
SnapShot	Chart Review	Results Review	Flowsheets	Allergies	Problem List	Referral/Order Entry	
☆ Order E	ntry						ē 0
E Preference	List 📀 Dx Associ	ation					
New proce	dure:		P			Mercado, Francis A - 91	1939739-FRANC
Unsigned n	new orders (0)						
			No uns	signed orders			
Orders sigr	ned in this enco	unter (0)					
					G		
							_
						_	Sign Orders

*Note – Search for the specialty first; using procedure codes will not yield a result. Specific procedures for your request will be found in the individual specialty order form.

8. Results display matching the searched criteria. Type in the service or double click to select the line.

Please make a selection						
Procedure: ref gastro I × Search						
My Preference List Matches:						
Name	Px Code	Туре	Priority	Status	Pref List	~
REF MASSAGE THERAPY	99201.221	Referral			KPWA AL REFERRAL PROCEDURES	
REF MATERNAL AND FETAL	99201.205	Referral			KPWA AL REFERRAL PROCEDURES	
REF MENTAL HEALTH	90806.100	Referral			KPWA AL REFERRAL PROCEDURES	
REF MENTAL (FOR MH PROVIDERS ONLY)	99201.427	Referral			KPWA AL REFERRAL PROCEDURES	
REF NATUROPATHY	99201.405	Referral			KPWA AL REFERRAL PROCEDURES	
REF NEONATOLOGY	99201.404	Referral			KPWA AL REFERRAL PROCEDURES	
REF NEPHROLOGY	99201.122	Referral			KPWA AL REFERRAL PROCEDURES	
REF NEUROLOGY	99201.123	Referral			KPWA AL REFERRAL PROCEDURES	~
100 records loaded, load more.					× Cancel	

Please make a selection					
Procedure: ref gastro	× Search				
My Preference List Matches:					
Name	Px Code	Type Priority	Status	Pref List	
	99201.114	Referral		KPWA AL REFERRAL PROCEDURES	
	11 1				
1 record loaded.				× Ca	ncel

Mental Health examples:

Please make a selection					
Procedure:					
My Preference List Matches:					
Name	Pa Code	Type	Priority	Status	Pref List
REF MENTAL (FOR MH PROVIDERS ONLY) (was MENTAL)	99201.427	Referral			KPWA AL REFERRAL PROCEDURES
REF MENTAL HEALTH	90806.100	Referral			KPWA AL REFERRAL PROCEDURES

Please make a selection					
Procedure: Protection					
My Preference List Matches:					
Name	PxCode	Type	Priority	Status	Prefilist
REF MENTAL HEALTH GAS CHEM DEP	90805,100	Refertal			KPWA AL REFERRAL PROCEDURES
REF CHEMICAL DEPENDENCY	99201.425	Referral			KPWA AL REFERRAL PROCEDURES
REF CHEMICAL DEPENDENCY (FOR CD PROVIDERS ONLY)	99201.424	Referral			KPWA AL REFERRAL PROCEDURES

Please make a selection						
Procedure: Search						
My Preference List Matches:						
Name	/	Px Code	Type	Priority	Status	Prof List
REF SUBCIONE TREATMENT (JALA SUBCIONE)	*	99201.425	Referral			KPWA AL REFERRAL PROCEDURES

9. Select the line to confirm the procedure.

The edit screen displays.

10. If prompted, select either *Internal* to refer to a Kaiser Permanente provider or *External* to refer to a non-Kaiser Permanente provider.

SnapShot Chart Review	Results Review	Flowsheets	Allergies	Problem	List Re	eferral/Order E	ntry	•••	23)	
Order Entry 🕨 Edit Ord	ler							ē	0	
REF GASTROENT	EROLOGY									
	Class: Internal [1008]		Interr	nal Exte	ernal					
Process instruc	tions: If you think to order and place	his request an order :	could be ha for an e-con	ndled virt sult for t	ually, re the specia	move this lty.	~			
Ret	terral: Priority:	Routine [1]		P	Routine	Urgent				
	🚯 To dept:			Q						
	To dept spec:	Gastroenterol	ogy [9]	Q						
Ques	tions:	Answer								
	1. Select the corre	Select the correct questions. 😝 🗸								

SnapShot	Chart Review	Results Review	Flowsheets	Allergies	Problem List	Medications	Demograph
☆ Order E	intry 🕨 Edit Or	der					
	REF GASTROEN	TEROLOGY					
	Process instru	ctions: If additional coverage an If you choos adjudicate a Select a pro is not availa	services are entern d will not be inclu e "Other" in the R nd a coverage det vider specialty by o ble for the location	ed in the comme ded in the final o eferral Reason b ermination may clicking one of th , your request V	ent box, they will not l overage determination ox, your request WILL be delayed. The choices. If you selev VILL NOT auto- adjud	be reviewed for n. NOT auto- ct a specialty that icate.	
	R	eferral: To prov	spec: Gastroent	erology [9]	P		
		🔥 To pro	vider:		P		
			Addres	5			Q
		🙏 To lo	c/pos:		Q		

- 11. Process Instructions: These are very important to read, as they have specific information depending on the request.
 - a. If additional services are entered in the comment box, they will <u>not</u> be reviewed for coverage and will not be included in the final coverage determination.
- 12. The *To provider* specialty will default. If this is incorrect, select the magnifying glass to change it.

• If you are choosing a specialty that does not match the initial search in step 7, please cancel and start the search anew.

Please make a selection	
To provider specialty: Destro × Search	
Search Matches:	
Title	Number
Gastroenterology	9
Pediatric Gastroenterology (aka Gastroenterology, Pediatric)	299

- 13. To locate a referred *To provider*, either:
 - a. Enter the provider name in the To provider field and press enter, or
 - i. If this option is chosen and a provider autopopulates to the field, there was only one provider option meeting the search criteria available.
 - b. Use the magnifying glass to perform a search.

SnapShot	Chart Review	Results Review	Flowsheets	Allergies	Problem L	ist Re	ferral/Ord	er Entry	
☆ Order E	intry 🕨 Edit Or	der							† 0
		Select a provi select a speci request WILL N	der specialty alty that is OT auto- adju	y by clickin not availab dicate.	g one of th le for the	e choice: location	s. If you , your	~	
	Referra	al: Priority:	Routine [1]		P 🗸	Routine	Urgent		
		To prov spec:	Gastroenterolog	ју [9]	P	N			
		To provider:			9	>			
			Address					\checkmark	
	\Im	To loc/pos:			Q				

The Provider Search screen will appear.

- 14. Complete fields and select Search. Filling in more fields will narrow the search results.
- 15. To search for all providers that offer the specialty, leave all fields except *Specialty* blank and select the *Search* button.

rovider Search				0
Name:		City:		
State:	Q	ZIP:		
Internal Department:	Q	Provider Specialty:	Gastroenterology [9]	
Gender:	Q	Language:	Q	
Geographic Area:	Q			
			🔎 Søgrch 🔌 Clear 🗙 Cancel	

Providers meeting the search criteria will display based on proximity to the patient's home address. If an expected provider did not display, select either *Next Level* or *All In-Net Levels* to view all providers within the Kaiser Permanente network meeting the search criteria.

- Utilize the scroll bar on the right hand side of the screen to view additional providers.
- Additional providers may display. Note the <u>network level</u> with Kaiser Permanente.
- Click on the header to re-sort.

Pro	ovider Search				•
⊞ <mark>Se</mark> Se	arch Criteria arch Results: 9 providers found			(Next Lev	el) (All In-Net Levels)
	Provider Name	Network Information	Location	Location Address	Distance From Patient ⊾
0	WHIDBEYHEALTH MEDICAL CENTER	In-Network	WHIDBEYHEALTH MEDICAL CENTER	101 N MAIN ST COUPEVILLE WA 98239	150.53 mi
0	WHIDBEYHEALTH MEDICAL CENTER	In-Network	WHIDBEYHEALTH MEDICAL CENTER	101 N MAIN ST COUPEVILLE WA 98239	150.53 mi
0	SKAGIT NORTHWEST ORTHOPEDICS ASC AT CONTINENTAL	In-Network	SKAGIT NORTHWEST ORTHOPEDICS ASC AT CONTINENTAL	1500 Continental PI Mount Vernon WA 98273	152.15 mi
0	SKAGIT REGIONAL HEALTH	In-Network	SKAGIT REGIONAL CLINICS-RIVERBEND	2320 FREEWAY DR MOUNT VERNON WA 98273	153.01 mi
0	SKAGIT NORTHWEST ORTHOPEDICS	In-Network	SKAGIT NORTHWEST ORTHOPEDICS - COMMERCIAL AVE	2720 COMMERCIAL AVE ANACORTES WA 98221	163.52 mi
0	SKAGIT NORTHWEST ORTHOPEDICS ASC AT LAVENTURE	In-Network	SKAGIT NORTHWEST ORTHOPEDICS - COMMERCIAL AVE	2720 COMMERCIAL AVE ANACORTES WA 98221	163.52 mi
0	PEACEHEALTH MEDICAL GROUP	In-Network	PEACEHEALTH WOUND HEALING CENTER	4280 MERIDIAN ST STE 110 BELLINGHAM WA 98226	177.12 mi
0	PEACEHEALTH ST JOSEPH MEDICAL GROUP	In-Network	PEACEHEALTH WOUND HEALING CENTER	4280 MERIDIAN ST STE 110 BELLINGHAM WA 98226	177.12 mi
0	PEACEHEALTH MEDICAL GROUP	In-Network	PEACEHEALTH MEDICAL GROUP CENTER FOR ORTHOPEDICS & SPORTS MEDICINE-LYNDEN	1610 GROVER ST STE C6 LYNDEN WA 98264	185.36 mi
				✓ Acce	pt X Cancel

If the provider being sought is not displaying, leave the *To Provider* field blank and enter comments with the *Referred To* provider contact information.

Without the required information, Kaiser Permanente cannot process the request.

Required information:

- Provider/clinic name
- Full clinic address
- Phone number of the clinic
- If known, include the TIN or NPI

16. To select a provider, click the radio button next to the provider's record and click Accept.

Pro	vider Search						6	
E Se	arch Criteria arch Results: 20 pro	oviders foun	d					
~	Name	Level Title ▲	Multiple Provider Specialties	Multiple Languages	Level Location/Place of Service	Level Location/Place of Service Address	Facility Specialty	^
0	PEACEHEALTH MEDICAL GROUP - SEDRO WOOLLEY	Preferred	Family Medicine, Emergency Medicine, Cardiology, Gastroenterology, Urgent Care, Allergy & Immunology, Neurology, Obstetrics/Gynecology, Orthopedic Surgery, Pulmonary Medicine, Nuclear Medicine, Sports Medicine, Gerontology/Geriatrics;Midwifery, Consultative Internal Medicine, Sleep Medicine, Cardiac Electrophysiology, Interventional Cardiology		PEACEHEALTH MEDICAL GROUP [850000811]	1990 Hospital Dr SEDRO WOOLLEY WA 98284		
0	Northwest Gastroenterology Clinic	Preferred	Family Medicine, Gastroenterology, Consultative Internal Medicine		NORTHWEST GASTROENTEROLOGY CLINIC [800001495]	STE 301 2979 Squalicum Pkwy BELLINGHAM WA 98225-1813		
0	Northwest	Preferred	General Surgery, Gastroenterology		NORTHWEST	STE 202 2930		~
V						✓ Accept	X Cancel	1

The edit screen re-displays and the provider has populated the *To provider* field. The address may display as a P.O. Box. This is the address Kaiser Permanente has on record for the provider organization. The referred to provider office should confirm their clinic location with the patient when scheduling an appointment.

Class:	External [1007]	Q	Internal	🗸 Exter	nal		
Process instructions:	are referring If you choose NOT auto-adjud Select a provi select a speci	to any other phys: "Other" in the Rei icate and a covers der specialty by o alty that is not a	ician, cho ferral Rea age determ clicking o available	oose "Ex ason box mination one of t for the	xternal". x, your re n may be d the choice a location	quest WILL elayed. s. If you , your	<
Peferral	request WILL N	OT auto- adjudicat	te.		Deutine	Unevent	
Referral.	Priority:	Routine [1]			Koutine	Orgent	
	To prov spec:	Gastroenterology [9]		0			
	To provider:	DIGESTIVE HEALTH CO	ONSULTANTS	PLP			
		Address					
							\checkmark
	To loc/pos:	DIGESTIVE DISEASE &	ENDOSCOPY	CP			

17. If prompted, select the correct questions pertaining to the request from the drop down – *Internal* if referring into a Kaiser Permanente provider or clinic, *External* if referring to a non-Kaiser Permanente provider or contracted network provider.

Class:	External [1007]	P Internal	✓ External
Process instructions:	are referring to any ot	cher physician, c	hoose "External".

18. Answer questions by selecting from the drop down or by using the magnifying glass to search for options. Questions vary depending on values selected.

Questions:		Ansv	ver			
	1. Indicate the timeframe that patient care needs to occur:					•
	2. Reason For Referral?					•
	3. Requested Place Of Service?	Offi	ce [11]		ρ	
	4. Facility For Procedure (If facility is not in list add in comments below)				ρ	
	5. Ok to substitute an in network provider if the chosen referred to provider is not in the member's network?	Y	'es	No		
	6. Is this a retrospective request? (In the past)	Y	'es	No		
	7. Contact Name:					
	8. Contact Number/Ext:					
	9. Referred services may be covered by another party?	Y	'es	No		

ALERT: Ok to substitute an in-network provider if the chosen referred to provider is not in the member's network?

- If you answer **yes**, this allows the Kaiser Permanente referral team to update the authorization to an in-network provider.
- If you answer no, the request will follow Kaiser Permanente's current process of clinical review. To indicate the reason for selection of "No," enter a comment in the Comment field. This is not required.

Does patient have any functional status or cognitive limitations?	No
🖌 Is this a retrospective request? (In the past)	Yes
Solution Was the earliest visit more than 7 days ago?	Yes
Solution Number of visits missing authorization?	1
Surface List date(s) missing authorization?	2/3
Is the REASON the authorization was not requested timely due to extenuating circumstances?	Yes 🔹
\leq Select the appropriate reason(s):	Unable to know the pat × <
Se Contact Name:	0
Se Contact Phone/Ext:	0

REMINDER: Entering Comments will not stop the referral from processing as it has historically.

19. *Dx association*: Enter as many diagnoses as appropriate. Select the magnifying glass to search.

- 20. If you are providing supplemental material such as chart notes, select Add files.
- 21. Browse for the file.
- 22. Attach.

Dx association:	Add a new diagnosis:		
Attach files:	Add files		
	100.0 MB Total Allowed	0 Files	
		✓ Accept	× Cancel

- 23. Confirm the file is attached.
 - a. File name will display.
 - b. File size will display.
 - c. Screen will indicate number of files attached.
- 24. Enter (optional) description.
- 25. Attach additional files if appropriate.

0			
Description			
chart notes			

26. Select Accept.

The *Referral/Order Entry* screen reappears, and the system displays that there is an Unsigned new order.

☆ Order Entry	e 0
E Preference List O Dx Association New procedure: Unsigned new orders (1)	Mercado, Francis A - 911939739-FRANC
REF GASTROENTEROLOGY	1
Orders signed in this encounter (0)	

- 27. Review the request for accuracy.
- 28. If necessary, select the pencil icon to edit,
- 29. If additional orders/referrals are needed for this patient, you can continue to add orders. Once ready to sign and submit, they can be submitted at the same time.

☆ Order Entry	ē	0
E Preference List 📀 Dx Association		
New procedure:		
Unsigned new orders (3)		
REF ORTHO		丗
Image: Second		
REF PT		丗
📀 External		
REF RADIOLOGY		8
⊗ External		
Orders signed in this encounter (0)		
Don't see the order you're looking for? Try Order Review.		
~	Sign Order	rs

- 30. Select *Sign Orders* in the lower right corner of the screen. Only those who are authorized to do so should Sign Orders and are representing the provider and provider office when doing so.
- 31. The Confirmation screen will appear that the order has been signed.

☆ Order Entry	ē 0
E Preference List O Dx Association	Mercado, Francis A - 911939739-FRANC.
Unsigned new orders (0)	
	No unsigned orders
Orders signed in this encounter (1)	
REF GASTROENTEROLOGY	
Scheduling needed. External	

Manual/Exception Referral Entry

Select *Manual/Exception Referral Entry* when the clinic name is not under the *Ordering Clinic/Tax ID* on the *Referral/Order Entry* option. Most non-contracted providers will use this option. Some contracted providers may use this tool only if instructed by Kaiser Permanente.



If the following message is displayed, return to the the home screen by selecting the *Home* button and select <u>*Referral/Order Entry*</u>.

Do you see your Clinic and/or Authorizing Provider in the Order Entry feature? If so, using this feature will cause a delay in your request. Please use Referral/Order Entry (tab above). If your Ordering Clinic or Authorizing Provider is not displayed on the Order Entry screen, please continue.



If the Ordering Clinic or Authorizing Provider is not displayed on the Order Entry screen, please continue.

- 1. Select Manual/Exception Referral Entry.
- 2. Enter member name or medical record number and select Search.
- 3. Select member.

- 4. Confirm the correct member is displaying or select *Change patient* from the bottom left side of the screen to search again.
- 5. Use the magnifying glass to search for *Referral type*.



6. Select *Referral type.*

7. Scroll to the appropriate selection or use the *Referral type* search bar to locate the type.

Please make a selection		
Referral type: Search		
Search Matches:		
Name	ID	~
Alternative Health	14	
Ambulance	40	
Dialysis	43	
DME/9&O	12	
Eye Care	62	
Home Health Services	1	
Hospice OP	46	
Laboratory Services	47	~
18 items loaded.	×c	ancel

Upon selection, the *New Referral* tab and the selected referral type will display. The most common use is Outpatient Services.

8. Select Next.

The *General Information* tab will display. Content may vary based on the selection made in the prior screen.

9. View *Priority*; update if appropriate.

(i) Genera	I Information							
Priority			Туре			Reason		
Routine [1]		× ,O	DME/P&O [12]				θ	P
Class			Number of visits	Start date	 Expiration date		Ν	
V	Outgoing		1	θ]	hơ"	

Please make a selection	n	
Priority:	Search	
Search Matches:		
Name		ID
Routine		1
Urgent		2

Referral Type selected in the prior screen displays. If the referral type needs to be changed, select the *Back* button from the bottom right of the screen and re-select.

10. Select the *Reason* for the referral.

Please make a selection	
Reason: Search	
Search Matches:	
Name	ID
Consult Only	1
Evaluate and Treat-Surgery if Indicated	3
Itemized Services	13
Procedure Only	15
Second Opinion Only	9

11. View *Number of visits* (or duration). Service will determine if this is number of visits or number of months. Update if appropriate. These will be reviewed by the referral team and final determination will be made on the number of visits.

Num	ber o	of visits
1		

- 12. Select *Start* date. We recommend using the calendar to make your selection or use the shortcut noted in <u>Tips & Tricks</u>.
 - a. A retro referral may be requested up to 6 months in the past.
 - b. A future referral may be requested up to 30 days in the future.
- 13. Select *Referral By Provider* by selecting the magnifying glass to search. If the table displays blank upon searching, this field may be left blank.
- 14. View *Location/POS*; update the location or place of service if appropriate.

🖘 Referral	Ву			
Provider		Location/PO	S	
	4	0	<u>A</u>	Q

Referral To Provider

Providers are a provider place of service, not a practitioner (physician, ARNP, etc)

🔫 Referral To	<i>40</i>		
Provider	Location/PC	DS	
<u>^</u>	9	<u> </u>	Q
Provider specialty	Location/PC	DS type	
θ	2	θ	Q

- 15. *Provider specialty* is a required field. We recommend completing this field first.
- 16. Select the magnifying glass under the *Provider* field to begin the search.

SnapShot	Chart Review	Results Review	Flowsheets	Allergies	Manual/Exc	eption Referral Entry		
☆ Provide	er Search						ę	•
	Name:	1			City:			
	State:			0	ZIP:			
Inte	ernal Department:			Prov	vider Specialty:			P
	Gender:			0	Language:			P
	Geographic Area:			0				
			6			🔎 Search 🔌 Clear	X Cance	el

17. If specialty was not entered on the prior screen, enter specialty or select the magnifying glass to search for and select the specialty.

Provider Search			ē 0
Name:		City:	
State:	Q	ZIP:	
Internal Department:	Q.	Provider Specialty:	Durable Medical Equipment [277]
Gender:	Q	Language:	٩
Geographic Area:	Q.		
			Search Clear Cancel

- 18. Enter search criteria, e.g. provider name
- 19. Select Search.
 - If no search criteria is entered and *Search* is selected, the provider list displays with contracted (Preferred) providers offering the specialty listed.

82	Provider Search						ē (9
± Se Se	arch Criteria arch Results: 35 provid	lers found				(Next Level) (All	In-Net Leve	els)
	Name	Level Title ▲	Multiple Provider Specialties	Multiple Languages	Level Location/Place of Service	Level Location/Place of Service Address	Facility Specialty	^
0	Yakima Orthotics & Prosthetics Pc	Preferred	Orthotics, Durable Medical Equipment		KITTITAS ORTHOTICS AND PROSTHETICS [850002803]	STE 110 1206 N Dolarway Ellensburg WA 98926		
0	Yakima Orthotics & Prosthetics Pc	Preferred	Orthotiूs, Durable Medical Equipment		YAKIMA ORTHOTICS & PROSTHETICS [850002802]	313 S 9th Ave Yakima WA 98902		
0	Kittitas Orthotics And Prosthetics	Preferred	Durable Medical Equipment		KITTITAS ORTHOTICS AND PROSTHETICS	STE 110 1206 N Dolarway Ellepsburg WA		~
						✓ Accept	× Cancel	

- 20. Select provider. Use the right hand scroll bar to view additional provider offices meeting the specialty criteria entered.
- 21. Click on the radio button and select the *Accept* button from the bottom right of the screen.

The General Information Referral To provider screen will populate based on the selection.

- 22. Confirm information displaying is what was expected or select *Back* button in the bottom right of the screen to perform the search again.
- 23. Select Next.

The *Diagnoses/Services* tab displays. Content may vary based on the selection made in the prior screen.

SnapShot	Chart Review	Results Review	Flowsheets	Allergies	Manual/Exception	n Referral Entry		
New Refe	erral						9	0
√ Referral	Type √ G	eneral Information	Diagnos	es/Services				
 Do you s request. Ple screen, plea Diagr 	ee your Clinic and ase use Referral/C se continue.	/or Authorizing Prov order Entry (tab above	ider in the Orde e). If your Order	er Entry feature ring Clinic or Au	? If so, using this feat ithorizing Provider is	ure will cause a de not displayed on	elay in your the Order En	ry
Diagnosis			(9			Q	
+ Add								L3
主 Servie	ces 🔒				(It is re	quired to fill in at least one	item in this section)	
Procedure		P Re	evenue code		P Modifi	iers	Qty Unit type	
+ Add	tionnaire							

24. Search for and enter Diagnosis by code or name.

Please make a	selection		
Diagnosis: 169	× Search		
Search Matches:			
Code	Name	HCC	Specific/Generic
R69	Illness in pediatric patient		Both Specific and Generic
R69	Illness, unspecified		
R69	Severe comorbid illness		Both Specific and Generic
R69	Multisystem disorder		Both Specific and Generic

- 25. The tool may provide guidance if the diagnosis isn't specific enough.
- 26. Select *Add* to enter additional Diagnoses.



27. Search for and enter *Services* by either Procedure code or Revenue code – words or numbers, or use the magnifying glass to select.

E Services 🔒			<	(It is required to fill in	at least one item in this section)
Procedure	Q	Revenue code	Q	Modifiers	Qty Unit type
+ Add					

- 28. Select *Add* to enter additional codes.
- 29. Answer *Questionnaire* Content may vary.



30. Enter provider office information in the field notes. Replace asterisks *** with office information. Answering the questions is a requirement in order to process the request. Without this information, Kaiser Permanente cannot associate the request with the requesting office, potentially impacting patient care.

Tip: Select F2 to move to the next set of asterisks.

Referring	Provider Name:***
Referring	Clinic Name:***
Submitter	Name:***
Submitter	Phone Number:***

- 31. If you are providing supplemental material such as chart notes, select *Add file*.
- 32. Browse for the file please note there is a file size limit of 100 mp; files can be split up to be sent if they are larger than this size.
- 33. Attach file.
- 34. Confirm the file has attached.
- 35. Select Request Referral.

+ Back Request Referral	X Cancel Request
-------------------------	------------------

The Referral Details screen displays.

- 36. Review content.
 - c. Select the *Back* button to return to the prior screen to complete updates.
 - d. Select Add Note/Attachment if it was missed in the prior step.
 - e. Note Referral number.

Referral			Referral # 1848433
Referral Information			
Referral #	Creation Date	Referral Status	Status Update
1848433	03/05/2020	Pending Review	03/05/2020: Status History
Status Reason	Referral Type	Referral Reasons	Referral Class
ncomplete Referral Review			Outgoing
o Specialty To	o Provider	To Location/Place of Service To Department	To POS Type

Referral Status Lookup

1. From the Affiliate Link home page or any Affiliate Link screen, select *Referral Search*





- 2. Select fields appropriate to the search.
 - a. Referral Type
 - i. Incoming if the referral is coming into the clinic.
 - ii. Outgoing if it is a referral entered by the referring clinic
 - b. Creation Date
 - c. *Referred By* provider (if you selected outgoing). The provider must be listed to perform a search using this feature.
 - d. Referred To provider (if you selected incoming)
 - e. Referral Status
 - f. Scheduling Status; not used by non-Kaiser Permanente providers
 - g. *Referral ID;* This field allows you to search for a specific referral if you already have the Referral ID number.
 - Filling in more fields further narrows the search results.

Loaded 1 ou	Itgoing	referral.							C	C Refresh	
Referral ID		Patient Name	Status	Priority	Referred by Provider	Referred by Location	Referred to Provider	Referred to Department	Created	Expires	
1848432	Chart	Tapumqms, Sam	Pending Review	Routine	Mercado, Francis A	GROUP HEALTH COOPERATIVE	Pllc, Digestive Health Consultants		03/05/2020	09/01/2020	

3. Click on *Referral ID* to open the referral.

☆ Referral by Member ▶ Referral Details	ē	6
🕞 Add Note/Attachment 🛛 🛱 Referral Message		

Referral			Referral # 4106	8564
Referral Information				
Referral # 4106856414	Creation Date 08/16/2023	Referral Status Pending Review	Status Update 08/16/2023: Status History	
Status Reason	Referral Type	Referral Reasons	Referral Class	
Incomplete Referral Review	Alternative Health	Itemized Services	Outgoing	
To Specialty	To Provider	To Location/Place of Service To Departm	nent To POS Type	
Massage Therapy	none	MASSAGE THERAPY PROVIDER none	Office	
o Vendor	Referred By	By Location/Place of Service	By Department	
one	Mercado, Francis A	GROUP HEALTH COOPERATIVE	KPWA AFFILIATE LINK	
riority	Start Date	Expiration Date	Referral Entered By	
outine	03/05/2020	09/01/2020	Mercado, Francis A Test	
isits Requested	Visits Authorized 3	Visits Completed	Visits Scheduled	

If the *Referral Status* is *Pending Review*, the *Authorized* visits displayed are <u>NOT</u> yet authorized.

By Location/Place of Service displays as Group Health Cooperative as a result of legacy system updates that have not yet been completed.

Procedure Information					
Procedure 99201.114 - REF GASTROENTEROLOGY	Modifiers None	Revenue Code None	Provider PIIc, Digestive Health Consultants	Requested 0	Approved 0
99201 (CPT®) - OFFICE VISIT E&M NEW SELF LIMIT/MINOR 10	None	None		3	3

Procedure Information: For audit purposes, CPT codes that are changed, whether as a result of programming table updates or manually, are struck through and not changed. Both *Requested* and *Approved* visit counts will also display as 0. For audit purposes, this cannot be hidden from the screen. Please ignore any lines that are crossed out.

Referral Notes				Number of Notes: 1
Type General	Date 03/05/2020 8:56 AM	User Mercado, Francis A Test	Summary Referral Attachment	Attachment Document on 3/5/2020 8:56 AM by Mercado, Erancis A Test: chart potes
Note Auto-generated fro	om ORD #137972145	l≩.		Planus A rest, chart notes

- If a document, such as chart notes or medical records, were attached to the original request, they may be accessed from *Referral Notes*.
- Documents sent to a provider office and/or member may display here.
- Once health plan determination letters have been sent, they will display here.

If chart notes or other clinical information were not attached to the original request, they may also be added through this feature.

KAISER PERMANENTE	And the Home	In Basket	List	Referral Search	P atient
Referral Sea	irch 🕨	Referral	Details		
Add Note/At	tachmen	t 🖾 Refer	ral Message		

In Basket Messages

The *In Basket* will contain messages for all tax ID numbers the user is authorized to access via OneHealthPort, all in one in basket. Every Affiliate Link user accessing Kaiser Permanente's referral tools will have access to the in basket. Kaiser Permanente recommends providers check their *In Basket* for new messages each time Affiliate Link is accessed.

If the provider office requested chart access, a message will appear in the *In Basket* once the request has been processed.

IMPORTANT:

Regardless of whether the provider is the <u>Referring</u> or <u>Referred to</u> provider:

- d) Providers with an Affiliate Link account (anyone accessing the Kaiser Permanente Washington Secure Provider Portal through OneHealthPort) will receive referral and coverage determinations via the Affiliate Link <u>In Basket</u>
 - Provider offices without a referring or referred to clinician will follow rules b) and c) below.
- e) If the provider has no Affiliate Link account and Kaiser Permanente has a fax number on file, that provider will receive referral and coverage determinations via fax.
- f) If none of the above is set up, the provider will receive a hard copy referral and coverage determination notice via USPS mail.

To view messages:

- 1. Select In Basket
- 2. Select Referral Notification Letter

	KAISER	Patient List Referral Search Qmstapum, M	ila		* *	Henu Log Out
	My In Basket	My Messages				53 @ 0
	My Messages Referral Notification Letter (Refresh Search				9
		Favorite Searches		Public		Add/Remove
		No searches found		RX Auth Outside Provider	≭ Keep × Remove	
, i , i , t		Folder Summary - My Messages Referral Notification Letter 11 /	72			

	KAISER	et Patient List Referral Search Pa	L atient		Menu Log Out
-	My In Basket	My Messages 🕨 Referral	Notification Letter		53 🖶 😧
	My Messages Referral Notification Letter (P C ✓ New Msg Refresh Done	Print Selected Select Patient	P K C Open Referral Search Sort Properties	
		□ Referral Priority ▲ Msg Date	Patient Referral ID R	eferral Status Reason	Specialty Group
		Routine 08/17/2023 12:	2:56 PM Brock, Big Tony 4106861464 D	enied Not Medically Necessary Member Liable [2]	Endocrinology 471268477-Advanced Diabetes & Endocrin
		Routine 08/17/2023 12:	2:47 PM Brock Big Tony 4106861464 D	enied Not Medically Necessary Member Liable [2]	Endocrinology 471268477-Advanced Diabetes & Endocrin
-		Routine 08/17/2023 12:	2:42 PM Brock Big Tony 4106861464 D	enied Not Medically Necessary Member Liable [2]	Endocrinology 471268477-Advanced Diabetes & Endocrin
		Routine 08/17/2023 12:	2:41 PM Brock. Big Tony 4106861464 D	enied Not Medically Necessary Member Liable [2]	Endocrinology 471268477-Advanced Diabetes & Endocrin
		Routine 08/17/2023 12:	2:39 PM Brock, Big Tony 4106861464 D	enied Not Medically Necessary Member Liable [2]	Endocrinology 471268477-Advanced Diabetes & Endocrin 💌
		•			•
1					e

Leverage the Sort feature to sort through lengthy lists.

My In Basket	My Messages 🕨 Referral N	otification Letter			53 8 8
My Messages Referral Notification Letter (New Msg Refresh Done	Print Selected Select Patient	Image: product of the second seco	Properties	
	Referral Priority ▲ Msg Date Referral Priority ▲ Msg Date Q8/17/2023 12:56	Patient Referral ID Re 2M Brock Big Tony 4106861464 D	eferral Status Reason	Specialty	Group
	C Roduine 06/17/2025 12:56	W BIOCK BIG 10119 4106861464 D	enied Not Medically Necessary Men	iber clable [2] Endocrinology	471200477-Advanced Diabetes & Endocrin

X Cancel

Accept

Sort By



3. Select the line with the referral to be viewed.

P	0	~	-			¥,	9		
New Msg	Refresh	Done	Print Selected	Select Patient	Open Referral	Sort	Properties		
	Status 🔺	Patient		RFL #	Event Type			Msg Date	Msg Time
	New	Uatapum, Ra	у	1844454	KPWA AL Referral Den	ied		03/04/2020	3:05 PM
	Read	Tapumqms, Et	han	1848427	KPWA AL Referral Autho	rized		03/04/2020	5:48 PM
	Read	Tapumqms, C	arly	1848381	KPWA AL Referral Denie	d		03/03/2020	3:32 AM
	Read	Tapumqms, C	arly	1848343	KPWA AL Referral Autho	rized		02/28/2020	12:38 PM
	Read	Tapumqms, C	arly	1848346	KPWA AL Referral Denie	d		02/28/2020	3:05 PM
🗏 Message	e 🛛 Patient	info 🖪 M	eds/Problems	Vitals/Labs	🗏 My Last Note	E H	elp ^{Là}	b	Set as Default
Ethar	n Tapumqms	8	Referral ID: Class: Priority:	184 Ou Roi	48427 tgoing utine	Rec Typ	eived on: be:	3/4/2020 Radiolog) У
Male, 14 MRN	year old, 1/7/20 I: EID04353866	006		Info					

If a patient was being worked and the user moves to the *In Basket*, selecting *Opened Patient* from the bottom of the screen will display any messages pertaining to that member.

KAISER PERMANENTE Home In	Basket Patient List	Referral Search	L Tapumqms, Carly
My In Basket	My Messages		
My Messages Referral Notifications (2)	New Msg Ref	C fresh	
4	Folder Summary - Referral Notification	<u>My Messages</u> s 2	2/5
My In Basket			
Opened Patient	1 N 1 N 1 N 1		



Patient Menu

 Select *Open Chart Review*. This button will not display if the user does not have chart access. To request chart access, see instructions at <u>request chart access</u>.

If the member record was previously open, selection of *Open Chart Review* will open that member's record. If a different patient is needed, select the *Change patient* button at bottom of screen.

KAISER PERMANENTE Home	In Basket Pati	😍 🤤 ent List Referra	l Search	2 Tapumqms	× , Carly		
	SnapSh	ot Chart R	eview	Results F	Review		
	🕸 Cha	art Review - L	oaded: 1,	Filtered cour	nt: 1		
	Encour	nters Notes	Labor	atory Im	aging		
	🗏 Start	Review C Ref	resh 🔳	Encounter	Flowsł		
Male, 44 year old, 7/17/1975	Filters: De	Filters: Default filter					
MRN: 1218		When v	т	ype 🔉	Dep		
Care Team: No PCP	Recent \	/isits					
ALLERGIES Not on File		02/28/2020		community Orders	AFL		
ACCESS ENDS 5/28/2020							
Change patient		-					

2. Select tab(s) to view relevant information.

☆ Chart Re	view - Lo	oaded: 1, Filtered	count: 1					R.7 16 3
Encounters	Notes	Laboratory	Imaging	Procedures	Cardiac Studies	Medications	Referrals	Episodes
Start Review	C Refr	esh f Encou	nter Flowshe	ets T Filters	- 🗸 Default filter			

3.

Select the patient name at the top of the screen to open *Referral/Order Entry* or *Manual/Exception Referral Entry* without having to return to the Affiliate Link home screen. You can also search all referrals for the patient. Only referrals where your organization is either the referring or referred to provider will display.

Patier View patient chart		*	
Clinical Review	Patient Profile	Orders	
SnapShot	Demographics	Order Entry	
Chart Review	Documents	Order Review	
Results Review	Misc. Reports	Referrals	
Flowsheets	Coverages	New Referral	
Allergies	Provider Search	Referral by Member	
Problem List			-
Medications			

End document