

Behavioral Health “Outgoing” Referral

From the treatment window:

- 1.) Select the diagnosis for which the Referral is being created for

The screenshot shows the 'Treatment' window for patient Curran, Jeff P. The interface includes a top navigation bar with 'Pt. Info', 'Encounter', 'Physical', and 'Hub'. Below this is a toolbar with various icons for actions like 'Add', 'Edit', 'Delete', 'Print', 'Share', 'Refresh', 'Home', 'Back', 'Forward', 'Search', 'Filter', and 'Help'. A 'Quick Order' search bar is also present. The main area displays a list of diagnoses with checkboxes for 'OS', 'RX', and 'IP'. The first diagnosis, 'E11.9 Type 2 diabetes mellitus without complications', is highlighted with an orange border. At the bottom of the window, there are buttons for 'Preventive Medicine', 'Send', and 'Billing'.

- 2.) Select “Add” and scroll down to select “Referral”

This screenshot is similar to the previous one, but it shows the 'Add' dropdown menu open over the 'E11.9 Type 2 diabetes mellitus without complications' diagnosis. The menu options are: 'Dx', 'Rx', 'Labs', 'Diagnostic Imaging', 'Procedures', 'Referral' (which is highlighted with an orange border), 'Req Form', and 'Action'. The rest of the interface, including the toolbar and bottom navigation, remains the same.

3.) On the New Referral (Outgoing) window document:

a. The "Provider To" Name and/or the Specialty.

b. The "Reason" for the Referral.

c. The "Diagnosis" for the Referral.

d. The "Assigned To" field to assign the Referral to the staff member responsible for completing the referral.

e. Click OK

New Referral (Outgoing) TEST, TEST Nov 12, 1989 (31 yo F) Acc No. 9129

Patient * TEST, TEST

From

Provider BRUCE, JENIE
Facility Katy Trail Com Health S

To

Provider
Specialty * Behavioral Health Specialist
Facility

Insurance Patient Respor Pt Ins
Auth Type
Auth Code Authorization Code
Open Cases
Unit Type V (VISIT)
Assigned To * Vajen, Ashley
Priority Routine

POS 11
Start Date 12/22/2020
End Date 12/22/2021
Received Date
Referral Date 12/22/2020
Appt Date
Sub Status

Status Open Consult Pending Addressed

Diagnosis / Reason Visit Details Notes Structured Data

Reason *

Description
Chronic Disease Management

Diagnosis *

Code	Name
E23.2	Diabetes insipidus

Procedures

Code	Name
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Scan Attachment (2) Logs OK Cancel Send Referral

Processing BHC Referral Workflow

1.) From the "R" Jellybean, BHC PSR will access all Behavioral Health Referrals:

DATE	PATIENT	REASON	REFERRAL FROM	REFERRAL TO	SPECIALTY	START DATE	END DATE	APPT DATE	FACILITY FROM	FACILITY TO	STATUS
12/21/2020	Hilgar,Ciara	anxiety Katy trail Behaviour Health, Jennie	STEVENSON,SEA NNA		Behavioral Health Specialist	12/21/2020	12/21/2021		Katy Trail Com Health Versailles		NA
12/21/2020	Shelley,Austin	grief and depression , loss of brother and aunt	TEDROW,JEFFREY		Behavioral Health Specialist	12/21/2020	12/21/2021		Katy Trail Com Health Warsaw		NA
12/21/2020	Rodriguez,Wayne	Irritability	KASHANI,LEILA		Behavioral Health Specialist	12/21/2020	12/21/2021		Katy Trail Com Health Sedalia		NA

2.) Click on patient name to open referral window: BHC PSR will notate the following items

- a.) Location of patient and reason for referral
- b.) BHC PSR will notate the insurance and whether authorization will need to be obtained
- c.) Next BHC PSR will click patient's name to open patient HUB for create a case

Referral (Outgoing) HILGAR, Ciara D | May 23, 2002 (18 yo F) | Acc No. 24889

Hilgar, Ciara D, 18 Yrs FEMALE | 05/23/2002 | No | Acc#: 24889 | 573-569-2871

From: Provider: STEVENSON, SEAN; Facility: Katy Trail Com Health Versailles

To: Provider: [Search]; Specialty: Behavioral Health Specialist; Facility: [Search]

Insurance: MISSOURI CAR; Pt Ins; Auth Code: Authorization Code

Diagnosis / Reason:

Description
1 anxiety
2 Katy trail Behaviour Health, Jennie

Diagnosis: F41.9 Anxiety disorder, unspecified

Procedures: [Add]

Buttons: Scan, Attachment (3), Logs, OK, Cancel, Send Referral

3.) BHC Case Creation

a.) Select "N" next to open cases

Referral (Outgoing) HILGAR, Ciara D May 23, 2002 (18 yo F) Acc No. 24889

Hilgar, Ciara D, 18 Yrs FEMALE 05/23/2002 No Acc#: 24889 573-569-2871

From
Provider: STEVENSON, SEAN
Facility: Katy Trail Com Health V

To
Provider: [Search] x ... Pref
Specialty*: Behavioral Health Specialist
Facility: [Search]

Insurance: MISSOURI CAF Pt Ins
Auth Type: [Search]
Auth Code: Authorization Code
Open Cases: [Search] ... **N** ←
Unit Type: V (VISIT)
Assigned To*: Miller, Tamar
Priority: Routine

POS: 11
Start Date: 12/21/2020
End Date: 12/21/2021
Received Date: [Search] 12/22/2020
Referral Date: 12/21/2020
Appt Date: [Search] 12/22/2020 Time [Dropdown]
Sub Status: [Dropdown]

Status: Open Consult Pending Addressed

Diagnosis / Reason Visit Details Notes Structured Data

Reason*

	Description	
1	anxiety	[Trash]
2	Katy trail Behaviour Health, Jennie	[Trash]

Diagnosis* Add

Code	Name	
F41.9	Anxiety disorder, unspecified	[Trash]

Procedures Add E&M Add

Code	Name
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Scan Attachment (3) Logs OK Cancel Send Referral

- 4.) From the case details window complete the following information:
- a.) Select Case Provider (Behavioral Health Provider)
 - b.) Select Case Type
 - c.) Enter case label (BH)
 - d.) Select add insurance (Linking insurance to case)

The screenshot shows a 'Case Details' window for a patient named 'TEST, TEST' with a date of birth of 'Nov 12, 1989 (31 yo F)' and account number '9129'. The status is set to 'Open'. The 'Case Information' section includes fields for Patient (TEST, TEST), Case Provider (ARNOLDJESSICA), Case Type (BH(Behavioral Health)), and Case Label (BH). The 'Insurance Information' section has fields for Case Manager, Phone Number, and Fax Number, along with a table for adding insurance. The 'Claim Data Information' section includes Date of Injury (12/18/2020), Referral, Cause of Accident, and Accident details. The 'Court Information' section has fields for Court Name, Court Location, Court Case Name/No., and Court Date (12/18/2020). There are also sections for 'Dates Patient Unable to work in current occupation' and 'Hospitalization Dates Related to Current Services'. The window has 'Scan', 'OK', and 'Cancel' buttons at the bottom.

e.) Add appropriate insurance to case and click “OK”

***Note if home state health Cenpatico must be added and linked to Behavioral Health case**

The screenshot displays a software interface with a main window titled 'Case Details TEST, TEST Nov 12, 1989 (31 yo F) Acc No. 9129' and a modal dialog box titled 'Insurances TEST, TEST Nov 12, 1989 (31 yo F) Acc No. 9129'. The main window shows 'Status' as 'Open', 'Case Information' with 'Patient' 'TEST, TEST', 'Case Provider' 'ARNOLD, JESSICA', 'Case Type' 'BH (Behavioral Health)', and 'Case Label' 'BH'. The 'Insurances' dialog box contains a table with columns 'Name' and 'Subscriber No.', listing 'Patient Responsibility' with subscriber number '9129'. Below the table are 'OK' and 'Cancel' buttons. A green arrow points from the 'Patient Responsibility' row to the 'OK' button. The background window also shows 'ICD Codes From Associated Progress Notes' and 'Dates Patient Unable to work in current occupation' with 'HCFA Form Box 16' and 'Hospitalization Dates Related to Current Services' with 'HCFA Form Box 18'.

f.) Verify all details of case have been entered and select “OK”

Case Details TEST, TEST Nov 12, 1989 (31 yo F) Acc No. 9129

Status Open Closed

Case Information

Patient: TEST, TEST

Case Provider: ARNOLD, JESSICA

Case Type: BH (Behavioral Health)

Case Label: BH

External Case No.:

Guarantor: Both

Attorney:

Insurance Information

Case Manager:

Phone Number:

Fax Number:

Bill To: Patient

Name	Subscriber No.
Patient Responsibility	9129

Claim Data Information

Date of Injury: 12/18/2020

Accident: Auto Non Auto No

Referral:

Cause of Accident:

Employment Related: Yes No

Court Information

Court Name:

Court Location:

Court Case Name/No.:

Court Date: 12/18/2020

Dates Patient Unable to work in current occupation

HCFA Form Box 16: To

Hospitalization Dates Related to Current Services

HCFA Form Box 18: To

Code Name

Scan

OK Cancel

Verify your case was created:

5.) Under the hamburger select "Billing"

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Case Manager

Case Status: Open

Case Type: BH (Behavioral Health)

Case ID	Case Label	Patient	Created By
8	2020.10.02, BH In...	Hofer Cassi...	Morales, Jasmin
10	2020.11.02	Paxton, Bra...	Miller, Tamara
11	2020.11.02	Paxton, Bra...	Miller, Tamara
62	2020.12.08 BH Ca...	Bowers, Jes...	Altis, Kady
109	2020.12.17 BH Ca...	Clark, Lane ...	Altis, Kady
69	BELT ME CODE 56	Wilson, Kat...	Meyers, Ashley
70	BELT ME CODE 56	Britt, Kendy...	Meyers, Ashley
71	BELT ME CODE 56	Britt, Collin ...	Meyers, Ashley
13	BH	Castle, Sha...	Meyers, Ashley
15	BH	Joy, Jesse C	Lame, Samantha
16	BH	Neal, Mega...	Meyers, Ashley
74	BH	Brunjes, An...	Lame, Samantha
75	BH	Welch, Chri...	Miller, Tamara
77	BH	Welch, Chri...	Miller, Tamara
77	BH	Heinking, S...	Miller, Tamara
78	BH	Heinking, S...	Miller, Tamara

a.) Select case manager

109	2020.12.17 BH Ca...	Clark, Lane ...	Altis, Kady		Open	BH (Behavior
69	BELT ME CODE 56	Wilson, Kat...	Meyers, Ashley		Open	BH (Behavior
70	BELT ME CODE 56	Britt, Kendy...	Meyers, Ashley		Open	BH (Behavior
71	BELT ME CODE 56	Britt, Collin ...	Meyers, Ashley		Open	BH (Behavior
13	BH	Castle, Sha...	Meyers, Ashley		Open	BH (Behavior
15	BH	Joy, Jesse C	Lame, Samantha		Open	BH (Behavior
16	BH	Neal, Mega...	Meyers, Ashley		Open	BH (Behavior
74	BH	Brunjes, An...	Lame, Samantha		Open	BH (Behavior

Encounters ☆	Accounts Lookup ☆	Rule Engine ☆
PM Dashboard ☆	Batches ☆	Service Authorization Request ☆
Claims ☆	Printed Claims ☆	Service Authorization Response ☆
Payments ☆	Payment Statements ☆	Denial Management ☆
ERA ☆	Compliance Management ☆	Patient Cost Estimator ☆
997/999 File Status ☆	Billing Alert Recall ☆	Payment Plan ☆
Claims Status ☆	Eligibility Admin... ☆	Behavioral Health ☆
Refunds ☆	Case Manager ☆	Statement Batch ☆

b.) Filter the case type as BH and select “OK”, there you can see all cases created.

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Case Manager

Case Status: Open

Case Type: BH (Behavioral Health)

Case ID	Case Label	Patient	Created By	Date Of
2020.10.02, BH In...		Hofer Cassi...	Morales, Jasmin	
2020.11.02		Paxton, Bra...	Miller, Tamara	
2020.11.02		Paxton, Bra...	Miller, Tamara	
2020.12.08 BH Ca...		Bowers, Jes...	Altis, Kady	
2020.12.17 BH Ca...		Clark, Lane ...	Altis, Kady	
BELT ME CODE 56		Wilson, Kat...	Meyers, Ashley	
BELT ME CODE 56		Britt, Kendy...	Meyers, Ashley	
BELT ME CODE 56		Britt, Collin ...	Meyers, Ashley	
BH		Castle, Sha...	Meyers, Ashley	
BH		Joy, Jesse C	Lame, Samantha	
BH		Neal, Mega...	Meyers, Ashley	
BH		Brunjes, An...	Lame, Samantha	
BH		Welch, Chri...	Miller, Tamara	
Bh		Welch, Chri...	Miller, Tamara	
BH		Heinking, S...	Miller, Tamara	
BH		Heinking, S...	Miller, Tamara	
BH		Heinking, S...	Miller, Tamara	
Bh		Krueger, A...	Miller, Tamara	
BH		Corona, Vin...	Miller, Tamara	

Case Types

Code	Name
test	test
SMHW	Show Me Healthy Women
Title X	Title X
B G Club	Boys & Girls Club
Pathways	Pathways
BH	Behavioral Health
PSYCH	Psychiatry
ME CODE	Medicaid ME Code
VER-BCBS	Versailles Anthem BCBS

OK Cancel

