

# CareAffiliate® Demonstration

## Provider Training Script



Hello, I'm <name,title>.

Today, I'll show you how to use the CareAffiliate referral and authorization submission tool that you'll find on the Health Net Federal Services' website. This tool allows you to quickly submit referral and authorization requests and view status. To use this tool, you'll first need to log in to [www.tricare-west.com](http://www.tricare-west.com), as requests submitted are tied to the provider Tax Identification Numbers associated with your **TRICARE West** account.

If you haven't already registered on our website, you can do so by clicking the Register link at the top of most web pages.

**TRICARE West Region referral and authorization requests** must be submitted online, and using CareAffiliate enables you to submit online, every time!

**CareAffiliate is available for both outpatient and inpatient requests** and includes authorization types for specific services that auto-populate key information. It also allows you to attach additional clinical information to support your request, and provides an immediate review determination in most instances.

### Remember these helpful tips when getting started:

- 1. Use Google Chrome for best results.** If you don't have access to Chrome, Internet Explorer 11 also works. Using Chrome or Internet Explorer 11 ensures that you can view all icons in CareAffiliate, like the magnifying glass search function and links.
- 2. Clear all cookies.** (If you need help, the reference guide can show you how.)

Start by logging in to [www.tricare-west.com](http://www.tricare-west.com) by clicking on the "Log In" link at the top right hand corner of most pages. Enter your username and password. For the purpose of this demonstration, I'll use my provider login information.

## **Here's another helpful tip for managing your tricare-west account:**

Your web registration account is linked to your provider Tax Identification Number or TIN. To determine which TIN your registration is linked to, go to the top or left navigation and click on **My Account**. Next, click on **Manage TIN** to display the provider TIN or TINs that are linked to your account. From here, you can also add additional TIN's to your account.

**Before we get started with the CareAffiliate demonstration**, we want to remind you that not all specialty services require a referral or authorization. For example, most TRICARE Prime beneficiaries do not require a referral for urgent care. Use our online **Prior Authorization, Referral and Benefit** or PARB tool and our **Benefits A–Z** pages to quickly and easily determine whether an HNFS approval is needed. We realize TRICARE referral and authorization guidelines can be complicated. PARB enables you to determine if a service is a benefit, and if that benefit requires prior authorization or a referral. Go to [www.tricare-west.com](http://www.tricare-west.com) > *Provider > Is Approval Needed* to verify referral and authorization requirements. (This tool is also available on the secure provider portal.) If the service doesn't require HNFS approval, then there's nothing to submit. You can print your results from PARB for your patient files.

**Now we're ready to start our demonstration.** To help navigate using the CareAffiliate tool, we developed an online guide that provides step-by-step instructions with screen shots to help you when submitting your requests. The guide is available at [www.tricare-west.com](http://www.tricare-west.com) > *Provider > Education/Quick Reference Charts*.

Throughout the demo, I'll generally follow the steps provided in this guide. I encourage you to have this guide open while watching this video.

**Now, let's walk through how to use CareAffiliate to submit a request.** Since we're using test data in the demonstration, we will stop just before we submit the request.

There are two paths to "submit a request", either from the top navigation section or the **Secure Tools Box**.

Next, you'll see a message that you'll be signed into **Care Radius**. Care Radius is a subset system of CareAffiliate.

Now, we'll click on the **Submit Authorizations Request** link in the middle of the page.

## Here are some tips to keep in mind when using CareAffiliate:

1. There are multiple ways to search. These include the magnifying glass icon that you'll notice in multiple places throughout CareAffiliate, drop-down menus, "type-ahead" fields that allow you to type in full or partial information, and "wild card" searches using asterisks. I'll demonstrate these different options to help you learn how to expedite entering in your authorization information.
2. Certain fields, such as member and requesting provider, have links displayed to the left that allow you to view more details. If you notice information is not correct (such as a provider address), you can report changes through the assessments function, which I'll demonstrate.
3. Fields outlined in orange are required fields. If a field is grayed out, it means it is locked and cannot be edited.
4. The associated CPT/HCPCS codes, number of visits, and duration of the authorization will populate based on the request type selected.
5. If you don't have a specific servicing provider in mind, enter the provider specialty and HNFS will locate one.

**First, we'll search for a member.** The magnifying glass symbol starts the search. Whenever you see the magnifying glass symbol or "pop-ups," it's always the first place to start a search. The search function displays the member search box. All fields are required. For the purpose of this demo, we'll use the following test member data. <enter data>

Be sure to enter the patient's date of birth in the 2-digit month, 2-digit day and 4-digit year format.

I'll click on **Search** and select the record from the search results. That'll populate information in the screen fields.

**Now, we're ready to enter the request type.** The request type drives all the service lines. Request types are basically templates created for referral and authorization submissions. Each request type was developed by HNFS in accordance with TRICARE manuals. When a request type is selected, the code or code ranges will automatically populate into the CareAffiliate request. The easiest way to find the appropriate request type is by using our online *Request Type Guide*.

The online *Request Type Guide* is organized by procedure code ranges that fall within a specific request type and description. After using the guide to locate which request type and description you need, you can then type that description into CareAffiliate and select the corresponding request type. For example, you'll notice in the guide that 99201 is in the "Evaluate and Treat Specialty Referral" description. In the **Request Type** field in CareAffiliate, start typing the words "evaluate and treat" and a drop-down menu will display. Select the "Evaluate and Treat Specialty Referral" option. (If you happen to type in the full description name, there will not be a drop-down with options.)

Or, if you're not using the *Request Type Guide* or aren't sure what request type you need, click on the magnifying glass to display the request type search box. Perform a search in the **Procedure** box by keying in a CPT, NDC or HCPCS code. Once a completed code is entered, select the appropriate description. You can then click the **Search** button to see what request types include this specific CPT or HCPCS code, and choose the appropriate request type.

You can also perform a search in the **Request Type** box. CareAffiliate has a wildcard asterisk search. When using a wildcard search, use key words to narrow down the search.

If the procedure you're requesting doesn't bring up any request types, you may enter a generic request type. Until CareAffiliate is updated to include generic request types, use the *Request Type Guide* at [www.tricare-west.com](http://www.tricare-west.com) to help you locate the appropriate generic request type – for example, P106 for an outpatient physical health medical procedure. (Please note: Only with generic request types are you able to add in CPT, NDC or HCPCS codes. Non-generic request types are restricted to the procedure code range displayed).

**Today I'll be showing you how to enter a specialty referral request.** As mentioned earlier, I used the *Request Type Guide* to determine CPT code 99201 is in the "Evaluate and Treat Specialty Referral" description. After typing in "evaluate and treat," I'm going to select P1 Evaluate and Treat Specialty Referral.

Depending on the request type selected, you may receive a type validation message. **Pay close attention to these types of messages!** They may require you to do additional actions prior to submitting your requests.

For example, if your request has an urgent or emergent classification, on the next screen in the **Events Classification**, you'll need to attach clinical documentation or add a clinical note in the orange section on the left navigation. Otherwise, it will process as routine. I'll show you an example on the next screen. But first, click **Yes** to continue using this request type.

Next, select an **Event Classification** from the drop-down menu. Use the following suggested guidelines when choosing an event classification.

Use **Routine** when care is needed within the four-week TRICARE specialty care access standards. Nearly all referral requests are routine unless the patient needs care in less than 72 hours; use **Urgent** when care is needed within 24-72 hours; and use **Emergent** when care is needed within 24 hours or less.

For this example we'll use **Urgent**.

In this instance, I'll demonstrate the steps to correctly enter attachments or notes to submit for the profile validation message we saw on the last screen. On the previous screen, I needed to add an attachment or note in the orange section on the left navigation. Simply click on **Note** to indicate a free form note (that comes with a spell check feature) or you can include an attachment. Instructions for adding an attachment are also included in the online guide. For the purpose of this demonstration, I'll use a sample attachment.

In addition to the attachment and notes, there is also a line item called **Assessments**. Assessments are used only for beneficiary and provider demographic updates, if necessary.

**Next, input your phone number in the Contact Phone field.** Make sure you provide a number you can be reached at in case there is a problem with your request.

**The next step is to use the magnifying glass to look up providers.** You can search by TIN, name, and other filters to narrow your search. For this demonstration, I'll choose an individual provider.

**Next, the provider location search will display.** Click on the **Search** button to bring up all the TINs associated with your web account. You can then select from the drop down or use other filters to narrow your search. For this demonstration, I'll enter a provider ID and press Search. Select the record from the results and the provider information will populate.

If the requesting provider is also going to be the servicing provider for all service lines, check the box "use for all requested services."

**Next, we'll do a diagnosis search.** Enter in your ICD-10 code or click on the magnifying glass if you don't have a code. **Make sure you select ICD-10 codes only, even if you see ICD-9 options in the drop-down menu or search results.** The system will populate the right code or description based on the selection. Select the right diagnosis for your request from the search results. You can do wild card searches using words or codes for the diagnosis, if needed. CareAffiliate lets you add up to four diagnosis codes, with the first diagnosis considered to be primary. If there are additional codes, you can enter them in the Notes feature in the left navigation orange section.

**Now, select a service line from the left navigation orange section.** Service lines are determined by the request type. We'll start with Service Line 1.

Once you've selected the service line, select the servicing provider group or facility. For each service line, you must enter the specialty. Required fields are outlined in orange. CareAffiliate has several copy shortcut functions like **copy service** and **copy provider** when entering requests with multiple service lines (only for use with generic request types).

Use the TIN or NPI to search for the servicing provider and select the provider from the search results. If you don't have a servicing provider in mind, HNFS can help you locate one by typing in a specialty description in the provider specialty section.

**You may be wondering how to add service lines or codes to your request.** It's important to remember you can only add service lines and codes to **generic** request types. You'll notice as we chose the P1 Evaluate and Treat Specialty Referral request type, which is not generic, the "add a procedure" and "delete selected" buttons, are disabled.

If you try to add service lines or codes to non-generic request types that have a pre-determined set of codes, this can cause a delay in processing. If you would like to request approval for codes that are associated with a different request type, please submit a separate request for those services. Please refer to the online guide for additional details on generic vs non-generic request types.

**Click on the **Submit** button to complete the request.** Once the authorization is submitted, CareAffiliate has functionality to not only view the confirmation and reference number for your submissions, but to also check authorization status. You can check authorization status by "Search by Member ID" or Reference Number. The CareAffiliate guide provides the detailed screens and steps on how to perform these tasks.

**In addition to this tutorial and the step-by-step online guide to using CareAffiliate,** we also offer live provider education webinars. No registration is required. Visit [www.tricare-west.com](http://www.tricare-west.com) > *Education* for the latest schedule.

If you have additional questions on referrals and authorizations, please visit the authorizations tab on our provider portal at [www.tricare-west.com](http://www.tricare-west.com).

Thanks for watching this demonstration!

**End of Script**