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Getting Started

This chapter provides:

- An overview of the NaviMedix Referral Processing Application (RPA)
- Tips on how to interact with Web-based software applications
- Steps for logging in to RPA and getting started
- A description of the RPA toolbar and Referral Log screen
- Steps for logging out of RPA

About the NaviMedix Referral Processing Application

The NaviMedix Referral Processing Application (RPA) is a Web-based system that automates referral-processing interactions between providers and health plans.

With RPA, you can perform referral tasks electronically, eliminating paperwork and simplifying administration. RPA allows you to:

- Create referrals and submit them to health plans for approval
- Track referrals by patient, provider, or plan
- Quickly check on the status of referrals
- Add notes or action (to-do) items to referrals
- Create and maintain patient and specialist records
- Create informational reports

How does the NaviMedix system work?

When a health plan contracts with NaviMedix to automate its referral processing, NaviMedix creates electronic versions of the health plan's referral forms and implements business rules to facilitate the referral process. If you also create referrals for patients in other health plans, NaviMedix creates electronic versions of referral forms for these plans as well.

When you want to create and submit a referral to the plan, you can now do it electronically. To create a referral, you do the following:

- Select the patient for whom you want to create a referral.
- Select the specialist to whom you want to refer the patient.
- Fill out the online referral form.
- Submit the referral for processing.

Once you submit the referral, the NaviMedix software checks the plan's referral-processing procedures and approves or denies the referral.

Note: For patients who are not members of plans that subscribe to NaviMedix, you can still use RPA to enter patient information and create referrals. The only tasks you must perform manually are submitting the referral to the plan and updating the status of the referral.

How to get started

To get started using RPA, do the following:

- Look through the Table of Contents to become familiar with the tasks RPA can perform.
- If you have never used a Web-based software application, read the next section to learn some basics about interacting with Web-based software.
- Read the rest of the sections in this chapter to learn how to log in to RPA, and to become familiar with the RPA toolbar and Referral Log.
- Read Chapter 2 to learn how to create and submit a new referral, and how to search for and work with existing referrals.

Tips if you are new to the Web

Web-based applications use a graphical interface. This means that you can usually just click icons on the screen or choose options from menus to perform tasks. Most Web-based software applications use similar techniques, so when you learn how to interact with one application, you already know a lot about interacting with others.

This section describes some of the common ways you interact with Web-based applications, including RPA, and defines some of the terminology this book uses to describe these interactions.

Using the mouse

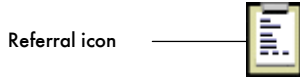
The mouse that is connected to your computer lets you position your pointer on the screen. Once the pointer is positioned where you want it, you click the mouse button—for example, to select an option or button or to begin typing text.

The mouse has a left and a right button. The button you use most often is the left mouse button. You click it, for example, to select an icon or an option on a menu. When a step in this book tells you to **click** something, it means click the left mouse button.

Some tasks require you to click the mouse button twice in quick succession. When a step in this book tells you to **double-click** something, it means click the left mouse button twice in quick succession.

Clicking icons and buttons

Steps in this book often tell you to click an icon or a button. For example, you click the Referral icon to open a referral from the Referral Log.



To click an icon or button, do the following:

1. Move the mouse until the pointer is over the icon or button on the screen.
The pointer changes to the shape of a hand when it's over an icon or button you can click.
2. Click the left mouse button.

Entering text in fields

Many screens have fields in which you need to enter text—for example, a patient name or address. The name of the field is usually next to the field box where you enter the text. For example, the screen where you enter patient information looks like this:

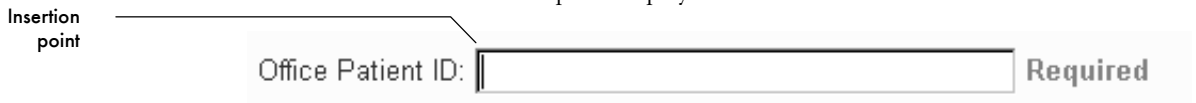
Add Patient

Office Patient ID:	<input type="text"/>	Required
Last Name:	<input type="text"/>	Required
First Name:	<input type="text"/>	Required
Middle Initial:	<input type="text"/>	
SSN:	<input type="text"/>	

To enter text in a field, do the following:

1. Move the mouse until the pointer is over the field box where you want to enter the text.
The pointer changes to the shape of an I when it's over a field where you can enter text.

2. Click the left mouse button.
You will see an insertion point display in the field.



3. Type the text you want to enter.
If you make a mistake, you can backspace over it and retype the text. You can also click where you want to insert text and then type the new text.

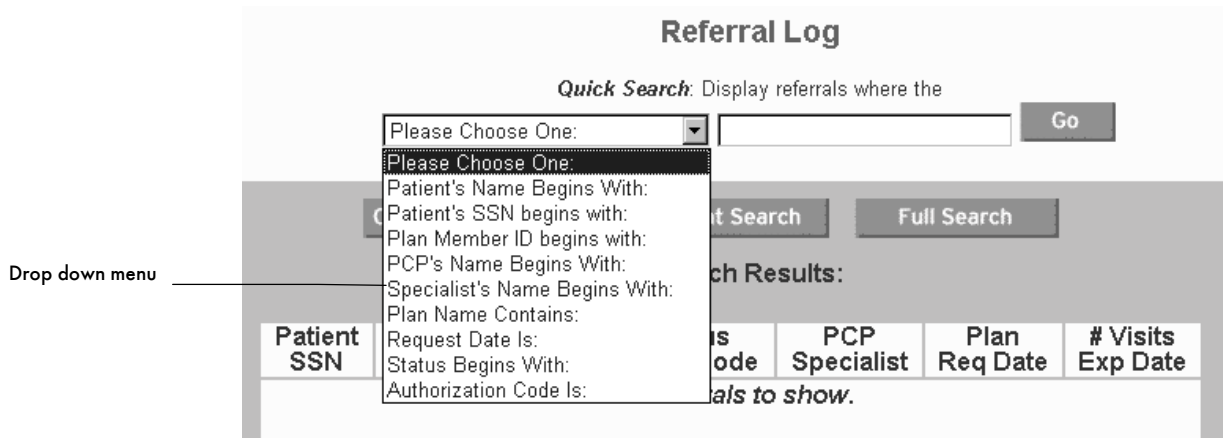
Selecting menu options

In some fields, you make an entry by selecting an option from a menu rather than by typing text. If a field has a menu, you see a down arrow at the end of the field box. A field that has a menu looks like this:

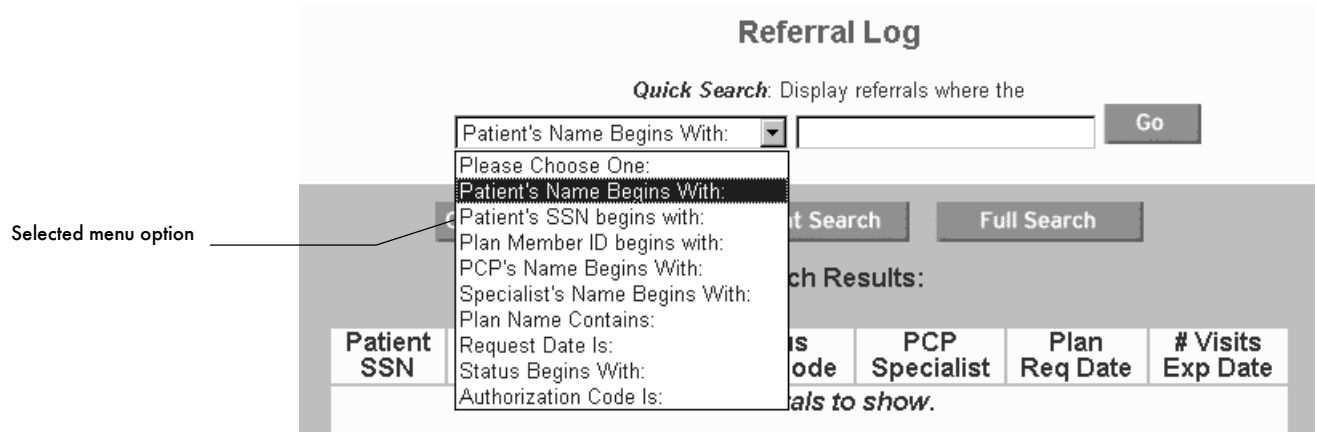


This book sometimes tells you to select an option from the menu. To select a menu option, do the following:

1. Move the mouse so the pointer is over the down arrow and click the left mouse button.
The menu displays—or **drops down**—so you can see the options on it.



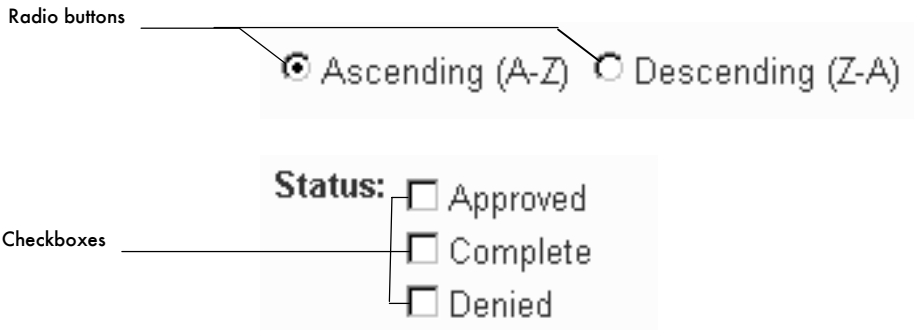
2. Move the mouse downward over the menu options until the one you want is highlighted.



3. Click the left mouse button to select the option.

Selecting radio buttons and checkboxes

Some screens let you select options by clicking radio buttons or checkboxes. A radio button is a small circle that appears next to an option label, and a checkbox is a small square.

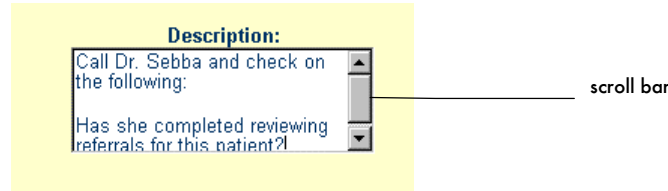


To select an option with a radio button, click the radio button so it is highlighted. If you then select another option, the option you selected previously is automatically deselected.

To select an option with a checkbox, click the checkbox so a checkmark appears in it. Click the checkbox again to remove the checkmark and deselect the option.

Scrolling

Sometimes the entire text of a form or field can't fit within the screen or field. In these cases, you see a scroll bar that allows you to scroll the display up or down.



1. Move the mouse so the pointer is over the up arrow at the top of the scroll bar and click the left mouse button to scroll up one line. Click the down arrow to scroll down one line.
2. Move the mouse so the pointer is over the square in the scroll bar, hold down the left mouse button, and move the square up or down. When you see the information you want to view, release the mouse button.
3. Click the scroll bar above or below the square to move up or down one screenful.

Using the Tab key to move among fields

As the previous sections explain, you use the mouse to move among fields on a screen; just click the field where you want to enter text or select an option. However, as a shortcut, you can also use the Tab key to move from field to field.

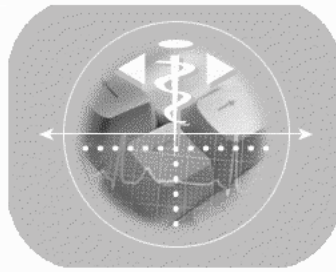
- Press Tab in any field to move to the next field.

Logging in to RPA

To start working with RPA, you must log in. To do so, you need to know the user name and password that NaviMedix assigned to you or that you selected. If you don't know your user name and password, or if you have forgotten them, contact NaviMedix.

1. Double-click the NaviMedix icon on your computer screen.
RPA displays a Welcome screen where you can log in.

Welcome to the NaviMedix Referral Processing Application



Please enter your user name and password into the fields below, then click the "Login" button.

Username:

Password:

Login

If you have any problems or questions, please contact us at (800) 685-3463.

2. Type your user name in the Username field.
If you make a mistake, backspace over the error and retype the user name.
3. Click the Password field and type your password.

Note: You can also press the Tab key to move to the Password field.

To protect the security of your password, RPA displays asterisks instead of characters as you type.

4. Click the Login button.
RPA displays the RPA toolbar and the Referral Log, which is the main RPA screen.

The RPA toolbar

The RPA toolbar appears at the top of all RPA screens. It lists all areas of functionality in the product.

Click an option in the toolbar to perform a task in that area.

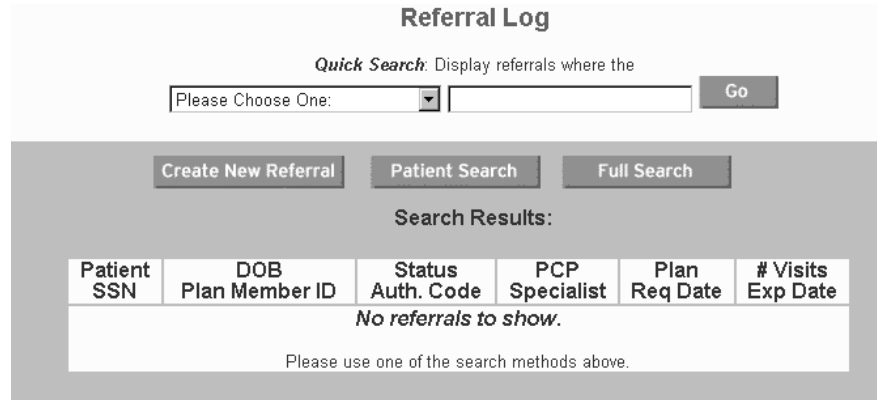


- **Referral Log** displays the Referral Log screen. This is the main RPA screen where you search for and access existing referrals and create new ones. See the next section for information about the Referral Log screen.
- **Task Central** displays a screen that lets you access a variety of functions, such as creating reports, viewing and editing your personal specialist list, and viewing and creating patient records.
- **Action Items** lets you view all action items assigned to you. Action items are reminders of actions you need to take in relation to particular referrals.
- **Print** lets you print your current RPA screen.
- **Messages** lets you send messages to NaviMedix and view and reply to any messages that you receive from NaviMedix.

All screens also display a Logout button in the upper right corner. Click this button to end your session and log out of RPA. For information, see *Logging out of RPA* on page 9.

The Referral Log screen

The Referral Log screen is the first screen you see when you start RPA. You can always return to this screen by clicking Referral Log in the toolbar.





From the Referral Log screen, you can search for referrals. For example, you can search for all referrals for a particular patient, or for all referrals made by a particular PCP. Once RPA finds and lists the referrals in the Log, you can view or edit the one you want—for example, to complete processing or add an action item. You can also create new referrals from the Referral Log screen.

On this screen you can:

- Use the Quick Search fields to quickly search for referrals that meet a particular criterion—for example, referrals for patients with the last name of Carlson. For information, see *Searching for a referral* on page 15.
- Click the Patient Search or Full Search button to perform more precise searches—for example, to find all referrals for patient Robert Smith made in the last week. For information, see *Refining a search* on page 40.
- Click the Create New Referral button to create a new referral. For information, see *Creating a new referral* on page 10.

When you search for referrals, RPA displays a list of all referrals that meet your search criteria. Each entry includes two lines of information about the referral.

First referral for Lorraine Stone

LORRAINE LOSTONE	10/10/1906	Incomplete	S Moynihan	AETNA/USHC	5 req	 
991-49-9999	MMJML919	n/a	D RABID, M.D.	2/9/99	n/a	

You may also see one or more of these icons next to referral entries.





Click this icon...	To...
	Delete the referral. This icon appears next to referrals that can be deleted.
	Open the referral.
	See notes associated with the referral, or create a new note or action item. A note includes any information you choose to enter related to the referral, such as a patient's vacation phone number or times when he is available for an appointment.
	See action items associated with the referral. An action item is a reminder about something you need to do related to the referral. This icon appears when you have action items associated with a referral that you haven't yet completed.

Table 1-1 Referral Log icons

The next chapter, *Creating and Working with Referrals*, tells you how to create, search for, and work with referrals.

Logging out of RPA

When you finish an RPA session, you can log out

Depending on the workflow in your office, you may want to stay logged in to RPA most of the time and log out only at the end of the day. Alternatively, you may want to log out after you finish completing one or more referral tasks. If more than one person in your office does referral processing with RPA, you may want to log out when you're finished performing tasks, but leave the Login screen displayed so another user can quickly log in.

1. Click the Logout button in the upper right of your screen.
RPA displays a message telling you that you are logged out.
2. If you want to display the Login screen for another user, click the Continue button.
RPA displays the Login screen with the Username and Password fields blank.

Creating and Working with Referrals

This chapter tells you how to:

- Create a new referral
- Search for referrals
- View and edit referrals
- Delete referrals

Creating a new referral

To create a referral, you select the patient, enter some basic referral information, choose a specialist, and then fill out the health plan's referral form. When the referral is ready, you submit it to the patient's health plan for final processing.

Selecting the patient

1. From the Referral Log screen, click the Create New Referral button.
RPA displays the New Referral Patient Picker screen, which lets you search for the patient for whom you are creating the referral. You can search for a patient by name, Social Security number, or plan member ID.
2. If you want to search for a patient by name, click the Last Name field and type the patient's last name.

If you're not sure how to spell the name, just enter the first few letters.

Example: Enter Carl to find all patients named Carlyle or Carlisle, as well as patients named Carlson, Carling, etc.

Chapter 2: Creating and Working with Referrals

To make your search more precise, you can also click the First Name field and enter all or part of the patient's first name.

Example: Enter the following information to find all patients whose last name begins with Smith and whose first name begins with B.

New Referral Patient Picker

Last Name SSN

First Name Plan Member ID

3. If you want to search for a patient by Social Security number or plan member ID, click the appropriate field and enter all or part of the number or ID you're searching for.
4. Click the Search button.
RPA displays all patients who match your search criteria.

New Referral Patient Picker

Last Name SSN

First Name Plan Member ID

	Plan Member ID	Name	SSN	M/F	DOB	Plan	
<input type="button" value="Edit"/>	559001	Smith, Benjamin J	523-99-3421	M	12/30/1949	NSMCHP	<input type="button" value="Select"/>

5. If you want, click the View or Edit button next to a patient to see information about the patient. (The Edit button appears for patients in health plans that let you modify patient information.) When you're finished, click the Go Back button to return to the list of patients who match your search criteria.
6. Click the Select button for the patient for whom you want to create the referral.
RPA now displays the New Referral screen.

Note: If you don't find the patient you're looking for, you can widen your search by changing your search criteria. For example, leave the First Name field blank to find all patients named Smith, not just those whose first name begins with B. In some instances, however, you might not find a patient because his record is not entered in the system. If this is the case, click the Create New Patient button to create a record. For information, see *Creating a record for a new patient* on page 25.

Entering referral information

The New Referral screen lets you enter some basic referral information, such as the diagnosis and number of requested visits. The top part of the screen automatically displays information on the patient you selected.

Note: Depending on whether a health plan allows you to modify patient records, you will also see either a View Selected Patient button or an Edit Selected Patient button. Click the button to see the patient record. If it's a record you can modify, you can also change the patient information, if necessary. For information, see *Viewing and editing a record for an existing patient* on page 28.

New Referral

Please verify that the patient information is correct, then fill out the fields at the bottom of the page.

Patient's Name: Benjamin J. Smith	PCP: Nathan E. Kaufman
SSN: 523-99-3421	Plan: NSMCHP
DOB: 12/30/1949	Plan Member ID: 559001

If the information here is incorrect, you can: [Edit Selected Patient](#)

Date of Request:	<input type="text" value="2/10/1999"/>	Required
# of Visits:	<input type="text"/>	Required
Diagnosis:	<input type="text"/>	

[Submit](#) [Save](#) [Cancel](#)

Note: If you are interrupted while creating the referral, click the Save button at the bottom of the screen at any time. If you later reopen the referral from the Referral Log, you'll find it just as you left it, so you can continue working on the referral.

1. If you want, change the date in the Date of Request field.
RPA automatically enters the current date, but you can change it if you want.
Type the date in the format mm/dd/yyyy—for example 3/31/1999.
2. Click the # of Visits field and type the number of visits you want to request.
3. Click the Diagnosis field and type a diagnosis.
4. To continue creating the referral, click the Submit button at the bottom of the screen.
RPA now displays the Choose a Specialist screen.

Choosing a specialist

The Choose a Specialist screen lets you search for the specialist to whom you want to refer the patient. You can search for a specialist by name, specialty, and/or geographical area.

1. If you want to search for a specialist by name, click the Last Name field and type in all or part of the name.

Example: Type Anderson to see all specialists with the last name of Anderson, or type Anders to see all specialists whose last names begin with those letters (Anderson, Andersen, etc.).

To make your search more precise, click the First Name field and enter the specialist's first name as well.

2. If you want to see a list of all specialists with a particular specialty, click the Specialty Description field and type in the name of the specialty.

RPA matches the letters you enter with letters it finds anywhere in a specialty name. If you enter the letters Cardio, RPA finds specialists in all specialties that include the letters Cardio, such as Cardiology and Pediatric Cardiology.

3. If you want to search for specialists in a particular area, you can also type a city name, state, or zip code in the appropriate fields.

You can make your search more precise by entering criteria in several fields.

Example: Enter the following information to see a list of all dermatologists in Boston, Massachusetts.

Choose a Specialist

Please choose a specialist by entering some information about the specialist into the boxes below, then clicking "Search".

Last Name <input style="width: 90%;" type="text"/>	First Name <input style="width: 90%;" type="text"/>
Street <input style="width: 90%;" type="text"/>	State <input style="width: 90%; border: 1px solid #ccc;" type="text" value="Massachusetts"/>
City <input style="width: 90%; border: 1px solid #ccc;" type="text" value="Boston"/>	Zip <input style="width: 90%;" type="text"/>
Specialty Description <input style="width: 90%; border: 1px solid #ccc;" type="text" value="Dermatology"/>	

SearchGo BackUse Personal Specialist List

Chapter 2: Creating and Working with Referrals

- Click the Search button.
RPA displays a list of all specialists who match your search criteria.

Choose a Specialist

Please choose a specialist by entering some information about the specialist into the boxes below, then clicking "Search".

Please note that you are selecting from a list of "Out-of-System" providers.

Last Name City
First Name State
Specialty Zip

	Name	Specialty	Address	
<input type="button" value="Edit"/>	Aronson, Jonathan	Dermatology	45 Myra Street, Boston, MA, 02119	<input type="button" value="Select"/>
<input type="button" value="Edit"/>	Jensen, Marlene	Dermatology	992 E. Milton Road, Boston, MA, 02198	<input type="button" value="Select"/>

- If you want, click the Edit or View button next to a specialist to see information about the specialist. (Edit appears if the specialist's record is one you can edit.) When you're finished, click the Go Back button to return to the list of specialists who match your search criteria.
You might want to do this, for example, if two specialists have the same last name and you want to be sure you are selecting the right one.
- Click the Select button for the specialist you want to use.
RPA selects that specialist and displays the referral form for the patient's health plan.

Note: If you don't find the specialist you're looking for—for example, because she is not in the health plan's network—you need to create a record for the specialist in your personal specialist list. For information, see *Adding a specialist to your personal list* on page 30. For information on referrals to out-of-network specialists, see *About referrals to out-of-network specialists* on page 22.

Filling out the plan referral form and submitting it to the health plan

The plan referral form should look familiar—it's simply an electronic version of the paper form you are used to filling out. As you know, forms vary from plan to plan. Fill in the fields just as you do on the paper forms.

To make the task easier, RPA prefills many of the fields for you, based on your patient and specialist selections and the information in the patient record.

Note: To enter a note about the referral or create an action item related to it, click the Review Referral Notes button at the bottom of the screen. For information, see *Adding a note or action item* on page 19.

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1. To enter information, click a field and enter the appropriate information.
Remember that you can click the Save button at the bottom of the screen at any time to save your work. If you log off and later reopen the referral, it will appear in the state in which you left it.
2. When you finish entering information, click one of the buttons at the bottom of the screen:
 - Click Submit to submit the form to the health plan for approval.
You'll see a screen telling you that RPA submitted the referral. Click Referral Log in the toolbar to return to the Referral Log screen. If you now search for that referral, it will be listed with a status of Submitted, Approved, Denied, or Pending. For information on referral status, see the next section.
 - Click Save for PCP Approval if you need PCP approval before submitting the referral to the plan.
You'll return to the Referral Log screen. If you now search for that referral, it will be listed in the view with a status of Pending PCP Approval. See *Viewing and editing an existing referral* on page 18 for information on opening the referral and submitting it to the health plan after the PCP approves it.
 - Click Cancel if you want to cancel the changes you made and return to the Referral Log screen.

Finding and working with referrals

To work on a referral, you first search for it in the Referral Log. Once you've found it, you can open it to review the information in it, complete it, and/or submit it for approval. You can also delete referrals that have not yet been submitted to a health plan.

Searching for a referral

When you search for referrals, you enter search criteria in the Referral Log screen that define what referrals you want to find. RPA lets you search for referrals in many ways. You might want to search for all referrals for a particular patient, all referrals made by a particular physician, or all referrals to a particular specialist.

Doing a Quick Search from the Referral Log screen is the quickest way to search for referrals that match a particular criterion.

Note: See *Refining a search* on page 40 for more information on performing searches, including searches using multiple criteria.

1. Click Referral Log in the toolbar.
RPA displays the Referral Log screen.
2. In the field under Quick Search, where you see Please Choose One, drop down the menu and select an option.
For example, select Patient's Name Begins With to search by patient name, or select Patient's SSN Is to search by patient Social Security number.
See the table below for an explanation of all of the Quick Search options.

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3. Click the field to the right and type the characters you want to search for.
 For example, if you're searching by patient's last name, type Smith to find all referrals for patients with the last name of Smith, Smithers, etc. If you're not sure of the spelling, type the first few characters of the name. If you type Sm, for example, RPA finds referrals for patients named Smith, Smyth, Smithers, Smithson, and so on.
 If you're searching by patient's Social Security number, type the Social Security number, or as much of the number as you remember. If you type 246, for example, RPA finds referrals for all patients whose Social Security numbers begin with 246.
4. Click the Go button.
 RPA displays the Quick Search Results screen, which lists all referrals that match your search criterion. See the next section for information on the Results display.

If you choose this Quick Search option...	Enter this information in the criterion field
Patient's Name Begins With	Patient's last name, or first letters of the last name. You can also enter the patient's last and first name, such as Smith, Robert.
Patient's SSN Begins With	Patient's social security number, or first digits in the number.
Plan Member ID Begins With	Patient's plan member ID, or first characters in the ID. The health plan assigns this ID.
PCP's Name Begins With	Primary Care Physician's last name, or first letters of the last name.
Specialist's Name Begins With	Specialist's last name, or first letters of the last name. You can also enter the specialist's last name and first name.
Plan Name Contains	Plan name, or any letters in the plan name. RPA finds any referrals where the plan name contains any of the letters you entered.
Request Date Is	Date on which you requested the referral(s). RPA entered this date automatically when you created the referral, but gave you the option to change it.
Status Begins With	Status, or the first letters of a status. Entries include: Incomplete, Pending PCP Approval, Submitted, Pending Plan Approval, Approved, Denied, and Complete. See the next section for an explanation of status options.
Authorization Code Is	Authorization code. This health plan assigns this code when it approves the referral.

Table 2-1 Quick Search options

Viewing the results of a search

When RPA displays the results of a search, it includes two lines of information for each referral. In the first column, for example, the top line displays the patient's name and the second line displays the patient's Social Security number.

The screenshot shows the 'Referral Log' interface. At the top, there is a search bar with the text 'Quick Search: Display referrals where the' and a dropdown menu set to 'Patient's Name Begins With:'. The search term 'Smith' is entered in the text box, and a 'Go' button is to the right. Below the search bar are three buttons: 'Create New Referral', 'Patient Search', and 'Full Search'. Underneath these buttons is the heading 'Quick Search Results:' followed by a table. The table has seven columns: 'Patient SSN', 'DOB Plan Member ID', 'Status Auth. Code', 'PCP Specialist', 'Plan Req Date', and '# Visits Exp Date'. The first row of data shows: Benjamin J. Smith, 523-99-3421, 12/30/1949, 559001, Pending PCP Approval, n/a, N Kaufman, D MARTINI, M.D., NSMCHP, 2/10/99, 1 req, n/a. A bracket on the left side of the table points to the first row with the label 'First referral'. There are also icons for a document and a checkmark at the bottom right of the table.

The display includes basic information about the referral, such as the patient's Social Security number and the physician who made the referral. RPA gets this information from the patient's record, and from information you entered when you created the referral.

If the health plan has already approved the referral, RPA also displays an authorization code and expiration date. The health plan assigns the authorization code when it approves a referral. Each health plan sets its own rules about when a referral expires and is no longer valid.

The display also includes the status of each referral. This information is extremely important for tracking referrals. The following table lists each possible referral status and explains what the status means.

This referral status...	Means...
Incomplete	The referral was created and saved, but not saved for PCP approval or submitted to the health plan. This might happen if you start a referral and get interrupted or need more information. When you're ready, you can go back to the referral and complete and then submit it.
Pending PCP approval	The referral is complete, but it needs the primary care physician's approval before it can be submitted to the health plan. (Some offices do not require this step.)
Submitted	The referral was submitted to the health plan. (If the referral is for a patient who is not a member of a subscribing health plan, see <i>Creating a referral for a non-subscribing plan</i> on page 22.)
Pending plan approval	The health plan reviewed the referral and decided it requires further consideration.
Approved	The health plan approved the referral.
Denied	The health plan denied the referral.

This referral status...	Means...
Complete	This status applies only to referrals for patients who are not members of subscribing health plans. For information, see <i>Creating a referral for a non-subscribing plan</i> on page 22

Table 2-2 Referral status options

Viewing and editing an existing referral

Once you've found the referral you're looking for, you can open it to review or edit the information in it or to continue entering information and processing the referral.

- Click the Referral icon for the referral you want to open.
The Referral icon appears to the right of every referral entry.



RPA opens the referral you selected.

RPA displays the referral as it was when you last saved it. You can now continue creating and processing the referral.

For example, if you saved it while you were filling out the plan referral form, RPA displays this form with any information you previously entered. You can fill in the rest of the information and continue referral processing.

If you saved the referral for PCP approval, and the PCP has now approved it, click the Submit button to submit the referral to the health plan.

If you previously submitted the referral, but want to review the referral form, click the Go to Previous Form button to display the form.

Deleting a referral

You can delete any referral in the Referral Log that has a Delete icon to the left of the referral entry.

- Click the Delete icon for the referral you want to delete.



RPA deletes the referral and removes it from the Referral Log display.

Note: Please be sure that you really want to delete the referral before you click the Delete icon.

Annotating Referrals

This chapter tells you how to:

- Add notes and action items to a referral
- View existing notes and action items

Adding a note or action item

You can add notes to referrals—for example, with information about a patient's preferences regarding specialist location. You can also add action items to remind you of things you need to do to complete the referral. For example, you may need to get information from the PCP or patient before you can complete the referral and submit it to the health plan.

When you display referral entries in the Referral Log, RPA displays the Note icon next to all referrals. It displays the Action Item icon next to any referrals with action items that you haven't yet completed.



_____ Note icon



_____ Action Item icon

You add a note or action item on the Referral Notes screen. You can display the screen while you are creating or editing a referral. You can also display the Referral Notes screen directly from the Referral Log.

1. While creating or editing a referral, display the health plan referral form.
For information on creating a referral, see *Creating a new referral* on page 10. For information on editing a referral, see *Viewing and editing an existing referral* on page 18.
2. Click the Review Referral Notes button at the bottom of the screen.
RPA displays the Referral Notes screen.

Referral Notes

Patient: mcgurn, ross
DOB: 03/17/1962

SSN: [redacted]
Plan Member ID: 444

Description:

Assigned To:

Add as Action Item

Add as Referral Note

No notes for this referral

Submit Cancel

3. Click anywhere in the Description field and type the note or action item.
4. If you are creating a note, click the Add as Referral Note button.
RPA redisplay the notes and action items list with the note added to the list.
5. If you are creating an action item, drop down the Assigned To menu and select the person who must take the action. Then click the Add as Action Item button.
RPA redisplay the notes and action items list with the action item added to the list.

Note: You can also display the Referral Notes screen directly from the Referral Log. Search for and display the referral in the Referral Log and click the Note or Action Item icon for the referral. Then proceed from step 3 above.

Viewing notes and action items for a referral

1. Click Referral Log in the toolbar and do a search to display the referral.
2. Click the Note or Action Item icon next to the referral.
RPA displays the Referral Notes screen and lists all notes and action items associated with the referral.
3. For action items, you can do any of the following:
 - To change the person an action item is assigned to, drop down the Assigned To menu for that action item and select a different person.
 - To mark an action item as completed, click the box in the Done column.
 - To delete an action item, click the box in the Delete column.
4. To save your changes, click the Submit button at the bottom of the screen.
Click Cancel to cancel any changes you made.

Viewing all of your action items

1. Click Action Items in the toolbar.
RPA displays a list of all action items assigned to you.

Action Items for Kathy						
	Referral	Action Item	Created By	Assigned	Done	Delete
 	Julie ANDREWS 02/21/1999	Call specialist for info on availability.	Kathy	kcamaro	<input type="checkbox"/>	<input type="checkbox"/>

2. If you want, do one of the following:
 - To view all referral notes and action items for a particular referral, click the Action Item icon next to the referral.
RPA displays the Referral Notes screen and lists all notes and action items associated with the referral.
 - To view a particular referral, click the Referral icon next to the referral.
RPA displays the referral.
 - Assign the action item to another person, mark it as completed, or delete it, as explained in the previous section.
Then click the Submit button at the bottom of the screen.

Referring to Out-of-Network Specialists or Non-Subscribing Plans

This chapter tells you how to:

- Create referrals to out-of-network specialists
- Create referrals for patients in health plans that do not subscribe to NaviMedix

About referrals to out-of-network specialists

At times, you may need to create a referral to an out-of-network specialist. To cover such situations, RPA lets you create a personal list of specialists. You can create records for any specialists you want on this list. For information, see *Adding a specialist to your personal list* on page 30.

You choose a specialist on the Choose a Specialist screen as part of the process of creating a new referral. (For information, see *Choosing a specialist* on page 13.) When you search for a specialist on this screen, RPA follows these rules:

- If the patient's health plan includes a network of specialists, by default RPA searches for the specialist on the health plan's specialist list. Click the Use Personal Specialist List button on the screen to search your personal specialist list instead.
- If the health plan does not include a network of specialists, or if it does not subscribe to NaviMedix, RPA automatically uses your personal specialist list when it searches for specialists.

Creating a referral for a non-subscribing plan

Some of your patients may belong to health plans that do not subscribe to NaviMedix. NaviMedix may create electronic versions of the referral forms for several non-subscribing plans, so you can still use RPA to create referrals for your patients who belong to them.

Chapter 4: Referring to Out-of-Network Specialists or Non-Subscribing Plans

Creating referrals for patients in non-subscribing plans is for the most part the same as creating referrals for patients in subscribing plans. However, since these plans are not connected to NaviMedix, you must perform a few tasks manually. The following sections explain how to perform these tasks.

Creating the referral

1. Create a new referral just as you would for a patient in a subscribing plan.
For information, see *Creating a new referral* on page 10.
On the Choose a Specialist screen, RPA automatically uses your personal specialist list to search for specialists.
If necessary, save the referral for PCP approval just as you would any referral.
2. When you finish filling out the plan's referral form and are ready to submit it, click Print in the toolbar to print the form.
RPA displays the Print dialog box. In the Print frames section of the dialog box, click the "Only the selected frame" radio button. Then click the OK button at the bottom of the dialog box.
RPA prints the screen and redisplay the referral form.
3. On the referral form, click the Submit button at the bottom of the screen.
RPA displays an Approvals screen for the non-subscribing plan.

Approval for Acme Health Care

Please select the appropriate status, then enter any other relevant information in the spaces provided below.

Acme Health Care

INSTRUCTIONS:
PRIMARY CARE PHYSICIAN - FORWARD WHITE COPY TO SPECIALIST - RETAIN YELLOW COPY FOR YOUR RECORDS.
SPECIALIST - INDICATE PRIMARY CARE PHYSICIAN'S PROVIDER NUMBER ON CLAIM FORM ONLY AND FORWARD TO *Acme Health Care* - RETAIN WHITE COPY FOR RECORDS ONLY - DO NOT FORWARD REFERRAL TO *Acme Health Care*.

TELEPHONE NUMBER
(800) HLT-ACME
(617) 627-ACME

Authorization #:

APPROVED -

Date of Authorization:

Expiration Date:

of Visits Approved:

PENDING REVIEW - Awaiting:

DENIED - Reason:

COMPLETE

SUBMITTED

Chapter 4: Referring to Out-of-Network Specialists or Non-Subscribing Plans

4. Do one of the following:
 - If the plan does not require approval, click the Complete radio button and then click the Submit button at the bottom of the screen.
RPA redisplay the Referral Log. The status of the referral is Complete.
 - If the plan does require approval, click the Submitted radio button and then click the Submit button at the bottom of the screen.
RPA redisplay the Referral Log screen. The status of the referral is Submitted.

If necessary, you can now mail or fax the printed referral form to the health plan.

Note: If you complete the referral and want to print it at a later time, search for and open the referral from the Referral Log. Click the Go to Previous Form button at the bottom of the screen to display the referral. Then click Print in the toolbar and print the referral form as explained above.

Updating the status of the referral

You will need to manually update the status of the referral—for example, to indicate you received the health plan's approval of the referral.

1. In the Referral Log screen, search for the referral and open it.
For information, see *Finding and working with referrals* on page 15.
RPA displays the Approvals screen for the non-subscribing plan.
2. Click the radio button for the status you want to assign to the referral.
 - Click Approved if the health plan approved the referral.
If appropriate, type entries in the fields in the Approved section to enter an authorization number, authorization date, expiration date, and number of visits approved.
 - Click Denied if the health plan denied the referral.
If you want, click the field next to Denied and type the reason for the denial.
 - Click Pending Review if the health plan received the referral and decided it needed further consideration.
If you want, click the field next to Pending Review and type the reason for the review.
3. Click the Submit button at the bottom of the screen.
If you now want to return to the Referral Log screen, click Referral Log in the toolbar.

Managing Patient, Physician, and Specialist Information

This chapter tells you how to:

- Create new patient records
- View and edit existing patient records
- View primary care physician profiles
- Add and delete plans from physician profiles
- Create a personal list of specialists and view and edit records in this list

Managing patient information

Patient records contain basic information, such as patients' addresses and Social Security numbers. In some cases, patient records are already available in the system, but in others you may need to create patient records yourself.

You can also view records for existing patients and, if necessary, edit them to correct errors or update information.

Creating a record for a new patient

1. Click Task Central in the toolbar.
2. Click the Review Your Patient List button.
RPA displays the Your Patient List screen.

Note: A similar screen also displays when you are creating a new referral, so you can add the patient record while you create the referral.

3. Click the Create New Patient button.
RPA displays the Add Patient screen.

Chapter 5: Managing Patient, Physician, and Specialist Information

Add Patient

Office Patient ID:	<input type="text"/>	Required
Last Name:	<input type="text"/>	Required
First Name:	<input type="text"/>	Required
Middle Initial:	<input type="text"/>	
SSN:	<input type="text"/>	
Gender:	<input type="text" value="Please Choose One"/>	Required
Date of Birth:	<input type="text" value="12/30/1899"/>	Required
	Example MM/DD/YYYY	
Patient Address 1:	<input type="text"/>	Required
Patient Address 2:	<input type="text"/>	
Patient City:	<input type="text"/>	Required
Patient State:	<input type="text" value="Please Choose One"/>	Required
Patient ZIP Code:	<input type="text"/>	Required
Patient Home Phone:	<input type="text"/>	Required
	Example 555-555-5555 ext.555	
Patient Work Phone:	<input type="text"/>	
	Example 555-555-5555 ext.555	
Patient email:	<input type="text"/>	
Patient Medical Plan:	<input type="text" value="Please Choose One"/>	Required
Plan Member ID:	<input type="text"/>	Required
Patients PCP:	<input type="text" value="Please Choose One"/>	Required

- Click each field and type the appropriate information or drop down the menu and select an option.

You must make entries in all fields that say Required to the right of the field entry box. Entries in other fields are optional.

- When you finish entering information, click the Submit button at the bottom of the screen. RPA redisplay the Your Patient List screen so you can add or edit other patient records.

Note: If you see the Duplicate Patient screen instead, the record you created may closely match an existing patient record. For information, see the next section.

About duplicate records

When you create a new patient record, RPA checks to see if a record for that patient already exists. If it finds a record that closely matches the one you just created, it displays the Duplicate Patient screen.

Duplicate Patient

The patient you are trying to enter may be the same as a patient already in the system. Please compare the information on these two individuals and then click on the appropriate button at the bottom of this page.

New Patient	Existing Patient 1 of 1
Office Patient ID: 45924	* 45924
Last Name: Smith	* Smith
First Name: Ben	Benjamin
Middle Initial:	J
SSN: 523-99-3421	* 523-99-3421
Gender: M	* M
Date of Birth: 12/30/1949	* 12/30/1949
Plan: HMO Blue	NSMCHP
Plan Member ID: 44668	559001
PCP: Kaufman, Nathan	* Kaufman, Nathan
Address 1: 14 Oak Street	14 Oak Terrace
Address 2:	
City: Arlington	* Arlington
State: MA	* MA
ZIP: 02190	* 02190
Home Phone: 508-438-9988	* 508-438-9988
Work Phone:	617-498-6662 ext.45
Email:	

Same Patient:
Keep Existing Same Patient:
Keep New Different Patients:
Keep Both Cancel

This screen displays the data in the record you just created on the left, and the data in the record it matches on the right, so you can compare the records.

RPA also tells you the number of records it found. For example, if RPA finds three possible duplicate records, it displays the first one and tells you that it is Patient 1 of 3.

If you see the Duplicate Patient screen, do one of the following:

- Click the Same Patient: Keep Existing button to delete the record you just created and keep the record for the existing patient.
- Click the Same Patient: Keep New button to replace the existing record (the one on the right) with the one you just created (the one on the left).
- Click the Different Patients: Keep Both button to keep both the existing and the new record.
If RPA found more than one possible duplicate record, it now displays the next one on the right, so you can select the appropriate option.
- Click the Cancel button to go back to the Add Patient screen and modify the information in the record you just created.

Note: RPA also checks for possible duplicates when you are adding records to your personal specialist list. If you see the Duplicate Specialist screen when creating specialist records, select options on that screen as explained above.

Viewing and editing a record for an existing patient

You may want to view a record for an existing patient to check or edit information in the record.

1. Click Task Central in the toolbar.
2. Click the Review Your Patient List button.
RPA displays the Your Patient List screen.
3. To search for the patient record, enter information about the patient in some or all of the fields at the top of the form.

You enter search information the same way you do when you search for a patient while creating a referral. For information, see *Selecting the patient* on page 10.

4. Click the Search button.
RPA displays a list of all patients who match your search criteria.

	Plan Member ID	Name	SSN	M/F	DOB	Plan
Edit	XYZ123ABC	Carrot, Bob	111-22-3333	M	01/02/1950	AETNA/USHC
Edit	ABC456XYZ	Carrot, Susie	999-00-9999	F	01/02/1940	AETNA/USHC

5. Click the View or Edit button for the patient whose record you want to view or edit.
You see the Edit button if the patient's health plan allows you to modify the patient record, or if the patient is in a non-subscribing health plan. You see the View button if you cannot modify patient information.

RPA displays the View or the Edit Patient screen with the patient's record.

Note: You can also access this screen when creating a referral by clicking the View or the Edit Selected Patient button on the New Referral screen.

6. If you can modify the patient record and want to change any of the information, click the field and type the new information.
For fields with drop-down menus, drop down the menu and select the option you want.
7. Do one of the following:
 - If you are on the View screen, click the Go Back Button at the bottom of the screen.
 - If you are on the Edit Patient screen, click the Submit button at the bottom of the screen if you've made changes you want to save. Click the Cancel button if you don't want to save your changes.

You can now view or edit other patient records, or finish creating or editing the referral.

Viewing and editing PCP profiles

NaviMedix maintains profiles of all primary care physicians (PCPs) in your office. You can view these profiles. You can also add and remove provider IDs for plans the PCP has contracted with.

1. Click Task Central in the toolbar.
2. Click the Browse Your PCPs' Profiles button.

RPA displays the Your PCPs' Profiles screen, listing all PCPs in your office.



3. Click the View or Edit button for the PCP whose profile you want to view or edit. You see an Edit button if you have permission to edit the profile. If you don't have permission, you see the View button instead. RPA displays the PCP's profile. This screen lists all plans with which the PCP has contracted, along with the Plan Provider ID for each plan.
4. If you can edit the profile and the PCP has contracted with a new plan, do the following to add it to the list:
 - Drop down the New Plan Name menu and select the name of the plan.
 - Click the Plan Provider ID field and type the Provider ID.
 - Click the Add button after the ID field. RPA redisplay the PCP profile with the plan added to the list.
5. If the PCP has stopped contracting with a plan, click the Delete button for that plan. RPA redisplay the PCP profile with the plan deleted from the list.
6. When you are finished viewing and editing profiles, click the Go Back button to return to the Task Central screen.

Managing specialist information

Health plans generally create records for all specialists in their networks. However, you may sometimes want to create records for out-of-network specialists. RPA provides a Personal Specialist List where you can add information about these specialists.

You may also want to view or edit the information in existing specialist records—for example, to change an address or phone number.

Note: For information on selecting a specialist when creating a referral, see *Choosing a specialist* on page 13. For information on viewing all referrals you've made to a particular specialist, see *Searching for a referral* on page 15.

Adding a specialist to your personal list

1. Click Task Central in the toolbar.
2. Click the Review Additional Specialists button.
RPA displays the Specialist Review screen.

Specialist Review

Last Name City
First Name State
Specialty Zip

Name	Specialty	Address
<i>No specialists to show.</i>		
Please use search criteria above.		

3. Click the Create New Specialist button.
RPA displays the Add Specialist screen.

Note: You can also access this screen from the Choose a Specialist screen when creating a referral.

Chapter 5: Managing Patient, Physician, and Specialist Information

Add Specialist

Last Name:	<input type="text"/>	Required
First Name:	<input type="text"/>	Required
Middle Initial:	<input type="text"/>	
Specialty:	<input type="text"/>	
Gender:	<input type="text" value="Please Choose One"/>	
SSN:	<input type="text"/>	
Address1:	<input type="text"/>	Required
Address2:	<input type="text"/>	
City:	<input type="text"/>	Required
State:	<input type="text" value="Please Choose One"/>	Required
Zip Code:	<input type="text"/>	Required
Phone:	<input type="text"/>	Required
	Example 555-555-5555 ext.555	
Fax:	<input type="text"/>	
Email:	<input type="text"/>	
Medical Plan:	<input type="text" value="Please Choose One"/>	
Plan Provider ID:	<input type="text"/>	

- Click each field and type or select the appropriate information.
 - In most fields, you click the field and type the information.
 - In the Gender, State, and Medical Plan fields, you drop down the menu and select an option from the menu.

You must make entries in all fields that say Required to the right of the field entry box. Entries in other fields are optional.
- When you finish entering information, click the Submit button at the bottom of the screen. RPA redisplay the Specialist Review screen so you can add or edit other specialist records.

Note: If you added a specialist while creating a referral, RPA displays the referral form so you can continue the referral creation process.

Note: If you see the Duplicate Specialist screen instead, the record you created may closely match an existing specialist record. This screen is like the one that appears if you enter duplicate patient records. For information on selecting options on the screen, see About duplicate records on page 27.

Viewing and editing a record for a specialist on your list

You may want to view a record for a specialist already on your personal specialist list, to check or edit information in the record.

1. Click Task Central in the toolbar.
2. Click the Review Additional Specialists button.
RPA displays the Specialist Review screen.
3. To search for the specialist record, enter information about the specialist in some or all of the fields at the top of the form.
You enter search information the same way you do when selecting a specialist for a referral. For information, see *Choosing a specialist* on page 13.
4. Click the Search button.
RPA displays a list of all specialists who match your search criteria.

Specialist Review

Last Name City

First Name State

Specialty Zip

	Name	Specialty	Address
<input type="button" value="Edit"/>	Martin, Joseph A.	Cardiology	45 Archdale Terrace, Boston, MA, 02344

5. Click the View or Edit button for the specialist whose record you want to view or edit.
You see an Edit button if you have permission to edit the record. If you don't have permission, you see the View button instead.
RPA displays the View or the Edit Specialist screen with the specialist's record.
6. If you have permission to edit the record and want to change any of the information, click the field and type the new information.
For fields with drop-down menus, click the field and drop down the menu. Then select the option you want from the menu.
7. Do one of the following:
 - If you've made changes you want to save, click the Submit button at the bottom of the screen. If you don't want to save your changes, click the Cancel button.
 - If you only viewed the record, click the Go Back button at the bottom of the screen.
RPA redisplay the Specialist Review screen so you can view or edit other specialist records.

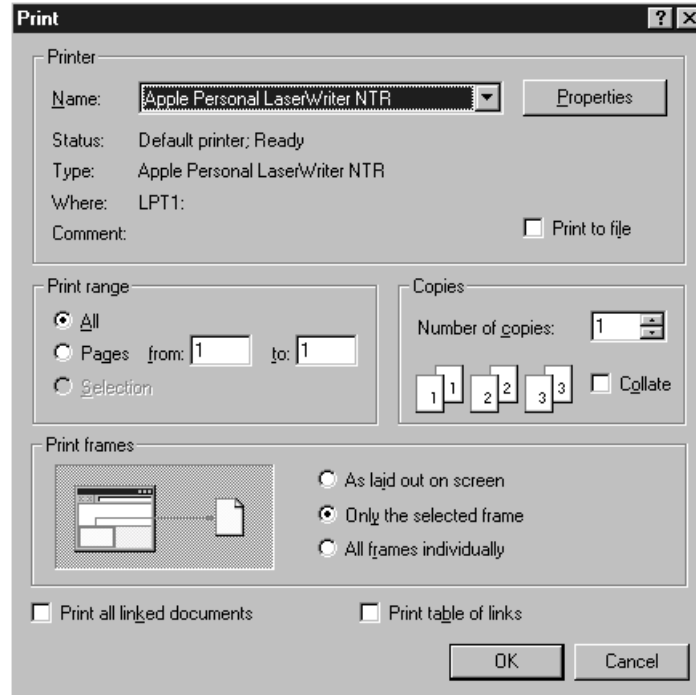
This chapter tells you how to

- Print RPA screens
- Create informational reports
- Send messages to NaviMedix and read and reply to messages you receive from NaviMedix
- Change your password

Printing screens

You can print any RPA screen. If you create a referral for a patient who is not a member of a subscribing health plan, for example, you may want to print the referral to mail to the health plan. Or you may want to print an informational report you create, such as a report listing all referrals currently awaiting health plan approval. To print a screen, follow this procedure:

1. Display the RPA screen you want to print.
2. Click Print in the toolbar.
RPA displays a dialog box that lets you specify print options.



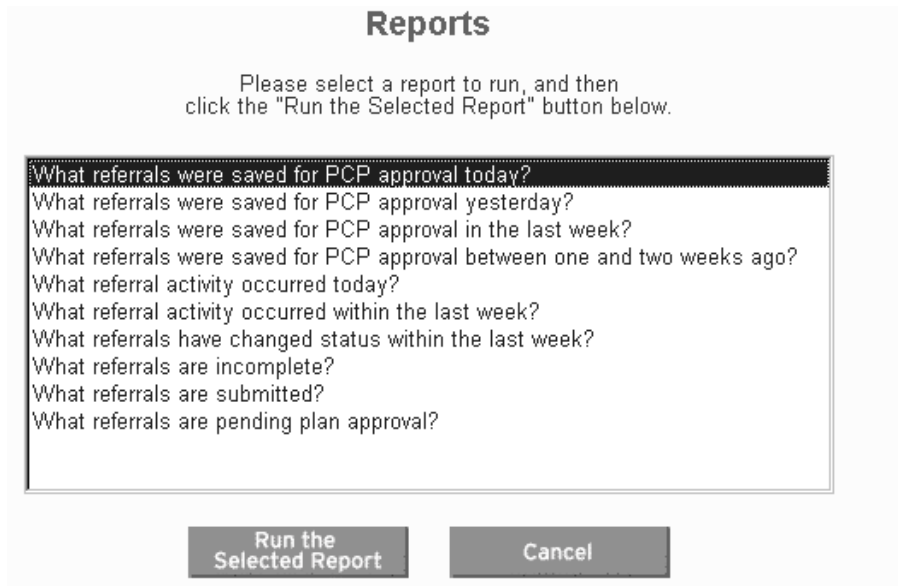
3. In the Print frames section of the dialog box, click a radio button to select an option.
 - "As laid out on screen" prints the RPA screen exactly as you see it on your computer, including the RPA toolbar.
 - "Only the selected frame" prints the part of the screen that is active. If you're viewing the Referral Log screen, for example, this option prints only the Log display, and not the toolbar. This is the option you'll probably use most often.
 - "All frames individually" prints each part of the screen separately. The printed copy will include all screen elements, but they won't be laid out as they are in the screen display.
4. Click the OK button at the bottom of the screen.

Creating informational reports

RPA can generate a variety of informational reports based on criteria related to status and date. For example, you can create a report that lists all referrals awaiting PCP approval, or one that lists all referrals that have been active in the last week.

Note: You use reports to create informational lists; you cannot open a referral from a report. Use searches when you want to find a referral so you can open and work on it. Searches also allow you to search for referrals using a wider range of criteria. For information, see *Searching for a referral* on page 15 and *Refining a search* on page 40.

1. Click Task Central in the toolbar.
2. Click the Create Reports button.
RPA displays the Reports screen.



3. Click the report you want to generate.
The table below lists the types of reports you can create and the information each report type includes.
4. Click the Run the Selected Report button.
RPA displays the Report Results screen, listing the referrals that meet the report criteria.

Report Results

What referrals were saved for PCP approval today?

Patient SSN	DOB Plan Member ID	PCP Specialist	Plan Req Date	# Visits Diagnosis
Bob Carrot 111-22-333	1/2/50 XYZ123ABC	Alison R Brookes, M.D. joe pirone	AETNA/USHC 2/24/99	3 Chest pain
Susie Carrot 999-00-999	1/2/40 ABC456XYZ	Susan E Moynihan, M.D. Kevin McGurn	AETNA/USHC 2/24/99	3 Sprained ankle

Go Back

5. If you want to print the report, click Print in the toolbar.
See *Printing screens* on page 33 for information on printing.
6. If you want to generate another report, click the Go Back button at the bottom of the screen.
RPA redisplay the Reports screen so you can select and generate another report.

The following table lists the types of reports RPA can generate and the information included in each report type.

Note: For a detailed explanation of status options, see *Viewing the results of a search* on page 17.

These report types...	Include this information
What referrals were saved for PCP approval: today? yesterday? in the last week? between one and two weeks ago?	<ul style="list-style-type: none"> • Patient name • Patient's Social Security number • Patient's date of birth • Patient's plan member ID • PCP name • Specialist name • Health plan name • Date on which referral was created • Number of visits requested • Diagnosis
What referral activity occurred: today? within the last week?	<ul style="list-style-type: none"> • Type of activity that occurred (for example, changed referral status, reassigned action item, submitted to plan) • Person (or plan) who performed the action • Date on which action occurred • Current status of referral (for example, submitted, approved, incomplete) • Patient name • PCP name • Specialist name • Person who created the referral • Date on which referral was created • Date on which referral was last modified
What referrals have changed status within the last week?	<ul style="list-style-type: none"> • Person (or plan) who changed the status • Date on which status was changed • Status to which referral was changed • Current status of referral • Patient name • PCP name • Specialist name • Person who created the referral • Date on which referral was created • Date on which referral was last modified
What referrals are: incomplete? submitted? pending plan approval?	<ul style="list-style-type: none"> • Patient name • PCP name • Specialist name • Person who created the referral • Date on which referral was created • Date on which referral was last modified

Communicating with NaviMedix

NaviMedix may at times send you messages. You can also send messages to NaviMedix and reply to messages they send you.

RPA stores a message with all previous messages it relates to. For example, if you send a message to NaviMedix, receive a reply, and then reply to the reply, NaviMedix stores all these messages together. If you view your final reply, you will also see the original message you sent and the NaviMedix reply you received.

Whenever you receive a new message, RPA displays an Envelope icon in the toolbar. If you see this icon, click it to go directly to the Messages screen.



When you view the Messages screen, any unread messages appear in bold.

Sending a message

1. Click Messages in the toolbar.
RPA displays the Messages screen.
2. Click the Create New Message button.
RPA displays the New Message for NaviMedix screen.

A screenshot of a software window titled "New Message for NaviMedix". The window has a white background and a thin grey border. At the top, the title "New Message for NaviMedix" is centered in a bold, black font. Below the title is a "Subject:" label followed by a single-line text input field. Underneath the subject field is a large, empty text area for the message body, which includes a vertical scrollbar on its right side. At the bottom of the window, there are two buttons: "Send Message" on the left and "Cancel" on the right, both with a grey background and white text.

3. Click anywhere in the Subject field and type a one-line description of the message.
4. Click anywhere in the blank field and type the message.
If the text doesn't fit into the field box, RPA automatically scrolls down as you type. To scroll through your message, click the up or down arrow in the scroll bar to the right of the message field.
If you make a mistake, place the pointer where you want to make the correction, click, and backspace over the error or type in additional text.
5. When the message is complete, click the Send Message button at the bottom of the screen.

RPA displays a screen telling you it sent the message.

6. Click the Continue button.
RPA returns to the Messages screen.

Replying to a message

1. Click Messages in the toolbar.
RPA displays the Messages screen, with a list of all messages you have received.
2. Click the Reply button for the message to which you want to reply.
RPA displays the Reply to NaviMedix screen.
3. In the blank field, type your reply.
4. Click the Send Message button to send the reply to NaviMedix.
RPA displays a screen telling you it sent the message.
5. Click the Continue button.
RPA returns to the Messages screen.

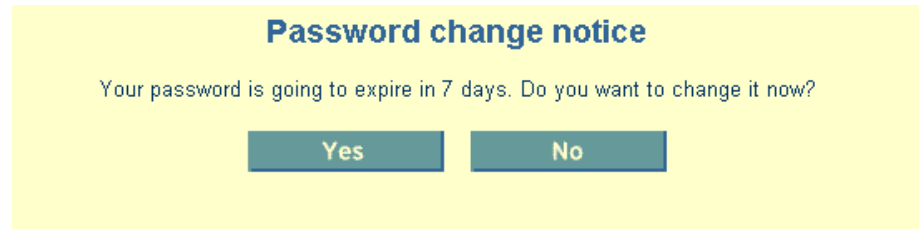
Viewing and deleting messages

1. Click Messages in the toolbar.
RPA displays the Messages screen, with a list of all messages you have received. Messages you haven't read yet appear in bold.
2. Click the View button for the message you want to read.
RPA displays the message text, as well as the text of any associated messages.
3. If you want, you can:
 - Click the Delete Message button to delete the message and any associated messages and replies. RPA returns to the Messages screen. The message you deleted no longer appears in the message list.
 - Click the Reply to Message button to send a reply to NaviMedix. RPA displays the Reply to NaviMedix screen. Enter and send your reply as explained in the previous section.
 - Click Continue to return to the Messages screen.

Changing your password

As a security measure, you must periodically change your NaviMedix password. You may also change your password at any time to enhance the security of your system.

If your password will expire soon, NaviMedix displays a message alerting you every time you log in, until you either change the password or the password expires.



1. If you see this alert, click Yes to display the Change Password screen.

Note: To display this screen at any time, even if your password isn't about to expire, click Task Central in the toolbar and then click the Change Your Password button on the Task Central screen.

2. Click the Current Password field and type your existing password.
To protect the security of your password, RPA displays asterisks rather than characters as you type.
3. Click the New Password field and type your new password.
Again, you will see asterisks instead of characters.
4. Click the Re-enter New Password field and type your new password again.
This ensures that you entered your password correctly in the New Password field.
5. Click the Submit button at the bottom of your screen.
RPA displays a message telling you whether the password change was successful.
If RPA tells you the change was not successful, you probably did one of the following:
 - Incorrectly entered your current password
 - Entered different characters in the New Password and Re-enter New Password fields
 - Entered a new password that is the same as your old password
6. Click the Continue button.
If the change was successful, RPA returns to the Task Central screen. If it was not successful, RPA redisplay the Change Your Password screen so you can re-enter and resubmit your password information.

This chapter tells you how to:

- Refine a referral search by using multiple search criteria or criteria that are not available in Quick Search
- Change how RPA sorts and displays entries in your Referral Log, Patient Picker, and your Personal Specialist lists

Refining a search

Using Quick Search, you can search for referrals that match a single criterion. However, RPA also lets you search for referrals using criteria not available in a Quick Search, such as all referrals requested before or after a particular date. In addition, you can search for referrals that match more than one criterion—for example, all referrals for a particular PCP that are awaiting his or her approval, or all referrals for a particular patient requested after a certain date.

Because RPA allows you to search for referrals in so many ways, you can narrow down a search to quickly locate a particular referral. In addition, searches can help you track referral patterns. For example, you can search for and view all referrals for a particular specialty requested after a certain date, to track your referral activity in this specialty area, or search for all referrals for members of a particular plan, to track your referral activity for that plan.

Example: If you enter the following criteria, RPA searches for all allergy referrals for a patient named Robert Anderson that you requested after February 1, 1999 and that are still awaiting plan approval.

Referral Search

Patient Information

Last Name:

First Name:

MI:

SSN:

Gender:

DOB:

Plan:

Plan Member ID:

Referral Information

of Visits:

Diagnosis:

Status: Approved
 Complete
 Denied
 Incomplete
 Pending PCP Approval
 Pending Plan Approval
 Submitted

Request Date After:

Request Date Before:

Expiration Date After:

Expiration Date Before:

PCP Information

PCP:

Specialist Information

Last Name:

First Name:

MI:

Specialty:

RPA can also generate a variety of informational reports based on criteria related to status and date. For example, you can create a report that lists all referrals awaiting PCP approval, or one that lists all referrals that are incomplete. However, you cannot open a referral from a report. For information, see *Creating informational reports* on page 34.

About entering search criteria

For any type of search, follow these guidelines for entering search criteria:

- Enter dates in the format *dd/mm/yyyy*
For example, type 3/31/1999.
- Enter telephone numbers in the format *###-###-#### ext.###*
For example, type 555-555-5555 ext.21
- When entering text, either enter all of the characters you are searching for or enter as many of the first characters as you know for sure.
For example, type Carlyle in a Last Name field to find all patients whose last name is Carlyle. Type Carl to find patients whose last name is Carlyle, Carlisle, Carlson, etc.
Some fields let you search for characters that appear anywhere in an entry. For example, if you type Cardio in a Specialty field, RPA finds referrals for cardiology, pediatric cardiology, and so on.
- For fields that have drop-down menus, select the criterion you want from the menu.
- For fields that have checkboxes, click the box for the criterion you want to use.
A checkmark appears in the box you select.

Doing a Patient Search or Full Search

You refine a search using the Patient Search and Full Search buttons on the Referral Log screen.

Patient search lets you use patient criteria not available in Quick Search, such as e-mail address or date of birth. It also lets you use more than one criterion in your search—for example, you can search for a referral by patient last name and date of birth.

Full Search also provides access to some additional criteria not available in Quick Search, such as diagnosis or type of specialty. In addition, when you do a Full Search you can use multiple criteria and combine patient-related criteria with other types of referral-related criteria. For example, you can search for all referrals for patient Robert Smith with a diagnosis of diabetes that you requested after January 1, 1999.

When you do a Patient Search or Full Search, RPA searches for referrals that match *all* of the criteria you entered.

1. Click Referral Log in the toolbar.
2. Click the Patient Search button or the Full Search button.
RPA displays the Referral Search by Patient or the Referral Search screen.
3. Enter criteria in all fields you want to search by.
If you change your mind while entering criteria, click the Clear All Fields button at the bottom of the screen. This erases all your entries so you can start again.

4. Click the Search button at the bottom of the screen.
RPA displays the Referral Log, listing all referrals that match your criteria.

Patient Search options

When you do a Patient Search, you can find referrals that match some or all of the following criteria:

To include this criterion in your search...	Enter this information in the field
Last Name	Patient's last name, or first letters of the last name.
First Name	Patient's first name, or first letters of the first name.
MI	Patient's middle initial.
DOB	Patient's date of birth, for example 5/15/1955.
Address 1	Patient's street address.
Address 2	2 nd line of street address.
City	City.
State	Patient's state of residence, selected from the drop-down menu.
ZIP	Patient's zip code.
Home Phone	Patient's home phone.
Work Phone	Patient's work phone.
E-Mail	Patient's e-mail address.
Office Patient ID	The ID assigned to the patient by your office.
SSN	Patient's Social Security number, or first digits of the number.
Gender	Male or Female, selected from the drop-down menu.
Plan	The name of a plan, selected from the drop-down menu.
Plan Member ID	The member ID assigned to the patient by the health plan.
PCP	The referring primary care physician, selected from the drop-down menu.

Table 7-1 Patient Search options

Full Search options

When you do a Full Search, you can find referrals that match some or all of the following criteria:

To include this criterion in your search...	Enter this information in the field
Patient Information	
Last Name	Patient's last name, or first letters of the last name.
First Name	Patient's first name, or first letters of the first name.
MI	Patient's middle initial.
SSN	Patient's Social Security number, or first digits of the number.
Gender	Male or Female, selected from the drop-down menu.
DOB	Patient's date of birth, for example 5/15/1955.
Plan	The name of a plan, selected from the drop-down menu.
Plan Member ID	The member ID assigned to the patient by the health plan.
Referral Information	
# of Visits	The number of specialist visits you requested when you created the referral.
Diagnosis	The diagnosis you entered when you created the referral.
Status	Click one or more status options. See <i>Viewing the results of a search</i> on page 17 for an explanation of status options.
Request Date After	Any previous date. RPA will find all referrals you requested after this date.
Request Date Before	Any previous date. RPA will find all referrals you requested before this date.
Expiration Date After	Any date. RPA will find all referrals that expire(d) after this date. The amount of time after which a referral expires is determined by each health plan.
Expiration Date Before	Any date. RPA will find all referrals that expire(d) before this date.
PCP Information	
PCP	A primary care physician, selected from the drop-down menu.
Specialist Information	
Last Name	Specialist's last name, or first letters of the last name.
First Name	Specialist's first name, or first letters of the first name.
MI	Specialist's middle initial.

To include this criterion in your search...	Enter this information in the field
Specialty	Specialty name, or any letters in the specialty name. Enter Cardio, for example, to find referrals in Cardiology and in Pediatric Cardiology.

Table 7-2 Full Search options

Specifying the order in which RPA displays lists

You can specify the order in which RPA displays entries in three lists: the Referral Log, the Patient Picker, and your Personal Specialist list. By default, the Referral Log and Patient Picker lists display alphabetically by patient last name, and the Personal Specialist list displays alphabetically by specialist last name. However, you can tell RPA to display the lists in other ways.

Note: You can't change the order in which RPA displays the lists of specialists in subscribing plans. RPA always sorts these lists by specialty, then by specialist last name and first name.

For example, you can display Referral Log entries by primary care physician or specialist last name rather than by patient name, or you can display the Personal Specialist list by specialty rather than specialist last name.

You can also specify a primary criterion to sort lists by, then a secondary criterion, and so on.

Example: If you choose to sort the Personal Specialist list alphabetically by specialty and then, within each specialty, alphabetically by specialist last name, the list might display like this:

	Name	Specialty	Address	
Edit	Mills, Howard R.	Allergy	143 Elm Street, Milton, MA, 03098	Select
Edit	Martin, Joseph A.	Cardiology	45 Archdale Terrace, Boston, MA, 02344	Select
Edit	Morton, Rachel	Cardiology	14 Selden Ave., Jamaica Plain, MA, 01230	Select
Edit	Milton, Milo	Neurology	534 Maxwell St., Boston, MA, 02203	Select

To change the display order, you use the Configure screen.

1. Click Task Central in the toolbar.
2. Click the Configure button.
RPA displays the Configure screen.
3. If you want to change the Referral Log display, drop down the Maximum Number of Records to Retrieve menu in the Log View Configuration section of the screen and select an option.
This setting determines how many records RPA retrieves when it performs a search.
4. In the First Sort By field, drop down the menu and select the attribute by which you want to sort Referral Log entries.
For example, select Name to sort by patient last name or PCP to sort by primary care physician.

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5. Click the Ascending or Descending button next to the First Sort By field.
 - Ascending sorts text entries from A to Z, numeric entries from lowest to highest, and dates from least to most recent.
 - Descending displays entries in the reverse order.
6. If you want to specify a secondary sort order, select an attribute in the first Then Sort By field and then click Ascending or Descending.
If you want, you can select options in the second and third Then Sort By fields as well.
7. If you want to change the Patient Picker or Personal Specialist list display, select the options you want in the appropriate section of the screen. (Set options for your Personal Specialist list in the Specialist Picker section of the screen.)
You select options for these lists in the same way as you do for the Referral Log.
You can change the display in all three lists, in any two of the lists, or in any single list.
8. Click the Submit button at the bottom of the screen to save your changes.

You can display the lists according to the following attributes:

Referral Log entries by...	Patient Picker entries by...	Specialist Picker entries by...
Patient last name	Health plan member ID of patient	Specialist first name
Patient Social Security number	Patient first name	Specialist last name
Patient date of birth	Patient last name	Area of specialty
Plan ID (the ID assigned by the health plan)	Patient Social Security number	Specialist street address
Status of referral	Gender of patient	City where specialist is located
Referral authorization code	Patient date of birth	State where specialist is located
Primary care physician last name	Health plan name	
Specialist last name		
Health plan name		
Date on which referral was requested		
Number of specialist visits requested		
Expiration date of referral		

Table 7-3 List sorting options

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